



501 PR348

Entering Procurement Contracts

Instructor Led Training



Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Training.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Glossary of frequently used terms

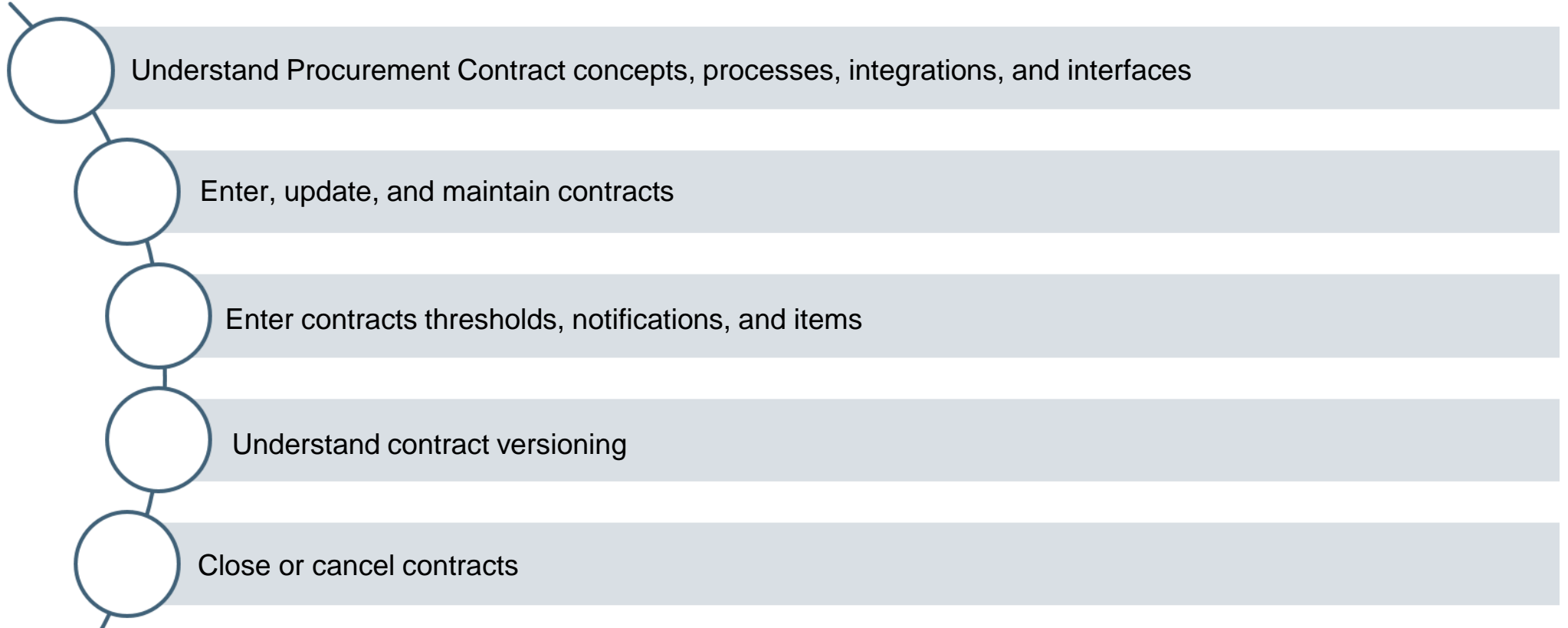
The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



Course Objectives

After completing this course, you will be able to:





Agenda

1

Understanding Procurement Contracts

2

Create or Update Procurement Contracts

3

Maintain Contracts

4

Entering Contracts Hands-On Practice



Lesson 1: Introduction

1

Understanding Procurement Contracts

This lesson covers the following topics:

- Procurement Overview
- Key Concepts
- Enter Contracts
- Maintain Contracts
- Integration with eProcurement and Purchasing
- Interface with SiteManager



Procurement Overview

The Procurement functional area of Cardinal includes four modules:

Purchasing

The Purchasing module includes the buying of goods and services (Procurement) by creating and processing requisitions, purchase orders (PO), receipts, procurement card (PCard), and Integrated Supply Services Program (ISSP) transactions.

eProcurement

Like Purchasing, the eProcurement module provides for Procurement but is web-based. It is similar to an online shopping cart experience for users requesting goods and/or services.

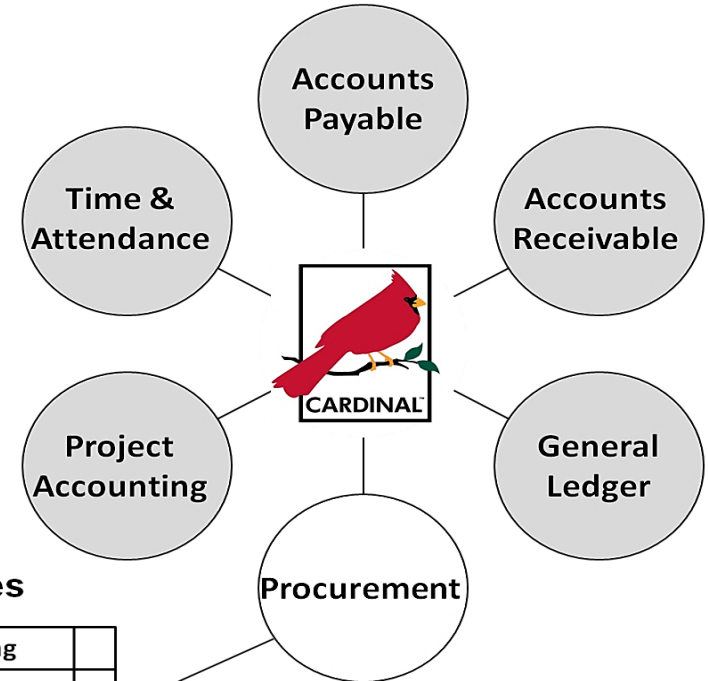
Strategic Sourcing

The Strategic Sourcing module allows users to create and award bids/proposals to purchase orders or contracts.

Procurement Contracts

The Procurement Contracts module builds, manages, and archives all Cardinal contract related information.

Cardinal Functional Areas



Modules

	Purchasing	
	eProcurement	
	Strategic Sourcing	
	Procurement Contracts	



Key Concepts

Key procurement contract concepts include:

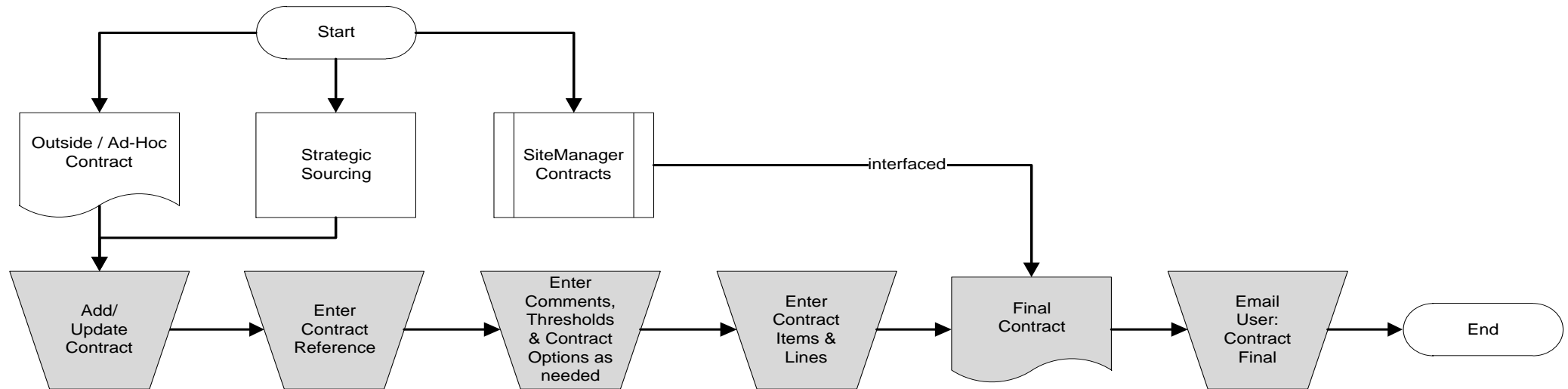
- Cardinal provides easy access to contracts, in order to maintain contract information. The purchasing contract is a part of the overall procurement system that includes integrations with strategic sourcing, requisitions, and POs for contract creation.
- Cardinal provides the ability to track renewal details as well as supplemental information.
- Changes to a contract are tracked using contract versioning as opposed to effective dating. Contract Versioning allows for major changes to a contract to result in the contract being saved as a new version.
- Cardinal provides the ability to create a notification to a user, or list of users, when a contract is about to expire or a specific threshold amount is approaching. Additional functionality is available to Contract Administrators that allows them to manage contracts and thresholds.



