

## Contract Guides

These CTsource guides are provided in an accessible digital format to support all users. While they differ in layout from the one-page quick guides, they cover the same steps in the contract process. **Use the Bookmarks panel on the left to select a guide.**

Both formats contain identical procedural information. Choose the version that best fits your workflow and learning style.

For additional technical assistance, use the Help feature within the CTsource application for detailed, step-by-step instructions. Use this link to access [WebProcure Online Help](#).

## Create a Contract Guide

### Purpose

This guide details how to create and post a contract to the CTsource Contract Board.

### Step-by-Step Instructions

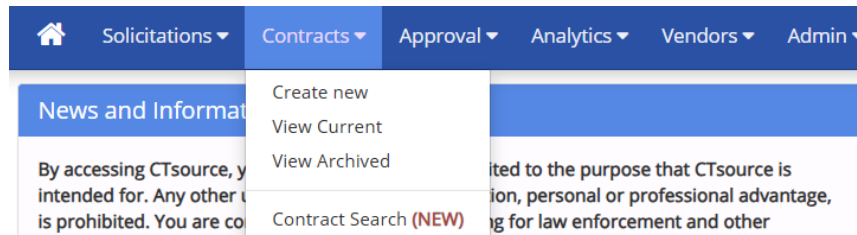
#### Step 1: Login

1. Sign in to [CTsource](#).
2. Enter your credentials and click Login.



#### Step 2: Create a New Contract

3. Select the Contracts module from the main menu.
4. Select Create New from the dropdown menu.



#### Step 3: Complete the Header Page

5. The Contract Module will open to the header page.

### 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**

6. Fill in the following required fields:

- **Contract Type:** General Contract.
- **Contract Number:** Must be unique to your organization. (enter unique contract number using all CAPS, e.g., enter agency-specific contract number: two-digit year, agency acronym, four-digit number sequence, add 'AA' Core-CT suffix)
- **Contract Visibility:** Set to Public.
- **Title:** Use Title Case to enter a brief contract description.
- **Detailed Description:** Add specifics, include agency-specific information.
- **Master Contract:** Do NOT select (N/A for agency contracts)
- **Do not dispatch Contract:** Do NOT select (unchecked ensures suppliers receive notices).
- **P-Card Accepted:** Select if applicable, for information purposes only.
- **Commodities:** Match to solicitation categories; add applicable UNSPSC for reporting and searches.
- **Contractors:** Add supplier; skip the insurance entry unless you want to track expiration at the contract level through the system.
- **Distributors & Diversity Allocation:** Skip.
- **Pricing Type:** Choose applicable option.
- **Total Value Condition:** Choose applicable option.
- **Total Value (USD):** Enter total contract value for the term.
- **Retainage Type:** Defaults to Off.
- **Initial Expended Value:** Not applicable.
- **Payment Terms & Notes:** Select payment terms (e.g., Net 45). For discount terms, enter them in Payment Notes.
- **Delivery Terms:** Choose 'Free On Board Destination' or 'N/A: Not Applicable'.
- **Delivery Notes and Other Notes:** Add if needed.

- Contract Period: Fill in Issue, Award, Effective, Expiration, and optional Final Expiration.
- Custom Fields: Skip.

7. Click Next Step.

**Step 4: Notifications Page (Optional)**

7. Add additional email addresses for amendment email notifications, e.g., supervisor or other contractor contacts, using semicolons without spaces between each address. Example: [janedoe@ct.gov](mailto:janedoe@ct.gov);[johnsmith@vendor.com](mailto:johnsmith@vendor.com)

8. Schedule event notifications to receive email alerts for Expiration Date (e.g., 180 days) or Insurance Expiration Date (e.g., 30 days).

Event Notifications				
Number	Type	Trigger	Agency Email	Contractor Email
1.	Total Value	% To Go	firstname.lastname@ct.gov	johnsmith@vendor.com
2.	Effective Date	Days To Go	firstname.lastname@ct.gov	johnsmith@vendor.com
3.	Expiration Date	Enter Days To Go For Notice	firstname.lastname@ct.gov	johnsmith@vendor.com
4.	Insurance and Certification Expiration	Enter Days To Go For Notice	firstname.lastname@ct.gov	johnsmith@vendor.com

9. To customize outgoing email messages:

- Set 'Override Default Template Body' to Yes. Enter your custom message.

