



DEEP and CoreCT Financials

Refresher Training for Current CoreCT Requesters

Rev. October 29, 2013

Information Available on InsideDEEP

State of Connecticut

Department of Energy and Environmental Protection
Intranet

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ADMINISTRATIVE POLICIES & PROCEDURES

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Procurement/Purchasing

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The Purchasing Unit is responsible for procuring the goods and services necessary for the staff of the Department of Energy and Environmental Protection to carry out their programs. These services are performed under authority granted by The Connecticut General Statutes and under the supervision of the Department of Administrative Services, Bureau of Purchases. The office strives to provide these services in a timely and proficient manner, while ensuring that all statutes, regulations and policies of both the State and the Department are adhered to.

Purchasing Unit Business Hours

The Purchasing Unit business hours are 7:30 a.m. – 4:00 p.m. If you require further assistance, please contact the Purchasing Unit at (860) 424-3500. If you need assistance after normal business hours, please contact DEEP/Emergency Dispatch Center at (860) 424-3333 for **emergency** purchasing assistance.

Upcoming Employee Events

Requisition & Purchasing Procedures available on InsideDEEP



The screenshot shows the Department of Energy and Environmental Protection Intranet. The header includes the state logo and navigation links: Home, Quick Links, Forms, and Contact Us. The main content area is titled 'How to Initiate a Purchase Request' and provides 'Guidance for Staff' in three numbered steps. A left sidebar lists various administrative policies and procedures, including Directives, Freedom of Information Act (FOIA), Grants/Contracts/MOUs/PSA Policies, Mail and Shipping, Procurement/Purchasing, Project Requests for Facility Improvements and Repairs, Record Retention, State Vehicle Use/Fleet Administration, Travel, and Inside DEEP Main Menu. There are also promotional banners for 'Upcoming Employee Events' and 'SMS'.

ADMINISTRATIVE POLICIES & PROCEDURES

- Directives
- Freedom of Information Act (FOIA)
- Grants/Contracts/MOUs/PSA Policies
- Mail and Shipping
- Procurement/Purchasing
- Project Requests for Facility Improvements and Repairs
- Record Retention
- State Vehicle Use/Fleet Administration
- Travel
- Inside DEEP Main Menu

How to Initiate a Purchase Request

Guidance for Staff

1. Identify need for item or service. Check to see if the item is already available:
 - in your Division's standard supply cabinet or
 - from DEEP's "[Recycle/ Reuse Center](#),"
 - through existing [State contract](#)
 - purchase "Green Products" wherever possible.
 - DEEP [Policy](#) on Green / Environmentally Preferable Purchasing (EPP)
 - Quick Reference List of commonly ordered items from [Suburban](#) and [Staples](#)
 - [DAS EPP Program](#)
2. Discuss your need with your Division's [CoreCT Requester](#) to determine if this is a "standard" purchase that can be ordered without additional detailed information from you or approvals from division staff before entry into CoreCT.
3. For non-standard purchases, or where pre-approval is required, check with your supervisor (or other authorized division designee).
 - Does the supervisor/authorized designee agree that the need is justified?
 - Is funding available?
 - Are detailed specifications required/available? Contact a [Purchasing Unit](#) or [technical assistance](#) contact regarding information to include in specifications.

CoreCT Financials

Procurement Overview

CoreCT has a variety of features:

- Requisition Entry, Approval & Management
- Asset Information
- Purchase Orders (vendors should **NOT** be authorized to commence work without a PO in place)
- Receiving
- Invoicing & Payments

How You'll Get Requests

Depending on the Bureau & Location:

- [Electronic Requisition Form](#)
- Hard copy Requisition Form *(least preferred option)*
- E-mail
- Copy of marked up catalog page
- Verbal
- Sticky notes



Approvals Required BEFORE CoreCT Requisition Entry

- **Air** – Supervisory pre-approval required.
- **BETP** – No pre-approval required for office supplies. Supervisor’s pre-approval required for other purchases.
- **BNR** – Director pre-approval required.
- **BOR** – Supervisory pre-approval required.
- **Commissioner’s Offices** – Verbal pre-approval from Director level required. Some areas require written pre-approval.
- **FSS** – No pre-approval required.
- **MMCA – Office Supplies** can be forwarded to Requester w/out pre-approval except for Emergency Response.
 - Emergency Response – Pre-approval by AD or Director required for ALL purchases.
 - WPED – No pre-approval for office supplies or filing on Land Records; all else requires AD or Director pre-approval.
 - WEED – Supervisory pre-approval required for anything other than standard office supplies.
- **PURA** - No pre-approval required for office supplies. Supervisor’s pre-approval required for other purchases.
- **WPLR** – No pre-approval required for office supplies. Supervisory pre-approval required for all other purchases.



Contacts

- Business Offices (for funding, freeze & vendor information)
- Purchasing Officers (coordinate with Purchasing Officers for large price purchases with time constraints and assistance developing specifications)
- **Supervisors & Division Directors** (obtain justification information if not already provided)

The Freeze



- Executive Directives to curtail spending are still in effect.
- Is the purchase critical to meet the agency's mission?
- Is there a state or federal mandate requiring the purchase?
- If printing, can it be published electronically?

Executive Directive #1

Purchasing Freeze

- Instructed agencies to freeze all purchasing except for those goods and services that are **absolutely and immediately essential to the agencies' operations**. The Directive also instructed agencies to:
 - (1) deplete all existing office supplies prior to placing any new orders;
 - (2) avoid exhausting year-end OE budget funds; and
 - (3) ensure that they have proper purchasing reviews and controls in place to guarantee that only emergency or truly essential items are purchased.