Enter Procurement Contracts

Steps to enter a contract include obtaining supplier and pricing information. This information is received from one of the following sources:

- **Outside/Ad-Hoc Contract** - Solicitation is done outside of Cardinal or created by another entity. Information is then entered manually from a contract that does not originate from the Strategic Sourcing process.
- **SiteManager** interface contract - Construction and Maintenance contract data is uploaded into Cardinal.
- **Strategic Sourcing Event** - Information from contract award information in the Strategic Sourcing module is shared with the Procurement Contracts module.

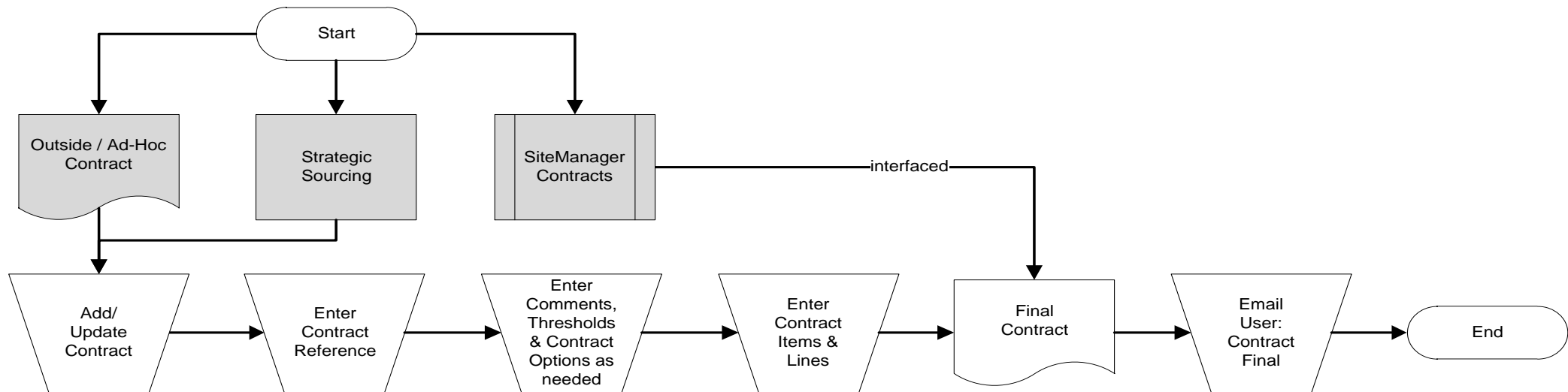




Enter Procurement Contracts (continued)

Add/Update Contract - Enter or copy contract details into new contract.

- Enter required contract reference details.
- Enter comments (e.g., terms and conditions), thresholds, and additional contract options as deemed necessary.
- Enter contract items and lines.
- Save contract.
- Notify user of finalized contract.

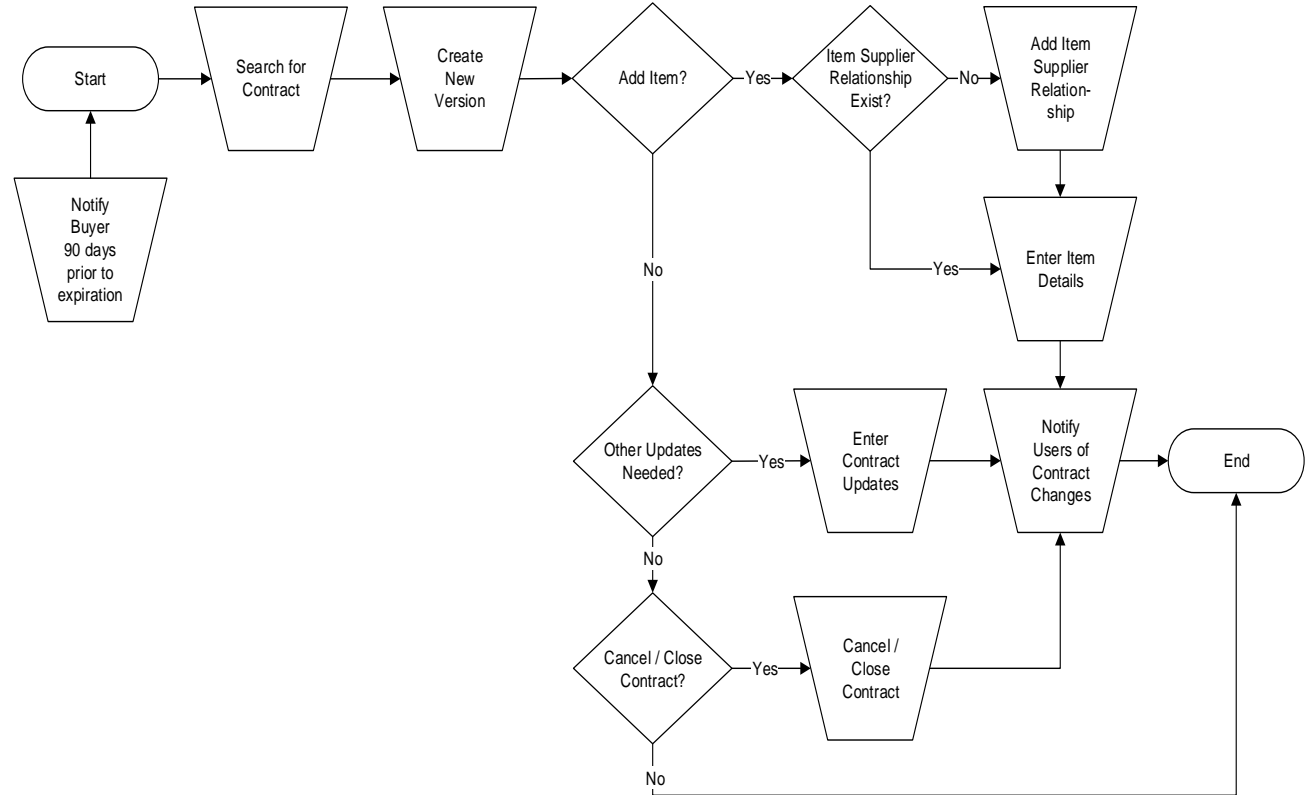




Maintain Procurement Contracts

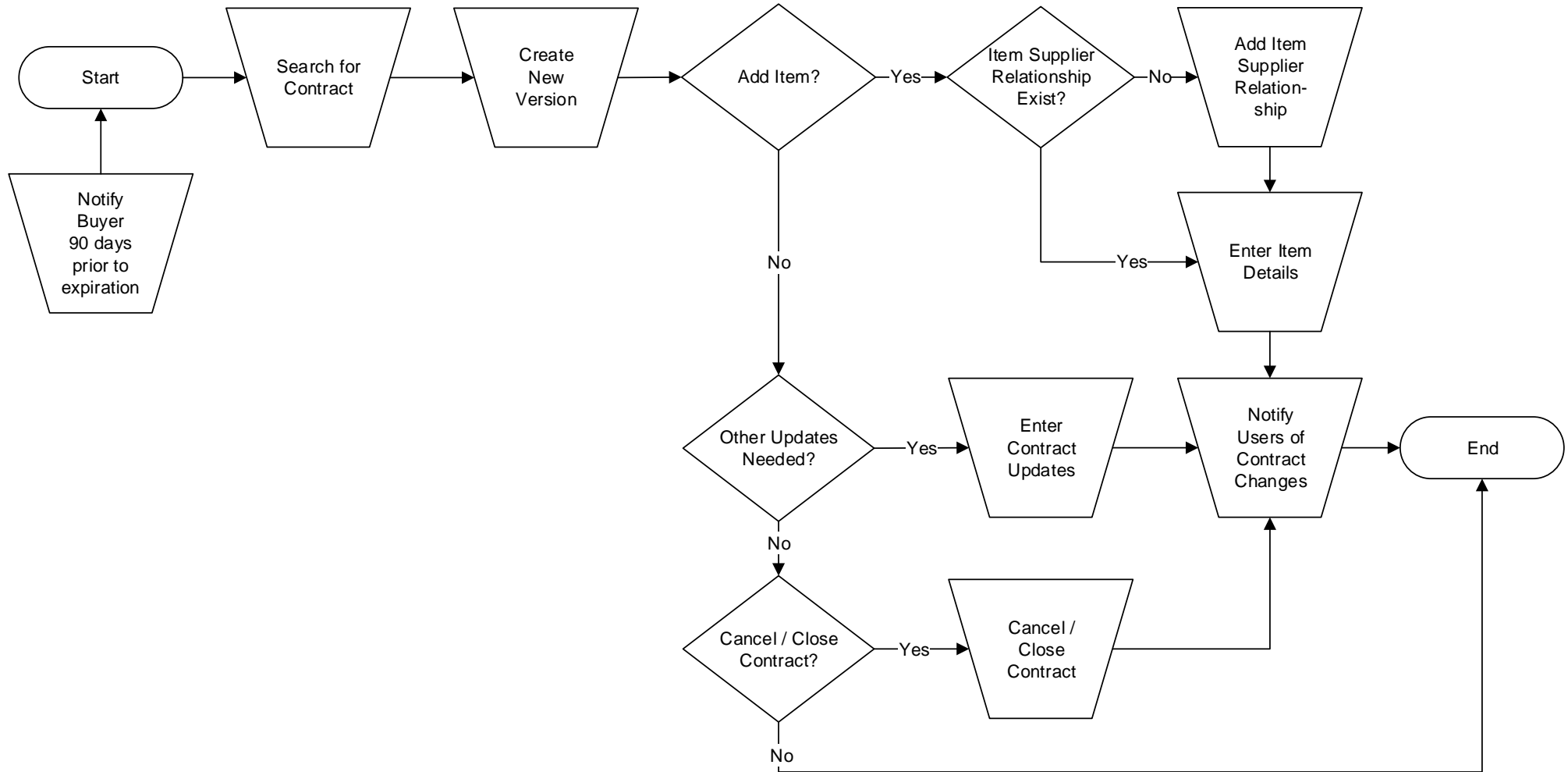
The following actions are available for maintaining procurement contracts:

