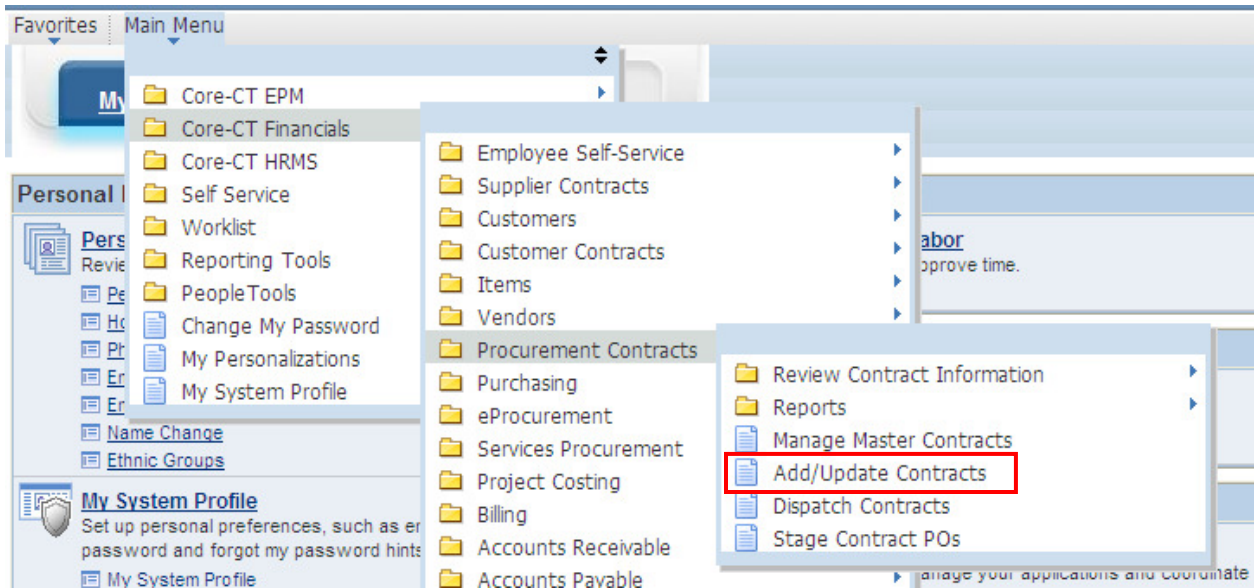


Contracts

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.

Click on [Find an Existing Value](#).

Contract Entry

[Find an Existing Value](#) [Add a New Value](#)

SetID:

Contract ID:

Contract Process Option:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

Enter in any information you have and click .

Contract Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value
Add a New Value

▼ Search Criteria

SetID: = STATE

Contract ID: begins with 14DOT

Contract Version: =

Version Status: = ▼

Contract Process Option: = ▼

Short Vendor Name: begins with

Vendor Name: begins with

Master Contract ID: begins with

Correct History Case Sensitive

Search
Clear
[Basic Search](#)
[Save Search Criteria](#)

This will return a list of matching contracts. Click on the contract you wish to change.

Search Results

View All											First	1-5 of 5	Last
SetID	Contract ID	Contract Version	State Identified Contract Type	Version Status	Contract Process Option	Vendor ID	Short Vendor Name	Vendor Name	Expire Date	Contract Status	Master Contract ID		
STATE	14DOT1112AA	2	Statewide	Current	Order	0000010009		SUBURBAN STATIONERS INC	01/30/2015	Approved	(blank)		
STATE	14DOT1112AA	1	Statewide	History	Order	0000010009		SUBURBAN STATIONERS INC	01/17/2014	Approved	(blank)		
STATE	14DOT0003AA	1	BU Award	Current	Order	0000010009		SUBURBAN STATIONERS INC	01/10/2014	Closed	(blank)		
STATE	14DOT0002AA	1	POC Comp	Current	Order	0000010009		SUBURBAN STATIONERS INC	01/10/2014	Approved	(blank)		
STATE	14DOT0001AA	1	BU Award	Current	Order	0000010009		SUBURBAN STATIONERS INC	01/09/2014	Approved	(blank)		

