

Solicitation 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 solicitation 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 Solicitation Guide

Purpose

This guide details how to create and post a formal solicitation to the CTsource Bid Board.

Step-by-Step Instructions

Step 1: Login

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

WebProcure



Username / Email Address

Password

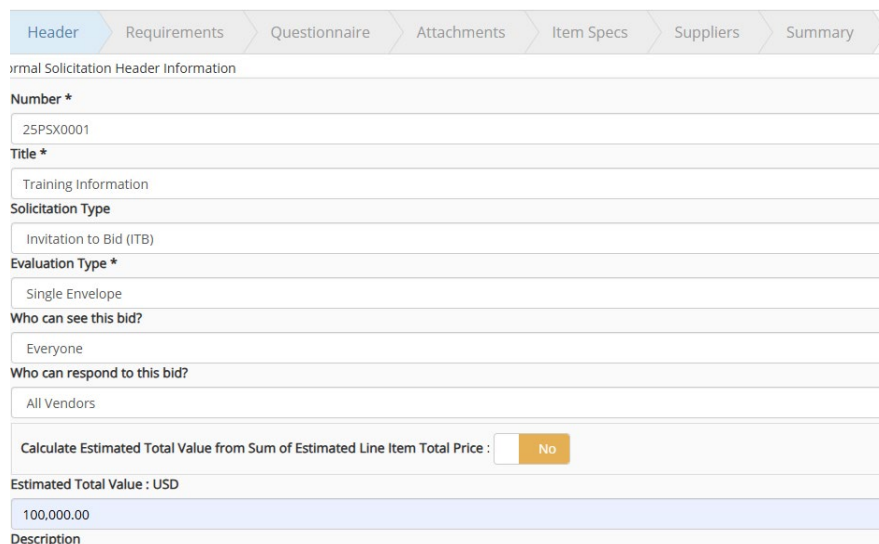
[Trouble Logging In?](#)

Step 2: Create a Formal Solicitation

3. Select the Solicitations module from the main menu.
4. Under Formal Solicitations, select Create.

Step 3: Complete the HEADER Page

5. The formal solicitation header page opens.



Header Requirements Questionnaire Attachments Item Specs Suppliers Summary

Formal Solicitation Header Information

Number *
25PSX0001

Title *
Training Information

Solicitation Type
Invitation to Bid (ITB)

Evaluation Type *
Single Envelope

Who can see this bid?
Everyone

Who can respond to this bid?
All Vendors

Calculate Estimated Total Value from Sum of Estimated Line Item Total Price :

Estimated Total Value : USD
100,000.00

Description

6. Enter data into required fields (*):

- Number: Enter a unique solicitation number for your organization.
- Title: Use Title Case to enter a brief solicitation description.
- Solicitation Type: Select type from dropdown (e.g., ITB or RFP).
- Evaluation Type: Single Envelope.
- Who can see this bid?: Everyone.
- Who can respond to this bid?: All Vendors.
- Calculate Estimated Total Value from Line Items: Select No unless line-item bid.
- Estimated Total Value: Skip if not required.
- Description: Enter a clear, straightforward summary using plain language.
- Justification: Optional (buyer view only).
- Justification Attachments: Optional (buyer view only).
- Solicitation Contact: Confirm default value or update.
- Restricted Access: Select No.
- The solicitation will not include line items: Select if only using attachments.
- Solicitation Categories: Choose the top-level categories to invite registered suppliers, and select lower-level categories for advertising and search purposes.
- Delivery Terms / Notes: Complete as needed.
- Payment Terms / Notes: Complete as needed.
- Custom Fields: Skip.
- Solicitation Duration: Enter start and end dates and times.
- Vendor Q/A Duration: Use only if accepting electronic supplier responses.

7. Select Next Step.

Step 4: Complete the REQUIREMENTS Page (Optional)

8. Requirements will be detailed in your attachment. No need to input values here.

9. Select Next Step.

Requirements : 25PSX0001 - Training Information (Formal)

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

Add New Section

Exit

Previous Step

Next Step

Step 5: Complete the QUESTIONNAIRE Page (Optional)

10. Add questionnaire if accepting responses through CTsource.

11. Use CTsource Help for assistance: [WebProcure Online Help](#)


12. Select Next Step.

Questionnaire : 25PSX0001 - Training Information (Formal)

Enter one or more questions. Each supplier will have an opportunity to respond to each question when they enter their Solicitation response.

Enable Scoring Add Sections and Questions to Questionnaire Library

Section Title: Buyer - Only

Section Description: 


Step 5: Add ATTACHMENTS

13. Click 'Add new document' to attach the prepared solicitation document(s) located on your computer.

- Ensure file names contain no special characters.
- Use concise, descriptive filenames (e.g., Bid Documents).
- Maximum file size 80 MB per document.

14. Select Next Step.

You may select the documents from the library by clicking on the "Upload Document from Library" button below. If the document does not exist, a new document can be uploaded by clicking on the "Upload New Document" button.

Select	Type	Document Name	Upload Date
<input checked="" type="checkbox"/>		Bid Documents.pdf	November 21,

Step 6: Complete ITEM SPECS (only if using line items)

15. Add each line item with clear descriptions and units.
16. Quantities are required.
17. Avoid blank fields.

18. Select Next Step.

Item Specifications : 25PSX0001 - Training Information (Formal) Current Formal Solicitations : 1 Line Items

Item Spec Library **Selected Item Specs**

View, edit, delete and specify delivery information for Items specifications.

[Download Item Template](#)
[Import Item Template](#)
[Create Group](#)
[Create New Item](#)

Reset Numbering | Sequence | Sequencing may take a while for Solicitations with a large number of items.

[Check All] [Uncheck All]

Required Response	No.	Quantity	Unit	Spec Number	Item	Actions
<input type="checkbox"/>	1	1 +	each	1000	Training	⋮

[Save](#)

[Exit](#)
[Previous Step](#)
[Next Step](#)

Step 7: Choose SUPPLIERS

19. Registered suppliers will automatically populate based on UNSPSC commodity codes entered on the Header page. Suppliers listed on this page will receive an email notice of the solicitation opportunity.
20. Add additional registered suppliers, if available. This is necessary if a supplier’s account was registered with different or removed UNSPSC commodity codes.
21. Select Next Step.

Add Suppliers **Selected Suppliers**

[Check All] [Uncheck All]			
	Supplier	Location	Actions
<input checked="" type="checkbox"/>	Association for Community Organizations and Resource Development, Inc (ACORD, In	308 Robin Lane Vestal NY 13850 US	⋮
<input checked="" type="checkbox"/>	Awesome Supplier	100 Norway Street 201 Boston MA 02115 United States	⋮
<input checked="" type="checkbox"/>	Beata Sz	1111 Country Club Road Middletown CT 06457 US	⋮
<input checked="" type="checkbox"/>	Behavioral Heath Consultants, LLC	3018 Dixwell Avenue Hamden CT 06525 United States	⋮

Step 8: Review the Summary Page

22. Verify all information, dates, and times. Note: the system may change the start date if the solicitation is entered on the same day.
23. If you need to make corrections, select Previous Step to edit. Or select Done to return to pages in edit mode. Edit mode lets you select the page you want to edit. Always select Save at the bottom of each page.