- Search for the contract
- Create new version
- Update/modify cancel or close contract
- Add an item
- Create item relationship to a supplier
- Enter contract information
- Notify user(s) of contract modification(s)





Maintain Procurement Contracts (continued)

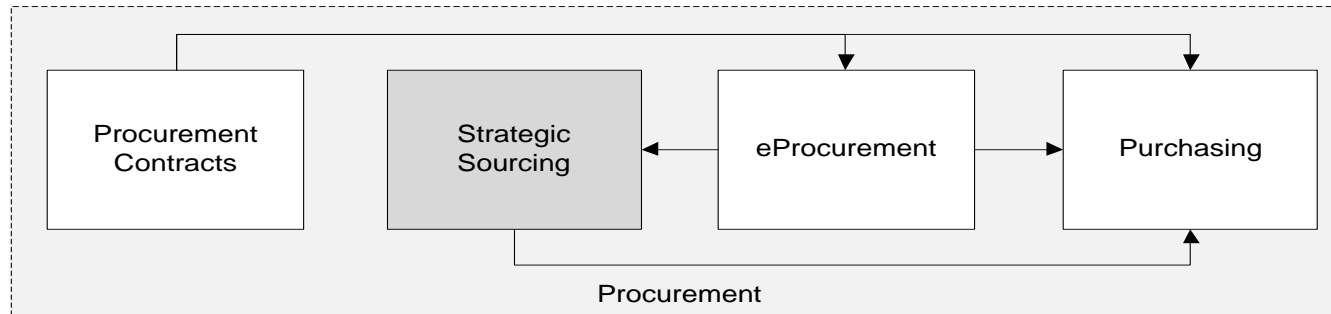




Integration with eProcurement and Purchasing

The Procurement Contracts module integrates with the eProcurement and Purchasing modules:

- **eProcurement:** An eProcurement requisition, can be tied to a procurement contract.
- **Purchasing:** When creating a requisition or PO, can be tied to an existing procurement contract.

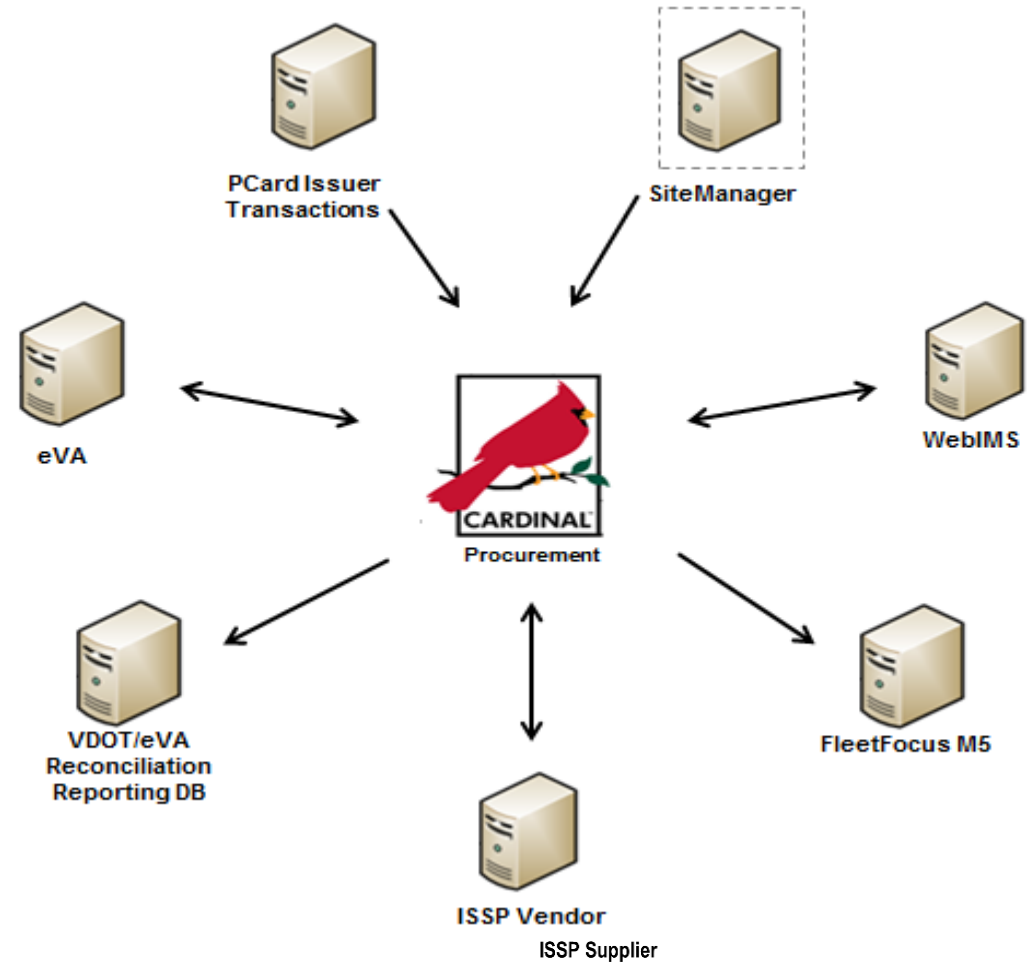




Interface with SiteManager

Procurement contracts processing interfaces daily with **SiteManager**:

- SiteManager construction and maintenance contracts are received via an inbound interface daily.
- SiteManager contracts are managed in SiteManager.
- If errors occur when loading the file, the errors are written to a log file for review and reporting to SiteManager staff for correction.





Interface with SiteManager (continued)

When the **SiteManager** contract is interfaced into Cardinal:

- The interface creates a Cardinal contract and a PO.
- Contracts are loaded without contract lines, and as a PO with one PO line for the full contract amount.
- If a SiteManager contract has retainage, the associated PO has three PO lines:
 - One line for the contract amount.
 - Two lines for the retainage, i.e., a positive and a negative so that the net effect is zero.
- Contract modifications from SiteManager are loaded as new versions of the Cardinal contract and as change orders to the PO.



Lesson 1: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. The Procurement Contracts module integrates with what other two modules?



2. The Procurement functional area is composed of what four modules?



Lesson 1: Summary

1

Understanding Procurement Contracts

In this lesson, you learned:

- Integration with the eProcurement and Purchasing modules allows you to tie requisitions and purchase orders directly to procurement contracts.
- Contracts are uploaded from SiteManager into the Procurement module daily.