10. Scroll to the bottom and click Next Step or Save.

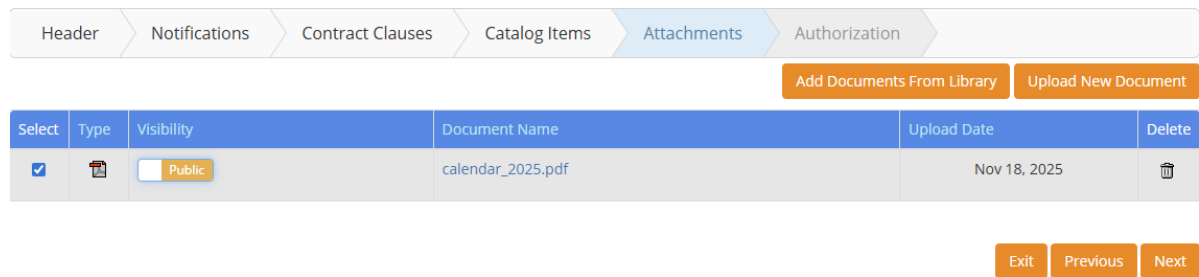
**Step 5: Skip pages**



11. Skip CATALOG ITEMS page, click Next.
12. Skip CONTRACT CLAUSES page, click Next.

**Step 6: Complete Attachments Page**

13. Select 'Upload New Document' to upload only executed contract documents.
14. Upload contract documents from your computer.
15. Follow the instructions in the Upload Document pop-up.
16. Set the document visibility to Public to display it on the Contract Board.
17. Click Next to proceed.

Contract Documents



Select	Type	Visibility	Document Name	Upload Date	Delete
<input checked="" type="checkbox"/>		<input type="text" value="Public"/>	calendar_2025.pdf	Nov 18, 2025	

**Step 7: Complete Authorization Page**

18. Skip Total Contract Amount
19. Skip Piggyback, Cooperative, and Emergency Contract flags (DAS use only)
20. Select the checkbox for your agency (not 'State of CT – DAS Procurement').
21. Select Finished

Total Contract Amount:0.00  
 Authorize the Head Organization ( State of CT - DAS Procurement )to administer the Contract regardless of the settings below

Piggyback Contract  No

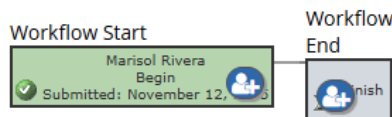
Cooperative Contract  No

Emergency Contract  No

Authorized to use Contract	Organization	Authorized Amount (USD)	Release Limit (USD)	Release Minimum (USD)
<input type="checkbox"/>	State of CT - DAS Procurement	0.00	0.00	0.00
<input type="checkbox"/>	A CTsource Training Entity	0.00	0.00	0.00
<input type="checkbox"/>	Boards, Commissions and Councils	0.00	0.00	0.00
<input type="checkbox"/>	Commission On Human Rights	0.00	0.00	0.00
<input type="checkbox"/>	Connecticut Siting Council	0.00	0.00	0.00
<input type="checkbox"/>	Consumer Council, Office of	0.00	0.00	0.00
<input type="checkbox"/>	Deaf & Hearing Impaired	0.00	0.00	0.00
<input type="checkbox"/>	Developmental Disabilities, Council	0.00	0.00	0.00
<input type="checkbox"/>	Elections Enforcement	0.00	0.00	0.00
<input type="checkbox"/>	Fire Prevention & Control	0.00	0.00	0.00
<input type="checkbox"/>	Firearms Permit Examiners, Board of	0.00	0.00	0.00

**Step 8: Review Summary Page**

- 22. Verify all entered information. Use 'Edit' to return to pages to make edits if needed.
- 23. If your organization requires approval workflow: (not common)
  - a. Select 'Approval Preview' and follow the instructions in the pop-up window.
  - b. To add approvers: Select 'Add Approver', click the plus sign, enter the person's name, and select. Approvers must be CTsource users with approval rights.
  - c. Select Close to return to the summary page.



- 24. If no approval workflow is needed, select submit to post to the Contract Board.

**Step 9: Post to the Contract Board**

- 25. Scroll to the bottom of the Summary page and click Submit. Submit is the 'save button' for the Contract Board.

Performance assessment

\*No data found

- 26. The contract will post to the Contract Board on the effective date and notify the supplier via email.

### **Step 10: Verify Posting**

27. Confirm that the contract and all attachments are visible on the [Contract Board](#).

### **Need Help?**

- WebProcure Contract Module Visit: [WebProcure Online Help](#)
- Visit: [CT DAS CTsource Webpage](#)
- Email: [DAS.CTSource@ct.gov](mailto:DAS.CTSource@ct.gov)

## Generate Contract from a Solicitation Award Guide

### Purpose

This guide explains how to generate a contract from a finalized solicitation award using CTsource.

