

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 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.

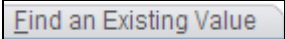
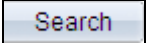
Version, **Version Status**, and **Expiration Date** are displayed in contract search results so users don't have to go into the contract pages to see this type of change.

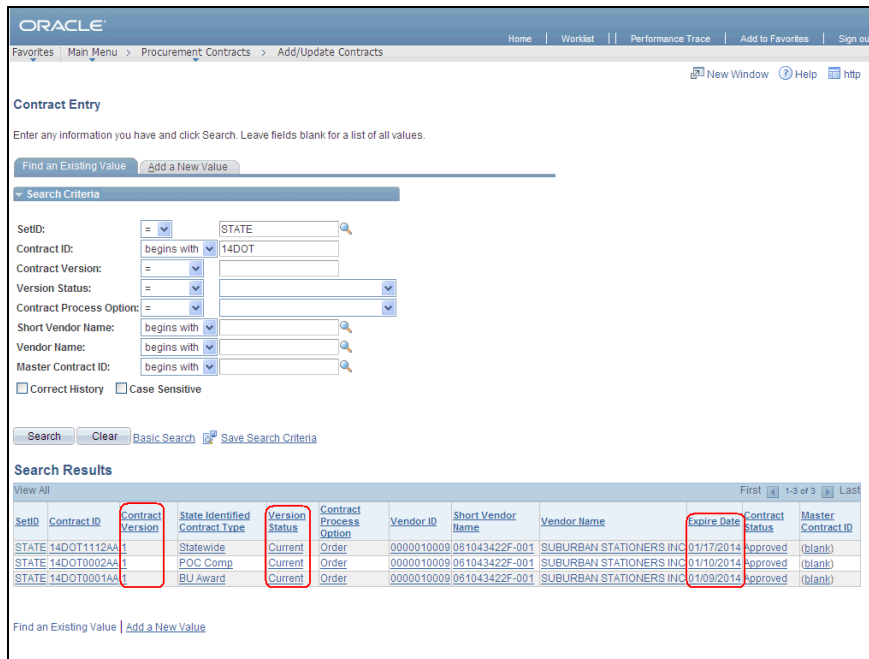
In this example the user updates the **Expiration Date** on an existing contract. Per the State of Connecticut business process a new version of the contract is created.

Procedure

Navigation: Procurement Contracts > Add/Update Contracts

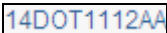
A screenshot of the Oracle Contract Entry web form. The page title is "ORACLE" and the breadcrumb navigation shows "Procurement Contracts > Add/Update Contracts". The form has two tabs: "Find an Existing Value" and "Add a New Value". Under the "Add a New Value" tab, there are three input fields: "SetID:" with a dropdown menu showing "STATE", "Contract ID:" with a text box containing "CORENEXT", and "Contract Process Option:" with a dropdown menu showing "General Contract". Below these fields is an "Add" button. At the bottom of the form, there are links for "Find an Existing Value" and "Add a New Value".

Step	Action
1.	Click the Find an Existing Value tab. 
2.	Enter 14dot into the Contract ID field.
3.	Click the Search button. 



The screenshot shows the Oracle Contract Entry search interface. The search criteria are set to find contracts with a Contract ID starting with '14DOT'. The search results table is as follows:

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	1	Statewide	Current	Order	0000010009	081043422F-001	SUBURBAN STATIONERS INC	01/17/2014	approved	(blank)
STATE	14DOT0002AA	1	POC Comp	Current	Order	0000010009	081043422F-001	SUBURBAN STATIONERS INC	01/10/2014	approved	(blank)
STATE	14DOT0001AA	1	BU Award	Current	Order	0000010009	081043422F-001	SUBURBAN STATIONERS INC	01/09/2014	approved	(blank)

Step	Action
4.	The Search Results show three contracts with a Contract Version of 1 and the Version Status of Current . 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.
5.	Click the 14DOT1112AA link. 