Lesson 2: Introduction

2

Create or Update Procurement Contracts

This lesson covers the following topics:

- Create or Update Procurement Contracts
 - Add Comments
 - Create Thresholds and Notifications
 - Enter Contract Reference
 - Order Contract Options
 - Enter Contract Items - Lines
- Create Supplier/Item Relationship
- Save and Finalize Contracts
- Print and Dispatch Contracts

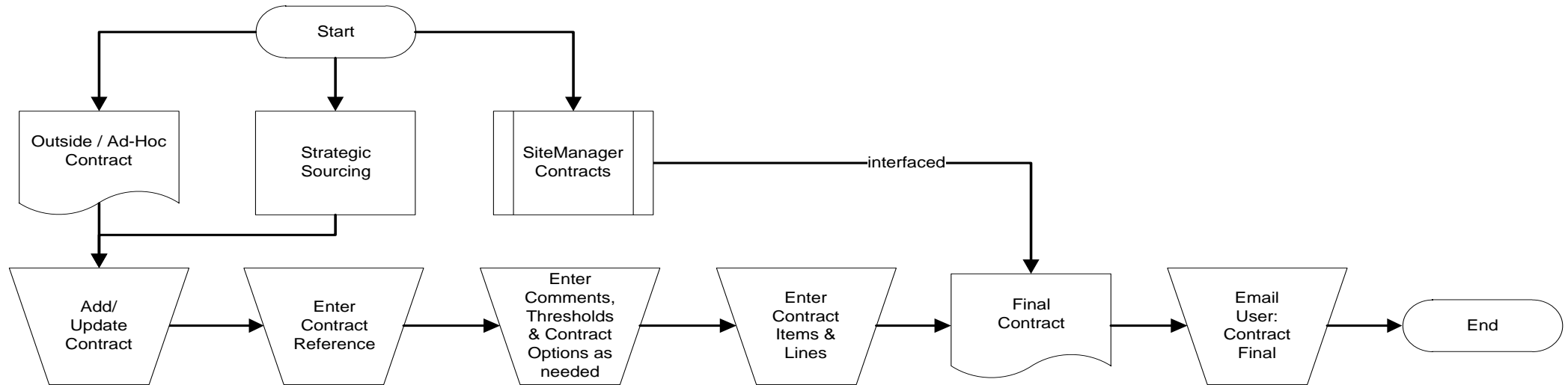


Create or Update Procurement Contracts

A procurement contract captures an agreement between an agency and the seller of the goods or services. It specifies details about the goods or services, pricing, and any other terms and conditions.

Purchasing contracts facilitate the purchasing process by establishing relationships between items and one or more suppliers. This allows identification of suppliers' prices for various items in advance.

Requisitions and POs can be created against contracts to order goods or services without having to request price quotes from suppliers each time.





Create or Update Procurement Contracts (continued)

Outside or Ad-Hoc contracts must be entered manually.

To enter a contract navigate to:

Main Menu > Procurement Contracts > Add/Update Contracts

- **SetID** defaults to **STATE**.
- **Contract ID** defaults to **NEXT**. Do not update, the contract number will automatically generate upon save.
- **Contract Process Option** defaults to **Purchase Order** type. Do not update.
- Click **Add**.

The screenshot shows a web application interface for creating or updating procurement contracts. The breadcrumb navigation at the top reads: Favorites > Main Menu > Procurement Contracts > Add/Update Contracts. The main heading is 'Contract Entry'. Below this, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. The form contains the following fields:

- SetID**: A text input field with the value 'STATE' and a magnifying glass icon.
- Contract ID**: A text input field with the value 'NEXT'.
- Style ID**: A text input field with the value 'PO' and a magnifying glass icon.
- Contract Process Option**: A dropdown menu with the selected value 'Purchase Order'.

At the bottom of the form, there is an 'Add' button. Below the form, there are links for 'Find an Existing Value' and 'Add a New Value'.



Create or Update Procurement Contracts (continued)

From the **Contract Entry - Contract** page information about the contract can be entered in the **Header** section, or use the **Copy From Contract** hyperlink to copy the following field values:

- **Administrator/Buyer name**
- **Supplier and Supplier ID**
- **Begin Date**
- **Expire Date**
- **Renewal Date**
- **Supplier Contract Ref**
- **Description**
- **Maximum Amount** (if applicable)

Once the **Status** is set to **Approved** and the contract is saved, the **Approval Due Date** will automatically populate and become the **Approved Date**.

The screenshot displays the 'Contract Entry - Contract' page. At the top, there's a navigation bar with 'Favorites', 'Main Menu', 'Procurement Contracts', and 'Add/Update Contracts'. Below this, the page title is 'Contract Entry Contract'. The main form area is divided into sections. The 'Contract Version' section at the top right shows 'Version 1' and 'Status Current'. A 'Copy From Contract' button is visible. The 'Header' section contains various input fields: '*Contract Style' (Purchase Order), 'Process Option' (Purchase Order), '*Supplier' (with a search icon), '*Supplier ID' (with a search icon), 'Primary Contact' (with a search icon), 'Supplier Contract Ref', 'Description', 'Master Contract ID' (with a search icon), '*Begin Date' (11/06/2019), 'Expire Date', 'Renewal Date', 'Control Type' (dropdown), and 'Tax Exempt ID' (checkbox). A 'Dispatch' button is located on the right side of the form. The '*Status' dropdown menu is highlighted with a red box and set to 'Approved'. The 'Approval Due Date' field is also highlighted with a red box.



Create or Update Procurement Contracts (continued)

Contract Entry – Contract Header page:

Do not change the following:

- **Auto Default:** defaults to selected
- **Dispatch Method:** defaults to **Print**
- **Allow Multicurrency PO**

The screenshot displays the 'Add/Update Contracts' page. The top navigation bar includes 'Favorites', 'Main Menu', 'Procurement Contracts', and 'Add/Update Contracts'. The 'Contract Entry Contract' link is highlighted. The main form area contains fields for 'SetID', 'STATE', 'Copy From Contract', 'Contract ID', 'NEXT', '*Status' (set to 'Approved'), 'Version' (set to '1'), 'Status' (set to 'Current'), 'Approval Due Date', and 'New Version' button. The 'Administrator/Buyer' field is also present. The 'Header' section includes '*Contract Style' (set to 'Purchase Order'), 'Process Option' (set to 'Purchase Order'), '*Supplier' (with a search icon), '*Supplier ID' (with a search icon), 'Primary Contact' (with a search icon), 'Supplier Contract Ref', 'Description', 'Master Contract ID' (with a search icon), '*Begin Date' (set to '11/06/2019'), 'Expire Date', 'Renewal Date', 'Control Type' (dropdown), 'Tax Exempt' checkbox, 'Auto Default' checkbox (checked), 'Look Chartfields' checkbox, and 'Tax Exempt ID'. The 'Dispatch' button is visible. The right sidebar lists various actions: 'Dispatch', 'Add Comments', 'Contract Activities', 'Primary Contact Info', 'Contract Header Agreement', 'Contract Releases', 'Activity Log', 'Document Status', 'Thresholds & Notifications', 'Price Adjustment Template', 'Purchase Order BU Defaults', and 'Contract Reference'. The bottom section includes 'Corporate Contract' checkbox, 'Currency' (set to 'USD'), 'Rate Date' (set to '11/06/2019'), 'CRRNT' (with a search icon), 'Must Use Contract Rate Date' checkbox, and 'Allow Multicurrency PO' checkbox (checked).



Create or Update Procurement Contracts (continued)

Contract Open Item Reference section:

Do not change the following:

- **Adjust Supplier Pricing First:** defaults to unselected
- **Allow Open Item Reference** - Select this option if the contract will not be restricted to specific items. This option allows the contract to be referenced on a requisition or PO line. This checkbox may be used when creating a Parts/Catalog type contract.
- **Price Can Be Changed on Order** - Gives Buyers the capability to change the contract price on a PO when ordering against a contract. If this check box is not selected, the price fields on the purchase order are unavailable for entry.
- **Add Open item Price Adjustments** – Not used at contract level

The screenshot shows the 'Add/Update Contracts' interface. The top navigation bar includes 'Favorites', 'Main Menu', 'Procurement Contracts', and 'Add/Update Contracts'. The 'Contract Entry Contract' link is highlighted. The main form contains various fields for contract details, including 'SetID', 'STATE', 'Copy From Contract', 'Contract ID', 'NEXT', 'Status', 'Approved', 'Version', '1', 'Status', 'Current', 'Approval Due Date', and 'New Version'. The 'Header' section includes fields for 'Contract Style', 'Process Option', 'Supplier', 'Supplier ID', 'Primary Contact', 'Supplier Contract Ref', 'Description', 'Master Contract ID', 'Begin Date', 'Expire Date', 'Renewal Date', 'Control Type', 'Tax Exempt', 'Auto Default', 'Lock Chartfields', and 'Tax Exempt ID'. The 'Contract Open Item Reference' section is expanded, showing the following options:

- ☐ Allow Open Item Reference
- ☐ Adjust Supplier Pricing First
- ☐ Price Can Be Changed on Order

The 'Add Open Item Price Adjustments' link is also visible.