### Step-by-Step Instructions

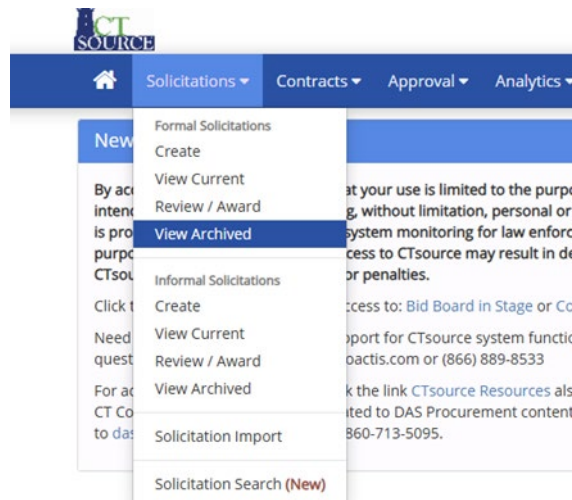
#### Step 1: Login

1. Sign in to [CTsource](#).
2. Enter your credentials and click Login.



#### Step 2: Access the Finalized Solicitation

3. Select the Solicitations module from the main menu.
4. Under Formal Solicitation, select View Archived.



5. Under Finalized Solicitations, click the Solicitation # link.

Past Bids

Organization: State of CT - DAS Procurement | User: -- All --

Title: | Solicitation Number: | Start Date Occurring Between: | and: | End Date Occurring Between: | and: |

[Filter Solicitation](#)

**Finalized Solicitations** | Retracted/Canceled Solicitations

Past Formal Solicitations that have been awarded.

Solicitation #	Title	Buyer	Start Date	End Date	Actions
25PSX6598	Demonstration for Charlene	G Gagne	Mar 03, 2025 3:00 PM EST	Mar 05, 2025 1:15 PM EST	⋮
1482	Widgets	K Munro	Jan 17, 2025 11:55 AM EST	Jan 17, 2025 1:00 PM EST	⋮
55PSX1234	Demo for DAS Procurement	G Gagne	Mar 19, 2024 1:35 PM EDT	Mar 27, 2024 2:30 PM EDT	⋮

6. Scroll to the bottom of the Edit Formal Solicitation View page and select Generate Contracts.

**Questionnaire**

\* This Solicitation has no questions defined

**Document Attachments**

- bid Documents.pdf
- Q&A Center Items - 25PSX6598 - Addendum # 2.pdf

**Solicitation Addenda**

- BuyerChangeDetailsReport\_25PSX6598\_v2\_Mar\_3\_25.pdf Date: March 03, 2025 at 3:25:55 PM EST

**Item Specifications and Quantities**

Solicitation has been designated as having no line items.

**Supplier Invitation List**

- Training Supplier 1
- Training Supplier 2

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

**Step 3: Answer Initial Questions**

7. Master Contract? (No)
8. Is this the vendor? (Verify vendor is correct and click Next)
9. Catalogue Contract? (No)

**Step 4: Generate Contract**

10. The Contract Module will open to the header page with the solicitation award information.

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 \*  
 --Select C  
 Contract Visibility \* This contract will be posted to the Public Contract Listing, available to users without WebProcure login credentials.  
 Public  
 Title \*  
 Training for Procurement  
 Detailed Description  
 Training for Procurement

Contract Number \* 25psw6598  
 Status Unissued

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

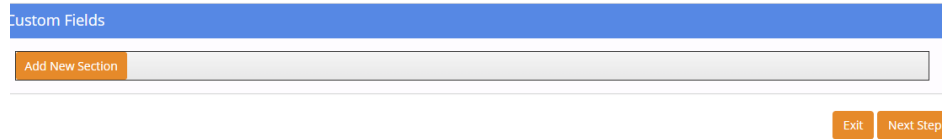
Contract Administrator \* Rivera, Marisol  
 Contract Manager --Select One--  
 Email Address mrisol.rivera@ct.gov  
 Req Number  
 Organization A CTSource Training Entity  
 Solicitation Number