New Window

Contract Entry

Contract

SetID:	STATE	Contract Version	
Contract ID:	14DOT0003AA	Version:	1 Status: Current
*Status:	Approved	<input type="button" value="New Version"/>	Approved Date: 02/13/2013
Administrator/Buyer:	MarquesA	DOT-Marques Aimee	

Header

CT Contract Type:	BU Award	Add Comments	Activity Log
Process Option:	Purchase Order	Contract Activities	Document Status
Vendor:		Primary Contact Info	Thresholds & Notifications
Vendor ID:	0000010009 SUBURBAN STATIONERS INC	Contract Releases	View Changes
Begin Date:	02/13/2013	Current Change Reason	
Expire Date:	01/10/2014	Amount Summary	
Renewal Date:		Maximum Amount:	130,000.00 USD
Currency:	USD CRRNT	Line Item Released Amount:	0.00
Primary Contact:		Category Released Amount:	0.00
Vendor Contract Ref:		Open Item Released Amount:	0.00
Description:		PCard Swipe Amount:	0.00
Master Contract ID:		Total Released Amount:	0.00
<input type="checkbox"/> Tax Exempt		Remaining Amount:	130,000.00
		Remaining Percent:	100.00

Order Contract Options

<input type="checkbox"/> Allow Multicurrency PO	<input type="checkbox"/> Allow Open Item Reference	<input type="checkbox"/> Must Use Contract Rate Date	Rate Date: 01/09/2013
<input checked="" type="checkbox"/> Corporate Contract	<input type="checkbox"/> Adjust Vendor Pricing First	<input checked="" type="checkbox"/> Auto Default	
<input type="checkbox"/> Lock Chartfields	<input checked="" type="checkbox"/> Price Can Be Changed on Order	*Dispatch Method:	<input type="button" value="Print"/> <input type="button" value="Dispatch"/>

If you are going to change anything on the contract other than the expiration date, you will re-open the contract to make the change. If you make a change to the expiration date, you will now use contract versioning.

Changing a Contract

Click the arrow to the right of **Status** and change the contract to **Open**.

New Window

Contract Entry

Contract

SetID:	STATE	Contract Version	
Contract ID:	14DOT0003AA	Version:	1 Status: Current
*Status:	Closed	Approved Date:	02/13/2013
Administrator/Buyer:		DOT-Marques Aimee	

Header

CT Contract Type:		Add Comments	Activity Log
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Make any changes necessary to the contract. In this example, we will reduce the amount of the Contract by \$20,000 to \$110,000.

Contract Entry
Contract

SetID:	STATE	Contract Version	
Contract ID:	14DOT0003AA	Version:	1 Status: Current
*Status:	Open	Approved Date:	02/13/2013
Administrator/Buyer:	MarquesA	DOT-Marques Aimee	

Header

CT Contract Type:	BU Award	Add Comments	Activity Log
Process Option:	Purchase Order	Contract Activities	Document Status
Vendor:	<input type="text"/> Vendor Search	Primary Contact Info	
*Vendor ID:	0000010009 SUBURBAN STATIONERS INC	Contract Releases	Current Change Reason
*Begin Date:	02/13/2013	Amount Summary	
Expire Date:	01/10/2014	Maximum Amount:	100,000.00 USD
Renewal Date:		Line Item Released Amount:	0.00
Currency:	USD CRRNT	Category Released Amount:	0.00
Primary Contact:	<input type="text"/>	Open Item Released Amount:	0.00
Vendor Contract Ref:	<input type="text"/>	PCard Swipe Amount:	0.00
Description:	<input type="text"/>	Total Released Amount:	0.00
Master Contract ID:	<input type="text"/>	Remaining Amount:	100,000.00
<input type="checkbox"/> Tax Exempt	<input type="text"/>	Remaining Percent:	100.00

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.

