Contracts

Navigation: Main Menu > Core-CT Financials > Procurement Contracts > Add/Update Contracts.

The Contract Entry page will display and the Add a New Value Tab will be active.

Manually enter the contract number in the Contract ID field using the Core-CT numbering schema: two numbers to represent the calendar year, three characters to represent the Agency, four sequential numbers to represent the contract number, and two alphas to represent the vendor.

- The first 2 characters are numeric for the calendar year that the contract is being created in. For example if the contract is being created in calendar year 2005, the numeric is 05.

- The three characters to represent the Agency: if this contract was being created by the Department of Transportation, the user would input DOT.

- The four sequential numbers represent the contract number, such as 9999.

- The 2 alpha characters to represent the vendor. In the event that more than one vendor is awarded this contract, these letters differentiate between vendors. The first alphas used would be AA, followed by AB, AC, etc.

In this example the contract number would be: 05DOT9999AA. If there was an additional vendor awarded on this contract the next contract number to be used would be: 05DOT9999AB.
The use of this numbering schema will provide consistency of data entry for all state Business Units and will facilitate a standardized item loading process when items need to be loaded into the item master tables via the Catalog Management module.

For the **Contract Process Option**, select Purchase Order from the drop down menu.

Click the **Add** button.

This will take you to the Contract Entry Page. The Contract Entry Page is comprised of five sections: the Contract, the Header, Order Contracts Options, Contract Items, and Contract Categories.
1. In the **Contract section**, you have the option to copy from a previously created contract. Click on **Copy From Contract**. If you are not going to copy from a contact, skip down to Status.

**NOTE:** The contract process option must be the same as the contract you are copying from (i.e. General to General or Purchase Order to Purchase Order).

This will open a new screen where you can search for an existing contract by Contract ID, Vendor, or Vendor ID. Use the search icon to look for existing values. Once you have found the contract you are looking for, click **Search**.

This will bring the contract information down to the Select Contract section. Check the box next to the contract, then click **OK**.
The information from the contract you selected has been copied over. Continue on and make any changes to the fields, if necessary.

**Status:** The status of the contract. Since this is a new contract, the status is Open.

**Administrator/Buyer:** The originator of the Contract. Enter in the employee’s name or search by clicking the search icon.

**Contract Version:** A separate job aid will be available to discuss the use of Contract Versions. Since this is a new contract, the value will always be one and new version button will be disabled. You may enter an approval due date if applicable.

2. The following fields must be entered in the **Header** section:

**CT Contract Type:** There are several types of contracts for selection and this step is very important to identify correctly. Contract type has an impact on the PO type to be selected on your Purchase Order Header Details Page.
• **BU Award** - **Business Unit Award** is a contract that an agency establishes based on statutory purchasing authorities or delegated statutory purchasing authorities. DAS procurement could use this value if they are establishing a contract for a single agency to use (they would need to restrict the business unit to the agency that the contract was developed for on the PO defaults page).

• **Constr. - Construction** - a contract established by DOT, DCS or any agency that has a construction contract.

• **Grant** – is a grant award that is either budgeted or federally funded between the state and another entity such as another state agency, municipality or not for profit business.

• **Loan** - used by ECD for the purpose of tracking their loan related contracts.

• **MOU – Memorandum of Understanding** - used when an agency creates a contract previously known as a Memorandum of Understanding or Memorandum of Agreement.

• **POC Comp - POS Competitive** - used by the Social Service Agencies for their Purchase of Services contracts that were competitively bid. Once selected, an OPM Reporting link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**

• **PON Noncom - POS Noncompetitive** - used by the Social Service Agencies for their Purchase of Services contracts that were not competitively bid. Once selected, an OPM Reporting link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**

• **PSC Comp - PSA Competitive** - used by any agency when Personal Service Agreement contracts that were competitively bid. Once selected, an OPM Reporting link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**
• **PSN Noncom - PSA Noncompetitive** - used by any agency when Personal Service Agreement contracts that were *not competitively bid*. Once selected, an **OPM Reporting** link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**

• **Rght of Wa - Rights of Way** - used by the DOT for their right of way contracts.

• **Rntl Lease - Rental Lease** - used for Building Leasing or Real Property contracts.

• **Statewide - Statewide Award** - used by DAS when creating a contract that all agencies can use.

• **MA – Master Agreement** - used to contract for goods or services resulting from an RFP (Request for Proposal)

• **GL – General Letter** - *(GL71a, b, c, d, e, f, g)* *is used when GL is the delegated purchasing authority.*

• **SCS – Statutory Contractual Services** – to be used by DAS, DCS, and DOT only for statutory contractual services. Once selected, an **OPM Reporting** link will become active for use in entering additional required contract information. **OPM reporting requires users to enter all the lines for the services provided for this contract type.**

• **UFA – Utility Force Account** - to be used by DOT for their Utility Force Account.

