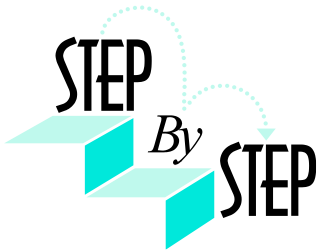


**Note:** This job aid does not contain agency specific procedures. Before proceeding, please check with your individual agency procedures for specific set up of Customer Contracts.



1. Navigate to *Customer Contracts > Create and Amend > General Information*.
2. Click the **Add a New Value** tab.
3. Verify that the **Business Unit** is correct.
4. Type the contract name in the **Contract** field.
5. Type or select the **Sold To Customer**.
6. **Select the Contract Classification of Standard or Government.** *Do not select the Contract Classification of Internal.*

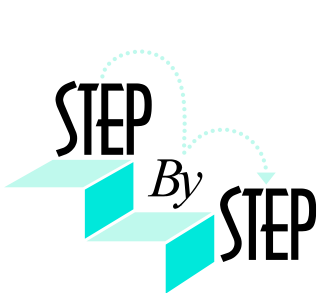
The State will be using either Standard or Government type classifications. Once you specify a classification and save the contract, it cannot be changed. The classification that you select determines the functionality that is available for that particular contract type. The main difference between the Standard and Government classification is there are additional pages for Government where you specify such things as Awarded and Funded amounts and Start and End dates for the contract.

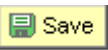

**Figure 1 - This is the Add a New Value tab.**

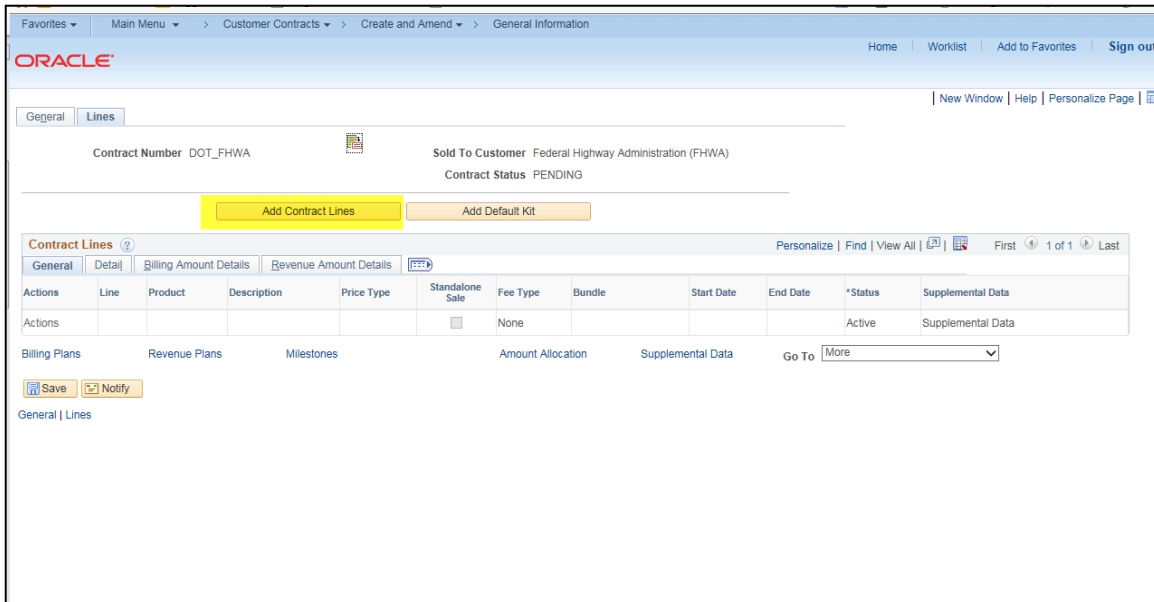
7. Click **Add**. The General page displays.
8. Type a description of the contract in the **Description** field.

9. **Ensure the Contract Admin field defaults correctly.** This field defaults based on the Sold To Customer selected on the Add a New Value tab.
10. **Type or select the Contract Type.** The Contract Type is configured differently for each agency. It is used for reporting purposes.

Figure 2 - This is the completed Contract General page.