Create or Update Procurement Contracts (continued)

Hyperlinks to additional details are also located on the **Po Defaults** section:

- **Price Adjustments Template** – Not used at contract level
- **PO Defaults** - Set the accounting distribution and payment terms on the contract which then default to the PO.
 - Professional Service contracts are typically set to a **Payment Terms ID** of **00 – Due Now**.



Create or Update Procurement Contracts (continued)

The **Line Groupings** tab and the **Contract Categories** section are not used.

Contract Entry Contract

SetID STATE Copy From Contract Contract Version

Contract ID NEXT Version 1 Status Current

*Status Approved Approval Due Date New Version

Administrator/Buyer

Header

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings Spend Threshold

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

View Category Hierarchy Category Search

Contract Categories

Lines

Details Pricing Options Release Amounts

Line	Category	Description	Status
1			Active

Save Notify Refresh Add Update/Display Correct History



Create or Update Procurement Contracts (continued)

Use the **Contract Items - Lines** section on the **Contract Entry** page to define basic information for contract line items.

- **Item** and **Category** numbers are the same as the National Institute of Governmental Purchasing (NIGP) numbers. NIGP numbers are used on all contract lines.
- Identify the specific items included in the contract. Those items can be used on a requisition or a PO. Items can be identified by **Item** (10 digit) or **Category** (5-7 digit) in the same fashion as a requisition or PO.
- When entering a contract for inventory items, always use a WebIMS inventory item number. On the item table, the **Item Type** will be equal to **Inventory Item**.

Contract Entry
Contract

SetID STATE Copy From Contract Contract Version
Contract ID NEXT Version 1 Status Current
*Status Approved Approval Due Date [B] New Version
Administrator/Buyer []

Header ?

Contract Items

Catalog Search Item Search Search for Contract Lines

Lines

Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings Spend Threshold [PDF]

Line Item Description UOM Category Include for Release Status

1 [] [] [] [] [] Active

View Category Hierarchy Category Search

Contract Categories

Save Notify Refresh Add Update/Display Correct History



Create or Update Procurement Contracts (continued)

- **NOTE:** If entering a contract for inventory items, always use a WebIMS inventory item number. On the item table, the **Item Type** will be equal to **Inventory Item**.

Favorites ▾ Main Menu ▾ > Items ▾ > Define Items and Attributes ▾ > Define Item

General | Inventory | Substitutes | Configuration | Custom | Audit

Common Classifications Classification 2 Dimensions Usage

SetID STATE Item ID 8857851000

*Description LIME, QUICK, CALCINATED LIMESTONE, SHELL OR THE EQUIVALENT,

Item Status

Current Status Date 11/26/2011 *Current Status Active
Future Status Date Future Status Copy Item Status

*Standard UOM EA Each Default Category 8857851 Categories

*Physical Nature Goods

Item Group
Family
Demand Priority
Cost Profile Group
Promise Option

Item Type

- ☒ Inventory Item
- ☐ Non-Owned Item
- ☐ Consigned Purchase

Item Image Manufacturers Purchasing Item Attributes Units Of Measure

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

General | Inventory | Substitutes | Configuration | Custom | Audit



Create or Update Procurement Contracts (continued)

Contract Entry – Contract page: **Contract Items – Lines** section, **Details** tab – use one of three methods:

1. **Catalog** and **Item Search** hyperlinks - These links may be used to search for an item by **Category** or description, and result in a list of items narrowed down by the supplier selected.
2. **Item** lookup -This is the most common method used to select an **Item**. On each line, click on the magnifying glass next to the **Item** field. The items listed will be narrowed down to items related to the supplier previously selected. The **UOM** (unit of measure) and **Description** field values default from the item table.
3. **Category** lookup - On each line, click on the magnifying glass next to the **Category** field. This method will not be limited to items related to the chosen supplier. Complete the **UOM** and **Description** fields. These fields become available for entry after the **Category** is selected.

Contract Items

Catalog SearchItem Search

Search for Contract Lines

Lines

Personalize | Find | View All | [Grid Icon] [Print Icon] First 1-2 of 2 Last

Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings [List Icon]

Line	Item	Description	UOM	Category				Include for Release	Status		
1	<div>0051404000</div>	<div>ABRASIVES,</div>	<div>EA</div>	<div>0051404</div>	<div></div>	<div></div>	<div></div>	<div><input checked="" type="checkbox"/></div>	<div>Active</div>	<div>✗</div>	<div>+ -</div>
2	<div></div>	<div>Category Description</div>	<div></div>	<div>0051408</div>	<div></div>	<div></div>	<div></div>	<div><input checked="" type="checkbox"/></div>	<div>Active</div>	<div>✗</div>	<div>+ -</div>

View Category Hierarchy

Category Search



Create or Update Procurement Contracts (continued)

- After updating the **Details** tab with **Items**, click on the **Line Details** icon (between the **Line** and **Item** columns) to enter additional information such as **Max or Min Quantities** and the **Unit** price.
- Repeat this step for each **Line**.

Contract Items

Catalog Search Item Search

Lines

Details Order By Amount Item Information Defa

Line	Item	Description
1		
2		

View Category Hierarchy Category

Details for Line 1

Transaction Item Description:

254 characters remaining

Expand All Collapse All

Item Information

Release Amounts / Quantities

Pricing Information

☐ Use Contract Base Price ☐ Use Supp Price UOM Adjustments

☐ Price Can Be Changed on Order ☐ Use Supplier Price Shipto Adj

Price Date: Due Date

Price Qty: Line Quantity

Qty Type: Current Order Quantity

Adjust: Before Contract Adjustments

Order By Amount

☐ Amount Only

Merchandise Amount

Schedule Defaults

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing Personalize Find View All First 1 of 1 Last

	Price Loc	UOM	Base Price	Curr
<input type="checkbox"/>			0.00000	USD

Enter the lead times and schedule quantities to be used for contract generated purchase order releases. Quantity is in standard UOM, and will be converted to the UOM that is selected as the Release Default at the time of release.

Shipping Template Personalize Find View All First 1 of 1 Last

Lead Time	Time Due	*Qty Sched	UOM
0			

OK Cancel Refresh



Create or Update Procurement Contracts (continued)

Contract Entry - Details for Line X page, Release Amounts/Quantities section:

If there is a required minimum and maximum amount and quantity for a line, enter those details here.

- **Minimum Line Amount** - The minimum amount that can be ordered for a line at one time; generally set to **.01**.
- **Maximum Line Amount** - The maximum amount that is allowed for all orders; generally left blank to allow for any amount.
- **Minimum Line Quantity** - The minimum quantity that can be ordered for a line at one time; generally set to **.01**.
- **Maximum Line Quantity** - The maximum quantity that is allowed for all orders; generally left blank to allow for any quantity.

Details for Line 2

Line 2

Version1

Supplier

Item ID

Description

Line Details

Category

Description

Category ID

StatusActive

Physical Nature

Transaction Item Description:

254 characters remaining

Expand All

Collapse All

Item Information

Release Amounts / Quantities

Minimum Line Amount

Minimum Line Quantity

Maximum Line Amount

Maximum Line Quantity

Total Line Released Amount0.000

Total Line Released Quantity0.00

Remaining AmountUSD

Remaining Quantity0.0000

Remaining Amount %

Remaining Quantity %0.00

Pricing Information

OK

Cancel

Refresh



- Details for Line 2

Line 2

Version 1

Supplier

Item ID

Description

Line Details

Category

Description

Category ID

Status Active

Physical Nature

Transaction Item Description:

254 characters remaining

Expand All Collapse All

Item Information

Release Amounts / Quantities

Minimum Line Amount		Minimum Line Quantity	
Maximum Line Amount		Maximum Line Quantity	
Total Line Released Amount	0.000	Total Line Released Quantity	0.00
Remaining Amount	USD	Remaining Quantity	0.0000
Remaining Amount %		Remaining Quantity %	0.00

Pricing Information

OK

Cancel

Refresh



Create or Update Procurement Contracts (continued)

- The **Physical Nature** field defaults to a blank value. For Professional Service contracts, select **Services**.