ORACLE
 Home | Worklist | Performance Trace | Add to Favorites | Sign out
 Favorites | Main Menu > Procurement Contracts > Add/Update Contracts

Contract Entry
 Contract

SetID: STATE
 Contract ID: 14DOT1112AA
 Status: Approved

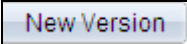
Contract Version
 Version: 1 Status: Current
 Approved Date: 01/17/2013
 New Version

Administrator/Buyer:

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 Contract:
 Vendor Contract Ref:
 Description: All using state BUs
 Master Contract ID:
 Tax Exempt

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

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
 Auto Default
 Rate Date: 01/17/2013
 *Dispatch Method: Print Dispatch
 Price Adjustment Template

Step	Action
6.	<p>The contract date is being extended so a new version of the contract will be created.</p> <p>Click the New Version button.</p> 

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

Contract Entry
 Contract

SetID: STATE
 Contract ID: 14DOT1112AA
 Status: Approved

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

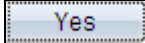
Administrator/Buyer:

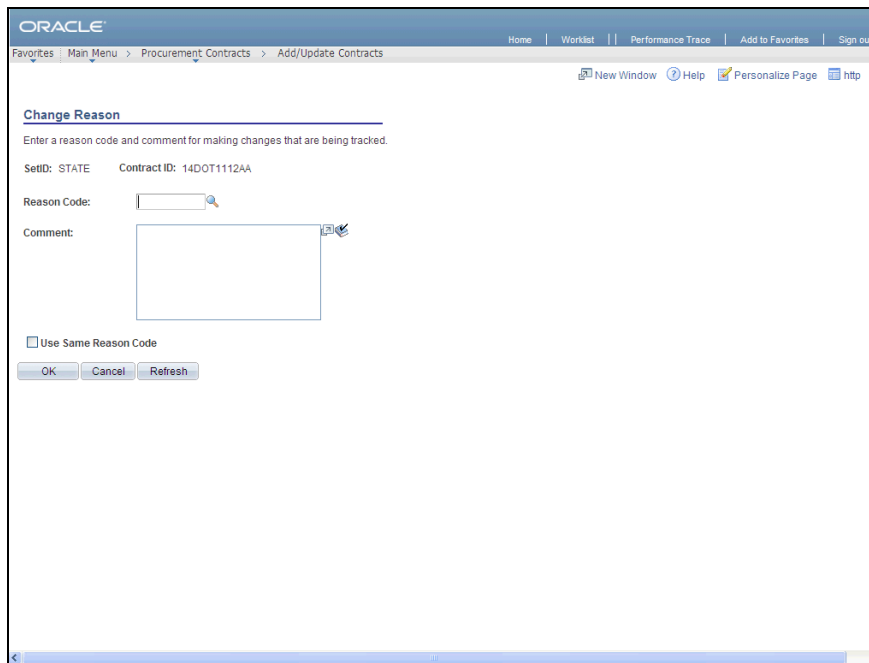
Header
 CT Contract Type: Statewide
 Process Option: Purch
 Vendor: 06104
 Vendor ID: 00000
 Begin Date: 01/17
 Expire Date: 01/17
 Renewal Date:
 Currency: USD CRRNT
 Primary Contract:
 Vendor Contract Ref:
 Description: All using state BUs
 Master Contract ID:
 Tax Exempt



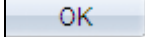
Amount Summary
 Maximum Amount: 100,000.00 USD
 Line Item Released Amount: 0.00
 Category Released Amount: 0.00
 Open Item Released Amount: 1,820.00
 PCard Swipe Amount: 0.00
 Total Released Amount: 1,820.00
 Remaining Amount: 98,180.00
 Remaining Percent: 98.18