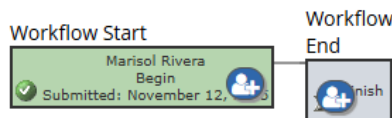
Edit Formal Solicitation View : 25PSX0001 - Training Information (Formal)

Header Information

Contact	Marisol Rivera 450 Columbus Blvd Hartford CT, 06103 United States marisol.rivera@ct.gov	
Vendor Q&A Dates	<i>Start Date</i> November 13, 2025 at 7:15:00 AM EST	<i>End Date</i> November 14, 2025 at 1:45:00 PM EST
Duration Dates	<i>Start Date</i> November 13, 2025 at 7:00:00 AM EST	<i>End Date</i> November 14, 2025 at 2:00:00 PM EST
Title	Training Information	
Solicitation Type	Invitation to Bid (ITB)	
Evaluation Type	Single Envelope	
Who can see this bid?	Everyone	
Who can respond to this bid?	All Vendors	
Estimated Total Value	\$100,000.00	
Description	Training Information to show how a solicitation is posted	

Step 9: Approvals

- 24. If no approval workflow is required, select Submit to post to the Solicitation Board.
- 25. 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.

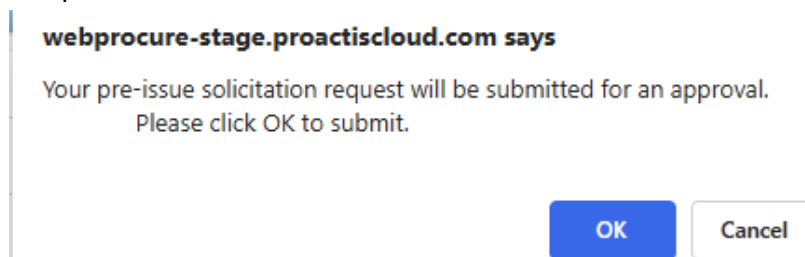


Step 10: Submit the Solicitation to Post to the Bid Board

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



- 27. When the confirmation dialog appears, click OK regardless of whether an approval workflow is required.



- 28. Then select Close.

Info

This solicitation has been submitted to **pre-issue** workflow for approval.

Close

Step 11: Verify Posting on the Bid Board

29. On the start date, go to the [Bid Board](#).

30. Search for your solicitation to confirm it has been posted. Click on the title to verify that documents are displayed.

Bid Board 25PSX

Sort Results By Relevance

775 Matching Solicitations Found Page 1

Organization
Select Organization
None selected

- ★ 25PSX0020 | ADA Concrete Sidewalks and Ramps*
This contract is for complete in place installation concrete sidewalks and ramps in accordance with the American with Disabilities Act (ADA) standards.
Start Date: Mar 14, 2025
End Date: Mar 28, 2025
State of CT - DAS Procurement
- ★ 25PSX0108 | Bituminous Concrete Materials*

Need Help?

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

Create a Solicitation Addendum Guide

Purpose

This guide details how to create and post a solicitation addendum in CTsource.

Step-by-Step Instructions

Step 1: Login

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

WebProcure

The login form is titled "WebProcure" and contains two input fields: "Username / Email Address" with the value "RiveraMa" and "Password" with masked characters. Below the fields are a "Log In" button and a "Trouble Logging In?" link.

Step 2: Search for the Solicitation

3. Select the Solicitations module from the main menu.
4. Select Solicitation Search (New) from the dropdown menu.
5. Enter solicitation number or keywords, then click Search.
6. Optionally use filters to narrow down results, then click Search.

The screenshot shows the WebProcure interface. The top navigation bar includes "Solicitations", "Contracts", "Approval", "Analytics", "Vendors", and "Admin". The "Solicitations" dropdown menu is open, showing options for "Formal Solicitations" (Create, View Current, Review / Award, View Archived) and "Informal Solicitations" (Create, View Current, Review / Award, View Archived). Below this, there are "Solicitation Import" and "Solicitation Search (New)" options. The search results area shows a list of results, with the first result being "25PSX0001 | Training Information" with a status of "Active" and a date range of "Nov 13, 2025 to Nov 14, 2025".

Step 3: Choose the Solicitation, Create Addendum

7. Find your solicitation in the results table.
8. In the far-right column, click the Actions ellipsis.
9. Choose 'Create Addendum' from the drop-down menu.
10. When prompted, click OK.



The screenshot shows a search results page with two solicitations. The first solicitation, 25PSX0001, is selected. A dropdown menu is open over it, listing various actions. The 'Create Addendum' option is highlighted. Below the menu, a confirmation dialog box is displayed with the text: 'webprocure-stage.proactiscloud.com says You are creating an addendum to this Solicitation Are you sure you want to proceed?' with 'OK' and 'Cancel' buttons.

Step 4: Edit Solicitation Pages

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

- Edit Header
- Edit Requirements
- Edit Questionnaire
- Edit Documents
- Edit Item Specs
- Edit Suppliers

The screenshot shows a horizontal navigation bar with seven buttons: 'Edit Header', 'Edit Requirements', 'Edit Questionnaire', 'Edit Documents', 'Edit Item Specs', 'Edit Suppliers', and 'Summary'. The 'Summary' button is highlighted in blue.

12. Click Save at the bottom of each edited page.  
13. If no edits are needed on a page, click Return/Exit to go back to Summary.

Step 5: Submit the Addendum

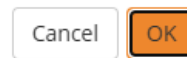
14. When all changes are complete, scroll to the bottom of the Summary page. If an error was made, edit and save the necessary page, review Summary page again.
15. Click Submit. Submit is the 'save button' for the Bid Board.



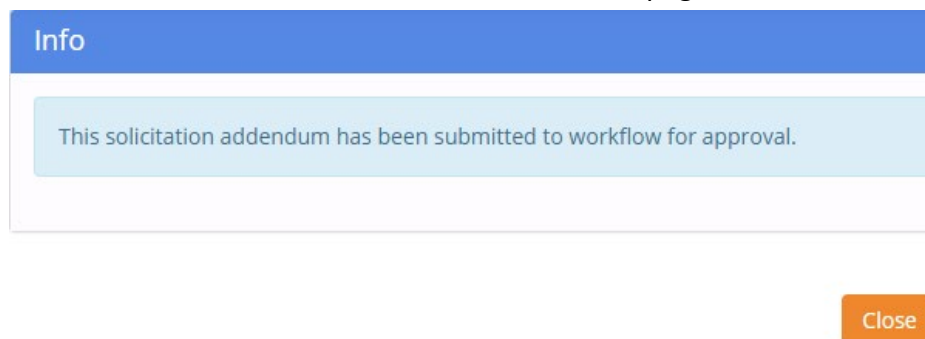
Step 6: Publish the Addendum

16. When prompted, click OK to publish the addendum.

Your Solicitation addendum will be submitted for approval. Please click OK to submit. ^
Note: if your addendum only contains changes to the quantity allocation of one or more items (without changing the total quantity), changed estimated total and/or if you only added suppliers, then an internal addendum will be created and the suppliers will not be notified.



17. Click Close to return to the Current Formal Solicitations page.



Step 7: Verify Status

18. The solicitation status will display as 'Open / ADDENDUM' on the Bid Board.
19. Registered suppliers will see addenda in their profiles.
20. Suppliers not registered in CTsource will only see addendum attachments on the Bid Board.

Step 8: Understand Supplier Notifications

21. Registered suppliers receive an email notice that an addendum was posted.
22. If the supplier hasn't submitted a response yet, they must acknowledge the addendum.
23. If a response was already submitted, no acknowledgment is required, only an email is sent.