### Step 5: Complete Header Page

#### 11. Fill in or confirm the following fields:

- Contract Type (General Contract)
- Contract Number Must be unique to your organization. (enter contract number using all CAPS, e.g., enter agency-specific contract number: two-digit year, agency acronym, four-digit number sequence, add 'AA' Core-CT suffix)
- Contract Visibility (Public)
- Title (auto-filled from solicitation title; adjust as needed)
- Detailed Description (auto-filled from solicitation, revise as necessary and add agency-specific information)
- Do not select 'Do not dispatch Contract' to ensure email delivery
- P-Card Accepted (if applicable and for information purposes only)
- Commodities (review and revise as needed for reporting and searches)
- Contractors (skip insurance entry unless you want to track expiration at the contract level through the system)
- Distributors & Diversity Allocation (skip)
- Pricing Type (select applicable)
- Total Value Condition (select applicable)
- Total Value (Enter total contract value for the term.)
- Retainage Type (defaults to Off)
- Initial Expended Value (not applicable)
- Payment Terms & Notes (Net 45; Net 25 for small businesses; enter discount terms if applicable in Payment Notes)
- Delivery Terms ('Free On Board Destination' or 'N/A')
- Delivery Notes, Other Notes (enter as needed)
- Contract Period (enter dates: Issue, Award, Effective, Expiration, and optional Final Expiration)

- Custom Fields (skip)
- Select Next or Save



**Step 6: Notifications Page (Optional)**

12. Add agency email addresses for amendment notifications, e.g., supervisor, using semicolons without spaces between each address.
13. Schedule event notifications to receive email alerts for Expiration Date (e.g., 180 days) or Insurance Expiration Date (e.g., 30 days).
14. To customize outgoing email messages:
  - Set 'Override Default Template Body' to Yes. Enter your custom message.
15. Select Next or Save.

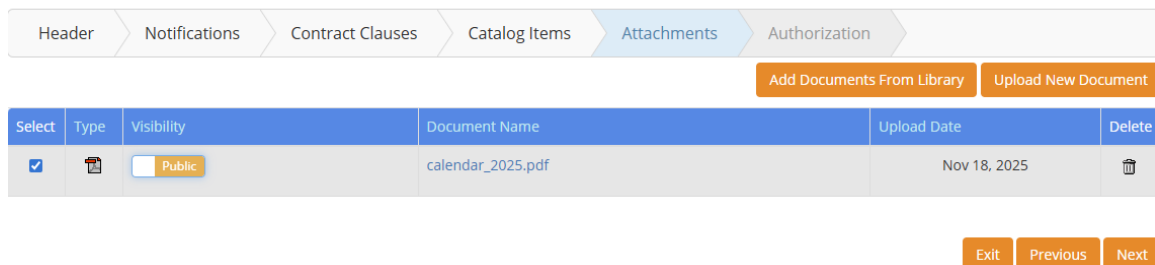
**Step 7: Skip Pages**

16. Skip CATALOG ITEMS page.
17. Skip CONTRACT CLAUSES page.

**Step 8: Complete Attachments Page**

18. Delete all auto-filled solicitation documents from the contract, including those from awarded suppliers. These documents can be accessed under Solicitations -> View Archived when needed.
19. Select 'Upload New Document' to upload only executed contract documents.
20. Upload contract documents from your computer.
21. Follow the instructions in the Upload Document pop-up.
22. Set the document visibility to Public to display it on the Contract Board.
23. Select Next to proceed.

Contract Documents



**Step 9: Complete Authorization Page**

24. Skip Total Contract Amount
25. Skip Piggyback, Cooperative, and Emergency Contract flags (DAS use only)

26. Select the checkbox for your agency (not 'State of CT – DAS Procurement').

Total Contract Amount: 0.00  
 Authorize the Head Organization (State of CT - DAS Procurement) to administer the Contract regardless of the settings below

Piggyback Contract  No

Cooperative Contract  No

Emergency Contract  No

Authorized to use Contract	Organization	Authorized Amount (USD)	Release Limit (USD)	Release Minimum (USD)
<input type="checkbox"/>	State of CT - DAS Procurement	0.00	0.00	0.00
<input type="checkbox"/>	A CTSource Training Entity	0.00	0.00	0.00
<input type="checkbox"/>	Boards, Commissions and Councils	0.00	0.00	0.00
<input type="checkbox"/>	Commission On Human Rights	0.00	0.00	0.00
<input type="checkbox"/>	Connecticut Siting Council	0.00	0.00	0.00
<input type="checkbox"/>	Consumer Council, Office of	0.00	0.00	0.00
<input type="checkbox"/>	Deaf & Hearing Impaired	0.00	0.00	0.00
<input type="checkbox"/>	Developmental Disabilities, Council	0.00	0.00	0.00
<input type="checkbox"/>	Elections Enforcement	0.00	0.00	0.00
<input type="checkbox"/>	Fire Prevention & Control	0.00	0.00	0.00
<input type="checkbox"/>	Firearms Permit Examiners, Board of	0.00	0.00	0.00