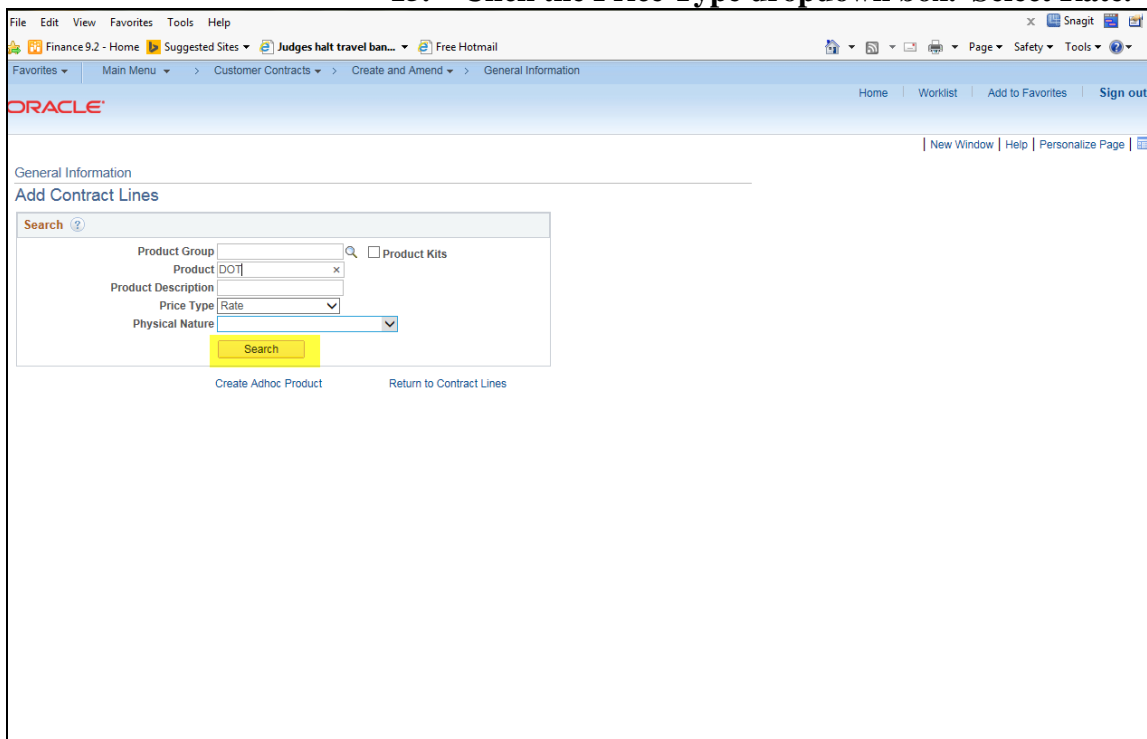
11. Click .
12. Click the Lines tab. The Lines page displays.
13. Click . The General Information – Add Contract Lines page displays.



**Figure 3 - This is the Add Contract Lines page.**

**14. Type a name in the Product field. All products start with your agency's three letter acronym.**

**15. Click the Price Type dropdown box. Select Rate.**



**Figure 4 - This is the Add Contracts line where you search for Product.**

**16. Click Search. The search results display.**

**17. Select the checkbox of the contract lines you want to add to the contract.**

*Note: Do not deselect any boxes in the Create Plans from Template or Combine Like Template boxes.*

General Information

**Add Contract Lines**

Search ?

Product Group   Product Kits

Product DOT

Product Description

Price Type Rate

Physical Nature

Search

Search Results ? Personalize | Find | View All | First 1-7 of 7 Last

General	Templates	Product	Description	Price Type	Physical Nature	Product Kit	*Fee Type	Start Date	End Date	Quantity	UOM
<input type="checkbox"/>		1 DOT_DHS	DOT - Dept Homeland Security	Rate	Goods	N	None	<input type="text"/>	<input type="text"/>	1.0000	<input type="text"/>
<input type="checkbox"/>		2 DOT_FAA	DOT - Federal Aviation Admin	Rate	Goods	N	None	<input type="text"/>	<input type="text"/>	1.0000	<input type="text"/>
<input type="checkbox"/>		3 DOT_FEDOTH	DOT - FED Other State Agencies	Rate	Goods	N	None	<input type="text"/>	<input type="text"/>	1.0000	<input type="text"/>
<input type="checkbox"/>		4 DOT_FHWA	DOT - Federal Highway Admin	Rate	Goods	N	None	<input type="text"/>	<input type="text"/>	1.0000	<input type="text"/>
<input type="checkbox"/>		5 DOT_FMCSA	DOT-Federal Motor Carrier Safe	Rate	Goods	N	None	<input type="text"/>	<input type="text"/>	1.0000	<input type="text"/>
<input type="checkbox"/>		6 DOT_FRA	DOT - Federal Railroad Admin	Rate	Goods	N	None	<input type="text"/>	<input type="text"/>	1.0000	<input type="text"/>
<input type="checkbox"/>		7 DOT_FTA	DOT - Federal Transit Admin	Rate	Goods	N	None	<input type="text"/>	<input type="text"/>	1.0000	<input type="text"/>

Select All  Clear All

Create Plans from Template  Billing Plans  Revenue Plans

Combine Like Templates  Billing Plans  Revenue Plans

Add Contract Lines Create Adhoc Product Return to Contract Lines

Figure 5 - This displays the Search Results of Products.

18. Click **Add Contract Lines**. The General Information – Add Contract Lines page re-displays without a listing of products.

General Information

**Add Contract Lines**

Search ?

Product Group   Product Kits

Product DOT

Product Description

Price Type Rate

Physical Nature

Search 1 line(s) have been added to the contract

Create Adhoc Product **Return to Contract Lines**

Figure 6 - This displays the Search Results on the Add Contracts Lines after (Product Selection).