Step 9: Review Solicitation Attachments

24. Mandatory Documents: Original uploaded solicitation documents.

25. Solicitation Addenda: Auto-generated report showing updated system fields.
26. Addendum Documents: Uploaded by the buyer as part of the addendum.

Step 10: Final Notes

27. You cannot remove any original documents posted with solicitation. If a critical error was made, cancel the solicitation to remove all documents from public view.
28. A pencil and paper icon will appear next to the solicitation number, indicating an addendum was posted.

Need Help?

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

ITB Solicitation Evaluation Document Responses Only Guide

Purpose

This guide explains how to review and evaluate online supplier response documents in CTsource for an Invitation to Bid (ITB).

Step-by-Step Instructions

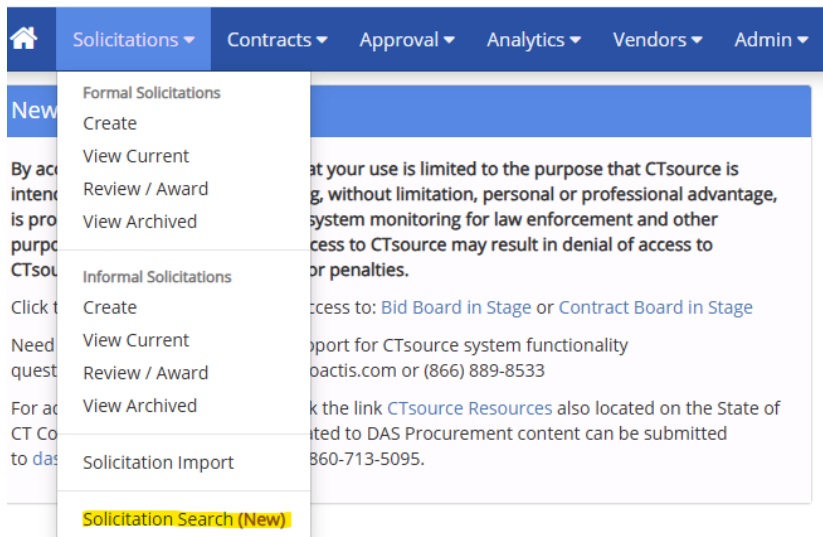
Step 1: Login

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

WebProcure

Username / Email Address
RiveraMa
Password
.....
Log In Trouble Logging In?

3. Select the Solicitations module from the main menu.
4. Select Solicitation Search (New) from the dropdown menu.



5. Under Solicitation Search field, enter the solicitation number or keyword.
6. Click the Search button.

Solicitation Search Date Range Organization Buyer Name
25PSX0001 No date selected All All Search

Step 2: Review Activity and Download Submitted Responses

7. Click the Actions ellipsis in the far-right column of the solicitation row.
8. Select 'Solicitation Vendor Activity Report' to view supplier activity. This shows a snapshot of responding suppliers and their CTsource status. Once you're finished, click Done to return to the search page.
9. Click the Actions ellipsis in the far-right column of the solicitation row.
10. Select 'Download Solicitation Documents'.

Solicitations #	Title	Buyer	End Date	Status	Actions
25PSX0001	Training Information	M Rivera	Nov 14, 2025, 2:00:00 PM	Under Evaluation	⋮
25PSX000AA	Training Information	M Rivera	Nov 14, 2025, PM		
1117	testing quick guide	M Rivera	Aug 09, 2021, PM		
1087	Traffic monitoring and parts	M Rivera	Jun 16, 2021, 2 PM		

Showing: 1-4 / 4

Solicitation 25PSX0001

- 📄 Evaluate Supplier Responses
- 📄 Solicitation Vendor Activity Report
- 🕒 Solicitation History
- 🚫 Cancel Solicitation
- 🗨️ Q&A Center
- 📄 Award Report
- 📄 Publish Award Report
- 📄 Download Solicitation Documents

11. Save the ZIP file to your computer to evaluate submitted responses and determine the award. Return to CTsource.
12. Manually prepare a contract price schedule based on the awarded supplier's cost proposal and include it in Exhibit A of the contract as applicable.
13. Outside of CTsource, determine the award and then process it in CTsource.

Step 3: Review Supplier Document Responses Online or Manually via Zip File

14. Click the Actions ellipsis in the far-right column of the solicitation row.
15. Select 'Evaluate Supplier Responses' to continue.

Solicitations #	Title	Buyer	End Date	Status	Actions
25PSX0001	Training Information	M Rivera	Nov 14, 2025, 2:00:00 PM	Under Evaluation	⋮
25PSX000AA	Training Information	M Rivera	Nov 14, 2025, PM		
1117	testing quick guide	M Rivera	Aug 09, 2021, PM		
1087	Traffic monitoring and parts	M Rivera	Jun 16, 2021, 2 PM		

Solicitation 25PSX0001

- 📄 Evaluate Supplier Responses
- 📄 Solicitation Vendor Activity Report
- 🕒 Solicitation History
- 🚫 Cancel Solicitation
- 🗨️ Q&A Center
- 📄 Award Report

16. Click a radio button to review supplier online responses, then click Continue:
 - a. Paper Responses: Not applicable (electronic responses only).
 - b. Review Questions: To view questionnaire summaries as applicable.
 - c. Review Requirements: To view requirement responses as applicable.
 - d. Review Vendor Documents: Manually summarize uploaded files. Note: verify that all online documents are included in the zip file.

Step 4: Process the Award

17. Select the Solicitations module from the main menu.

18. Select Solicitation Search (New) from the dropdown menu
19. Under Solicitation Search, enter the solicitation number or keyword.
20. Click the Search button.
21. Click the Actions ellipsis in the far-right column of the solicitation row.
22. Select 'Evaluate Supplier Responses'.
23. Under 'Select Award Method', select 'Award' and click Continue.

Select Award Method

Review and/or download documents and attachments submitted by suppliers as part of their response.

Review Vendor Documents

Select the vendor(s) to which you would like to award this Solicitation.

Award

[Continue](#)

Step 6: Complete Award Page

24. On the Award page, select the Award checkbox associated with the lowest, responsible, qualified bidder/supplier. Note: Suppliers with a pending status (purple question mark icon) cannot receive awards. These suppliers must be approved (green check mark icon) before they are awarded the solicitation/contract.

	ABC Training Company (n/a) ?	Awesome Supplier (56%) ✓	Training Supplier 1 (51%) ✓
Documents			
Award	<input type="checkbox"/> Recommend as Finalist	<input checked="" type="checkbox"/> Award	<input type="checkbox"/> Recommend as Finalist

[Done](#)
[Close](#)

25. After selecting Done, an Award Report Page automatically displays the awarded responses. At the bottom of the Item Award Report page, select 'Done'.

[Awarded Responses](#) [All Responses](#)

Awarded Formal Solicitation Winners

No.	Supplier
1.	Awesome Supplier

Awarded

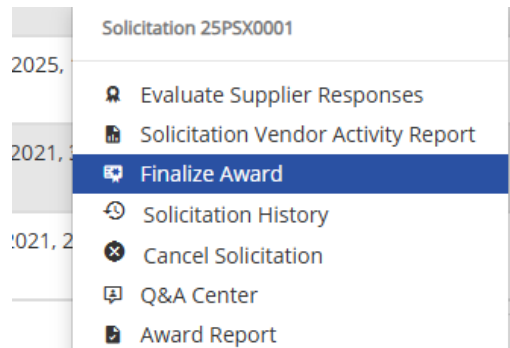
[Evaluation Notes](#)
[Download](#)
[Print](#)
[Done](#)

Caution on Publishing: Do NOT click 'Publish' unless your procurement rules allow awards before contract finalization.