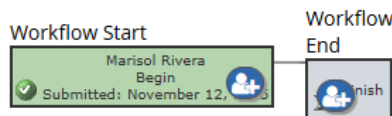
27. Select Finished

**Step 10: Review Summary Page**

28. Verify all entered information. Use 'Previous' to return to earlier sections if needed.

29. If approval workflow is required for your organization:

- a. Select 'Approval Preview' and follow the instructions in the pop-up window.
- b. To add approvers: Select Add Approver, click the plus sign, enter the person's name, and select. Approvers must be CTsource users with approval rights.
- c. Select Close to return to the summary page.



30. If no approval workflow is needed, proceed to submission.

**Step 11: Post to the Contract Board**

31. Scroll to the bottom and click Submit. Submit is the 'save button' for the Contract Board.

Performance assessment

\*No data found

32. The contract will post to the Contract Board on the effective date and notify the supplier via email.

### **Step 11: Verify Posting**

33. Confirm that the contract and documents display correctly on the [Contract Board](#).

### **Need Help?**

- WebProcure Contract Module Visit: [WebProcure Online Help](#)
- Visit: [CT DAS CTsource Webpage](#)
- Email: [DAS.CTSource@ct.gov](mailto:DAS.CTSource@ct.gov)

## Create a Contract Amendment Guide

### Purpose

This guide details how to create and post a contract amendment in CTsource.

### Step-by-Step Instructions

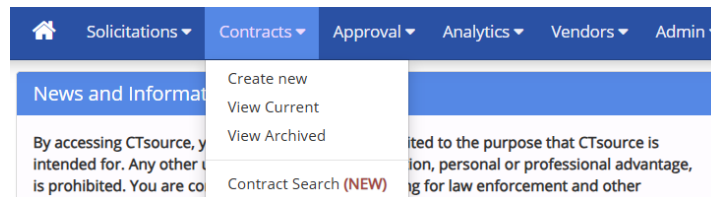
#### Step 1: Log In

1. Sign in to [CTsource](#).
2. Enter your credentials and click Login.

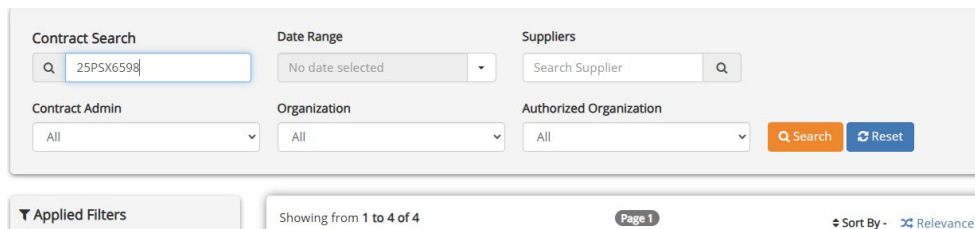


#### Step 2: Search for the Contract

3. Select the Contracts module from the main menu.
4. Select Contract Search (NEW) from the dropdown menu.



5. Enter the contract number or keywords.
6. Optionally use filters to narrow down results, then click Search.



#### Step 3: Choose the Contract, Create Amendment

7. Find your contract in the results table.
8. In the far-right column, click the Actions ellipsis.
9. Choose 'Create Amendment' from the drop-down menu.



### Step 4: Edit Contract Pages

10. From the Summary page, choose the page(s) to edit:

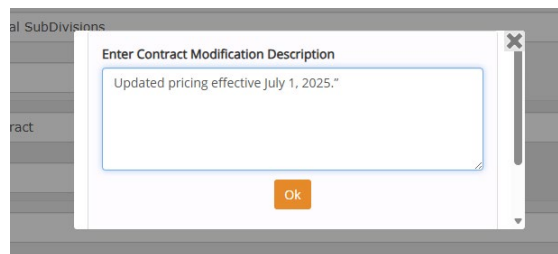
- Edit Header
- Edit Notification
- Edit Clauses (N/A)
- Edit Items (N/A)
- Edit Documents
- Edit Authorization (N/A)



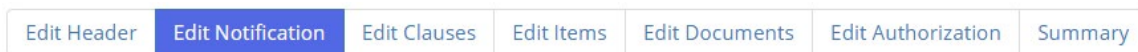
11. Select Edit Header to update applicable fields related to the amendment (e.g., expiration date, amount). Scroll to the bottom to click Save.