Contract Entry
Contract

SetID:	STATE	Contract Version	
Contract ID:	14DOT0003AA	Version:	1 Status: Current
*Status:	Open	Approved Date:	02/13/2013
Administrator/Buyer:	MarquesA	DOT-Marques Aimee	

Header

CT Contract Type:	BU Award	Add Comments	Activity Log
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Click to save the contract.

When you click Save to save the contract, you will receive the following screen:

Change Reason

Enter a reason code and comment for making changes that are being tracked.

SetID: STATE Contract ID: 14DOT0003AA

Reason Code:

Comment:

Use Same Reason Code

Available Reason Codes

Search Results	
Reason Code	Description
ADD FUND	Add Funding to Contract
EXTEND	Extend Contract Dates
RED FUND	Reduce Funding to Contract

Select the appropriate code and make any comments as necessary.

Click when you are done.

Change Reason

Enter a reason code and comment for making changes that are being tracked.

SetID: STATE Contract ID: 14DOT0003AA

Reason Code:

Comment:

Use Same Reason Code

Contract Version

Click  to start a new version.

Contract

Contract Entry
Contract

SetID: STATE Contract ID: 14DOT0003AA *Status: Approved	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Contract Version version: 1 Status: Current New Version Approved Date: 02/13/2013 </div> Administrator/Buyer: MarquesA DOT-Marques Aimee	
--	---	--

Header

CT Contract Type: BU Award Process Option: Purchase Order Vendor: XXXXXXXXXX Vendor ID: 0000010009 SUBURBAN STATIONERS INC Begin Date: 02/13/2013 Expire Date: 01/10/2014 Renewal Date: Currency: USD CRRNT Primary Contact: Vendor Contract Ref: Description: Master Contract ID: <input type="checkbox"/> Tax Exempt	<div style="margin-bottom: 10px;"> Add Comments Activity Log Contract Activities Document Status Primary Contact Info Thresholds & Notifications View Changes Contract Releases Current Change Reason </div> <div style="border: 1px solid #ccc; padding: 5px;"> Amount Summary <table style="width: 100%; border-collapse: collapse;"> <tr><td>Maximum Amount:</td><td style="text-align: right;">110,000.00 USD</td></tr> <tr><td>Line Item Released Amount:</td><td style="text-align: right;">0.00</td></tr> <tr><td>Category Released Amount:</td><td style="text-align: right;">0.00</td></tr> <tr><td>Open Item Released Amount:</td><td style="text-align: right;">0.00</td></tr> <tr><td>PCard Swipe Amount:</td><td style="text-align: right;">0.00</td></tr> <tr><td>Total Released Amount:</td><td style="text-align: right;">0.00</td></tr> <tr><td colspan="2"><hr/></td></tr> <tr><td>Remaining Amount:</td><td style="text-align: right;">110,000.00</td></tr> <tr><td>Remaining Percent:</td><td style="text-align: right;">100.00</td></tr> </table> </div>	Maximum Amount:	110,000.00 USD	Line Item Released Amount:	0.00	Category Released Amount:	0.00	Open Item Released Amount:	0.00	PCard Swipe Amount:	0.00	Total Released Amount:	0.00	<hr/>		Remaining Amount:	110,000.00	Remaining Percent:	100.00
Maximum Amount:	110,000.00 USD																		
Line Item Released Amount:	0.00																		
Category Released Amount:	0.00																		
Open Item Released Amount:	0.00																		
PCard Swipe Amount:	0.00																		
Total Released Amount:	0.00																		
<hr/>																			
Remaining Amount:	110,000.00																		
Remaining Percent:	100.00																		

You will receive the following message. Click  to continue.

Message

Contract must be saved before a Draft can be created. (10400,577)

Contract must be saved before a Draft can be created. Hit Yes to proceed with Saving the contract and creating a Draft version. Hit No to cancel out and continue working with the Current version.

Yes
No

Once you click , you will be taken to the following page.

Change Reason

Enter a reason code and comment for making changes that are being tracked.

SetID: STATE Contract ID: 14DOT0003AA

Reason Code:

Comment:

Use Same Reason Code

Available Reason Codes

Search Results	
Reason Code	Description
ADD FUND	Add Funding to Contract
EXTEND	Extend Contract Dates
RED FUND	Reduce Funding to Contract

Select the appropriate code and make any comments as necessary.