Step 8: Finalize the Bid

26. Click the Actions ellipsis for the solicitation again.

27. Select 'Finalize Award'.



28. On the Finalize Bid page, unselect all suppliers to avoid sending award notifications prematurely.

29. Type 'Yes' in the confirmation box.

30. Click 'Submit' to confirm and change the bid status to awarded on the bid board.

Please select the vendors who will receive the standard award notification. The list contains *only* the vendors that viewed or bid on the Solicitation. If you have done a custom notification using "Create Notification" above, you may consider unchecking all the vendors below.

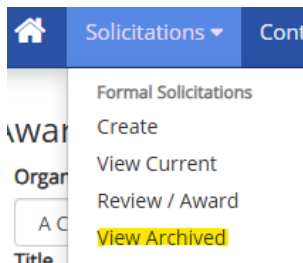
Select Vendors to Notify		
[Check All] [Uncheck All]		
Select	Supplier	
<input type="checkbox"/>	Awesome Supplier (56%) Quote 1	Awarded
<input type="checkbox"/>	ABC Training Company (n/a) Quote 1	Responded
<input type="checkbox"/>	Training Supplier 1 (51%) Quote 1	Responded
<input type="checkbox"/>	Training Supplier 2 (n/a) Quote 1	

When you are ready to finalize the award, please type the word "Yes" in the confirmation box at the bottom of the screen and click "Submit"

Confirmation:

Step 9: Access the Archived (finalized) Solicitation to Convert to Contract

31. The solicitation will now appear under Solicitations > Formal > View Archived.



32. Next step is to create or 'Generate' the contract from the awarded solicitation.



February 2026

Need Help?

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

Post Bid Opening Results Guide

Purpose

This guide provides step-by-step instructions for posting bid opening results for electronic responses in CTsource.

Step-by-Step Instructions

Step 1: Login

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

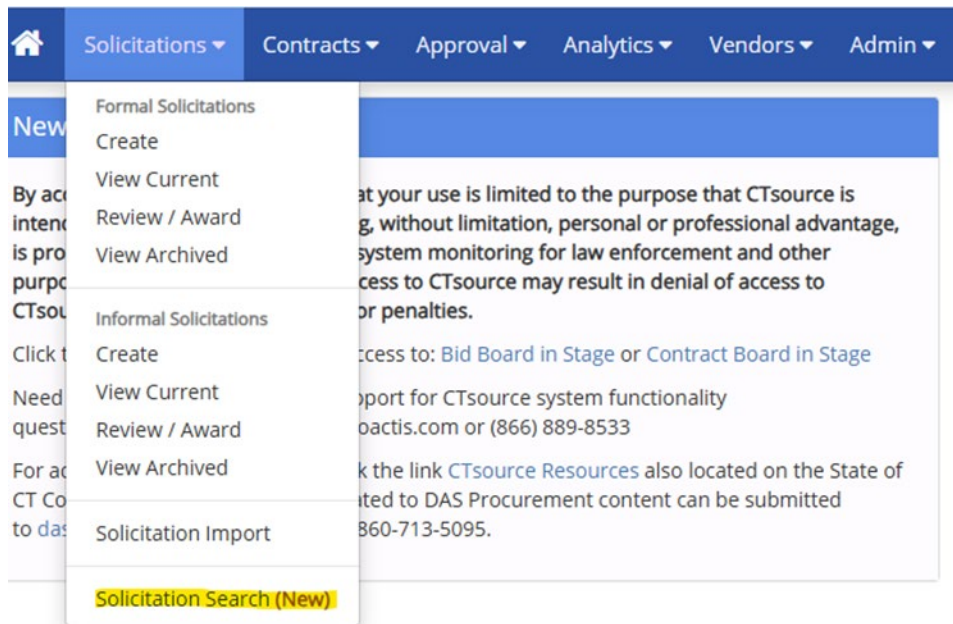
WebProcure



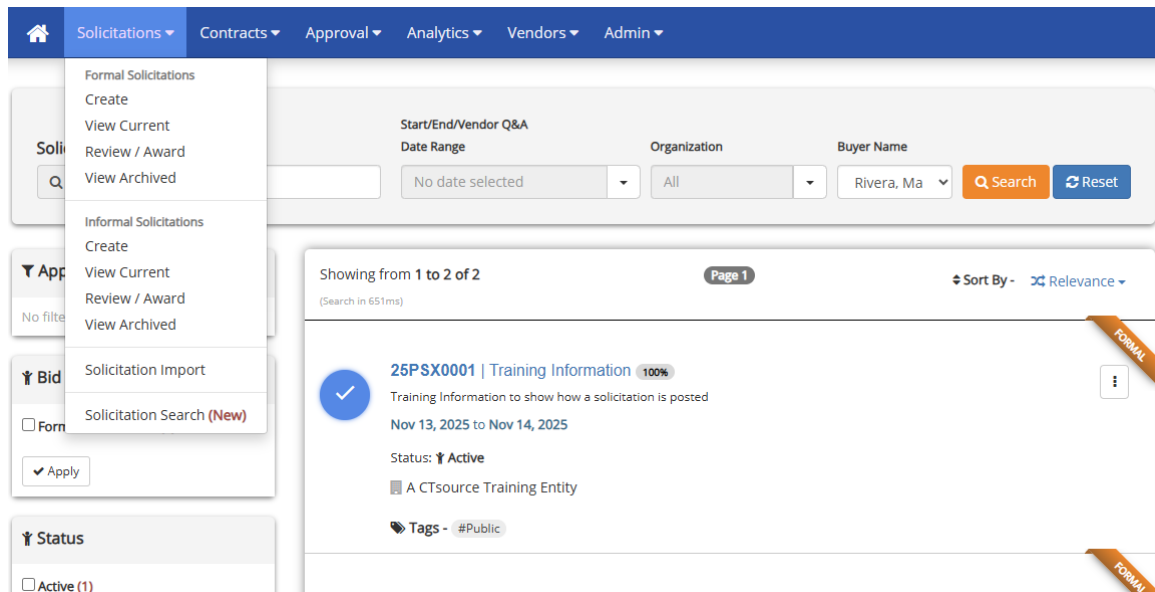
The image shows a login form for WebProcure. It has two input fields: 'Username / Email Address' with the text 'RiveraMa' and 'Password' with masked characters. Below the fields is an orange 'Log In' button and a link for 'Trouble Logging In?'.

Step 2: Search for Solicitation

3. Select the Solicitations module from the main menu.
4. Select 'Solicitation Search (New)' from the dropdown menu.



5. Enter the solicitation number or keyword.
6. Apply filters if needed, then click Search.

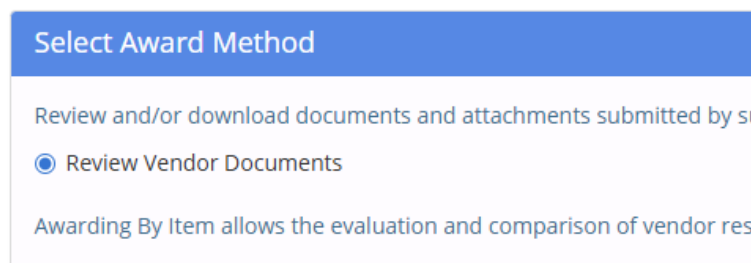


Step 3: Choose the Solicitation

7. Find your solicitation in the results table.
8. In the far-right column, click the Actions ellipsis.

Step 4: Evaluate and Prepare Bid Opening Results

9. Select 'Evaluate Supplier Responses'.
10. If your solicitation does not accept electronic responses, skip to the appropriate alternate step (Step 14 in original guidance).
11. Under 'Select Award Method', pick 'Review Vendor Documents'.