19. Click [Return to Contract Lines](#). The Lines page displays with the selected contract line.

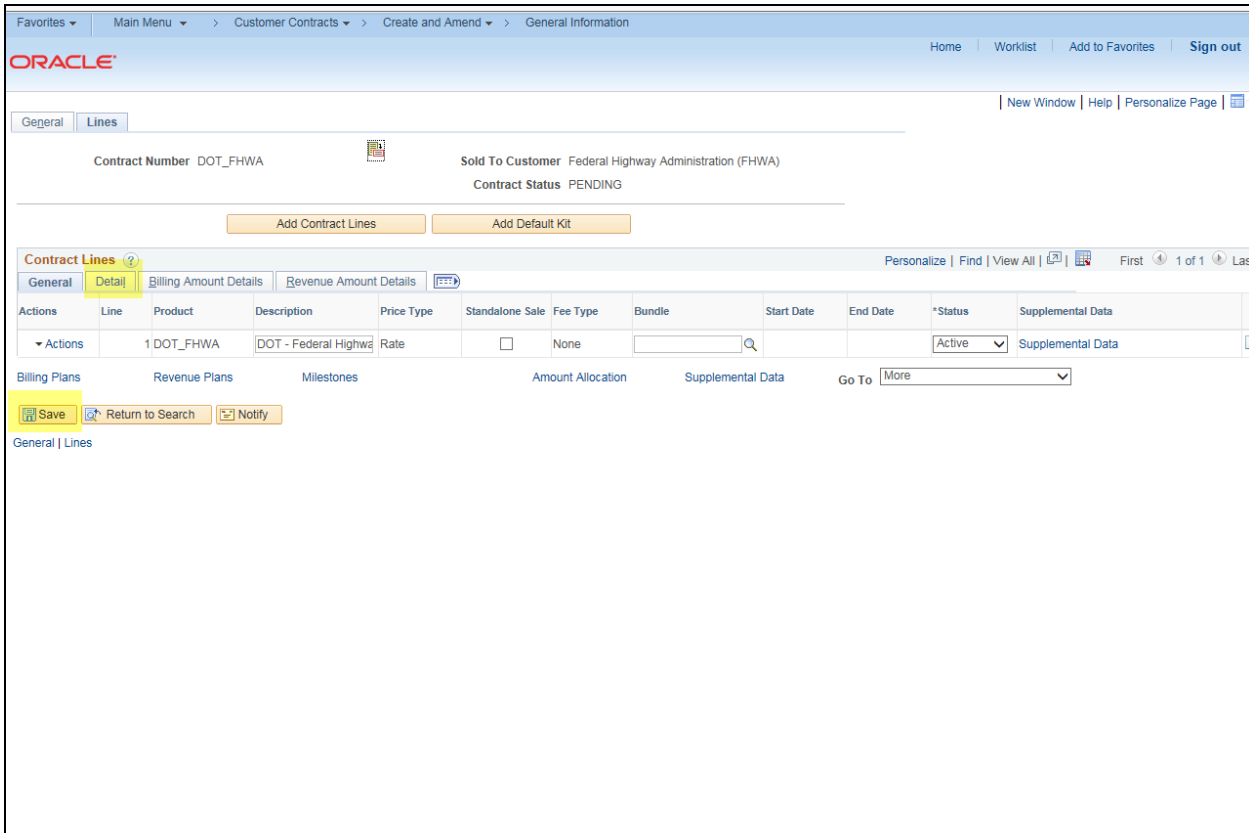


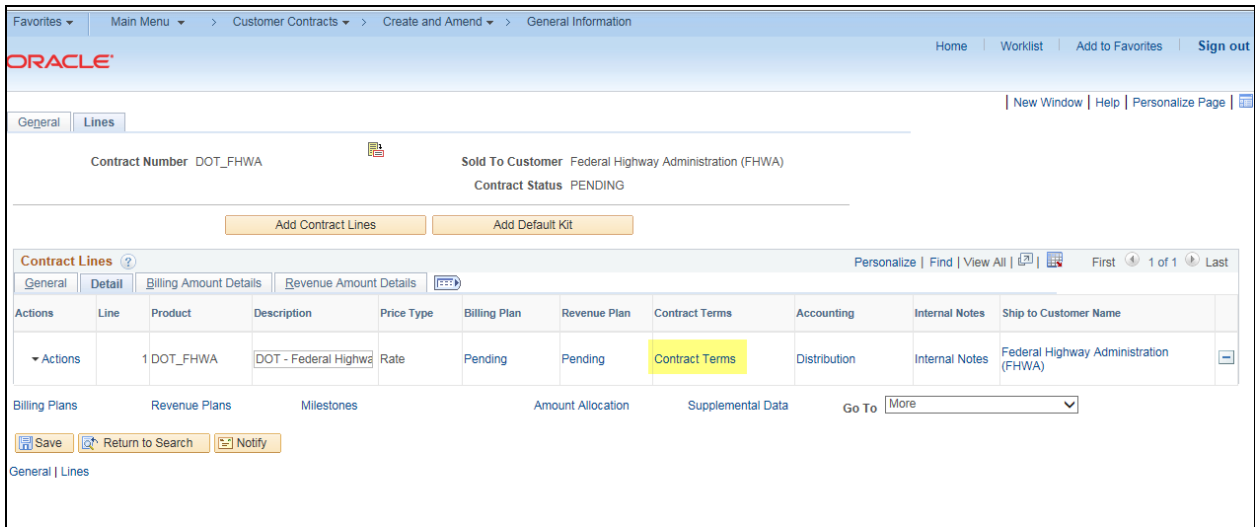
Figure 7 - This is the Lines page with a Contract Line.