• **Stand Tran – Standardization Transaction** - to be used when requesting the waiver of the bid or proposal requirement in accordance with CGS 4a-58. **Approval must be obtained by DAS before using this value.**
Once a POC/N, PSC/N or SCS CT Contract Type is selected, the OPM Reporting link is activated. (See section 3 for details on OPM Reporting)
Creating Contracts in Core-CT

Vendor: Use the Vendor Search link to find the vendor to be associated with this contract.

Vendor Search

<table>
<thead>
<tr>
<th>Name:</th>
<th>ShortName:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alternate Vndr Name:</td>
<td></td>
</tr>
<tr>
<td>City:</td>
<td>State:</td>
</tr>
<tr>
<td>Country:</td>
<td>Postal:</td>
</tr>
<tr>
<td>Class:</td>
<td>Type:</td>
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<td>Max Rows:</td>
<td>10</td>
</tr>
</tbody>
</table>

Search Criteria

Search Results

<table>
<thead>
<tr>
<th>Sel</th>
<th>Vendor ID</th>
<th>Address</th>
<th>Short Vendor Name</th>
<th>Name 1</th>
<th>Withholding Applicable</th>
</tr>
</thead>
<tbody>
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Vendor Detail

Address

OK  Cancel  Refresh

Fill in any of the fields to retrieve the vendor and then click Search.

Results returned will show in the Search Results view.

Vendor Search

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</table>

Vendor Detail

Address

OK  Cancel  Refresh
To view information about the vendor; place a check in the Sel checkbox, and click Vendor Detail or Address.

**Vendor Detail**

<table>
<thead>
<tr>
<th>SetID:</th>
<th>STATE</th>
<th>Vendor ID:</th>
<th>Vendor Status:</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>In City Limit:</td>
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</tr>
<tr>
<td>Alternate Vndr Name</td>
<td></td>
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</tr>
<tr>
<td>Address:</td>
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<td>693 HIGH ST</td>
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<tr>
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</table>

**Vendor Types**

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<th>Long Name</th>
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</table>

[OK] [Cancel] [Refresh]

**Address**

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<thead>
<tr>
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<th>Vendor ID:</th>
<th>USA United States</th>
</tr>
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<td></td>
<td></td>
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<td></td>
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<td>693 HIGH ST</td>
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<tr>
<td>Address 2:</td>
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<tr>
<td>Address 3:</td>
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<tr>
<td>City:</td>
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<tr>
<td>County:</td>
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</tr>
<tr>
<td>State:</td>
<td>CT</td>
<td>Connecticut</td>
<td></td>
</tr>
</tbody>
</table>

[OK] [Cancel] [Refresh]

Click OK or Cancel to return you to the previous screen, so you can select the vendor for the Contract.
Select the vendor by placing a check in the **Sel** checkbox and click the **OK** button. This will bring the vendor data onto the Contract Header page.

*If the vendor does not exist in the Core-CT system, please contact OSC for the necessary forms to request an addition to the vendor file.*

**Continue entering Header Information:**
Begin Date: The Begin Date of the contract defaults in with today’s date. If you enter a future begin date, this contract will not be available for selection in the Contract ID field of Purchase Orders until the begin date.

Expire Date: This is the date that the contract ends. After that expiration date has passed, the contract is no longer available for selection in the Contract ID field of Purchase Orders. In the future, this field will also be used to archive data off of the system.

Renewal Date: This field is optional. The date the contract is up for renewal.

Vendor Contract Ref: This field is optional. The field size is 30 characters.

Description: The Description field is optional for use. The field size is 30 characters. This field is viewable when searching the vendor contracts field in online PO creation. It is good practice to utilize the Description field.

Master Contract ID: This field is not used.

Tax Exempt: You can copy the tax exempt information from the PO Defaults.

Maximum Amount: Enter the maximum amount that can be released and paid against this contract.

3. The following fields need to be entered or updated in the Order Contracts Options Section:

- If the contract that you are creating is only for your agency’s use, uncheck the Corporate Contract checkbox (the Corporate Contract checkbox is used for DAS statewide contracting. Selecting this checkbox allows all Business Units to utilize the contract and the Business Unit on the PO Defaults link is set to DASM1).

- Select Lock Chartfields if you do not want the chartfields on your PO to be different than what you entered in your contract.