Executive Directive #2

P-Cards

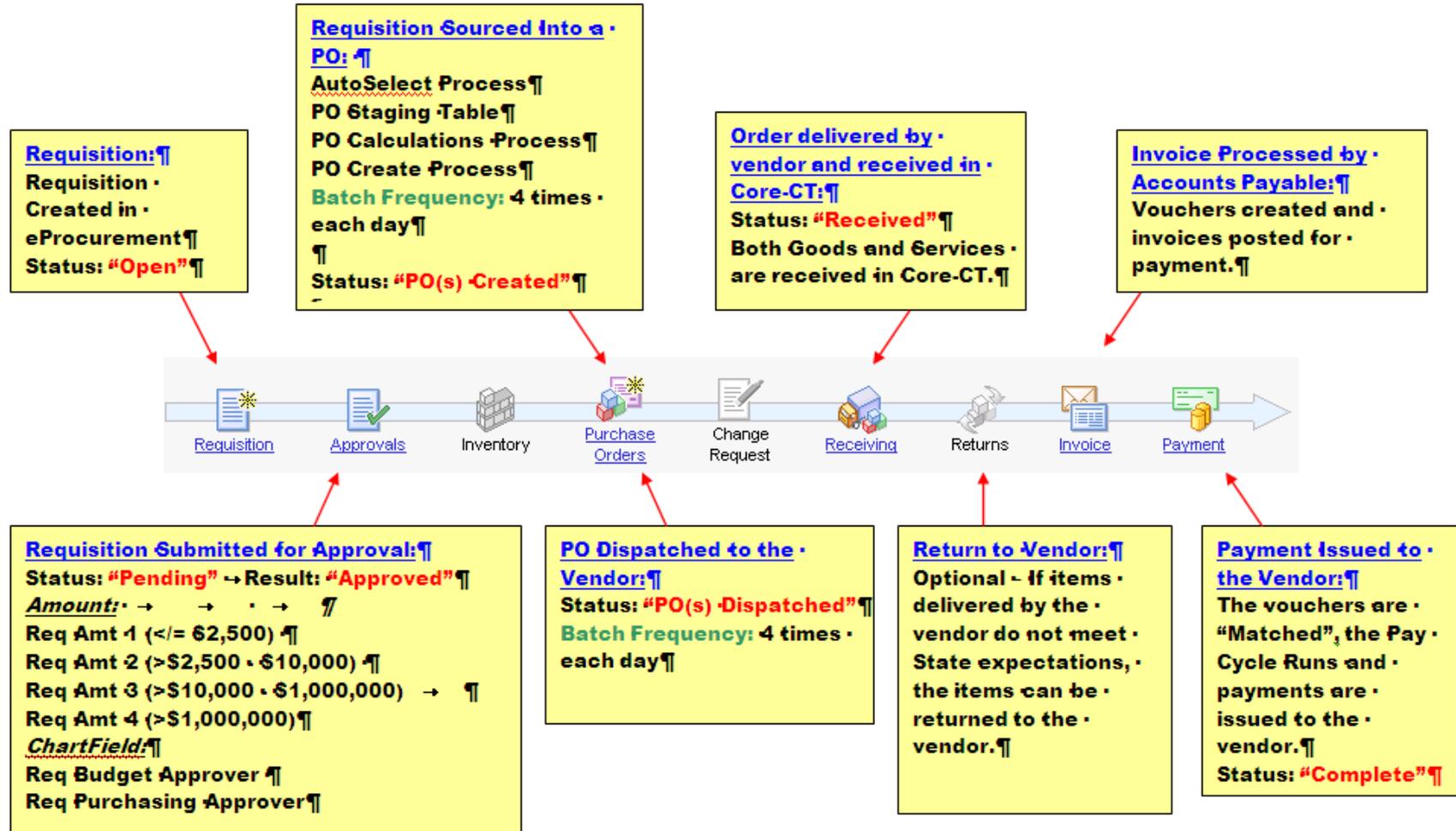
- Asked Agency Heads to cancel all P-Cards issued to agency employees that had not been used within the last six months, and to suspend all other agency P-Cards other than those required for purchases deemed absolutely and immediately essential to accomplish the mission of the agency.

Executive Directive #3

Printing

- Directed agencies to cease printing all agency business cards and letterhead, and to stop printing brochures, leaflets, annual reports and similar communications or informational materials **unless they are required to fulfill a federal or state mandate**. This directive also instructed agencies to **use paperless processes** – including the internet and email – whenever possible.

Requisition Life Span



Requisitions Overview

Factors to consider prior to entry:

- Accurate vendor information
- Adequate description
 - Be clear and complete
 - Many items are available through CoreCT catalogs
- Timing
 - When are goods or services actually needed – plan ahead – be specific
- Bidding
 - Required for all goods and services not on existing state contract
 - <\$50K done by DEEP Purchasing Office
 - >\$50K generally done through DAS (minimum 3 week process)
- Coding
 - See the [Master Chart of Accounts](#) (available through Quick Links on InsideDEEP)

Factors to Consider (cont'd.)

- Pricing
 - When invoices are received, how will Vendors be billing DEEP (hour, item, packet, variable price)?
- Asset Management
 - Will the item be a “taggable” asset?
 - Will there be design/installation costs (distribute cost among assets)
- Justification
 - **All requisitions require justification**
- Approvals
 - Are approvals outside your normal chain required?
 - All IT related requisitions must be entered to follow OIM approval workflow.

Manage Requisitions

- Once entered, regularly review your requisitions to ensure they're moving forward properly.