Contract Entry Contract

SetID STATE Copy From Contract Contract Version

Contract ID NEXT

*Status Approved

Administrator/Buyer

Header

Contract Items

Catalog Search Item Search

Lines

Order By Amount Item Information

Line Item Description

View Category Hierarchy

Contract Categories

Save Notify Refresh

Details for Line 2

Version 1 Supplier

Item ID Description

Line Details

Category

Description

Category ID

Status Active

Physical Nature

Transaction Item Description:

254 characters remaining

Expand All Collapse All

Item Information

Release Amounts / Quantities

Pricing Information

OK Cancel Refresh



Create or Update Procurement Contracts (continued)

Contract Entry - Details for Line X page, Pricing Information section:

- **Use Contract Base Price** - Select if the price from the contract, not the item supplier relationship price, should be used on the PO.
- **Price Can Be Changed on Order** - Select to allow the Buyer to change the contract line price on the PO. This would be used if the contract line price is a price range rather than a fixed price.
- **Price Date** - Defaults to **PO Date** – Do not change.
- **Price Qty** - Defaults to **Line Quantity** – Do not change.
- **Qty Type** - Defaults to **Current Order Quantity** – Do not change.
- **Use Supp Price UOM Adjustments** - Defaults to unselected – Do not change.
- **Use Supplier Price Shipto Adjust** - Defaults to unselected – Do not change

Pricing Information	
<input type="checkbox"/> Use Contract Base Price	<input type="checkbox"/> Use Supp Price UOM Adjustments
<input type="checkbox"/> Price Can Be Changed on Order	<input type="checkbox"/> Use Supplier Price Shipto Adj
Price Date <input type="text" value="Due Date"/>	Adjust <input type="text" value="Before Contract Adjustments"/>
Price Qty <input type="text" value="Line Quantity"/>	Order By Amount
Qty Type <input type="text" value="Current Order Quantity"/>	<input type="checkbox"/> Amount Only
	Merchandise Amount <input type="text"/>



Create or Update Procurement Contracts (continued)

Contract Entry - Details for Line X page, Pricing Information – Order by Amount section:

- **Amount Only** - Check this box when the contract line needs to be ordered as amount only.
 - Use **Amount Only** where the quantity is equal to 1 to allow receiving to be done by amount (dollars) instead of quantity.
 - Generally, used with Professional Services contracts or services that are invoiced along the way.
- **Merchandise Amount** - This field will be automatically populated from the **Base Price** field upon save.

Pricing Information

☐ Use Contract Base Price

☐ Price Can Be Changed on Order

Price Date

Due Date

Price Qty

Line Quantity

Qty Type

Current Order Quantity

☐ Use Supp Price UOM Adjustments

☐ Use Supplier Price Shipto Adj

Adjust

Before Contract Adjustments

Order By Amount

☐ Amount Only

Merchandise Amount



Create or Update Procurement Contracts (continued)

Contract Entry - Details for Line X page, Pricing Information – UOM Pricing section:

- **UOM/Pricing** - The checkbox defaults to selected.
- **Price Loc** - Defaults to the item location based on the supplier.
- **UOM** - Defaults based on the line item from the previous page.
- **Base Price** - Displays the price of the contract line item. A price defaults from the supplier item relationship or awarded sourcing event. The **Base Price** may be modified if needed.

Details for Line 2

Line 2	Version 1	Supplier	Description
Item ID			

Line Details

Category
Description
Category ID

Status Active
Physical Nature Services

Transaction Item Description:
254 characters remaining

Expand All Collapse All

Item Information

Release Amounts / Quantities

Pricing Information

☐ Use Contract Base Price
☐ Price Can Be Changed on Order
Price Date Due Date
Price Qty Line Quantity
Qty Type Current Order Quantity

☐ Use Supp Price UOM Adjustments
☐ Use Supplier Price Shipto Adj
Adjust Before Contract Adjustments
Order By Amount
☐ Amount Only
Merchandise Amount

Schedule Defaults

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing Personalize Find View All First 1 of 1 Last

Price Loc	UOM	Base Price	Curr
<input checked="" type="checkbox"/>		0.00000	USD

Enter the lead times and schedule quantities to be used for contract generated purchase order releases. Quantity is in standard UOM, and will be converted to the UOM that is selected as the Release Default at the time of release.

Shipping Template Personalize Find View All First 1 of 1 Last

Lead Time	Time Due	*Qty Sched	UOM
-----------	----------	------------	-----



Create or Update Procurement Contracts (continued)

Contract Entry - Details for Line X page, **Pricing Information – Shipping Template** section is used to pre-set the values which will default on the PO:

- **Qty Sched:**
 - Set the **Qty Sched** to **0.0001** to allow any variation of the quantity to be ordered on a PO.
 - Set to **1** if PO cannot be issued for a quantity less than **1**.
 - When a contract is set to **Amount Only**, the **Qty Sched** field must be set to **1**.
- Click **OK** and **Save** when all data has been entered.

Details for Line 2

Line Details

Category
Description
Category ID

Status Active
Physical Nature Services

Transaction Item Description:
254 characters remaining

Expand All Collapse All

► **Item Information**

► **Release Amounts / Quantities**

▼ **Pricing Information**

☐ Use Contract Base Price
☐ Price Can Be Changed on Order

Price Date Due Date
Price Qty Line Quantity
Qty Type Current Order Quantity

☐ Use Supp Price UOM Adjustments
☐ Use Supplier Price Shipto Adj

Adjust Before Contract Adjustments

Order By Amount
☐ Amount Only
Merchandise Amount

Schedule Defaults

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing Personalize Find View All First 1 of 1 Last

	Price Loc	UOM	Base Price	Curr		
<input checked="" type="checkbox"/>			0.00000	USD	+	-

Enter the lead times and schedule quantities to be used for contract generated purchase order releases. Quantity is in standard UOM, and will be converted to the UOM that is selected as the Release Default at the time of release.

Shipping Template Personalize Find View All First 1 of 1 Last

Lead Time	Time Due	*Qty Sched	UOM		
0				+	-

OK Cancel Refresh



Create or Update Procurement Contracts (continued)

In the **Header** section of the **Contract Entry – Contract** page, contract entry hyperlinks include:

- **Add Comments** - Used to add comments and/or attachments which can be sent to the supplier, or copied to the PO or Voucher as terms, conditions, and/or notifications that affect the entire contract. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.
- **Contract Activities** - Allows the tracking of activities on the contract, assigning Due Dates and marking them Done. This is especially useful when multiple VDOT Contract Administrators are assigned.
- **Activity Log** - Shows who entered, last updated, and approved the contract and when they did so.

The screenshot displays the 'Contract Entry - Contract' page in the Cardinal system. The page is divided into several sections. At the top, there's a navigation bar with 'Favorites', 'Main Menu', and 'Procurement Contracts > Add/Update Contracts'. Below this, the 'Contract Entry' section is visible. The 'Contract' section includes fields for 'SetID', 'STATE', 'Contract ID', 'Status' (set to 'Approved'), 'Version' (set to '1'), and 'Approval Due Date'. There's also a 'New Version' button. The 'Header' section is highlighted with a red box and contains a list of hyperlinks: 'Add Comments', 'Contract Activities', 'Primary Contact Info', 'Contract Header Agreement', 'Contract Releases', 'Activity Log', 'Document Status', 'Thresholds & Notifications', 'Price Adjustment Template', 'Purchase Order BU Defaults', and 'Contract Reference'. The 'Header' section also includes fields for 'Contract Style' (set to 'Purchase Order'), 'Process Option' (set to 'Purchase Order'), 'Supplier' (with a search icon), 'Supplier ID' (with a search icon), 'Primary Contact' (with a search icon), 'Supplier Contract Ref', 'Description', 'Master Contract ID' (with a search icon), 'Begin Date' (set to '11/06/2019'), 'Expire Date', 'Renewal Date', and 'Control Type' (set to 'Tax Exempt'). There are also checkboxes for 'Tax Exempt', 'Auto Default', and 'Lock Chartfields', and a 'Tax Exempt ID' field.



Create or Update Procurement Contracts (continued)

In the **Header** section of the **Contract Entry – Contract** page, contract entry hyperlinks and fields include:

- **Thresholds & Notifications:** Used to notify specific individuals, identified by the Contract Administrator, when certain events happen. Events can be date driven (approaching contract expiration or renewal), or amount driven (amount is within a specified amount or percentage of the maximum contract amount).
- **Contract Reference:** Captures additional information related to a contract such as **Contract Category**, **Responsible Org** (department), **Supplemental Agreements**, and **Contract Renewal Options**.