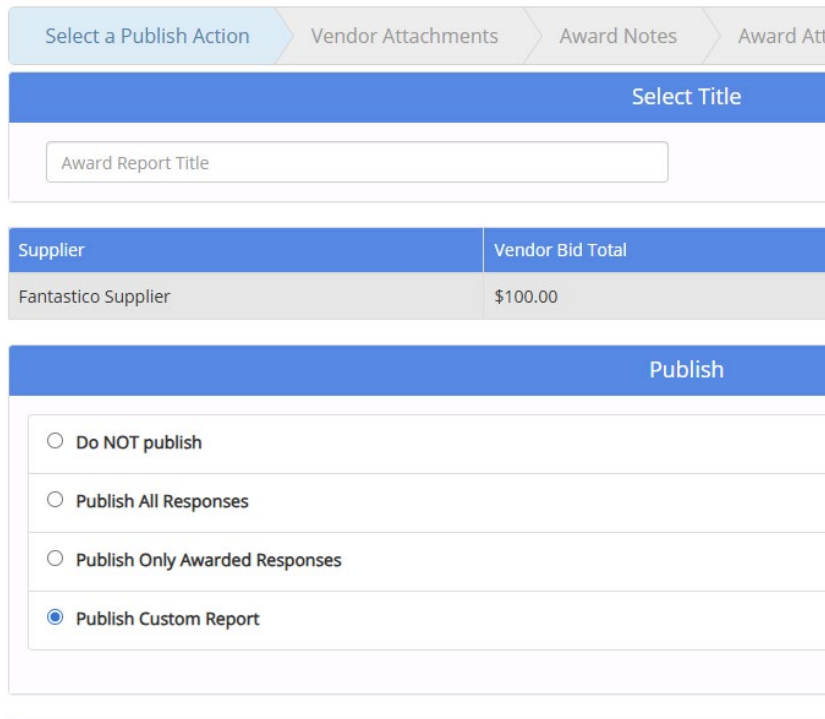


12. Click 'Continue'.
13. Review responses and prepare a Bid Opening Results document (Excel) outside of CTsource.
 - Save the file with a clear name (e.g., 'Bid Opening Results') and Close.
 - Avoid using special characters in the filename.
14. Go back into the already opened CTsource window & click the Cancel button.

Step 5: Publish Award Report

15. Click the Action ellipse and select 'Published Award Report'.

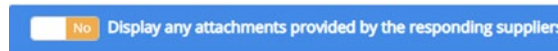
16. Under the 'Select a Publish Action' page, select the 'Publish Custom Report' radio button.



Supplier	Vendor Bid Total
Fantastico Supplier	\$100.00

Do NOT publish
 Publish All Responses
 Publish Only Awarded Responses
 Publish Custom Report

17. Under the 'Vendor Attachments' page, click the toggle switch from No to Yes & back to No to ensure no vendor attachments are displayed on the Bid Board.



No Display any attachments provided by the responding suppliers

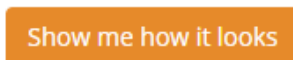
18. Under the Award Notes page:

- For ITBs: Type 'Bid Opening Results' into the text box.
- For RFPs: Display the vendor list and add names if needed.

19. On the 'Award Attachments' page, click 'Attach Documents', if needed.

20. In the 'Upload Document' box, click 'Browse', find the file, click 'Upload', then click 'Save'.

21. Click 'Show me how it looks' to see what the vendor will see.



Show me how it looks

22. Select Close and select Close again.

Step 6: Verify Posting

23. Go to the [Bid Board](#) from the Home page.
24. Search for the solicitation number.
25. Open the solicitation by clicking its number to confirm that Bid Opening Results have been posted.

Need Help?

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

ITB Solicitation Line-Item Bid Evaluation Guide

Purpose

This guide explains how to review and evaluate a line-item bid based on online supplier responses in CTsource for an Invitation to Bid (ITB).

Step-by-Step Instructions

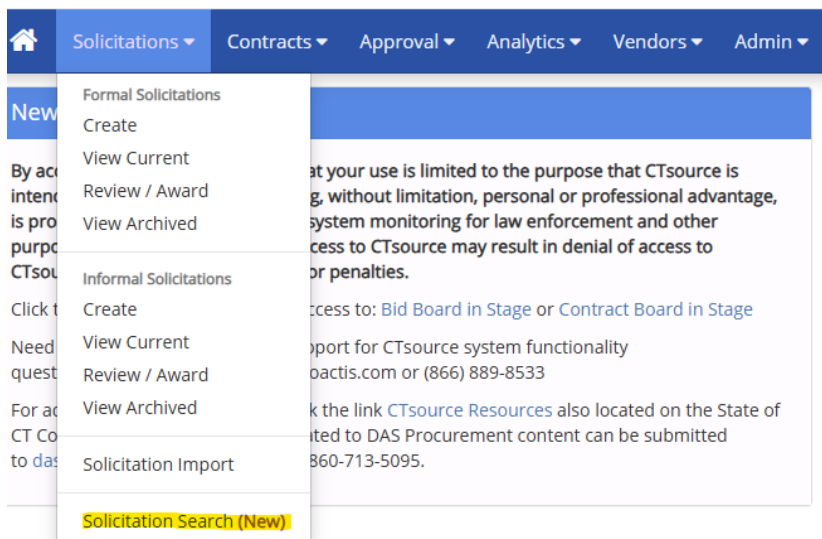
Step 1: Login to CTsource and select the Solicitations Module

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

WebProcure

Username / Email Address
RiveraMa
Password
.....
Log In Trouble Logging In?

3. Select the Solicitations module from the main menu.
4. Select Solicitation Search (New) from the dropdown menu.



5. Under Solicitation Search field, enter the solicitation number or keyword.
6. Click the Search button.

Solicitation Search Date Range Organization Buyer Name

25PSX0001 No date selected All All Search

Step 2: Review Activity and Download Submitted Responses

7. Click the Actions ellipsis in the far-right column of the solicitation row.
8. Select 'Solicitation Vendor Activity Report' to view supplier activity. This shows a snapshot of responding suppliers and their CTsource status. Once finished, click Done to return to the search page.
9. Click the Actions ellipsis in the far-right column of the solicitation row.
10. Select 'Download Solicitation Documents'.