The screenshot shows the 'Manage Requisitions' interface. At the top, there are navigation tabs for 'My HR', 'Finance', and 'Core-CT Help'. Below this is the 'Manage Requisitions' section with a search form. The search form includes fields for Business Unit (DEPM1), Requestion Name, Requestion ID, Date From (10/01/2013), Date To, Requester (ValenteL), and Request Status. A dropdown menu for Request Status is open, showing options: 'All but Complete', 'Approved', 'Canceled', and 'Complete'. The 'Search' button is circled in red. A text box points to the search form with the text: 'Enter any specific date or status information you want to view your desired requisitions, then press Search'. Below the search form is a table of requisitions. The table has columns: Req ID, Requisition Name, BU, Date, Sta, and Total. The first row is expanded, showing details for Req ID 0000033380. A text box points to the expand/collapse arrow in the first row with the text: 'Click on the arrow to view additional requisition information.' Below the table is a 'Requester' section with fields for Requester (DEP-Valente Laurie), Entered By (DEP-Valente Laurie), and Priority (Medium). A 'Request Lifespan' diagram shows a flow from Requisition to Approvals, Inventory, Purchase Orders, Change Request, Receiving, Returns, Invoice, and Payment. A text box points to the icons in the Request Lifespan diagram with the text: 'Icons will be displayed which will provide you with more information you can drill into.' At the bottom, there is a 'Line Information' table with columns: Line, Description, Status, Price, Quantity, UOM, and Vendor. The first row shows Line 1, Description 'FLDR - LTR - 11PT - 1/3 - AS...', Status 'Received', Price '19.07000 USD', Quantity '1.0000 BX', and Vendor 'SUBURBAN STATIONERS INC'.

Req ID	Requisition Name	BU	Date	Sta	Total
0000033496	OLISP/Recording Fee	DEPM1	10/24/2013	Per	35.00 USD
0000033481	IWRD/Vegetation Spraying				3,965.00 USD
0000033428	OLISP/Membership Dues				500.00 USD
0000033389	IWRD/Statutory Payment	DEPM1	10/10/2013	Per	7,500.00 USD
0000033380	IWRD/Office Supplies	DEPM1	10/09/2013	Received	42.43 USD

Line	Description	Status	Price	Quantity	UOM	Vendor
1	FLDR - LTR - 11PT - 1/3 - AS...	Received	19.07000 USD	1.0000 BX		SUBURBAN STATIONERS INC

Requisitions Approval Status

Approval Status

Business Unit: DEPM1
Requisition ID: 0000033428
Requisition Name: OLISP/Membership Dues
Requester: [DEP-Valente Laurie](#)
Entered on: 10/17/2013
Status: Approved
Priority: Medium
Budget Status: Valid

Total Amount: 500.00 USD
[REQ Obligation](#)

Requester's Justification:
No justification entered by requester.

[View printable version](#)

Line Information ?

Review/Edit Approvers

Amount Approval

OLISP/Membership Dues: **Approved**

Req Amount

Approved

✓ [DEP-Horton Victoria](#)
CT WF REQ AMT APPROVER 1
10/17/13 - 4:26 PM

Req Budget Approval

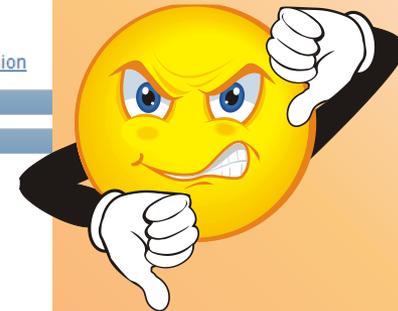
OLISP/Membership Dues: **Approved**

Req Bgt Appv

Approved

✓ [DEP-Moylan Daniel](#)
CT WF REQ BUDGET APPROVER
10/17/13 - 5:11 PM

Click here to view
requisition details & coding



Requisition Approvals

Approvals go in sequential order.

- **Amount Approval** – may involve several approvers depending on \$ amt. Ensures that the purchase is appropriate and source of funding is acceptable.
- **Budget Approval** – ensures coding is accurate & funding is available.
- **Purchasing Approval** – ensures proper purchasing authority is applied, determines if bidding is required, obtains additional information from requester or program staff as needed.

Give each approver at least 3-5 business days to act on the requisition. Contact the specific approvers if not done within that timeframe.

Every requester has a default approval path. You can also add “Ad hoc” approvers if others need to review/approve the request.

Asset Overview

Different coding required for all controllable assets and capital assets

- Controllable Asset - <\$1,000 and an expected useful life of one or more years.
 - Always use Account Code 54150 for "Controllable" Assets.
- Capital Asset - \$1,000+ and an expected useful life of one or more years.
 - Always use Account Code beginning with 55 for "Capital" Assets.
 - Remember to "capitalize" the item in "*Asset Information*" tab of the Requisition

Asset Coding

- Asset Codes which must be entered are:

- **AM Business Unit** = DEPM1

- **Profile Id** (always begins with “1”)

- Describes asset type (boat, equipment, land, etc.)
 - Determines depreciation

- **AM Location** (always begins with ADEP)

- Defines where the asset will be permanently assigned

- see [Master Chart of Accounts](#) for details

- Where applicable, indicate the name of the person to be assigned the asset in the Justification.

Note: If ordering an item to replace an old one, include the old Asset Id. in the Justification.

Contact your Business Officer to complete an Equipment Inventory Change Request form when replacing assets.

Helpful Tips



- Mandatory Purchasing Authority
(either contract, statute or [General Letter 71a-h](#))
- Requisitions can include Multiple Vendors
 - Single requisition will result in multiple POs.
- Strive to minimize the number of POs issued to a single vendor for similar goods & services
 - May make invoicing and PO management simpler.

Purchase Orders

Once the PO is dispatched to the Vendor, you can:

- *Review PO Information* (view description, price, coding, etc.)
- *Review PO Activity Summary* (view payments & balances)
- Run PO Balance Reports by vendor or Chartfield combinations (consult with your Business Officer)

Receipt

- Commodities are only “received” by those with receiver roles in the Business Office, Purchasing and major field locations:
 - Raul Granillo
 - Ed Stratton
 - Melanie Gangi
 - Scott Brandon
 - Lisa Rogers
 - Karen Marciano
 - Meghan Frommer
 - Rose Novak
- Invoices for all other services must have receipts entered by Business Officers or other Financial Management staff with the role.
- Payments can only be made if the purchase has a receipt entered in CoreCT.
- If a specialized piece of equipment is delivered, someone from the program staff may be requested to inspect the item to ensure it is acceptable.