12. When a pop-up box appears, provide a brief, clear description of the change.  
Example: "Updated pricing effective July 1, 2025."

13. Select OK



14. Scroll to the bottom and select Save, if finished select Summary.



15. Select Edit Notifications to add email notifications, event triggers or customize the email to the contractor.

16. Under the Amendment Notification section, include additional recipients:

- Add agency personnel or other contractor contacts as necessary.
- Separate multiple emails with semicolons (;) without spaces.

Example: [janedoe@ct.gov](mailto:janedoe@ct.gov); [johnsmith@vendor.com](mailto:johnsmith@vendor.com)

**Amendment Notification**

Agency Email:

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

17. Edit Event Notifications as needed.

**Event Notifications**

Number	Type	Trigger	Agency Email	Contractor Email
1.	Total Value	<input type="text" value="% To Go"/>	<input type="text" value="firstname.lastname@ct.gov"/>	<input type="text" value="johnsmith@vendor.com"/>
2.	Effective Date	<input type="text" value="Days To Go"/>	<input type="text" value="firstname.lastname@ct.gov"/>	<input type="text" value="johnsmith@vendor.com"/>
3.	Expiration Date	<input type="text" value="Enter Days To Go For Notice"/>	<input type="text" value="firstname.lastname@ct.gov"/>	<input type="text" value="johnsmith@vendor.com"/>
4.	Insurance and Certification Expiration	<input type="text" value="Enter Days To Go For Notice"/>	<input type="text" value="firstname.lastname@ct.gov"/>	<input type="text" value="johnsmith@vendor.com"/>

18. To customize the message.

- Set Override Default Template Body to Yes.
- Type a brief, clear summary of the amendment in the free-form text area.

Note: This personalized message is sent solely to the contractor.

**Dispatch Email Content**

Override Default Template body:

State of CT - DAS Procurement has amended Contract 26PSX6598 Demonstration for Charlene for your review. To access this contract, click the link below and login to WebProcure powered by WebProcure.

19. Scroll to the bottom and select Save, if finished select Summary.

20. Select Edit Documents to upload revised executed documents.

21. Set the Visibility flag to Public for revised documents. Change the flag to Private for original documents to save for audit purposes.

Select	Type	Visibility
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Public
<input checked="" type="checkbox"/>		<input type="checkbox"/> Private

22. Scroll down and select Save, if finished select Summary.

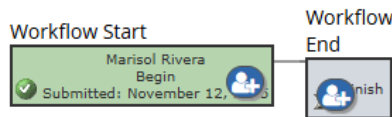
### Step 5: Review Summary Page



23. Select Summary page, scroll down page to review updated information for accuracy. If an error was made, edit and save the necessary page, review Summary page again.

### Step 6: Approval and Workflow (not common)

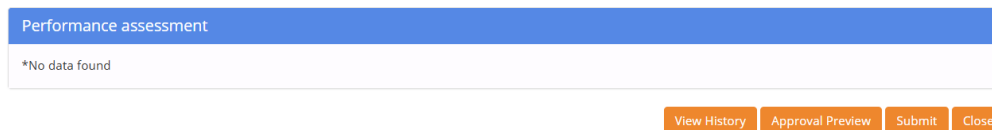
24. If approval workflow is required for your organization:
  - a. Select 'Approval Preview' and follow the instructions in the pop-up window.
  - b. To add approvers: Select Add Approver, click the plus sign, enter the person's name, and select. Approvers must be CTsource users with approval rights.
  - c. Select Close to return to the summary page.



25. If no approval workflow is needed, select submit to post to the Contract Board.

### Step 7: Submit to Post the Amendment to the Contract Board

26. Scroll down to the bottom of the page.
27. Click Submit. Submit is the 'save button' for the Contract Board.



28. The system will:
  - a. Post the amendment to the Contract Board.
  - b. Send an email notification to the contractor and others as applicable.

### Step 8: Confirm Posting

29. Confirm that the amendment and related documents display correctly on the [Contract Board](#).
30. If any errors occur, create another amendment, fix the errors and resubmit.

### Need Help?

- WebProcure Contract Module Visit: [WebProcure Online Help](#)
- Visit: [CT DAS CTsource Webpage](#)
- Email: [DAS.CTSource@ct.gov](mailto:DAS.CTSource@ct.gov)

## Approving a Supplier Guide

### Purpose

This step-by-step guide explains how to approve a supplier in CTsource. Registered suppliers automatically receive a pending status. Suppliers must be in an approved status to receive a contract award in CTsource.

This task is permission-based. Ensure your user role allows you to approve suppliers. If you do not have permission, contact your system administrator.