Solicitations #	Title	Buyer	End Date	Status	Actions
25PSX0001	Training Information	M Rivera	Nov 14, 2025, 2:00:00 PM	Under Evaluation	⋮
25PSX000AA	Training Information	M Rivera	Nov 14, 2025, PM		
1117	testing quick guide	M Rivera	Aug 09, 2021, PM		
1087	Traffic monitoring and parts	M Rivera	Jun 16, 2021, 2 PM		

Showing: 1-4 / 4

Solicitation 25PSX0001

- 📄 Evaluate Supplier Responses
- 📄 Solicitation Vendor Activity Report
- 🕒 Solicitation History
- 🚫 Cancel Solicitation
- 🗨️ Q&A Center
- 📄 Award Report
- 📄 Publish Award Report
- 📄 Download Solicitation Documents

11. Save the ZIP file to your computer to evaluate submitted responses and determine the award. Return to CTsource.
12. Manually prepare a contract price schedule based on the awarded supplier’s cost proposal and include it in Exhibit A of the contract as applicable.
13. Outside of CTsource, determine the award and then process it in CTsource.

Step 3: Review Supplier Line-Item Responses Online or Manually via Zip File

14. Click the Actions ellipsis in the far-right column of the solicitation row.
15. Select 'Evaluate Supplier Responses' to continue.

Solicitations #	Title	Buyer	End Date	Status	Actions
25PSX0001	Training Information	M Rivera	Nov 14, 2025, 2:00:00 PM	Under Evaluation	⋮
25PSX000AA	Training Information	M Rivera	Nov 14, 2025, PM		
1117	testing quick guide	M Rivera	Aug 09, 2021, PM		
1087	Traffic monitoring and parts	M Rivera	Jun 16, 2021, 2 PM		

Solicitation 25PSX0001

- 📄 Evaluate Supplier Responses
- 📄 Solicitation Vendor Activity Report
- 🕒 Solicitation History
- 🚫 Cancel Solicitation
- 🗨️ Q&A Center
- 📄 Award Report

16. Use Total Award Summary pop-up for item totals.
17. Collapse the chevron to view options.
18. Use drop-down arrows to apply Price Adjustments/Preferences (if applicable).
19. Click a radio button to review supplier online responses, then click Continue:
 - a. Paper Responses: Not applicable (electronic responses only).
 - b. Review Questions: To view questionnaire summaries as applicable.
 - c. Review Requirements: To view requirement responses as applicable.

- d. Review Vendor Documents: Manually summarize uploaded files. Note: verify that all online documents are included in the zip file.

Step 5: Select Item Award by Method

- 20. Under 'Select Award Method', choose one:
 - a. Award all to the lowest bidder: Select the supplier with the lowest total bid.
 - b. Award by Item: Choose by clicking the supplier's name or individual item trophies.
 - c. Award by Group: Use trophy icons or toggle switches to assign awards to multiple suppliers within each group.
 - d. Enable Heat Map to highlight the lowest prices (optional).

Select Award Method

Review and/or download documents and attachments submitted by suppliers as part of their response.

Review Vendor Documents

Awarding By Item allows the evaluation and comparison of vendor responses at the item level. Line item

Award By Item

This award method requires that responding suppliers have responded to all items in this Formal Solicit: displayed.
 Note: Line item level delivery information cannot be displayed using this method.

Award All to One For Bid

Step 6: Make Supplier Selection and Complete Award Page

- 21. Suppliers with a pending status (purple question mark icon) cannot receive awards. These suppliers must be approved (green check mark icon) before they are awarded the solicitation/contract.
- 22. Use checkboxes for single or multiple awards as needed and select Done.

Fantastico Supplier (n/a)	
Award	<input checked="" type="checkbox"/>
Bid Total	\$100.00

- 23. After selecting Done, an Award Report Page automatically displays the awarded responses. At the bottom of the Item Award Report page, select 'Done'.

Item Award Report : 25PSX0001 - Training Information (Formal)

Awarded Responses All Responses

Vendor Bid Total >

Awarded Items and bid Winners

No.	Item	Supplier	Brand	Prod. No	Manufacturer Name	Manufacturer Part Number	Delivery Date	Unit Bid	Total Qty	Awarded Item Qty	Item Total	Evaluated Item Total
1	Training Spec Number : 1000	Fantastico Supplier		2				\$100.00	1.00	1.00	\$100.00	\$100.00

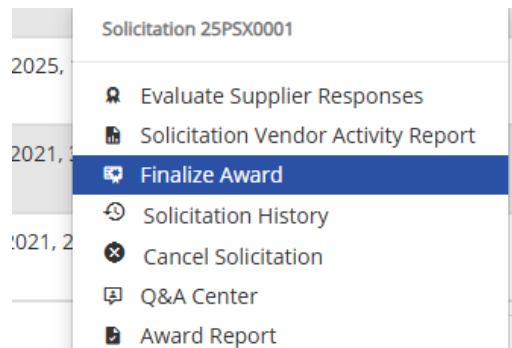
Awarded

- Evaluation Notes
- Download
- Print
- Export Bid Tab
- Done

Step 8: Finalize the Bid

24. Click the Actions ellipsis for the solicitation again.

25. Select 'Finalize Award'.



26. On the Finalize Bid page, unselect all suppliers to avoid sending award notifications prematurely.

27. Type 'Yes' in the confirmation box.

28. Click 'Submit' to confirm and change the bid status to awarded on the bid board.

Please select the vendors who will receive the standard award notification. The list contains *only* the vendors that viewed or bid on the Solicitation. If you have custom notification using "Create Notification" above, you may consider unchecking all the vendors below.

Select Vendors to Notify		
[Check All] [Uncheck All]		
Select	Supplier	
<input type="checkbox"/>	Fantastico Supplier (n/a) Quote 1	Awarded

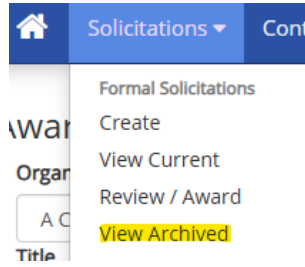
When you are ready to finalize the award, please type the word "Yes" in the confirmation box at the bottom of the screen and click "Submit"

Confirmation: YES

Submit

Step 9: Access the Archived (finalized) Solicitation to Convert to Contract

29. The solicitation will now appear under Solicitations > Formal > View Archived.



30. Next step is to create or 'Generate' the contract from the awarded solicitation.

Need Help?

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

RFP Solicitation Evaluation Guide

Purpose

This guide explains how to review and evaluate online supplier response documents in CTsource for a Request for Proposal (RFP).

Step-by-Step Instructions

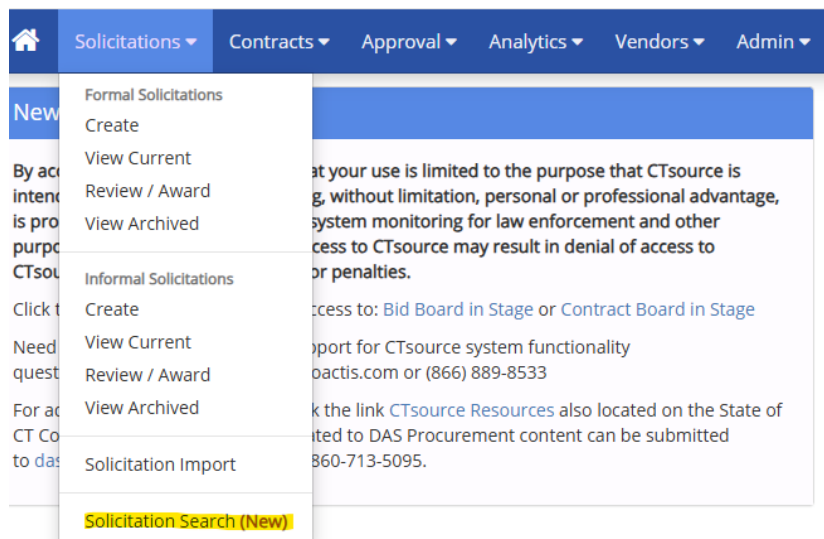
Step 1: Login

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

WebProcure

Username / Email Address
RiveraMa
Password
.....
Log In Trouble Logging In?