Invoicing



- **All invoices must be submitted direct to Accounts Payable by the vendor.**
 - Do not request invoices be sent to other locations.
- If an invoice must be authorized for payment by program staff (e.g. verify that services were acceptably performed), AP will e-mail a scanned copy of the invoice to the designated Business Officer and/or program office.
- Electronic authorization can be provided to AP by Replying or Forwarding the e-mail with authorization and receipt noted.

Invoicing (cont'd.)

- In most cases, invoices for commodities will be paid direct by AP following “receipt” of goods and invoice.
- When a PO is distributed by Quantity (not Amount), unit pricing on the Invoice must exactly match the PO unit pricing to release payment.
- If pricing on PO does not match the invoice, AP will coordinate with Business Officer and/or Purchasing.

Payments

Payments can be checked via CoreCT through various ways

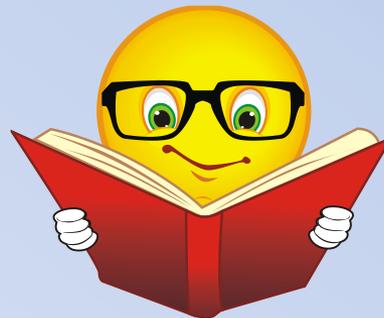
- **Manage Requisitions**

Icons displayed in color indicate a step that has been complete

- **PO Activity Summary**
- **Accounts Payable**
- **PO Balance Reports**



Step by Step Requisition Entry Instructions



Navigate Create Requisition

Step 1 – Define Requisition

- Navigate to Create Requisition
- Enter a Requisition Title.

State of Connecticut

Home HRMS Worklist FIN Worklist Add to My Links Sign out

Favorites: Main Menu > Core-CT Financials > eProcurement > Create Requisition

My HR Finance Core-CT Help My Links Select One:

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: DEPT Dept of Energy & Environ Prot

*Requester: LentN DEP-Lent Nancy *Currency: USD

Requisition Name: Fin Mgt Stapler CORE-10 REQ REQ Obligation Priority: Medium

Line Defaults

Default Options

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any defaults that are assigned.

Vendor: Vendor Location:

Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: 0640000176 Modify Onetime Address

Due Date: Attention:

Accounting Defaults

Pct	Account	Dept	Fund	SID	Program	PC Bus Unit	Project	Activity
		DEP43321						

Requisition Summary

There are no lines on this request. Please add new line in order to save this requisition.

Total Lines: 0

Total Amount (USD): 0

Populate with a brief descriptive requisition name

Populate Line Default Information

- The default option is to override all line distributions with the coding listed in Accounting Defaults. This will apply the coding to all lines. This option will allow you to establish split distributions to be applied to all lines as well.
- Complete all default information.
- See InsideDEEP for list of Buyers (Search for [Purchasing Staff](#))
- See Master Chart of Accounts for Category and other Chartfield and Asset Information coding.
- Do not populate Vendor or Unit of Measure if you will be selecting from a CoreCT Catalog.

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: Dept of Energy & Environ Prot

*Requester: DEP-Lent Nancy

Requisition Name: CORE-10 Obligation

*Currency: Priority:

Line Defaults

Default: If you select this option, the defaults specified below will be applied to requisition lines when there are no values for these fields.

Override: If you select this option, the defaults specified below will override any predefined values for these fields, or are assigned.

Vendor: Vendor Location:

Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: [Modify Onetime Address](#)

Due Date: Attention:

Accounting Defaults

Pct	Account	Dept	Fund	SID	Program	PC Bus Unit	Project	Activity
	<input type="text" value="54060"/>	<input type="text" value="DEP43321"/>	<input type="text" value="11000"/>	<input type="text" value="10020"/>	<input type="text" value="66099"/>	<input type="text" value="NONPC"/>	<input type="text" value="DEP_NONPROJECT"/>	<input type="text"/>

If shipping a commodity, ensure that the address is listed as 79 Elm Street (0640000176). This is the address that should now be the default for most Requesters.

Entering Asset Information

- If Entering an Asset, enter the proper AM Location Code.
- **AM Business Unit** must be DEPM1.
- Select the appropriate **Profile Id**.
- Location will default to ACORE. If you're entering an asset, enter the AM Location Code (beginning with ADEP.....)

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: Dept of Energy & Environ Prot

*Requester: DEP-Lent Nancy *Currency:

Requisition Name: CORE-10 REQ Obligation Priority:

Line Defaults ?

Default Options ?

Default If you select this option, the defaults specified below will be applied to requisition lines when there are no predefined values for these fields.

Override If you select this option, the defaults specified below will override any predefined values for these fields, only non-blank values are assigned.

Vendor: Vendor Location:

Buyer: Category: Unit of Measure:

Shipping Defaults

Ship To: [Modify Onetime Address](#) **Personalize your page(s) to relocate field placement for ease of use.**

Due Date: Attention:

Accounting Defaults Personalize | Find | | First 1 of 1 Last

Location	AM Business Unit	Profile ID	Capitalize	Cost Type	Description		
<input type="text" value="ADEP550001"/>	<input type="text" value="DEPM1"/>	<input type="text" value="1EQUIPMENT"/>	<input type="checkbox"/>	<input type="text"/>		<input type="button" value="+"/>	<input type="button" value="-"/>

Step 2. Add Items and Services

Catalog Entry

- Click on the type of order you'll be making **Catalog** or **Special Request**; **Templates** and **Favorites** for items you regularly order.
- For items available through Core **Catalogs** (e.g. Corporate Express, Suburban Stationers, etc.) enter the **Vendor** or **Manufacturer's Item Id** then press the yellow **Search** button.
- All text must be in **UPPER CASE** and **no spaces are allowed**.