29. Click .

30. Click the Detail tab.

If this is a Standard Contract, follow steps 31 through 48. If this is a Government Contract, skip to step 40.

31. Click [Contract Terms](#) to associate Projects and Activities to the Contract. The Related Projects page displays.



**Figure 8 - This displays the Contract Line and associated Contracts Terms.**

- 32. Type or select the PC Business Unit.**
- 33. Type the Billing Limit.** The Billing Limit is the maximum dollar amount that can be billed.
- 34. Type or select the Project.** If you select a Project, you must select an Activity.
- 35. Type or select the Activity.**
- 36. Type or select the Effective Date.** This is the date that you start to create transactions against the contract.
- 37. Ensure the Status defaults to Active.**
- 38. Ensure the Rate Selection defaults to Rate Set.**
- 39. Type or select the Rate Set.** The Rate Set represents the standard pricing of the transactions associated with the contract line. The Rate Sets you see in the lookup are specific to your agency. It is extremely important that you select the correct Rate Set.

[Favorites](#) > [Main Menu](#) > [Customer Contracts](#) > [Create and Amend](#) > [General Information](#) > [Contract Terms](#)

[Home](#) | [Worklist](#) | [Add to Favorites](#) | [Sign out](#)

---

Contract Amounts | **Related Projects** | Withholding
New Window | Help | Personalize Page

**Contract Number** DOT\_FTA1      **Sold To Customer** Federal Highway Administration (FHWA)  
**Amendment Number**      **Contract Status** PENDING

---

**Contract Line** ◀ 1 ▶      **Price Type** Rate  
**Product** DOT\_FTA      **Fee Type** None  
**Description** DOT - Federal Transit Admin

---

**PC Business Unit** DOTM1      **Transaction Limits**      **Review Limits**

**Associated Rates** Personalize | Find | First 1 of 1 Last

Effective Date	Status	Rate Selection	Rate Set
03/16/2017	Active	Rate Set	FH-0100-100-0 Rate Set

**Associated Projects & Activities** Personalize | First 1 of 1 Last

*Project	*Activity	Description	Description
DOT01710305CN	G0100	N BRITAIN -HTFD BUSWAY	CONTINGENCY FTA SID 22100

[Create Project](#)   [Create Activity](#)   [All Activities](#)

[Return to General Information](#)      **Amount Allocation**

[Save](#)   [Return to Search](#)   [Notify](#)   [Refresh](#)   [Update/Display](#)   [Include History](#)   [Correct History](#)

[Contract Amounts](#) | [Related Projects](#) | [Withholding](#)

**Figure 9 - This is the Related Projects page with Projects and Activities associated to the Contract.**

**If this is a Government Contract, follow the steps below.**

- 40. Click [Contract Terms](#).** The Contracts Amount page displays.