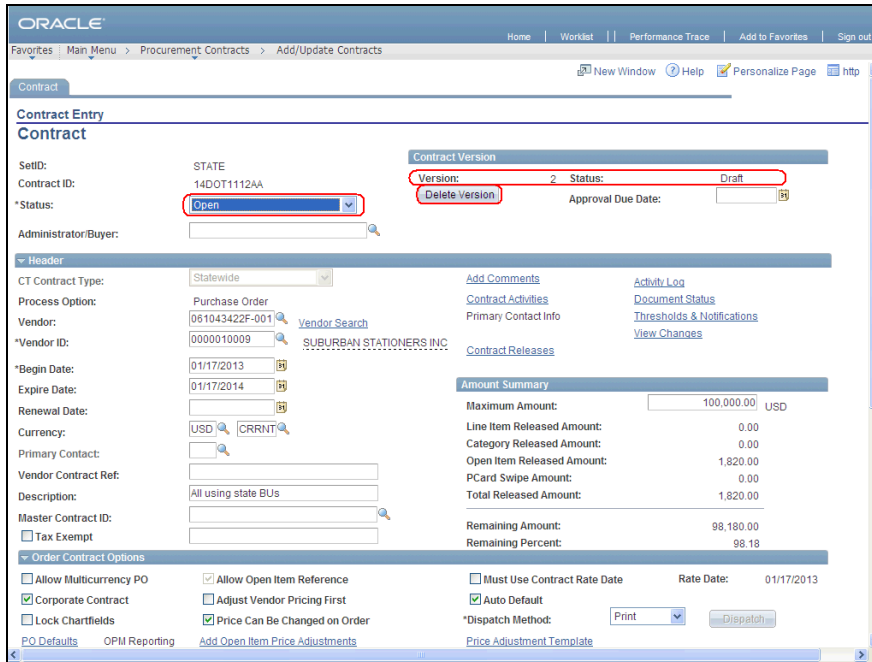
Order Contract Options
 Allow Multicurrency PO
 Allow Open Item Reference
 Corporate Contract
 Adjust Vendor Pricing First
 Lock Chartfields
 Price Can Be Changed on Order
 Must Use Contract Rate Date
 Auto Default
 Rate Date: 01/17/2013
 *Dispatch Method: Print Dispatch
 Price Adjustment Template


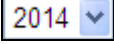



Message
 Contract must be saved before a Draft can be created. (10400,577)
 Contract must be saved before a Draft can be created. Hit Yes to proceed with Saving the contract and creating a Draft version. Hit No to cancel out and continue working with the Current version.
 Yes No

Step	Action
7.	Click the Yes button to create a draft version of the contract. 



Step	Action
8.	Click the Look up Reason Code button. 
9.	Click the Extend Contract Dates link. 
10.	A standard comment is entered. Ordinarily, a more complete comment based on the circumstances for the contract extension should be entered. Click the OK button. 



Step	Action
11.	<p>The Contract Entry page displays the draft.</p> <p>The Contract Version is 2.</p> <p>The Version Status is Draft.</p> <p>A Delete Version button displays.</p> <p>The Contract Status of this draft is Open.</p>
12.	<p>Click the Expire Date button.</p> 
13.	<p>Click the list.</p> 
14.	<p>Click the 2015 list item.</p> 
15.	<p>Click the desired date.</p> 
16.	<p>It is not required to change the status. This would be appropriate where business practice requires a separate approver. The draft version will remain in Open status and no further changes will take place until it is approved.</p> <p>Click the Status list to approve it right away.</p> 

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

Contract Entry
 Contract

SetID: STATE
 Contract ID: 14DOT112AA
 *Status: Open
 Administrator/Buyer: Approved

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

Header
 CT Contract Type: Open
 Process Option: Purchase Order
 Vendor: 06104322F-001 Vendor Search
 *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 BUs
 Master Contract ID:
 Tax Exempt

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

Order Contract Options
 Allow Multicurrency PO
 Corporate Contract
 Lock Chartfields
 PO Defaults
 Allow Open Item Reference
 Adjust Vendor Pricing First
 Price Can Be Changed on Order
 OPM Reporting
 Must Use Contract Rate Date
 Auto Default
 *Dispatch Method: Print
 Rate Date: 01/17/2013
 Dispatch

Step	Action
17.	Click the Approved list item. <input type="text" value="Approved"/>

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

Contract Entry
 Contract

SetID: STATE
 Contract ID: 14DOT112AA
 *Status: Approved

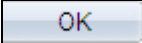
Contract Version
 Version: 2 Status: Draft
 New Version Approval Due Date:

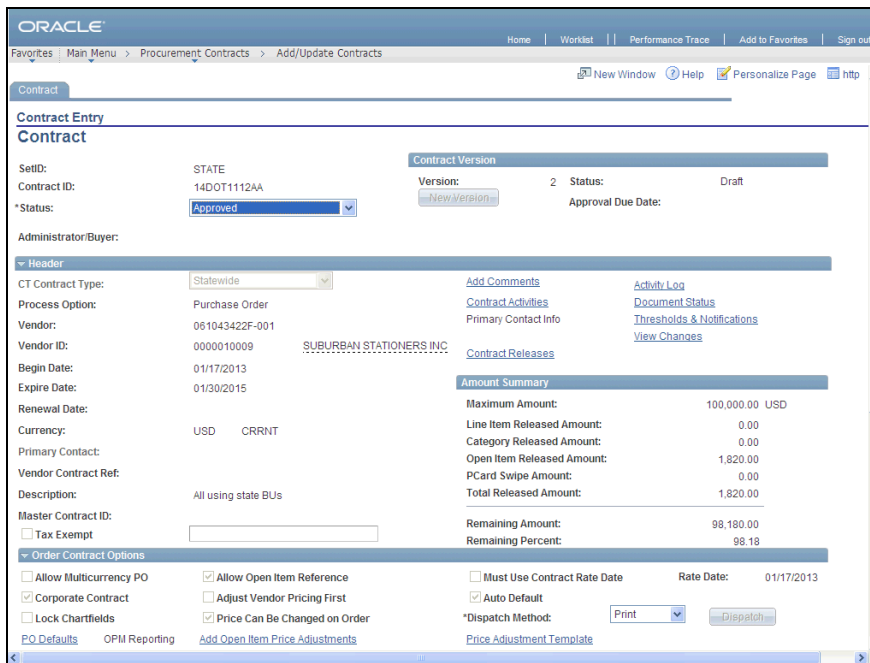
Header
 CT Contract Type: Statew
 Process Option: Purch
 Vendor: 06104
 Vendor ID: 00000
 Begin Date: 01/17
 Expire Date: 01/30
 Renewal Date:
 Currency: USD CRRNT
 Primary Contact:
 Vendor Contract Ref:
 Description: All using state BUs
 Master Contract ID:
 Tax Exempt

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

Order Contract Options
 Allow Multicurrency PO
 Corporate Contract
 Lock Chartfields
 PO Defaults
 Allow Open Item Reference
 Adjust Vendor Pricing First
 Price Can Be Changed on Order
 Add Open Item Price Adjustments
 Must Use Contract Rate Date
 Auto Default
 *Dispatch Method: Print
 Rate Date: 01/17/2013
 Dispatch

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.
 OK

Step	Action
18.	Click the OK button to make this draft the current version once it is saved. 



The screenshot shows the Oracle Contract Entry interface. The page title is "Contract Entry" and "Contract". The contract details include:

- SetID: STATE
- Contract ID: 14DOT1112AA
- Status: Approved
- Contract Version: Version: 2 Status: Draft
- Approval Due Date: (empty)
- Administrator/Buyer: (empty)

The "Header" section includes:

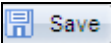
- CT Contract Type: Statewide
- Process Option: Purchase Order
- Vendor: 061043422F-001
- Vendor ID: 0000010009 SUBURBAN STATIONERS INC
- Begin Date: 01/17/2013
- Expire Date: 01/30/2015
- Renewal Date: (empty)
- Currency: USD CRRNT
- Primary Contact: (empty)
- Vendor Contract Ref: (empty)
- Description: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

The "Amount Summary" table shows:

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

The "Order Contract Options" section includes:

- Allow Multicurrency PO
- Allow Open Item Reference
- Must Use Contract Rate Date
- Rate Date: 01/17/2013
- Corporate Contract
- Adjust Vendor Pricing First
- Auto Default
- Lock Chartfields
- Price Can Be Changed on Order
- *Dispatch Method: (empty)
- Print: (button)
- Dispatch: (button)

Step	Action
19.	Click the scrollbar.
20.	Click the Save button. 