Click when you are done.

Change Reason

Enter a reason code and comment for making changes that are being tracked.

SetID: STATE Contract ID: 14DOT0003AA

Reason Code:

Comment:

Use Same Reason Code

Change the expiration date.

Note: The Version now says “2”.

Contract Entry
Contract

SetID: STATE
Contract ID: 14DOT0003AA
*Status: Open
Administrator/Buyer: MarquesA

Contract Version
Version: 2 Status: Draft
Delete Version
Approval Due Date:

Header

CT Contract Type: BU Award
Process Option: Purchase Order
Vendor: 0000010009 SUBURBAN STATIONERS INC
*Begin Date: 02/13/2013
Expire Date: 07/10/2014
Renewal Date:
Currency: USD CRRNT
Primary Contact:
Vendor Contract Ref:
Description:
Master Contract ID:
 Tax Exempt

[Add Comments](#)
[Contract Activities](#)
Primary Contact Info
[Contract Releases](#)
[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)
[View Changes](#)

Amount Summary

Maximum Amount:	110,000.00	USD
Line Item Released Amount:	0.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
PCard Swipe Amount:	0.00	
Total Released Amount:	0.00	
Remaining Amount:	110,000.00	
Remaining Percent:	100.00	

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.

If you do not wish to continue with this version, click [Delete Version](#).

NOTE: After you have saved the version, you will not be able to delete it.

Contract Entry
Contract

SetID: STATE
Contract ID: 14DOT0003AA
*Status: Open
Administrator/Buyer: MarquesA

Contract Version
Version: 2 Status: Draft
Delete Version
Approval Due Date:

Header

CT Contract Type: BU Award
Process Option: Purchase Order
Vendor: 0000010009 SUBURBAN STATIONERS INC
*Begin Date: 02/13/2013
Expire Date: 07/10/2014
Renewal Date:
Currency: USD CRRNT
Primary Contact:
Vendor Contract Ref:
Description:
Master Contract ID:
 Tax Exempt

[Add Comments](#)
[Contract Activities](#)
Primary Contact Info
[Contract Releases](#)
[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)
[View Changes](#)

Amount Summary

Maximum Amount:	110,000.00	USD
Line Item Released Amount:	0.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
PCard Swipe Amount:	0.00	
Total Released Amount:	0.00	
Remaining Amount:	110,000.00	
Remaining Percent:	100.00	

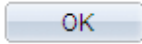
After you click Approved, you will receive the following message.

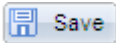
Click  to continue.

Message

This action will make the Draft version become the Current version when you Save (10400,591)

If you leave the status as Approved and then hit Save, the Current version will become a History version and this Draft version will become the Current version.



Click  to save the contract.

Contract

Contract Entry

Contract

SetID:	STATE	Contract Version		
Contract ID:	14DOT0003AA	Version:	2	Status: Current
*Status:	<input type="text" value="Approved"/>	<input type="button" value="New Version"/>		Approved Date: 02/21/2013
Administrator/Buyer:	MarquesA			DOT-Marques Aimee