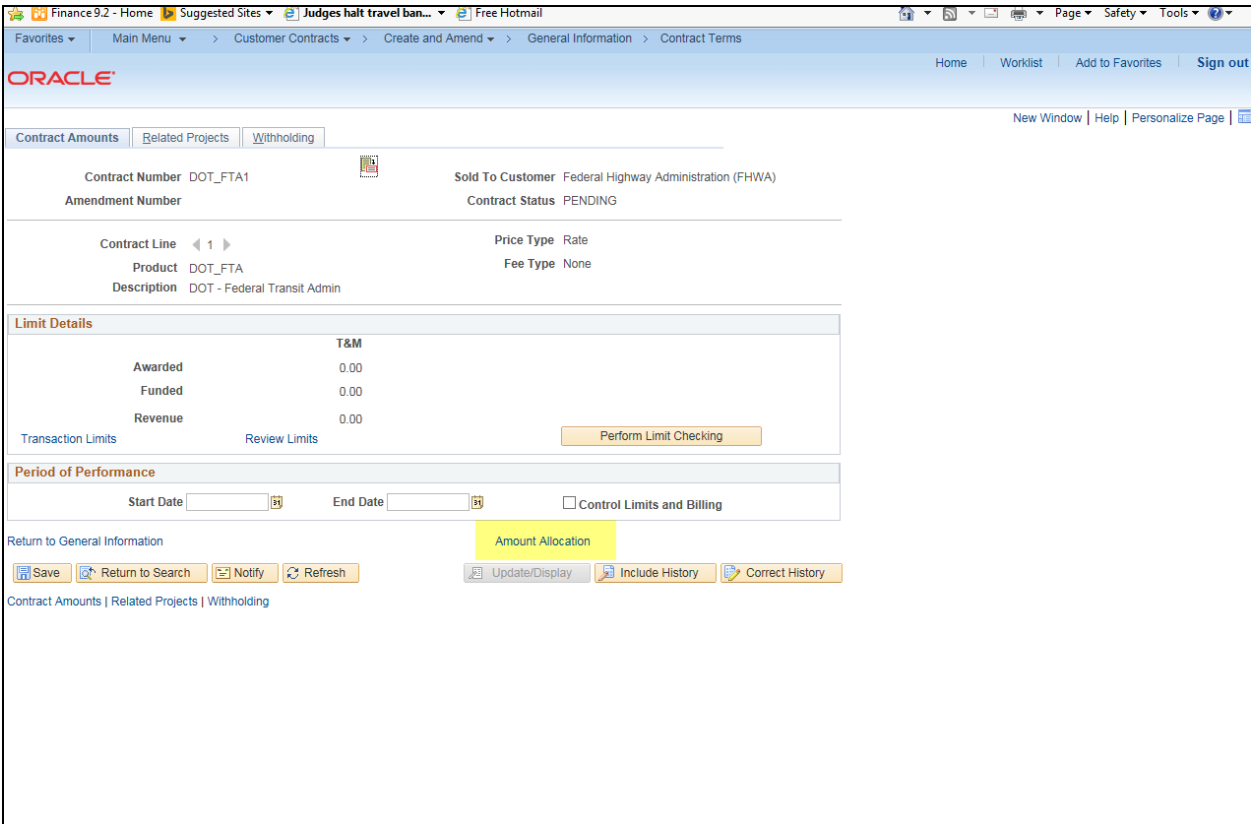


Figure 10 - This is the Contract Amounts page that displays when you create a Government Contract.

41. Click on the **Amount Allocation** Hyperlink (The Billing Allocation page appears)

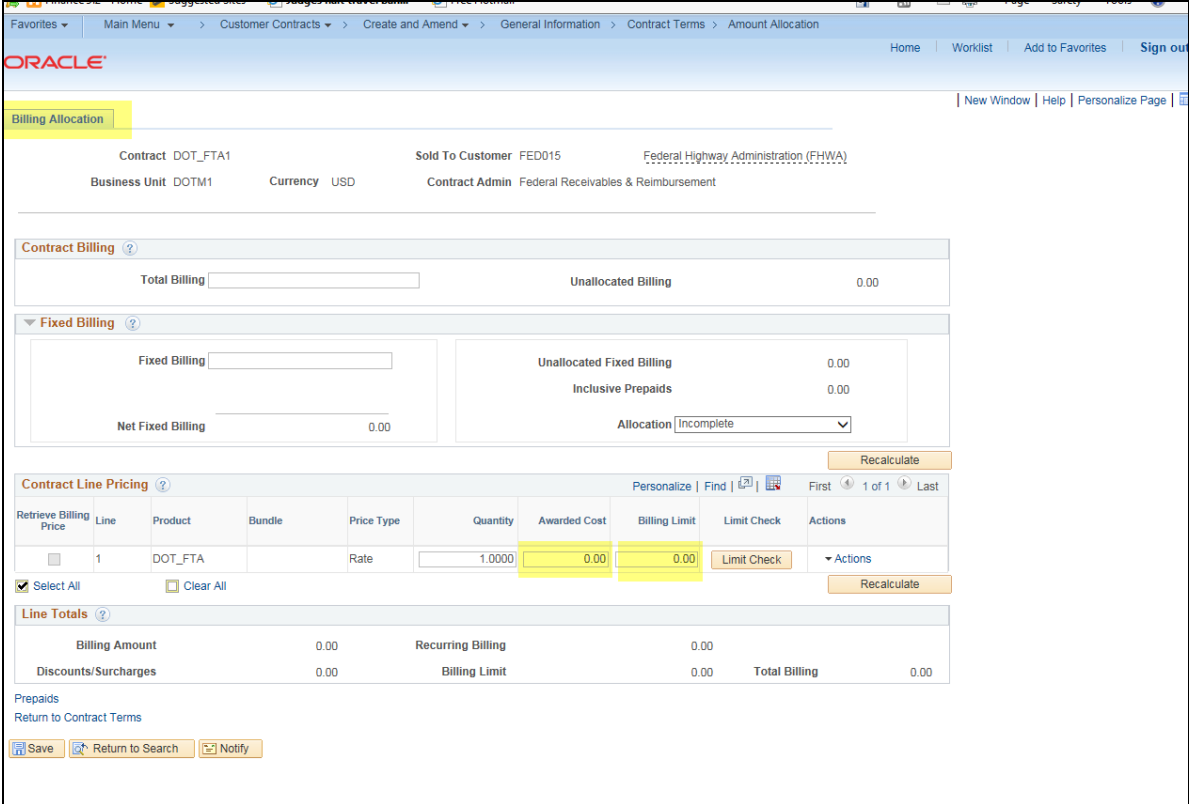


Figure 11 - This displays the Billing Allocation page to enter Awarded and Billing limits.



