

With the upgrade from Core-CT 8.9 to 9.1 the menu location for contracts has changed. Components are now located in the **Procurement Contracts** module. There are two functional changes for Contracts being implemented.

## Contract Versioning

### Understanding Contract Versioning

Core-CT now allows for creating new versions of an existing contract. Versioning is only used when the Expiration Date of a current contract is being changed. All other changes are made by updating and saving the current version of the contract.

A contract version can have three version statuses:

- **Draft**
- **Current**
- **History**

A contract can have only one Draft version and one Current version, but may have multiple History versions.

**Version, Version Status, and Expiration Date** are displayed in contract search results so users don't have to go into the contract pages to see this type of change.

**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 14DOT1112AA

Contract Version: =

Version Status: = **Current**  
Draft  
History

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 1-3 of 3 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 | 3                | Statewide                      | Draft          | Order                   | 0000010009 | 061043422F-001    | SUBURBAN STATIONERS INC | 01/30/2015  | Open            | (blank)            |
| STATE | 14DOT1112AA | 2                | Statewide                      | Current        | Order                   | 0000010009 | 061043422F-001    | SUBURBAN STATIONERS INC | 01/30/2015  | Approved        | (blank)            |
| STATE | 14DOT1112AA | 1                | Statewide                      | History        | Order                   | 0000010009 | 061043422F-001    | SUBURBAN STATIONERS INC | 01/17/2015  | Approved        | (blank)            |

### Adding a New Contract Version

Navigation: **Procurement Contracts > Add/Update Contracts**

Click the **New Version** button.

ORACLE

Home | Worklist | Performance Trace | Add to Favorites | Sign out

Favorites | Main Menu > Procurement Contracts > Add/Update Contracts

New Window | Help | Personalize Page | http

Contract

**Contract Entry**

**Contract**

SetID: STATE  
 Contract ID: 14DOT1112AA  
 \*Status: Approved

Administrator/Buyer:

**Contract Version**

Version: 1 Status: Current  
 Approved Date: 01/17/2013

**New Version**

Header

CT Contract Type: Statewide  
 Process Option: Purchase Order  
 Vendor: 061043422F-001  
 Vendor ID: 0000010009 SUBURBAN STATIONERS INC  
 Begin Date: 01/17/2013  
 Expire Date: 01/17/2014  
 Renewal Date:  
 Currency: USD CRRNT  
 Primary Contact:  
 Vendor Contract Ref:

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

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

**Amount Summary**

|                            |                |
|----------------------------|----------------|
| Maximum Amount:            | 100,000.00 USD |
| Line Item Released Amount: | 0.00           |
| Category Released Amount:  | 0.00           |
| Open Item Released Amount: | 1,820.00       |
| PCard Swipe Amount:        | 0.00           |

Enter the **Extend Reason Code**. In this example a standard comment is entered. The user should provide a more complete **Comment** based on the circumstances for the contract extension.

**Change Reason**

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

SetID: STATE Contract ID: 14DOT1112AA

Reason Code: EXTEND

Comment: Extend Contract Dates

Use Same Reason Code

OK Cancel Refresh

A draft version of the contract displays in an **Open Status**. Change the **Expire Date**.

**Contract Entry**  
**Contract**

SetID: STATE  
Contract ID: 14DOT1112AA  
\*Status: **Open**  
Administrator/Buyer:

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

**Header**  
CT Contract Type: Statewide  
Process Option: Purchase Order  
Vendor: 061043422F-001  
\*Vendor ID: 0000010009 SUBURBAN STATIONERS INC  
\*Begin Date: 01/17/2013  
\*Expire Date: 01/17/2014  
Renewal Date:  
Currency: USD CRRNT  
Primary Contact:  
Vendor Contract Ref:  
Description: All using state BU  
Master Contract ID:  
 Tax Exempt

**Order Contract Options**  
 Allow Multicurrency PO  Allow Open

**Amount Summary**  
Maximum Amount: 100,000.00 USD  
Line Item Released Amount: 0.00  
Category Released Amount: 0.00  
Open Item Released Amount: 1,820.00  
PCard Swipe Amount: 0.00  
Total Released Amount: 1,820.00  
Remaining Amount: 98,180.00  
Remaining Percent: 98.18

Must Use Contract Rate Date Rate Date: 01/17/201

The draft can be saved in an **Open** status or changed to **Approved** if the user making the update is also authorized to approve.

**Contract Entry**  
**Contract**

SetID: STATE  
Contract ID: 14DOT1112AA  
\*Status: **Approved**  
Administrator/Buyer:

**Contract Version**  
Version: 2 Status: Draft  
New Version Approval Due Date:

**Header**  
CT Contract Type: Statewide  
Process Option: Purchase Order  
Vendor: 061043422F-001  
Vendor ID: 0000010009 SUBURBAN STATIONERS INC  
Begin Date: 01/17/2013  
Expire Date: 01/30/2015  
Renewal Date:  
Currency: USD CRRNT  
Primary Contact:  
Vendor Contract Ref:  
Description: All using state BU  
Master Contract ID:  
 Tax Exempt

**Order Contract Options**

**Amount Summary**  
Maximum Amount: 100,000.00 USD  
Line Item Released Amount: 0.00  
Category Released Amount: 0.00  
Open Item Released Amount: 1,820.00  
PCard Swipe Amount: 0.00  
Total Released Amount: 1,820.00  
Remaining Amount: 98,180.00  
Remaining Percent: 98.18

**Contract Items**

**Contract Categories**

Save Return to Search Previous List Next in List Notify Refresh Add Update/Display Correct Hi

Once a contract version is saved with an **Approved** status it becomes the **Current** version. The screenshot below shows the **Contract Search** page. Both versions are listed, each with a different **Version Status** and **Expiration Date**.