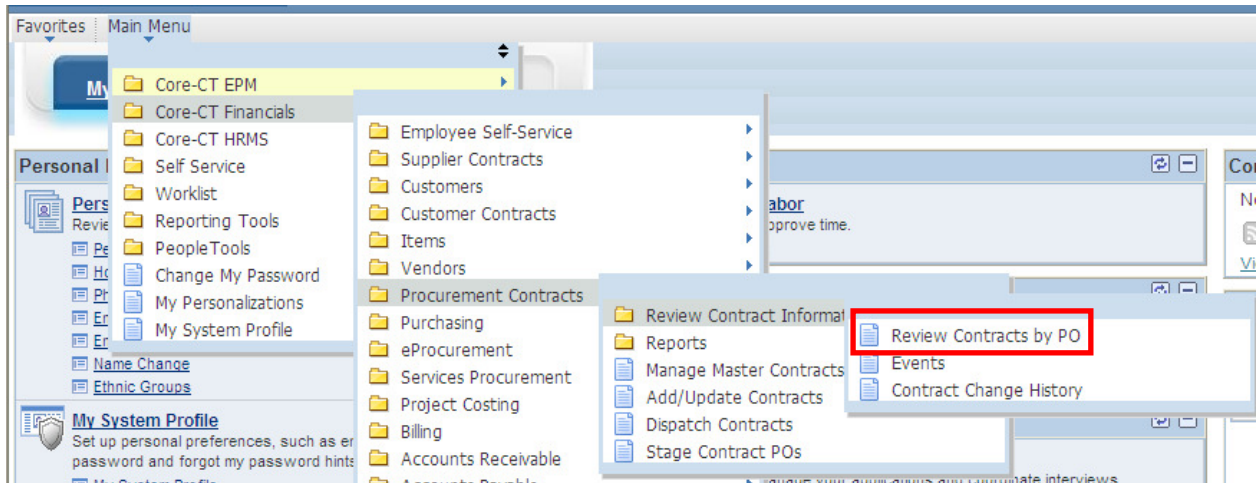
Header

CT Contract Type:	<input type="text" value="BU Award"/>	Add Comments	Activity Log	
Process Option:	Purchase Order	Contract Activities	Document Status	
Vendor:	061043422F-001	Primary Contact Info	Thresholds & Notifications	
Vendor ID:	0000010009 SUBURBAN STATIONERS INC	Contract Releases	View Changes	
Begin Date:	02/13/2013		Current Change Reason	
Expire Date:	07/10/2014	Amount Summary		
Renewal Date:		Maximum Amount:	110,000.00	USD
Currency:	USD CRRNT	Line Item Released Amount:	0.00	
Primary Contact:		Category Released Amount:	0.00	
Vendor Contract Ref:		Open Item Released Amount:	0.00	
Description:		PCard Swipe Amount:	0.00	
Master Contract ID:	<input type="text"/>	Total Released Amount:	0.00	
<input type="checkbox"/> Tax Exempt		Remaining Amount:	110,000.00	
		Remaining Percent:	100.00	

This completes changing a contract.

Reviewing Contract Changes

Navigation: Main Menu > Core-CT Financials > Procurement Contracts > Review Contract Information > Review Contracts by PO



Or when you are in a contract, click [View Changes](#).

Contract Entry

Contract

SetID: STATE
 Contract ID: 14DOT0003AA
 *Status: Approved

Administrator/Buyer: MarquesA DOT-Marques Aimee

Contract Version

Version: 2 Status: Current
 Approved Date: 02/21/2013

Header

CT Contract Type: BU Award
 Process Option: Purchase Order
 Vendor: 061043422F-001
 Vendor ID: 0000010009 SUBURBAN STATIONERS INC
 Begin Date: 02/13/2013
 Expire Date: 07/10/2014
 Renewal Date:
 Currency: USD CRRNT
 Primary Contact:
 Vendor Contract Ref:
 Description:
 Master Contract ID:
 Tax Exempt

[Add Comments](#)
[Contract Activities](#)
[Primary Contact Info](#)
[Contract Releases](#)

[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)
[View Changes](#)
[Current Change Reason](#)

Amount Summary

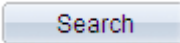
Maximum Amount:	110,000.00 USD
Line Item Released Amount:	0.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
PCard Swipe Amount:	0.00
Total Released Amount:	0.00
Remaining Amount:	110,000.00
Remaining Percent:	100.00

Order Contract Options

Allow Multicurrency PO
 Allow Open Item Reference
 Corporate Contract
 Adjust Vendor Pricing First
 Lock Chartfields
 Price Can Be Changed on Order

Must Use Contract Rate Date Rate Date: 01/09/2013
 Auto Default
 *Dispatch Method:

A new window will open up. Click



Contract Header | Contract Line | Contract Category | Header Agreement | Line Agreement | Category Agreement

SetID: STATE Contract ID: 14DOT0003AA

Check the records you wish to view, and optionally, select a field on that record.