42. **Enter the Awarded Amount of the Contract in the Awarded field.**  
This is the full amount of the contract awarded by the government. This amount is not used in limit processing, but is used by Core-CT as an edit to prevent the funded amount from exceeding the awarded amount. This field is controlled by amendment processing.
43. **Type the Billing Amount of the Contract in the Funded field.** This is the limit amount for billable costs for this contract line. You can edit this amount over the life of the contract using amendment processing, but cannot enter an amount that exceeds the amount entered in the Awarded field or is less than the amount already billed.

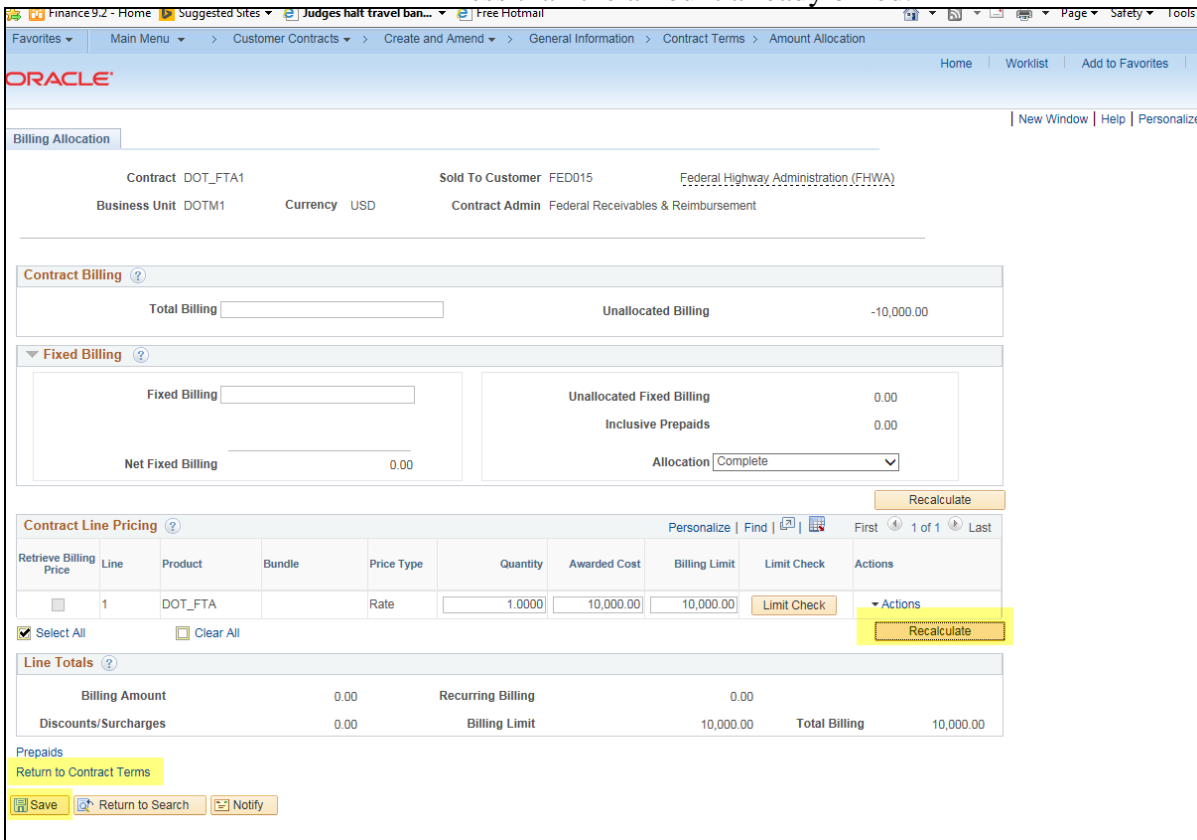


Figure 12 - This displays the Billing Allocation page to enter Awarded and Billing limits and process Recalculate.

44. Click the Recalculate Button
45. Click 'SAVE'
46. Click return to Contracts Terms

Oracle  
 Contract Amounts | Related Projects | Withholding

Contract Number DOT\_FTA1  
 Amendment Number

Sold To Customer Federal Highway Administration (FHWA)  
 Contract Status PENDING