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Vendor Contract Ref: [blank] Open Item Released Amount: 1,820.00
 Description: All using state BUs PCard Swipe Amount: 0.00
 Master Contract ID: [blank] Total Released Amount: 1,820.00
 Tax Exempt [blank] Remaining Amount: 98,180.00
 Order Contract Options Remaining Percent: 98.18

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date: 01/17/2013
 Corporate Contract Adjust Vendor Pricing First Auto Default
 Lock Chartfields Price Can Be Changed on Order *Dispatch Method: [Print] [Dispatch]

[PQ Defaults](#) [OPM Reporting](#) [Add Open Item Price Adjustments](#) [Price Adjustment Template](#)

Contract Items
 Catalog Search Item Search Search for Contract Lines

Lines
 Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Personalize | Find | View All | First 1 of 1 Lines

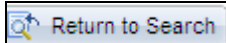
Line	Item	Description	UOM	Category	Include for Release	Status
1					<input checked="" type="checkbox"/>	Active

Contract Categories
 Lines
 Details | Pricing Options | Release Amounts | Personalize | Find | View All | First 1 of 1 Lines

Line	Category	Description	Status
1			Active

[Save] [Return to Search] [Notify] [Refresh] [Add] [Update/Display] [Correct History]

Step	Action
21.	Click the Return to Search button to confirm how this contract is listed.



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Contract Entry New Window | Help | http

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: [dropdown] STATE
 Contract ID: begins with 14DOT1112AA
 Contract Version: [dropdown] 2
 Version Status: [dropdown]
 Contract Process Option: [dropdown]
 Short Vendor Name: begins with [blank]
 Vendor Name: begins with [blank]
 Master Contract ID: begins with [blank]

Correct History Case Sensitive

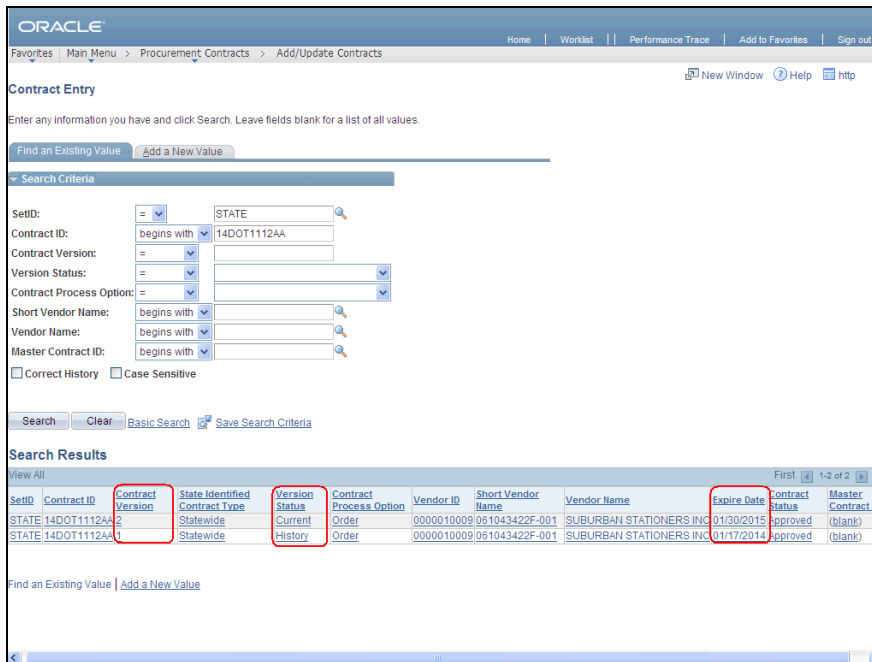
[Search] [Clear] [Basic Search] [Save Search Criteria]

Search Results
 View All | First 1 of 1 Lines

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	01/17/2014	Approved	(blank)

Find an Existing Value | Add a New Value

Step	Action
22.	Navigating from this link automatically sets the search criteria to display the new version. Remove the 2 from the Contract Version field to show both versions.
23.	Click in the field. <input type="text" value="2"/>
24.	Press [Delete] .
25.	Click the Search button to refresh the results. <input type="button" value="Search"/>



Step	Action
26.	Both versions are now listed, each with a different Version Status and Expiration Date .
27.	End of Procedure.