Note: Client Agencies using CORE-CT must ensure the supplier is approved in the financial system before approving CTsource and entering a contract award. (See CORE-CT precheck steps at the bottom of this guide.)

### Step-by-Step Instructions

#### Step 1: Login

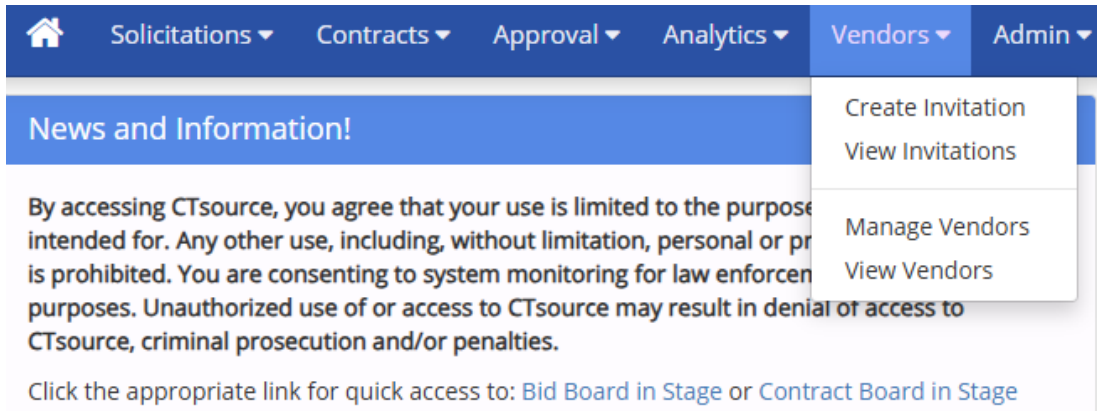
1. Sign into [CTsource](#).



The image shows the WebProcure login interface. At the top, the word "WebProcure" is written in a large, blue, serif font. Below it is a light blue login box. Inside the box, there are two input fields: "Username / Email Address" with a user icon and the text "RiveraMa" entered, and "Password" with a magnifying glass icon and a masked password ".....". Below the fields is an orange "Log In" button and a link "Trouble Logging In?" in orange text.