Contract Line 1  
 Product DOT\_FTA  
 Description DOT - Federal Transit Admin

Price Type Rate  
 Fee Type None

Limit Details	
	T&M
Awarded	10,000.00
Funded	10,000.00
Revenue	10,000.00

Transaction Limits Review Limits Perform Limit Checking

Period of Performance

Start Date [ ] End Date [ ]  Control Limits and Billing

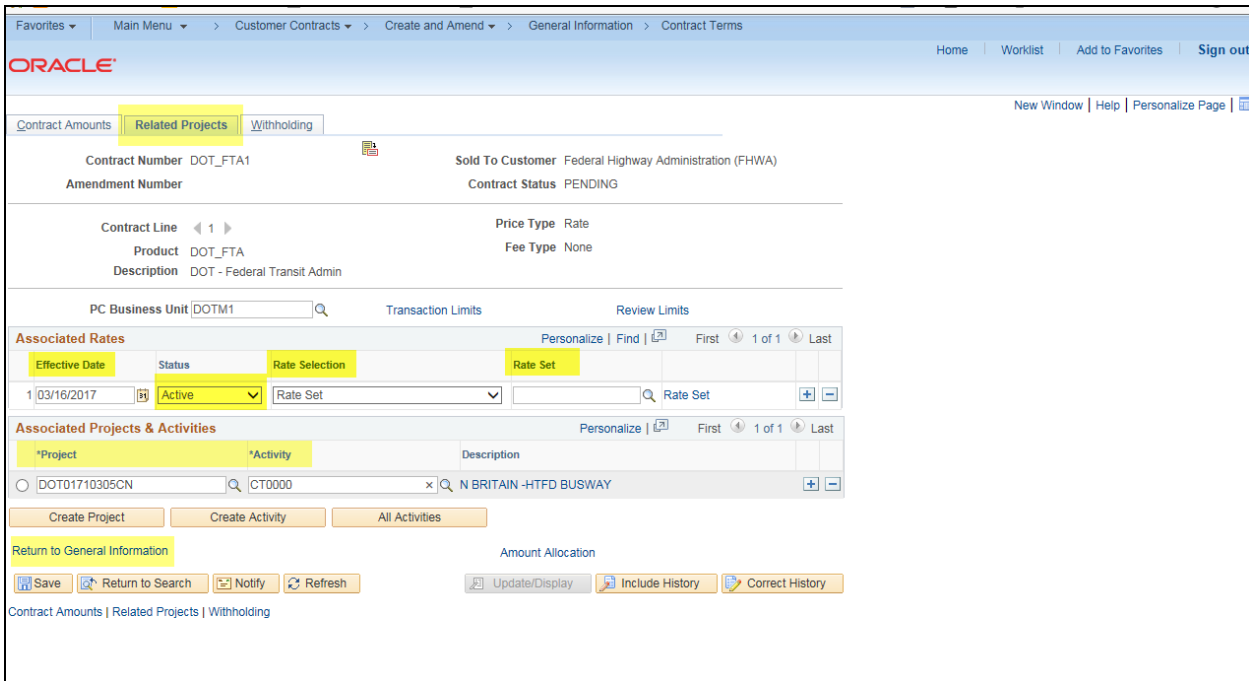
Return to General Information Amount Allocation

Save Return to Search Notify Refresh Update/Display Include History Correct History


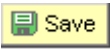
Contract Amounts | Related Projects | Withholding

**Figure 13 - This displays the Contracts Amount page to enter Start and End Dates and Control Limits checkbox.**

- 47. Type the Start Date of the Contract in the Start Date field.** This is the date that transactions can begin to be processed against this contract. After the contract is active, the date is no longer editable if the Control Limits and Billing option is selected.
- 48. Type the End Date of the Contract in the End Date field.** After this date, transactions will no longer be picked up for processing. Once the contract is active, you can edit this date throughout the life of the contract using amendment processing. However, it cannot be changed to a date that is earlier than the current system date.
- 49. Select the Control Limits and Billing checkbox.** By selecting the checkbox, the Limits process and the Contracts/Billing Interface process only selects billable transactions from the Project Resource table that have a transaction date that falls within start and end dates.



**Figure 14 - This is the Related Projects page with Projects and Activities associated to the Contract.**

- 50. Click the Related Projects tab.** The Related Projects page displays.
- 51. Type or select the PC Business Unit.**
- 52. Type or select the Project.** If you select a Project, you must select an Activity.
- 53. Type or select the Activity.**
- 54. Click .**
- 55. In the Associated Rates box type or select the Effective Date (of the Rate Set).** This is the date that transactions can begin to be priced against the contract.
- 56. Ensure the Status defaults to Active.**
- 57. Ensure the Rate Selection defaults to Rate Set.**
- 58. Type or select the Rate Set.** The Rate Set represents the standard pricing of the transactions associated with the contract line. The Rate Sets you see in the lookup are specific to your agency. It is extremely important that you select the correct Rate Set.
- 59. Click .**
- 61. Click [Return to General Information](#).** The Lines page displays.
- 62. Click the General tab.** The General page displays.