Contract Header Changed Field:

PO Defaults Changed Field:

Price Adjustments Changed Field:

Thresholds and Notifications Changed Field:

Search and Filter Criteria

Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results.

Modified By:

Reason Code:

From Date: To Date:

Version From: Version To:

Search Clear Expand All Collapse All

Version	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason
1	0						Reason

Version	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason
1	0						Reason

You will see a list of all changes made to that contract. This includes what was changed, by whom, when and why.

SetID: STATE Contract ID: 14DOT0003AA

Check the records you wish to view, and optionally, select a field on that record.

Contract Header Changed Field:

PO Defaults Changed Field:

Price Adjustments Changed Field:

Thresholds and Notifications Changed Field:

Search and Filter Criteria

Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results.

Modified By:

Reason Code:

From Date: To Date:

Version From: Version To:

Search Clear Expand All Collapse All

Version	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason
13		Change	Change Order Source	ONL	MarquesA	02/21/13 3:01:41PM	EXTEND
13		Change	Contract Version	2	MarquesA	02/21/13 3:01:41PM	EXTEND
12		Change	Change Order Source	ONL	MarquesA	02/21/13 2:51:29PM	RED FUND
12		Change	Contract Status	A	MarquesA	02/21/13 2:51:29PM	RED FUND
11		Change	Maximum Amount	110000	MarquesA	02/21/13 2:49:53PM	RED FUND
11		Change	Change Order Source	ONL	MarquesA	02/21/13 2:49:53PM	RED FUND

You can use the Search and Field Criteria to limit the results shown in the window. In this example, the limit is set to a change in the Maximum Amount.

SetID: STATE Contract ID: 14DOT0003AA

Check the records you wish to view, and optionally, select a field on that record.

Contract Header Changed Field:

PO Defaults Changed Field:

Price Adjustments Changed Field:

Thresholds and Notifications Changed Field:

Search and Filter Criteria

Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results.

Modified By:

Reason Code:

From Date: To Date:

Version From: Version To:

Version	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason
1	11	Change	Maximum Amount	110000	MarquesA	02/21/13 2:49:53PM	RED FUND
1	11	Change	Change Order Source	ONL	MarquesA	02/21/13 2:49:53PM	RED FUND
1	10	Change	Maximum Amount	100000	MarquesA	02/21/13 2:40:35PM	ADD FUND
1	10	Change	Change Order Source	ONL	MarquesA	02/21/13 2:40:35PM	ADD FUND
1	7	Change	Maximum Amount	130000	MarquesA	02/13/13 3:53:11PM	ADD FUND
1	7	Change	Change Order Source	ONL	MarquesA	02/13/13 3:53:11PM	ADD FUND

You can click on the Reason code to review the explanation entered by the person who made the change.

Contract versions will also show in this search view or you can view versions by navigating to add/update.

Reviewing Contract Versions

When you are searching for a contract, the Search Results will display with all versions created for a contract. The Expiration date shows on the right with the new date and new version.

Contract Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

SetID: = STATE

Contract ID: begins with 14DOT0003AA

Contract Version: =

Version Status: =

Contract Process Option: =

Short Vendor Name: begins with

Vendor Name: begins with

Master Contract ID: begins with

Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-2 of 2 Last

SetID	Contract ID	Contract Version	State Identified Contract Type	Version Status	Contract Process Option	Vendor ID	Short Vendor Name	Vendor Name	Expire Date	Contract Status	Master Contract ID
STATE	14DOT0003AA	2	EJ Award	Current	Order	0000010009	061043422F-001	SUBURBAN STATIONERS INC	07/10/2014	Approved	(blank)
STATE	14DOT0003AA	1	EJ Award	History	Order	0000010009	061043422F-001	SUBURBAN STATIONERS INC	01/10/2014	Approved	(blank)

Find an Existing Value | Add a New Value

Note: They are only for display purposes. Users are not able to use the Historical versions.

Updated 01/03/13