Contract Entry
Contract

SetID STATE [Copy From Contract](#) Contract Version
Contract ID NEXT Version 1 Status Current
*Status Approval Due Date [New Version](#)
Administrator/Buyer

Header ?

*Contract Style [Dispatch](#)
Process Option *Dispatch Method
*Supplier [Supplier Search](#)
*Supplier ID
Primary Contact
Supplier Contract Ref
Description
Master Contract ID
*Begin Date [Print](#)
Expire Date [Print](#)
Renewal Date [Print](#)
Control Type
☐ Tax Exempt Tax Exempt ID
☒ Auto Default
☐ Lock Chartfields

[Add Comments](#)
[Contract Activities](#)
[Primary Contact Info](#)
[Contract Header Agreement](#)
[Contract Releases](#)
[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)
[Price Adjustment Template](#)
[Purchase Order BU Defaults](#)
[Contract Reference](#)



Create or Update Procurement Contracts (continued)

In the **Amount Summary** section of the **Contract Entry – Contract** page, contract entry hyperlinks and fields include:

- **Maximum Amount:** Allows placement of a cap on the amount that can be released through POs.

▼ Amount Summary ?

Maximum Amount

0.00

USD

Line Item Released Amount	0.00
Category Released Amount	0.00
Open Item Released Amount	0.00
Total Released Amount	0.00



Add Comments

Add Comments hyperlink:

When entering a contract, comments and attachments can be added using the **Add Comments** hyperlink on the **Contract Entry – Contract** page. This comments section is similar to the comments section available in other modules. Here you can use **Standard Comments** may be used or type in the unique comments.

Comments section:

- The **Use Standard Comments** hyperlink is available allowing the user to choose from prepopulated comments.
- Select **Send to Supplier** to have the comment print on the contract.
- Select **Copy to Purchase Order** to have the comment to print on the PO.

Associated Document section:

- Click **Attach** to add a document. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the appendix section of this course.

Once added all comments and attachments have been added, be sure to click **OK** to return to the **Contract Entry – Contract** page.

From the **Contract Entry – Contract** page click **Save** to update the contract with the new comment.



Add Comments (continued)

Contract Comments

Contract Entry

Header Comments

SetID STATE Contract ID NEXT Version 1

*Sort Method Comment Time Stamp *Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate +

☐ Send to Supplier ☐ Show at Receipt ☐ Copy to Purchase Order

☐ Show at Voucher

Associated Document

Attachment Attach View Delete ☐ Email

From -> CNT STATE-NEXT

OK Cancel Refresh



Create Thresholds & Notifications

Thresholds & Notifications allows notification of other Cardinal users when certain events occur.

This feature allows set up of threshold dates or amounts. When those dates or amounts are met, email notifications are triggered to the Cardinal user specified on the page.

Send Date/Amount Notification checkbox must be selected in order for the notification functionality to work. This functionality sends an email and puts an item on the user's Worklist each week until the condition (expiration date, renewal date, or contract maximum) triggering the event is updated, or the contract is set to a **Closed** status.

Thresholds & Notifications

☐ Send Date/Amount Notification

[Expand All](#) [Collapse All](#)

Date Notification

Notify user when contract is within specified days of Expire Date.
Expire Date Notify Days Before Expires
Expiration Notification Date
Notify user when contract is within specified days of Renewal Date.
Renewal Date Notify Days Before Renewal
Renewal Notification Date
Notify user when New Contract or Draft is within specified days of Approval Due Date.
Approval Due Date Notify Days Before Approval
Approval Notification Date

Maximum Amount Notification

Notification Assignments

Personalize | Find | View All | First 1 of 1 Last

Notification Type	User ID	User Description	Email Address
1 <input type="text"/>	<input type="text"/>		

Amount Summary

Maximum Amount 0.00 USD

Total Line Released Amount 0.00

Total Category Released Amount 0.00

Open Item Released Amount 0.00

OK

Cancel

40



Create Thresholds & Notifications (continued)

Threshold Notification Types:

- **Expiration**
- **Maximum Amount**
- **Renewal**

By entering amounts or date ranges, rules are set up, otherwise known as thresholds, which trigger notification emails and worklist items for Cardinal users assigned on the **Thresholds & Notifications** page.

Thresholds & Notifications

☐ Send Date/Amount Notification

[Expand All](#) [Collapse All](#)

▼ Date Notification

Notify user when contract is within specified days of Expire Date.
Expire Date Notify Days Before Expires
Expiration Notification Date
Notify user when contract is within specified days of Renewal Date.
Renewal Date Notify Days Before Renewal
Renewal Notification Date
Notify user when New Contract or Draft is within specified days of Approval Due Date.
Approval Due Date Notify Days Before Approval
Approval Notification Date

▶ Maximum Amount Notification

▶ Notification Assignments

▶ Amount Summary



Create Thresholds & Notifications (continued)

Click **Expand All** to view all content in the two sections.

Date Notification section:

Expire Date: Enter an **Expire Date** notification by entering the number of days prior to expiration in the **Notify Days Before Expires** box. There must be a date in the **Expire Date** field on the contract header for this notification to work.

Renewal Date: Enter a **Renewal Date** notification by entering the number of days prior to renewal in the **Notify Days Before Renewal** box. There must be a date in the **Renewal Date** field on the contract header for this notification to work.

Maximum Amount Notification section:

Enter a monetary amount to trigger notification when the contract is about to meet or exceed its maximum amount. For this notification to work, there must be an amount in the **Maximum Amount** field on the contract header located on the **Contract Entry – Contract** page.

Thresholds & Notifications

☒ Send Date/Amount Notification

Expand All

Collapse All

Date Notification

Notify user when contract is within specified days of Expire Date.

Expire Date

Notify Days Before Expires

Expiration Notification Date

Notify user when contract is within specified days of Renewal Date.

Renewal Date

Notify Days Before Renewal

Renewal Notification Date

Notify user when New Contract or Draft is within specified days of Approval Due Date.

Approval Due Date

Notify Days Before Approval

Approval Notification Date

Maximum Amount Notification

Notification Assignments

PersonalizeFindView All

First1 of 1Last

Notification Type	User ID	User Description	Email Address
1			

+ -

Amount Summary

OK

Cancel






Create Thresholds & Notifications (continued)

Thresholds & Notifications

☒ Send Date/Amount Notification



Expand All Collapse All




▼ Date Notification

Notify user when contract is within specified days of Expire Date.
Expire Date  Notify Days Before Expires
Expiration Notification Date
Notify user when contract is within specified days of Renewal Date.
Renewal Date  Notify Days Before Renewal
Renewal Notification Date
Notify user when New Contract or Draft is within specified days of Approval Due Date.
Approval Due Date  Notify Days Before Approval
Approval Notification Date

▶ Maximum Amount Notification

▼ Notification Assignments

Personalize | Find | View All |   First ◀ 1 of 1 ▶ Last

	Notification Type	User ID	User Description	Email Address		
1	<input type="text"/>	<input type="text"/> 				

▶ Amount Summary

OK Cancel



Create Thresholds & Notifications (continued)

Notification Assignments Section:

Notification types include **Draft Approval**, **Expiration**, **Maximum Amount**, and **Renewal**. A new notification line must be created for each new notification type and for each user receiving the notification. Use the **+/-** icons to add or remove users. Multiple users may be setup to receive notifications.

NOTE: Only Active Users will appear in the User ID lookup icon. This list must manually updated to reflect when a VDOT user leaves.

Thresholds & Notifications

☒ Send Date/Amount Notification

Expand All

Collapse All

Date Notification

Notify user when contract is within specified days of Expire Date.

Expire Date

Notify Days Before Expires

Expiration Notification Date

Notify user when contract is within specified days of Renewal Date.

Renewal Date

Notify Days Before Renewal

Renewal Notification Date

Notify user when New Contract or Draft is within specified days of Approval Due Date.

Approval Due Date

Notify Days Before Approval

Approval Notification Date

Maximum Amount Notification

Notification Assignments

Personalize | Find | View All | First | 1-3 of 3 | Last

	Notification Type	User ID	User Description	Email Address		
1	Expiration				+	-
2	Maximum An				+	-
3	Renewal				+	-

Amount Summary

OK

Cancel

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Enter Contract Reference

Contract Entry - Contract Reference page:

On the **Contract Entry – Contract** page, click the **Contract Reference** hyperlink.