3. Select the Solicitations module from the main menu.
4. Select Solicitation Search (New) from the dropdown menu.



5. Under Solicitation Search field, enter the solicitation number or keyword.
6. Click the Search button.

Solicitation Search Date Range Organization Buyer Name

25PSX0MAR No date selected All Buyer, Buy Search

Step 2: Review Activity and Download Submitted Responses

7. Click the Actions ellipsis in the far-right column of the solicitation row.
8. Select 'Solicitation Vendor Activity Report' to view supplier activity. This shows a snapshot of responding suppliers and their CTsource status. Once finished, click Done to return to the search page.
9. Click the Actions ellipsis in the far-right column of the solicitation row.
10. Select 'Download Solicitation Documents'.

Solicitations #	Title	Buyer	End Date	Status	Actions
25PSX0001	Training Information	M Rivera	Nov 14, 2025, 2:00:00 PM	Under Evaluation	⋮
25PSX000AA	Training Information	M Rivera	Nov 14, 2025, PM		
1117	testing quick guide	M Rivera	Aug 09, 2021, PM		
1087	Traffic monitoring and parts	M Rivera	Jun 16, 2021, 2 PM		

Showing: 1-4 / 4

Solicitation 25PSX0001

- Evaluate Supplier Responses
- Solicitation Vendor Activity Report
- Solicitation History
- Cancel Solicitation
- Q&A Center
- Award Report
- Publish Award Report
- Download Solicitation Documents

11. Save the ZIP file to your computer to evaluate submitted responses and determine the award. Return to CTsource.
12. Manually prepare a contract price schedule based on the awarded supplier’s cost proposal and include it in Exhibit A of the contract as applicable.
13. Outside of CTsource, determine the award and then process it in CTsource.

Step 3: Review Supplier Document Responses Online or Manually via Zip File

14. Click the Actions ellipsis in the far-right column of the solicitation row.
15. Select 'Evaluate Supplier Responses' to continue.

Solicitations #	Title	Buyer	End Date	Status	Actions
25PSX0001	Training Information	M Rivera	Nov 14, 2025, 2:00:00 PM	Under Evaluation	⋮
25PSX000AA	Training Information	M Rivera	Nov 14, 2025, PM		
1117	testing quick guide	M Rivera	Aug 09, 2021, PM		
1087	Traffic monitoring and parts	M Rivera	Jun 16, 2021, 2 PM		

Solicitation 25PSX0001

- Evaluate Supplier Responses
- Solicitation Vendor Activity Report
- Solicitation History
- Cancel Solicitation
- Q&A Center
- Award Report

16. Click a radio button to review supplier online responses, then click Continue:
 - a. Paper Responses: Not applicable (electronic responses only).
 - b. Review Questions: To view questionnaire summaries as applicable.
 - c. Review Requirements: To view requirement responses as applicable.
 - d. Review Vendor Documents: Manually summarize uploaded files. Note: verify that all online documents are included in the zip file.

Step 5: Create an Evaluation Team in CTsource to Share Online Responses for Scoring

17. Click 'Manage Evaluation Committee'.

Continue Manage Evaluation Committee Cancel

18. Under the Teams tab, enter the Team Name using the format: Solicitation # - Evaluation Team.
19. Click 'Add Team'.

20. Use the icon to find other CTsource users and add team members.

Team Member	Action
Rivera, Marisol(A CTsource Training Entity)	-
Gagne, Geri-Lynne(A CTsource Training Entity)	-

21. For non-CTsource users, click 'Add External User', enter the information, and then click Save.

Add External User

22. Add yourself to gain access to the zip file for contract folder storage.
23. Click Next.

Step 6: Evaluation Materials

24. Go to the Evaluation Materials tab.
25. Review the Solicitation file in Available Files.

31. Click Publish to generate and send emails with zip attachments.
32. Click Proceed, then Close.

Committee members will be granted external system access to selected solicitation evaluation materials via WebProcureDrive.



Document published to Evaluation Committee successfully.

Proceed

Add new Teams / Team Members

Publish Additional Documents

Close

Step 8: Determine Top Scorer(s) Outside CTsource

33. Use your procurement process to identify the highest-scoring proposer(s) with the Evaluation Team. Outside of CTsource, evaluate responses using the predetermined scoring criteria, meet with the evaluation committee, identify the responsible and qualified proposer with the highest score, and then process the award in CTsource.

Step 9: Process the Award

34. Select the Solicitations module from the main menu.
35. Select Solicitation Search (New) from the dropdown menu
36. Under Solicitation Search, enter the solicitation number or keyword.
37. Click the Search button.
38. Click the Actions ellipsis in the far-right column of the solicitation row.
39. Select 'Evaluate Supplier Responses'.
40. Under 'Select Award Method', select 'Award' and click Continue.
41. Select Continue.

Select Award Method

Review and/or download documents and attachments submitted by suppliers as part of their response.

Review Vendor Documents

Select the vendor(s) to which you would like to award this Solicitation.

Award

Continue
Manage Evaluation Committee
Cancel

Step 9: Complete Award Page

42. Select the checkbox next to the name of the approved proposer. Note: Suppliers with a pending status (purple question mark icon) cannot receive awards. These suppliers must be approved (green check mark icon) before they are awarded the solicitation/contract.
43. After selecting Done, an Award Report Page automatically displays the awarded responses. At the bottom of the Item Award Report page, select 'Done'.

Awarded Responses All Responses

Awarded Formal Solicitation Winners

No.	Supplier
1.	Awesome Supplier

Awarded

Evaluation Notes
Download
Print
Done

Caution on Publishing: Do NOT click 'Publish' unless your procurement rules allow awards before contract finalization.

Step 10: Finalize Award

44. Click the Actions ellipsis again for the solicitation.
45. Select 'Finalize Award'.

- Q&A Center
- Send Supplier Message
- Publish Award Report
- Award Report History
- Evaluate Supplier Responses
- Finalize Award

46. On the Finalize Bid page, unselect all suppliers to avoid sending award notifications prematurely.
47. Type 'Yes' in the confirmation box.
48. Click 'Submit' to confirm and change the bid status to awarded on the bid board.

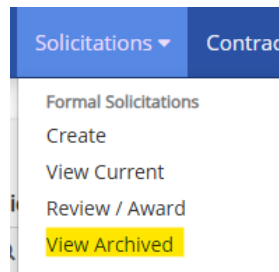
[Check All] [Uncheck All]		
Select	Supplier	
<input type="checkbox"/>	Fantastico Supplier (n/a) Quote 1	Awarded

When you are ready to finalize the award, please type the word **"Yes"** in the confirmation box at the bottom of the screen and click "Submit"

Confirmation:

Step 11: Access the Archived (finalized) Solicitation to Convert to Contract.

49. The solicitation will now appear under Solicitations > Formal > View Archived.



50. Next step is to create or 'Generate' the contract from the awarded solicitation.

Need Help?