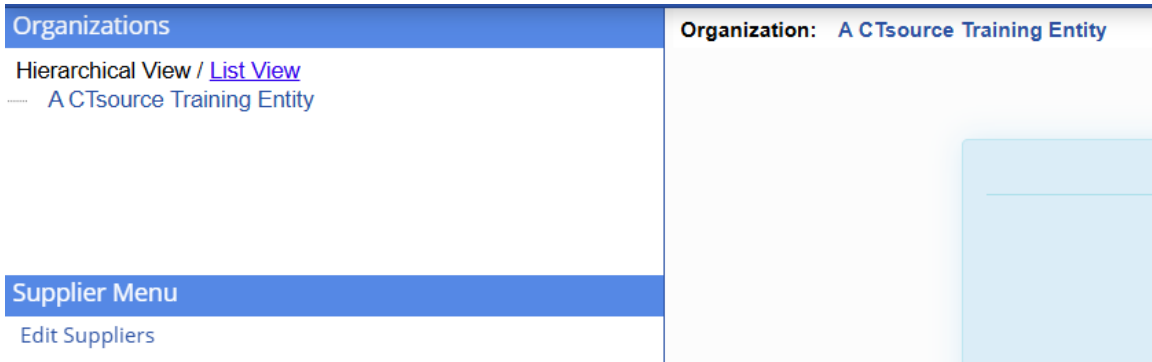
#### Step 2: Navigate to Vendors Module

2. Go to the Vendors module from the main menu.
3. Select 'Manage Vendors' from the dropdown menu.

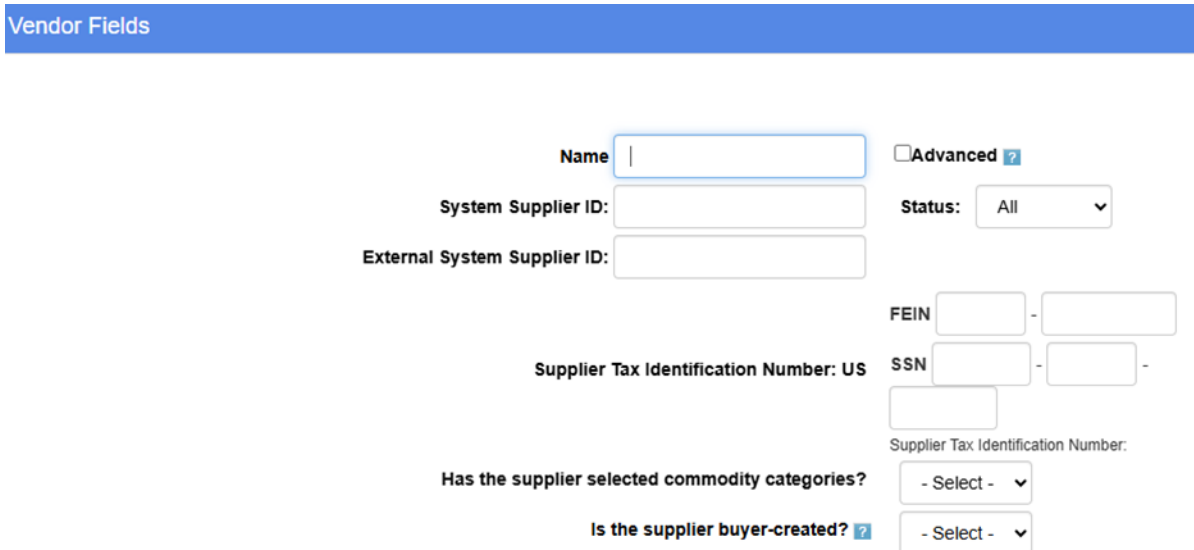


**Step 3: Edit Supplier Profile**

4. Under the Organizations menu, click on your organization name to populate and activate the right window.
5. Under the Supplier menu, click Edit Suppliers.



6. Under Vendor Fields, search by supplier Name, then press Enter on your keyboard or click the Search button at the bottom of the page. (Do not click Select)



7. In the Search Results, under Actions, click the Edit icon (pen) in the supplier's row.

Search Results						
Supplier	DBA	Relevance	Location	HQ	Status	Actions
Tri State Materials Testing Lab, LLC	Tri State Materials Testing Lab, LLC	5%	Berlin, CT, 06037 US	✓	Approved	
ABC Training Company	--	4%	Hartford, CT, 06103 United States	✓	Pending	
Qamar Ahsan	AeroTrain corp.	4%	Flint, MI, 48507 US		Pending	
Training Supplier 1	--	4%	Hartford, CT, 06103 US	✓	Approved	
Training Supplier 2	--	4%	Hartford, CT, 06103 US	✓	Approved	

### Step 4: Access and Approve Supplier Status

- Under General Info, go to the Supplier Status section on the Edit Suppliers page.
- Click the 'Approved' radio button to approve the supplier.

General Info
Contacts
Categories
Attachments

Supplier Status

Supplier Status  Approved  Pending  Declined  Propagate the status change  
 Propagate the supplier (Applicable only when approved)

### Step 5: Enter External Supplier ID (for State Agencies only)

- Scroll down to the field titled 'External System Supplier ID'.
- Enter the supplier's CORE ID. Note: This field will only accept unique values; if an error appears showing a duplicate value, it means there is another CTsource supplier profile for the same supplier. Contact [das.ctsource@ct.gov](mailto:das.ctsource@ct.gov) for further assistance.
- Click Save.

WebProcure Usage Terms Accepted On 03/23/2024

Buying Organization's Additional Terms Accepted 03/23/2024

Last Login On August 07, 2025 at 1:50:33 AM

External System Supplier ID

- Scroll back to Supplier Status to confirm the highlighted status (has successfully been propagated to all children organizations) now displays as Approved.

Supplier Status

Supplier Status  Approved  Pending  Declined  Propagate the status change  
 Propagate the supplier (Applicable only when approved)

has successfully been propagated to all children organizations.

### Step 6: Close

- Click the Close button to exit the page.

### CORE-CT Pre-Check (State Agencies only)

Before approval in CTsource, confirm the supplier exists in CORE-CT:

- Use the Short Supplier Name (first six letters of name + last four digits of FEIN).

- Or use the full FEIN (no hyphen) in the Supplier ID field.
- If the supplier exists, record the CORE-CT Supplier ID for CTsource entry.
- If the supplier does not exist, email W9 and vendor forms to [osc.apdvf@ct.gov](mailto:osc.apdvf@ct.gov).
- If the supplier is inactive in CORE-CT, submit an update using the CORE-CT Supplier Update Request Form.

### **Need Help?**

- WebProcure Contract Module Visit: [WebProcure Online Help](#)
- Visit: [CT DAS CTsource Webpage](#)
- Email: [DAS.CTSource@ct.gov](mailto:DAS.CTSource@ct.gov)