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 14DOT1112AA

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

| 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 061043422F-001 | SUBURBAN STATIONERS INC | SUBURBAN STATIONERS INC | 01/30/2015  | Approved        | (blank)            |
| STATE | 14DOT1112AA | 1                | Statewide                      | History        | Order                   | 0000010009 061043422F-001 | SUBURBAN STATIONERS INC | SUBURBAN STATIONERS INC | 01/17/2014  | Approved        | (blank)            |

## Review Contract Change History

Changes made to a contract are tracked in Core-CT. Use the **Contract Change History** page to review changes to the contract header or a contract line.

Navigation: **Procurement Contracts** > **Review Contract Information** > **Contract Change History**

(Users with access to **Add/Update Contracts** can click the **View History** link on **Contract Header** page.)

The **Contract Header** page displays. This and **Contract Line** are the only pages being used to review change history.

## Search

The top section of each page allows the user to define search criteria that limits the number of contract history records returned for the search.

## Results

The results section at the page bottom is organized into collapsible sections.

For example, the **Contract Header** results section displays key fields including:

**Version** Displays the contract version.

**Sequence** Indicates how many times the contract has been changed.

**Change Type** Can be **Change** or **Original**

**Description** and **Value** will vary with the change.

Each change event is associated to a **Change Order Status** row.

ORACLE

Home | Worklist | Performance Trace | Add to Favorites | Sign out

Favorites | Main Menu > Procurement Contracts > Review Contract Information > Contract Change History

Contract Header | **Contract Line** | Contract Category | Header Attachment | Line Attachment | Category Attachment

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

Contract Header

| Version | Sequence | Change Type | Description               | Value | Modified By | Last Changed        | Reaso |
|---------|----------|-------------|---------------------------|-------|-------------|---------------------|-------|
| 1       | 9        | Change      | Change Order Source       | ONL   | MarquesA    | 02/14/13 10:03:58AM | ADD.F |
| 1       | 9        | Change      | Contract Status           | C     | MarquesA    | 02/14/13 10:03:58AM | ADD.F |
| 1       | 8        | Change      | Allow Open Item Reference | N     | MarquesA    | 02/14/13 10:03:36AM | ADD.F |
| 1       | 8        | Change      | Change Order Source       | ONL   | MarquesA    | 02/14/13 10:03:36AM | ADD.F |
| 1       | 8        | Change      | Contract Status           | O     | MarquesA    | 02/14/13 10:03:36AM | ADD.F |

The **Contract Line** page looks similar but options are appropriate for finding and reviewing contract line changes.



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 Line Changed Field:

Unit of Measure Changed Field:

Distribution Details Changed Field:

Price Adjustments 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:

Line From:  Line To:

**Contract Lines Filter**

Item ID:  Category:

Description:

Vendor's Catalog:  Vendor Item ID:

Manufacturer ID:  Mfg Item ID:

Search Clear Expand All Collapse All

**Contract Line** Resource | Find | View All

Changes Line Detail

| Version | Line | Sequence | Change Type | Description | Value | Modified By | Last Changed |
|---------|------|----------|-------------|-------------|-------|-------------|--------------|
| 1       |      | 0        |             |             |       |             |              |

The following image shows the page with the **Contract Lines** and **Unit of Measure** options unchecked at the top so those result sections are hidden at the bottom.

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 Line Changed Field:

Unit of Measure Changed Field:

Distribution Details Changed Field:

Price Adjustments 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:

Line From:  Line To:

Contract Lines Filter

Item ID:  Category:

Description:

Vendor's Catalog:  Vendor Item ID:

Manufacturer ID:  Mfg Item ID:

Search Clear Expand All Collapse All

Distribution Details

| Version | Line | Contract Type | Distribution Line | Sequence | Change Type | Description         | Value    | Modified By |
|---------|------|---------------|-------------------|----------|-------------|---------------------|----------|-------------|
| 1       | 1    | PO            | 1                 | 3        | Change      | Account             | 54050    | MarquesA    |
| 1       | 1    | PO            | 1                 | 3        | Change      | Change Order Source | ONL      | MarquesA    |
| 1       | 1    | PO            | 1                 | 2        | Change      | Account             | 54060    | MarquesA    |
| 1       | 1    | PO            | 1                 | 2        | Change      | Change Order Source | ONL      | MarquesA    |
| 1       | 1    | PO            | 1                 | 1        | Change      | Account             | 54050    | MarquesA    |
| 1       | 1    | PO            | 1                 | 1        | Change      | Change Order Source | ONL      | MarquesA    |
| 1       | 1    | PO            | 1                 | 0        | Original    | Account             | 54060    | MarquesA    |
| 1       | 1    | PO            | 1                 | 0        | Original    | GL Business Unit    | STATE    | MarquesA    |
| 1       | 1    | PO            | 1                 | 0        | Original    | Change Order Source | ONL      | MarquesA    |
| 1       | 1    | PO            | 1                 | 0        | Original    | Department          | DOT57781 | MarquesA    |

Price Adjustments

| Version | Line | Effective Date | Price Adjustment Sequence | Minimum Quantity | Sequence | Change Type | Description | Value | Mo |
|---------|------|----------------|---------------------------|------------------|----------|-------------|-------------|-------|----|
|         |      |                |                           |                  | 0        |             |             |       |    |

In this example the change activity is in **Distribution Details** section shown. The **Sequence** column shows three changes and the original values of the updated distributions on **Line 1**.