- WebProcure Contract Module Visit: [WebProcure Online Help](#)
- Visit: [CT DAS CTsource Webpage](#)
- Email: 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

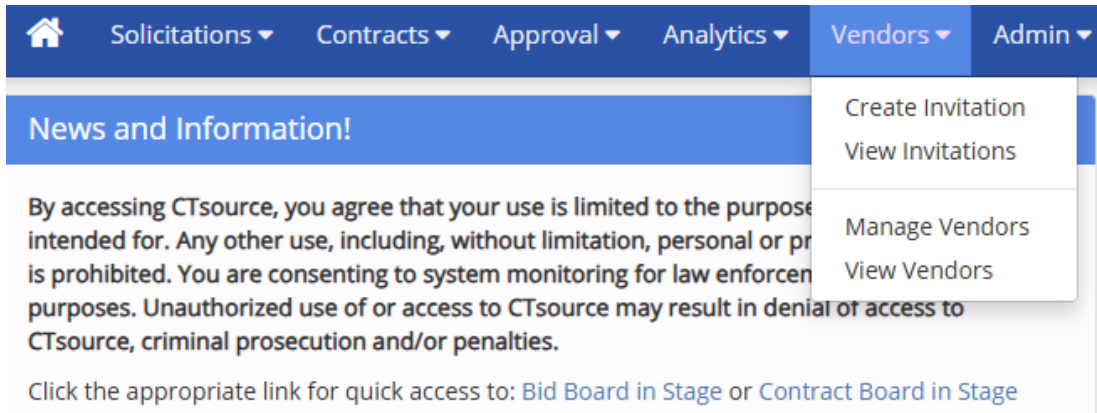
1. Sign into [CTsource](#).



The image shows the WebProcure login interface. At the top, the word "WebProcure" is displayed in a large, blue, italicized font. Below this, there is a light blue login box. Inside the box, the text "Username / Email Address" is positioned above a text input field containing "RiveraMa". Below that, the text "Password" is positioned above a password input field with masked characters ".....". At the bottom left of the box is an orange "Log In" button. At the bottom right is a link that says "Trouble Logging In?".

Step 2: Navigate to Vendors Module

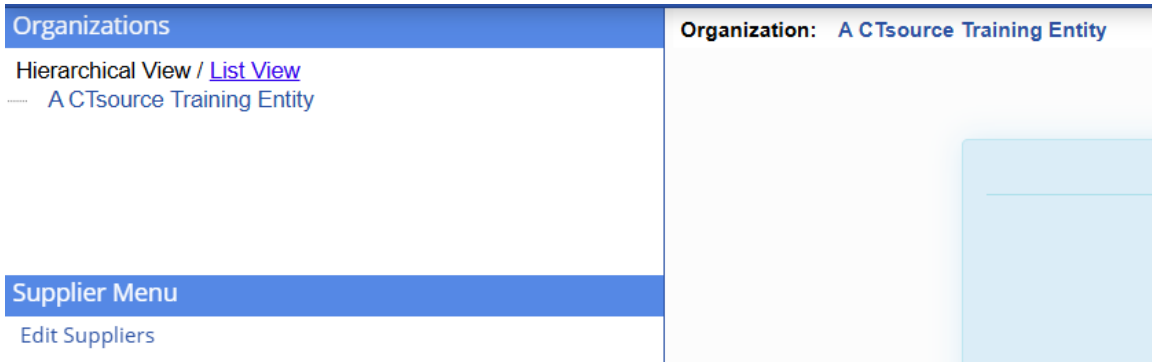
2. Go to the Vendors module from the main menu.
3. Select 'Manage Vendors' from the dropdown menu.



The screenshot shows the top navigation bar with the following items: Home, Solicitations, Contracts, Approval, Analytics, Vendors, and Admin. The 'Vendors' dropdown menu is open, showing options: Create Invitation, View Invitations, Manage Vendors, and View Vendors. Below the navigation bar, there is a 'News and Information!' section with a disclaimer: 'By accessing CTsource, you agree that your use is limited to the purpose intended for. Any other use, including, without limitation, personal or professional use, is prohibited. You are consenting to system monitoring for law enforcement purposes. Unauthorized use of or access to CTsource may result in denial of access to CTsource, criminal prosecution and/or penalties.' Below the disclaimer, there are links for 'Bid Board in Stage' and 'Contract Board in Stage'.

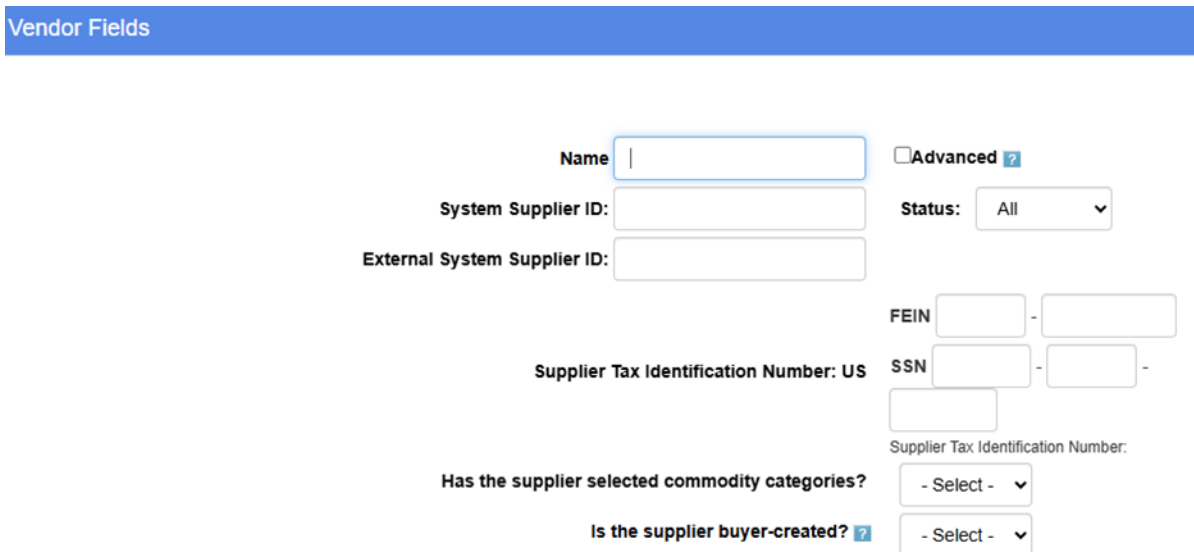
Step 3: Edit Supplier Profile

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.



The screenshot shows two panels. The left panel is titled 'Organizations' and contains the text 'Hierarchical View / List View' and 'A CTsource Training Entity'. The right panel is titled 'Organization: A CTsource Training Entity' and shows a large empty area, likely a placeholder for a profile picture or logo.

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)



The screenshot shows the 'Vendor Fields' search form. It includes the following fields and options:

- Name:** A text input field.
- Advanced:** A checkbox with a question mark icon.
- System Supplier ID:** A text input field.
- External System Supplier ID:** A text input field.
- Status:** A dropdown menu currently set to 'All'.
- FEIN:** A text input field followed by a hyphen and another text input field.
- Supplier Tax Identification Number: US:** A text input field followed by a hyphen and another text input field.
- SSN:** A text input field followed by a hyphen and another text input field.
- Supplier Tax Identification Number:** A text input field.
- Has the supplier selected commodity categories?:** A dropdown menu currently set to '- Select -'.
- Is the supplier buyer-created?:** A dropdown menu currently set to '- 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 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.
- 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