- The Allow Open Item Reference should NEVER be selected for POC/N, PSC/N or SCS contracts types, if selected you will not be able to save the contract. For other contract types, selecting this checkbox would allow the purchase of all items from this vendor within the scope of the vendor contract.
Select the **Price Can Be Changed on Order** checkbox; this will allow PO change orders to be created for POs associated with this contract.

For PSC/N, POC/N and SCS type contracts click on the OPM Reporting Link.

**OPM Approval Number**: enter the log number from the approved OPM PSC/N or POC/N Request form. (e.g., 2006-0711) If your contract falls below the dollar thresholds, and OPM Approval is not required, type **Not Req'd** in this field.

**OPM Contracted Entity**: select entity from the dropdown menu.
Creating Contracts in Core-CT

**OPM Statutory Reference:** select reference from the dropdown menu.

- CGS 13B-20B  Consultant Services, DOT
- CGS 4A-50  Contractual Services
- CGS 4B-55  Consultant Services, Construction
- CGS 4D-2  Consultant Services, use w/contract type SCS only
- Not Applicable  When the Statutory Reference is not one of selections listed above.

Please refer to the statutes for a more detailed explanation.

Click **OK** once you have entered data in the three required fields.

Click on **PO Defaults** (This is mandatory, even if you are not entering defaults here).

The PO Defaults page will open. Verify that your agency business unit has defaulted in the **Business Unit** field. *If DASM1 defaults in, you will need to change this to your agency’s business unit.*

Your **AM Business Unit** may default in. If not, enter manually if needed. You will only have to update this field if DASM1 defaults in instead of your agency business unit.
If your agency has multiple Business Units that should transact utilizing this contract, use the plus button to add additional Business Units.
You will see that your Tax Exempt ID populates. You should copy this information back into the Header Information section.

**Note:** You will also have to check the Tax Exempt box.

You will see that the Payment Terms ID is populated with 000 (Due Immediately – No Discount). If your vendor has offered a different pay term select the appropriate pay term from the list.

*If the pay term offered is not included in the list, please contact the Core-CT help desk to log a ticket (860) 622-2300.*
If your PO from this contract is to be amount only, then you would need to change the Charge By field from Quantity to Amount.

Do not enter Chartfield information on the PO defaults page. Enter it directly on the distribution for each contract line that is entered.

Click

You will return to the Contract Entry Page.

4. Go to **Contract Items**.

Enter a clear description of 10 words or less of the good or service contracted for in the **Description** field (max 254 characters). Agencies can reference their program tree to assist in a standard description. For PSC/N, POC/N and SCS CT Contract Types, these are required fields. You will not be able to save your contract if these fields are not entered. Add an additional line for each contracted service.

(To view the entire description, click ![view button]. This will open an expanded window view.)
Creating Contracts in Core-CT

Click [Return] to return back to Contract Entry

Enter the **UOM** - Unit of Measure. This field must be entered.
Enter the correct **Category**. This will bring in the account on the PO. This can be changed if necessary. **Use of the category 00000000 or CT_UNSPSC is unacceptable on any contract, PO or requisition.** These values were included for use by requesters on requisitions if they did not know the correct category. It is the responsibility of the Purchasing Approvers to apply the correct category code.

Click the **Line Details** icon to access all tabs.

Select **Expand All** to view all tabs on one page.
Select the appropriate choice (goods or services) in the **Physical Nature** field.
Place a check in the checkbox for Price Can Be Changed on Order.

FOR AN AMOUNT ONLY CONTRACT:

Order By Amount - If this is amount only, check the Amt Only checkbox. Reconfirm that you have selected Amount in the Charge By field on the PO Defaults.

Merchandise Amt - enter the amount for the line.

FOR A QUANTITY CONTRACT:

UOM/Pricing – enter a Base Price equal to the price for this line

Enter MAIN for the Price Loc (Pricing Location).

Click OK.

You will be returned to the Contract Header Page.

Repeat the steps above for each contract line entered.
Click on the **PO Distributions Details** icon.

Fill in the appropriate chartfield information here.

Select + to add additional distribution lines.

Repeat this step for each contract line entered. It is mandatory that agencies enter Chartfield values on the distribution line for each line of the contract.

This will copy to the PO when utilizing the Copy from Contract feature when creating an online purchase order.

Click OK when you are done

You will be taken back to the Contract Page.
Place the contract in approved status by updating the Status field if you have the authority to do so. If you do not have the authority to approve a contract, leave the contract in Open status and contact the appropriate person in your agency who can approve this contract.

Click ✉️ Save to save the contract.

Updated 01/03/13