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | Favorites | Templates | Special Request

Browse Catalog

*Select a catalog:

- Choose from available catalogs in the dropdown list
- Navigate categories by clicking folders
- View items in a category by clicking the category name
- Use the checkboxes to select categories to search below

Search Catalog

Search contains of the following search fields entered:

Description:

Manufacturer:

Manufacturer's Item ID:

Vendor:

Vendor Item ID:

Item ID:

Vendor Contract:

[Search Settings](#) [Search Tips](#)

Enter specific information regarding the items you wish to purchase then press Search.

Selecting a Catalog Item

- Take care to ensure you select an item with the appropriate unit of measure (box vs. each).
- Enter your desired Quantity.
- Press the Add button to add the item to your shopping cart.
- When done entering items, press Review and Submit to move to Step 3.

The screenshot shows a catalog selection interface. At the top, there is a checkbox labeled "Select All / Deselect All" and three buttons: "Add", "Add to Favorites", and "Compare". Below this is a table with columns: Item Description, Vendor, Manufacturer, Price, UOM, and Quantity. The first row is selected, with a red circle around the checkbox, another around the quantity field "1.0000", and a third around the "Add" button. The second row is not selected. At the bottom, a "Review and Submit" button is circled in red.

Item Description	Vendor	Manufacturer	Price	UOM	Quantity	
<input checked="" type="checkbox"/> STANLEY BOSTITCH B8 HEAVY DUTY STAPLING PLIER - FASTENER CAP	STAPLES CONTRACT & COMMERCIAL INC	AMAX INCORPORATED	18.92000	USD Each	1.0000	<input type="button" value="Add"/>
<input type="checkbox"/> STAPLER - PLIER PLIERS STAPLER - USES 1/4 INCH AND 3/8 INCH	SUBURBAN STATIONERS INC	SBE STANLEY BLACK & DECKER	21.21000	USD Each	1.0000	<input type="button" value="Add"/>

Step 2. Add Items and Services

Special Request

- Click on Special Item

Favorites Main Menu > Core-CT Financials > eProcurement > Create Requisition

[My HR](#) [Finance](#) [Core-CT Help](#)

Create Requisition

[1. Define Requisition](#) **[2. Add Items and Services](#)** [3. Review and Submit](#)

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Special Request](#)

Select a Request Type ?

Special Item	Request an item that is not listed in the Catalog.
Fixed Cost Service	Request a one-time service for a flat fee.
Variable Cost Service	Request a service for which the fee is based on the time worked.
Time and Materials	Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

Special Request Entry

- Enter the **Item Description, Price, and Quantity**. Be sure to make the 1st 30 characters of the description meaningful.
- If the description doesn't fit in the Item Description line, enter additional specific information in the **Additional Information** field, and then **check the box for Send to Vendor**. Make sure to include Item #s, if known, size, color, weight, brand name, etc. for items and clear description, date, time, location, etc. for services.
- When all information has been entered, click on **Add Item** then click on **Review and Submit**.

Create Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Catalog Favorites Templates **Special Request**

Special Item

*Item Description: FY 2014 Payment pursuant to Sec. 75 of PA 13-247

*Price: 75000.00000 *Currency: USD

*Quantity: 1.0000 *Unit of Measure: YR

*Category: 00000000 Due Date: 08/26/2013

Vendor ID: 0000069944 [Suggest New Vendor](#)

Vendor Name: LONG ISLAND SO

Vendor Item ID:

Mfg ID:

Manufacturer:

Mfg Item ID:

Additional Information

For use in accordance with the provisions of section 25-155 of the general statutes.

Send to Vendor Show at Receipt Show at Voucher

Request New Item

Request New Item

Add Item Cancel Add or Start New Type

Step 3. Review and Submit

Expanded Line Details

- Enter any specific obligation dates (especially for subscriptions/memberships, etc.)
- Coding entered in the Define Requisition page will automatically be applied to all lines unless otherwise specified.
- Click on the yellow triangle to view line details & change coding for a specific line.

Edit Requisition

1. Define Requisition
2. Add Items and Services
3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: Dept of Energy & Environ Prot. Currency:

Requester: DEP-Lent Nancy Priority:

Requisition Name: CORE-10 [REQ Obligation](#)

Requisition Lines						
Line	Description	Vendor Name	Quantity	UOM	Price	Total
▶ 1	FY 2014 Payment pursuant to Se	LONG ISLAND SOUND FOUNDATION INC	1.0000	Years	75,000.00000	75,000.00
▶ 2	FY 2015 Payment pursuant to Se	LONG ISLAND SOUND FOUNDATION INC	1.0000	Years	75,000.00000	75,000.00
<input type="checkbox"/> Select All / Deselect All					Total Amount: 150,000.00 USD	

Comments

Payment required pursuant to Sec. 75 of PA 13-247. 2015 amount must roll to FY 15. Do not reduce PO at end of Fiscal Year 2014.

Send to Vendor
 Show at Receipt
 Shown at Voucher
 Approval Justification
 [More Comments](#)

Save & submit
 Save & preview approvals
 Cancel Changes
[Find more items](#)

Click here and insert specific duration dates of service, subscription or membership.

Changing Distribution or Chartfields for Specific Lines

- You'll be brought to a screen where you can change your Distribution to Amt, and can also change Accounting Codes.

Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: Dept of Energy & Environ Prot. *Currency:

Requester: DEP-Lent Nancy Priority:

Requisition Name: CORE-10 [REQ Obligation](#)

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
<input type="checkbox"/> 1	FY 2014 Payment pursuant to Se	LONG ISLAND SOUND FOUNDATION INC	<input type="text" value="1.0000"/>	Years	75,000.00000	75,000.00

Consolidate with other Reqs Override Suggested Vendor

Requisition Line: 1 Due Date: Quantity: Price: 75,000.00000

*Ship To: [Modify Onetime Address](#)
[Add Shipto Comments](#)

Attention To: SpeedChart:

*Distribute By:

Accounting Lines

Line	Dist Type	Quantity	Percent	Merchandise Amt	Account	Dept	Fund	SID	Pr
1		<input type="text" value="1.0000"/>	<input type="text" value="100.0000"/>	<input type="text" value="75,000.00"/>	<input type="text" value="55050"/>	<input type="text" value="DEP43321"/>	<input type="text" value="11000"/>	<input type="text" value="12491"/>	<input type="text" value="6"/>

Check "Amt" if payment is not for specified unit/price amount, or is other than a one-time full amount payment.

Splitting Distributions

- Click on the + line and add the desired number of lines.

Business Unit: Dept of Energy & Environ Prot. *Currency:
Requester: DEP-Lent Nancy Priority:
Requisition Name: CORE-10 [REQ Obligation](#)

Requisition Lines ?

Line	Description	Vendor Name	Quantity	UOM	Price	Total
<input type="checkbox"/> 1	FY 2014 Payment pursuant to Se	LONG ISLAND SOUND FOUNDATION INC	<input type="text" value="1.0000"/>	Years	75,000.00000	75,000.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: Price: 75,000.00000

Status: Active *Ship To: [Modify Onetime Address](#)
[Add Shipto Comments](#)

Attention To:

*Distribute By: SpeedChart:

Accounting Lines Personalize | Find | View All | First 1-2 of 2 Last

ChartField 1	ChartField 2	Status	GL Unit	Source Type	Category	Subcategory	
<input type="text"/>	<input type="text"/>	Open	STATE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="text"/>	<input type="text"/>	Open	STATE	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="+"/> <input type="button" value="-"/>

2 [FY 2015 Payment pursuant to Se](#) LONG ISLAND SOUND FOUNDATION INC Years 75,000.00000 75,000.00

[Select All / Deselect All](#) Total Amount: 150,000.00 USD

- Ensure Chartfields are Distributed by Amount.
- Apply the percentages of the funding Split
- Enter appropriate coding for 2nd & subsequent lines of coding.

Business Unit: Dept of Energy & Environ Prot *Currency:

Requester: DEP-Lent Nancy Priority:

Requisition Name: CORE-10 [REQ Obligation](#)

Requisition Lines ?

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	FY 2014 Payment pursuant to Se	LONG ISLAND SOUND FOUNDATION INC	1.0000	Years	75,000.00000	75,000.00

Consolidate with other Reqs Override Suggested Vendor

Shipping Line: 1 Due Date: 08/21/2013 Quantity: 1.0000 Price: 75,000.00000

Status: Active *Ship To: 0640000176 [Modify Onetime Address](#)

Attention To: DEP-Lent Nancy [Add Shipto Comments](#)

*Distribute By: SpeedChart:

Accounting Lines Personalize | Find | View All | First 1-2 of 2 Last

Line	Dist Type	Percent	Merchandise Amt	Account	Dept	Fund	SID	Program	PC Bus U
1		50.0000	37,500.00	55050	DEP43321	11000	12491	66099	DEPM1
2		50.0000	37,500.00	55050	DEP43321	11000	10020	66099	DEPM1

2 [FY 2015 Payment pursuant to Se](#) LONG ISLAND SOUND FOUNDATION INC 1.0000 Years 75,000.00000 75,000.00

Justification

- Enter your **Justification Comments** (why is the purchase necessary – list special circumstances and/or statutory or grant citations) and check box for Approval Justification
- To enter the **Purchasing Authority**, click on the **notepad icon** to view **Line Details** for the 1st line of your requisition.

Edit Requisition

1. Define Requisition 2. Add Items and Services 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: Dept of Energy & Environ Prot. *Currency:
Requester: DEP-Lent Nancy Priority:
Requisition Name: CORE-10 [REQ Obligation](#)

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
<input type="checkbox"/> 1	FY 2014 Payment pursuant to Se	LONG ISLAND SOUND FOUNDATION INC	<input type="text" value="1.0000"/>	Years	75,000.00000	75,000.00 
<input type="checkbox"/> 2	FY 2015 Payment pursuant to Se	LONG ISLAND SOUND FOUNDATION INC	<input type="text" value="1.0000"/>	Years	75,000.00000	75,000.00 

Select All / Deselect All Total Amount: 150,000.00 USD

Comments

Send to Vendor Show at Receipt Shown at Voucher **Approval Justification** [More Comments](#)

 [Find more items](#)

Entering Purchasing Authority and other Changes

- Purchasing Authority defaults to Contracts.
- If you are ordering a “special item” or service from a DAS or DoIT contract, enter the contract ID.
- If you order from a **CoreCT catalog**, you do **not** need to enter the contract Id. It will automatically populate.
- If you are **not** ordering an item from a CoreCT Catalog or a known DAS or DoIT contract, and do not know the proper purchasing authority, change the Purchasing Authority to **GL71a** and DEEP Purchasing will apply the appropriate authority.
- If you know the proper purchasing authority, enter it.
- Press **OK**

Line Details

Line: 1 [FY 2014 Payment pursuant to Se](#) Line Status: Pending

Item Details

Merchandise Amt: 75,000.00 USD
Category: 00000000 [View Hierarchy](#)
Description: All Items
Buyer: MasIV [Buyer Information](#)
Vendor: 0000089944 [Suggest New Vendor](#)
Vendor Location: MAIN [LONG ISLAND SOUND FOUNDATION INC ORDER & REMIT-CHECKS](#)
Vendor Contract: [Purchasing Authority](#) CGS
Vendor Item ID:
Manufacturer ID:
Manufacturer's Item ID:
Physical Nature: Services
Where Performed: Ship To Location
 RFQ Required Zero Price Indicator Amount Only
 Device Tracking Stockless Item Inspection Required
[Configuration Info](#)

Contract

Contract ID: [GPO ID:](#)
Version: Use Contract if Available [GPO Contract:](#)
Contract Line:
Category Line:

Sourcing Controls

OK Cancel

Check "Amount Only" if payment is not for specified unit/price amounts or is other than a one-time full amount payment.

