## **Understanding Contract Versioning**

Core-

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

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Favorites Main Menu > Procurement Contracts > Add/Update Contracts	
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Contract Entry	
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SetID: STATE	
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Contract Process Option: General Contract	
Add	
Find an Existing Value   Add a New Value	

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

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Contract Entry										
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Find an Existing value   Add	ra new value									

Step	Action
4.	The <b>Search Results</b> show three contracts with a <b>Contract Version</b> of <b>1</b> and the <b>Version Status</b> of <b>Current</b> .
	A contract version can have three version statuses:
	- Draft - Current - History
	A contract can have only one <b>Draft</b> version and one <b>Current</b> version, but may have multiple <b>History</b> versions.
5.	Click the <b>14DOT1112AA</b> link. 14DOT1112AA

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ORACLE				
Favorites Main Menu > Procureme	ent Contracts > Add/Update Contracts	Home Worklist   P	erformance Trace   Add to Favorites   Sign (	out
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Contract Entry				
Contract				_
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*Status:	Approved	New Version Approved Da	te: 01/17/2013	
Status.	Approved 1			
Administrator/Buyer:				
- Header				
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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:	01/17/2013			
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Renewal Date:		Maximum Amount:	100,000.00 USD	
Currency:	USD CRRNT	Line Item Released Amount:	0.00	
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Description:	All using state BUs	Total Released Amount:	1,820.00	
Master Contract ID:		Remaining Amount:	99 190 00	
Tax Exempt		Remaining Percent:	98.18	
- Order Contract Options				
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		
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PO Defaults OPM Reporting	Add Open Item Price Adjustments	Price Adjustment Template		~
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Step	Action
6.	The contract date is being extended so a new version of the contract will be created. Click the <b>New Version</b> button.

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Contract				🖉 New Wind	low 🕜 Help 🛛 📝	Personalize Page	http 🛆
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Process option.	Fuich	Contract must be assed before a De	- A see he seeded 113 Vec to a	and with Online H	nolds & Notific	ations	
vendor:	06104	contract and creating a Draft version	<ol> <li>Hit No to cancel out and conti</li> </ol>	nue working with the	hanges		
Vendor ID:	00000	Current version.					
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Tax Exempt			Remaining Amo	unt:	98,1	180.00	
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PO Defaults OPM Reporting	Add (	Open Item Price Adjustments	Price Adjustmen	it Template			~
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Step	Action
7.	Click the <b>Yes</b> button to create a draft version of the contract.

Change Reason         Enter a reason code and comment for making changes that are being tracked.         Settb: STATE       Contract ID: 14D0T1112AA         Reason Code:       Comment:         Use Same Reason Code         OK       Cancel	ORACLE avorites Main Menu > Procurement Contracts > Add/Update Contracts	Hone   Workst    Performance Trace   Add to Favorites   Sign ou
Enter a reason code and comment for making changes that are being tracked. SetU: STATE Contract ID: 14DOT1112AA Reason Code Comment: Use Same Reason Code OK Cancel Refresh	Change Reason	
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Reason Code: Comment: Use Same Reason Code OK Cancel Refresh	SetID: STATE Contract ID: 14DOT1112AA	
Comment:	Reason Code:	
Use Same Reason Code	Comment	
	Use Same Reason Code	

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

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*Status:	(Open V)	Approval Due Date:	
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CT Contract Type:	Statewide	Add Comments Activity Log	
Process Option:	Purchase Order	Contract Activities Document Status	
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Lock Chartfields	Price Can Be Changed on Order	*Dispatch Method:  Print  Dispatch	
PO Defaults OPM Reporting	Add Open Item Price Adjustments	Price Adjustment Template	1
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Step	Action
11.	The <b>Contract Entry</b> page displays the draft.
	The Contract Version is 2. The Version Status is Draft.
	A Delete Version button displays.
	The Contract Status of this draft is Open.
12.	Click the <b>Expire Date</b> button.
13.	Click the list.
14.	Click the <b>2015</b> list item.
15.	Click the desired date.
16.	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 <b>Open</b> status and no further changes will take place until it is approved.
	Click the <b>Status</b> list to approve it right away.



Step	Action
17.	Click the <b>Approved</b> list item.
	Approved

ORACLE			Home	Worklist	Perform	nance Trace   .	Add to Favorites	Sign out
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Vendor:	06104		hanges	ions				
Vendor ID:	00000	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.			inanges			
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Step	Action
18.	Click the <b>OK</b> button to make this draft the current version once it is saved.
	OK

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

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

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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				
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Contract ID: 14DOT1112AA				
Contract Version: = Y (2)				
Version Status:				
Contract Process Option: =				
Short Vendor Name: begins with 👻				
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SettD Contract D Contract State Identified Version Contract Vendor ID Short Vendor	Vendor Na	me E:	pire Date Contract	Master
STATE 14DOT1112AA2 Statewide Current Order 0000010009 061043422F-00	01 SUBURBA	N STATIONERS INC 0	1/17/2014 Approved	(blank)
Find an Existing Value Add a New Value				
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Step	Action
22.	Navigating from this link automatically sets the search criteria to display the new version. Remove the <b>2</b> from the <b>Contract Version</b> field to show both versions.
23.	Click in the field.
24.	Press [Delete].
25.	Click the <b>Search</b> button to refresh the results.

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Home Eavorites Main Menu > Procurement Contracts > Add/Undate Contracts	Worklist    Performance Trace   Add to Favorites   Sign out
Contract Entry	Bra Men Murgow () Help III und
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	-
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SetID Contract ID Version Contract Type Status Contract Version Versio	Vendor Name Expire Date Status Contract ID
STATE 14DOT1112A4 2 Statewide Current Order 0000010009 061043422F-0	001 SUBURBAN STATIONERS INC 01/30/2015 Approved (blank)
STATE 14DOT1112AA1 Statewide History Order 0000010009 061043422F-0	001 SUBURBAN STATIONERS INC 01/17/2014 Approved (blank)
Find an Existing Value   Add a New Value	
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Step	Action
26.	Both versions are now listed, each with a different Version Status and Expiration Date.
27.	End of Procedure.