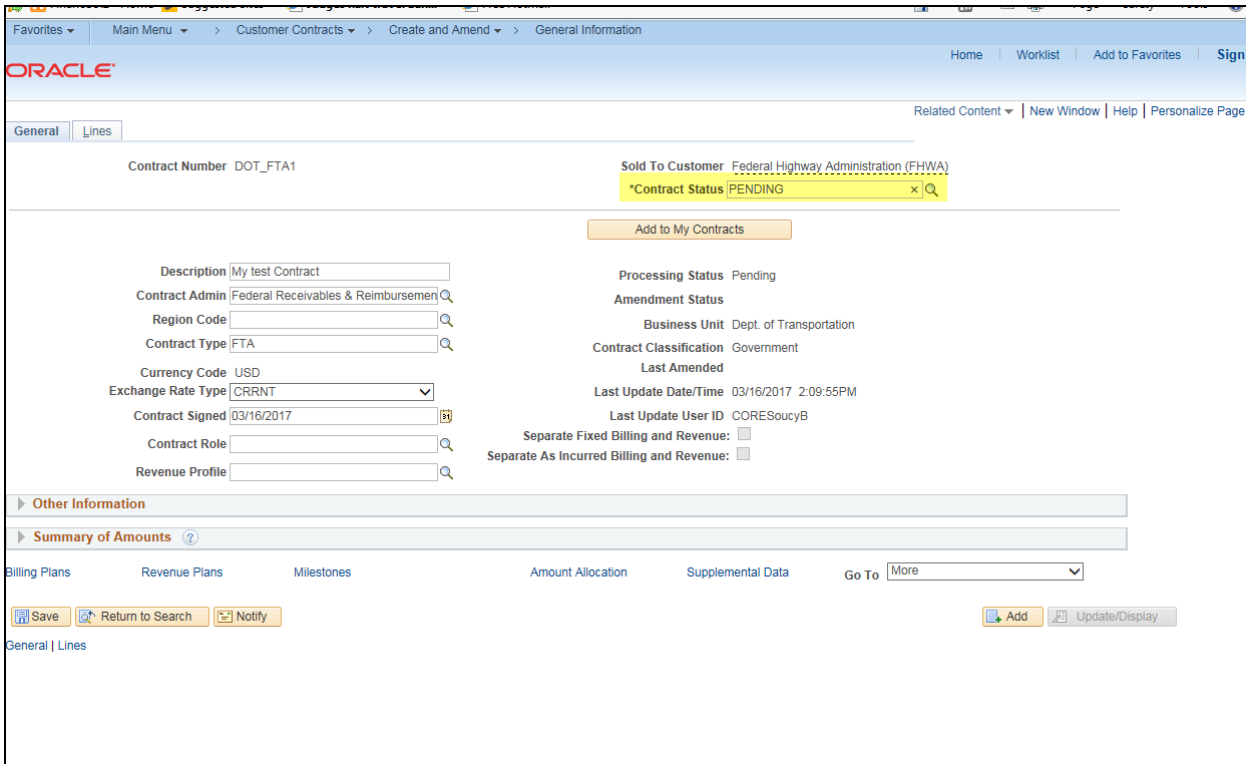
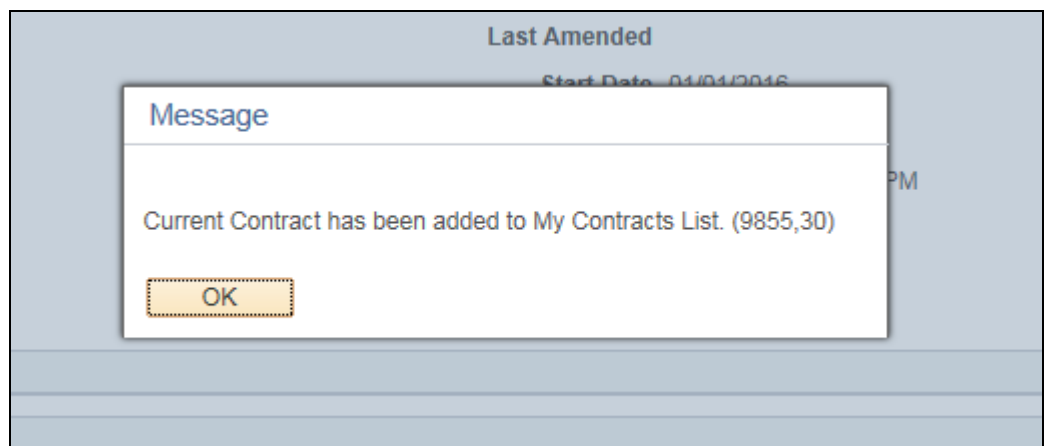


Figure 15 - This is the General page where Contract status can be changed.

**63. Change the Contract Status field from Pending to Active or an applicable status, as necessary.** The Contract Status fields are directly related to the processing status of the contract.

**64. If you would like to add the contract to the My Contracts list, click **Add to My Contracts**** If you do not want to add the contract to the My Contracts list, this procedure is complete.

**65.** The following message displays:



**66. Click OK.**

67. To view the Contract from the My Contracts list, **navigate to *Customer Contracts > My Contracts***.

Core-CT

Home

My HR Finance Core-CT Help

My Contracts

User ID CORESoucyB Name Bonnie Soucy

My Contracts Personalize Find View All First 1 of 1 Last

General Details

Contract	Description	Business Unit	Contract Type	Contract Classification	Sold To Customer
DOT_FTA1	My test Contract	DOTM1	FTA	Government	Federal Highway Administration (FHWA)

Create New Contract Search Contracts

Figure 16 - This is the My Contracts page with all Contracts associated to this User ID displayed.

The procedure is complete. Please call the Help Desk if you have problems with this procedure.