Attaching Documents

If you have quotes or specifications, attach them. In Step 3, click on More Comments

Edit Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: Dept of Energy & Environ Prot. *Currency:
Requester: DEP-Lent Nancy Priority:
Requisition Name: CORE-10

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	FY 2014 Payment pursuant to Se	LONG ISLAND SOUND FOUNDATION INC	1.0000	Years	75,000.00000	75,000.00
2	FY 2015 Payment pursuant to Se	LONG ISLAND SOUND FOUNDATION INC	1.0000	Years	75,000.00000	75,000.00

Total Amount: 150,000.00 USD

Comments: Payment required pursuant to Sec. 75 of PA 13-247. 2015 amount must roll to FY 15. Do not reduce PO at end of Fiscal Year 2014.

Send to Vendor Show at Receipt Shown at Voucher Approval Justification [More Comments](#)

Save & submit | Save & preview approvals | Cancel Changes | Find more items

Click on Add Attachments, then Browse for the document. After you've selected an attachment, click on Upload. Click OK

Line Comments

Business Unit: DEPM1 Requisition Date: 08/15/2013
Requisition ID: NEXT Status: Open Line: 1

Comments: Use Standard Comments
1 << Implement a new and improved public facing e-filing system for DE electronic filing all submittal types such as applications, reports, general BETP, Adjudications and the general public.

Send to Vendor Show at Receipt Shown at Voucher Approval Justification

[Add Attachments](#)

Attached File	User/Date Time
1 PO_sponsor_signoff_-080213_(3).doc	LentN2013-08-15-15.10.22.769

OK | Cancel

File Attachment

Drag to move

[Browse...](#) [Help](#)

Approvals

- Once saved, you'll be brought to a Confirmation page where you'll see the Req. # and can review and/or insert additional approvers.
- Click on the Green "+ " to insert approvers.

Confirmation

Requested For:	DEP-Lent Nancy	Number of Lines:	2
Requisition Name:	LIS Foundation FY 14-15	Total Amount:	150,000.00 USD
Requisition ID:	0000033027	Justification:	Payment required pursuant to Sec. 75 of PA 13-247. 2015 amount must roll to FY 15. Do not reduce PO at end of Fiscal Year 2014.
Business Unit:	DEPM1		REQ Obligation
Status:	Pending		
Priority:	Medium		
Budget Status:	Not Checked		

Amount Approval

LIS Foundation FY 14-15: Pending [View/Hide Comments](#) [Start New Path](#)

Req Amount

Pending [Multiple Approvers](#) [CT WF REQ AMT APPROVER](#) [+](#) [-](#) Not Routed [Multiple Approvers](#) [CT WF REQ AMT APPROVER 2](#) [+](#) [-](#) Not Routed [DEP-Thibodeau Dennis](#) [CT WF REQ AMT APPROVER 3](#) [+](#) [-](#)

[Comment History](#)

Req Budget Approval

LIS Foundation FY 14-15: Awaiting Further Approvals [View/Hide Comments](#) [Start New Path](#)

Req Bgt Appv

Not Routed [Multiple Approvers](#) [CT WF REQ BUDGET APPROVER](#) [+](#) [-](#)

[Comment History](#)

Req Purchasing Approval

LIS Foundation FY 14-15: Awaiting Further Approvals [View/Hide Comments](#) [Start New Path](#)

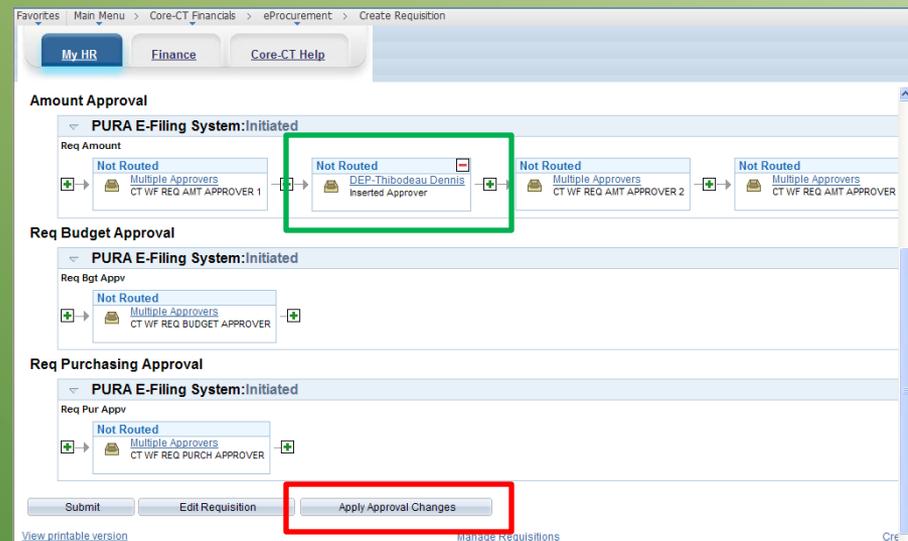
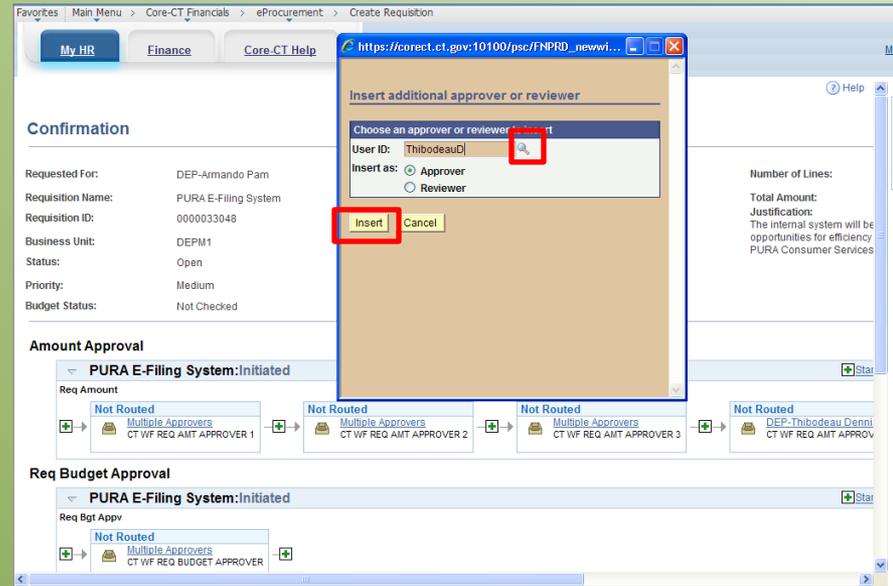
Req Pur Appv

Not Routed [Multiple Approvers](#) [CT WF REQ PURCH APPROVER](#) [+](#) [-](#)

[Comment History](#)

Inserting Approvers

- Enter the 1st few letters of the approver's last name and click on the magnifying glass icon to locate other approvers.
- Select your desired approver.
- Press Insert.
- You'll see where your Inserted Approver was placed.
- **Click on Apply Approval Changes**



Printing Requisitions

- Scroll to the bottom of the Approval Page
- Click on View Printable Version
- Select Yes to view distributions

req amount

Pending → Not Routed → Not Routed

Multiple Approvers
CT WF REQ AMT APPROVER 1

Multiple Approvers
CT WF REQ AMT APPROVER 2

DEP-Thibodeau Dennis
CT WF REQ AMT APPROVER 3

Comment History

Req Budget Approval

LIS Foundation FY 14-15: Awaiting Further Approvals

View/Hide Comments
Start New Path

Req Bgt Appv

Not Routed

Multiple Approvers
CT WF REQ BUDGET APPROVER

Comment History

Req Purchasing Approval

LIS Foundation FY 14-15: Awaiting Further Approvals

View/Hide Comments
Start New Path

Req Pur Appv

Not Routed

Multiple Approvers
CT WF REQ PURCH APPROVER

Comment History

Message

Do you want to print the requisition with distribution details ? (18038,11614)

Yes No

Change Request/Line Approval Summary

Line	Item Description	Change Request	Line Re-Approval
1	FY 2014 Payment pursuant to Se		Routed for Approval
2	FY 2015 Payment pursuant to Se		Routed for Approval

Submit Edit Requisition Apply Approval Changes

View printable version Manage Requisitions Create New Requisition

Approval History

- A new screen showing Requisition info will be displayed.
- Right click to print the document.

The screenshot shows a web browser window titled "Requisition - windows internet explorer". The address bar shows a URL from "corect.ct.gov". The page content includes a header with requisition details, a table for line items, and a shipping section. A right-click context menu is open over the "Print..." option, with a cartoon smiley face character pointing at it.

Business Unit: DEPM1
Requisition: 0000033027
Requisition Name: LIS Foundation FY 14-15
Header Comments: Payment required pursuant to Sec. 75 of PA 13-247. 2015 amount must roll to FY 15. Do not reduce PO at end of Fiscal Year 2014.

Requester: LentN
Requested By: DEP-Lent Nancy
Entered Date: 8/14/13
Status: Pending Approval
Currency: USD
Requisition Total: 150,000.00

Line:	Item Description:	UOM:	Price:	Line Total:	Cntrct_ID:
1	FY 2014 Payment pursuant to Sec. 75 of PA 13-247 for use in accordance with the provisions of section 25-155 of the general statutes. Quantity: 1.0000	YR	75,000.00	75,000.00	Pending

Ship Line: 1
Attention: DEP-Lent Nancy
Ship To: 0640000176
Due Date: 8/21/13
Address: 79 Elm Street, Hartford CT 06106 United States
Shipping Quantity: 1.0000
Shipping Total: 75,000.00

Dist	Status	Location	Qty	PCT	Amount	GL Unit	Account
1	Open	ACORE	1.0000	100.00	75,000.00	STATE	55050

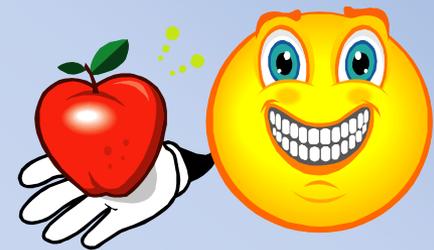
Dept	Fund	Program	Class	Budget Ref
DEP43321	11000	66099	12491	2014

Open QTY	PC BU	Project	Activity	Open Amt
0.0000	DEPM1	DEPA00004000298	155006	75000.000

GL Base Amount	Currency	Sequence	Capitalize
75,000.00	USD	0	N

Other Useful Information

- DEEP [Procurement/Purchasing Website](#)
- CoreCT [eProcurement Job Aids](#)
 - Creating Contracts, Purchase Orders and E-Pro Requisitions (Requisitions section begins on page 44)
 - ePro Requisitions Split Funding
 - ePro Requisitions Ad Hoc Approver/Reviewer
 - Managing Personal Templates
 - Searching the State Catalog
- [DAS Contracting Portal](#)



Other CoreCT “Cheat Sheets”

- [Vendor Lookup](#)
- [Review PO Information](#) (coding, etc.)
- [Viewing Payments](#)
- [Customizing Screens](#)
- Running Canned [PO Balance Reports](#)

Congratulations! You're an Expert!!