Contract Information section:

- ***Contract Category** drop-down provides a list of categories. **Contract Category** helps to categorize contracts to ease in the search and reporting process.
- ***GL Business Unit** field defaults to the agency.
- **Estimated Contract Value** should be entered for all contracts, including requirements contracts.
- ***Responsible Org** lookup icon provides a list of departments.

***Required fields**

NOTE: Information must be entered in the Contract Information section or the contract will not save.

Custom Contract Reference Page

Contract Entry

Contract Reference

SetID: STATE

Contract ID: NEXT Contract Version: 1

Contract Information

Contract Category: GL Business Unit:

Estimated Contract Value: Responsible Org:

Supplement Agreement

Supplement Number: Supplement Date:

Supplement Amount:

Contract Renewal Options

Renewal Date From: Renewal Date To:

Original Number of Renewal Options: Current Renewal Period:

OK Cancel Refresh



Enter Contract Reference (continued)

Supplemental Agreement section:

Supplemental agreements are usually related to professional service contracts where there is an addendum (add on) to the contract.

- **Supplement Number:** The number or reference field on the addendum. This could also be the Agency number. Please consult your agency for supplemental agreements procedures.
- **Supplement Date:** The date of the addendum.
- **Supplement Amount:** The addendum amount.

Custom Contract Reference Page

Contract Entry

Contract Reference

SetID: STATE

Contract ID: NEXT Contract Version: 1

Contract Information

Contract Category: GL Business Unit:

Estimated Contract Value: Responsible Org:

Supplement Agreement

Supplement Number: Supplement Date:

Supplement Amount:

Contract Renewal Options

Renewal Date From: Renewal Date To:

Original Number of Renewal Options: Current Renewal Period:

OK Cancel Refresh



Enter Contract Reference (continued)

Contract Renewal Options section:

- **Renewal Date From** and **Renewal Date To** are populated with the next renewal period dates.
- **Original Number of Renewal Options** is the number of times the contract may be renewed.
- **Current Renewal Period** displays the contract's current renewal period. This value depends on the **Original Number of Renewal Options** field. When a contract is new, this field displays **0** as it has never been renewed.

Custom Contract Reference Page

Contract Entry

Contract Reference

SetID: STATE

Contract ID: NEXT

Contract Version: 1

Contract Information

Contract Category:

GL Business Unit:

Estimated Contract Value:

Responsible Org:

Supplement Agreement

Supplement Number:

Supplement Date:

Supplement Amount:

Contract Renewal Options

Renewal Date From:

Renewal Date To:

Original Number of Renewal Options:

Current Renewal Period:

OK

Cancel

Refresh



Enter Contract Reference (continued)

Custom Contract Reference Page

Contract Entry

Contract Reference

SetID: STATE

Contract ID: NEXTContract Version: 1

Contract Information

Contract Category: GL Business Unit:

Estimated Contract Value: Responsible Org:

Supplement Agreement

Supplement Number: Supplement Date:

Supplement Amount:

Contract Renewal Options

Renewal Date From: Renewal Date To:

Original Number of Renewal Options: Current Renewal Period:

OK

Cancel

Refresh



Create Supplier/Item Relationship

Supplier/Item Relationship:

On an ad-hoc contract, i.e., a contract which is not from SiteManager or a Strategic Sourcing Event, a supplier/item relationship may not already exist. If the relationship does not exist when the item ID is entered into the contract, an error message will be displayed.

Create a supplier/item relationship for an item by inserting a new row on the **Item Supplier** page by using the following navigation path:

Main Menu > Items > Define Items and Attributes > Purchasing Attributes

Search for and select the hyperlink for the item that needs a supplier/item relationship.

Purchasing Attributes

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

[Find an Existing Value](#)

Search Criteria

SetID =

Item ID

Description

Item Group

Family

Category

☐ Include History ☐ Correct History ☐ Case Sensitive

Limit the number of results to (up to 300):

[Basic Search](#)

Search Results

300 of 191681 results are displayed.

View All First 1-100 of 300 Last

SetID	Item ID	Description	Item Group	Family	Category
STATE	0051404000	ABRASIVES, PLASTONE	(blank)	(blank)	0051404
STATE	0051404035	1 IN. X 50 YDS., 60 GRIT..	(blank)	(blank)	0051404
STATE	0051404055	1 IN. X 50 YDS. ROLL, 320 GRIT	(blank)	(blank)	0051404
STATE	0051404115	1-1/2 IN. W. 30 FT. ROLL, 120	(blank)	(blank)	0051404



Create Supplier/Item Relationship (continued)

Supplier/Item Relationship continued:

- Select the **Item Supplier** tab.
- Click the **+** icon to insert a new row.
- Enter the **Supplier ID** and accept default values.
- Click **Save**.
- Click on the **Item Supplier UOM** hyperlink and the **Supplier's UOM and Pricing Information** pop-up window will be displayed.



Create Supplier/Item Relationship (continued)

From the **Supplier's UOM and Pricing Information** pop-up window:

- In the **Unit of Measure** header section, change the default **Minimum Quantity** to reflect the minimum quantity that can be ordered for that item.
- To allow for an unlimited order quantity, set the **Maximum Quantity** to **0.000**.
- If applicable, in the **Conversion to Item Base UOM** section, change the **Qty Precision** value to **Decimal**.
- Click **OK** to return to the **Item Supplier** tab. Be sure to click **Save**.

Supplier's UOM and Pricing Information

SetID STATE Item ID 0051404000 ABRASIVES, PLASTONE
Supplier 0000034153 E & M Auto Paint and Supply Corp Location MAIN

Unit Of Measure Find | View All First 1 of 1 Last
*UOM EA Each ☒ Default Packing Details + -
Effective Dated UOM
Update PO
Minimum Quantity 0.0001
Maximum Quantity 0.0000 Order Quantity Multiple

Conversion to Item Base UOM
*Rate Type Standard Std UOM Rate Get Std Rate
*Qty Precision Decimal Rounding Rule
Natural Round
Round Up

UOM Price Attributes Find | View All First 1 of 1 Last
*Effective Date 01/01/1901 *Status Active
*Minimum Quantity 0.0001 Qty Rcvd Tolerance % 0.00
*Currency Code USD Supplier Price 0.01000
Standard Price Update Status No Update
BU Price Update Status No Update

Matching Controls

OK Cancel



- Review the data entered.
- The **Status** will default to **Approved**.
- Click **Save** to commit the entry of all contract specific data. Once approved and saved, the **Approval Due Date** field is populated with the date approved/saved and becomes the **Approved Date**.

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Print Contracts

Users with the role of Contact Administrator have the ability to print procurement contracts. The **Print** contract function provides users with a hard copy contract for the file. The **Dispatch** contract function provides users with a hard copy contract for signature.

To print a contract, navigate using the following path:

Main Menu > Procurement Contracts > Reports > Order Contracts

- Search for an existing **Run Control ID** or choose **Add a New Value** if one does not exist.
- On the **Order Contracts** run control page, enter:
 - **SetID – STATE**
 - **Business Unit** – The agency number
 - **Contract ID From** - Enter the Contract ID number. The **To** will populate with the same ID.
- Click **Run**.
- On the **Process Scheduler Request** page, select the PDF Format.
- Click **OK**.

For more detailed information about running reports, see the course entitled **SW NAV220: Cardinal Reporting** located on the Cardinal website in **Course Materials** under **Training**.



Print Contracts (continued)

Order Contracts Run Control Parameters:

Favorites ▾Main Menu ▾> Procurement Contracts ▾> Reports ▾> Order Contracts

Order Contracts

Run Control ID testReport ManagerProcess Monitor

LanguageEnglish ▾

Run

Report Request Parameters

SetIDSTATE 🔍Business Unit50100 🔍

Contract ID From00000000000000000000000045035 🔍To00000000000000000000000045035 🔍

Supplier ID 🔍

Miscellaneous Options

☐ Print Duplicate

Number Of Copies1

Sort BySort by Line Number ▾

Statuses to Include

☒ Approved☒ Open☒ Held

☒ Canceled☒ Completed

Dispatch Methods to Include

☒ Print☒ FAX

☒ E-Mail☒ Phone

SaveReturn to SearchPrevious in ListNext in ListNotifyAddUpdate/Display



Print Contracts (continued)

Process Scheduler Request:

Process Scheduler Request

User ID PPS1_KAREN.GHOLSON

Run Control ID test

Server Name

Run Date

Recurrence

Run Time

Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Vendor Contract Dispatch/Print	POCNT100	SQR Report	Web	PDF	Distribution

OK

Cancel



Dispatch Contract for Signature

The **Dispatch** contract function provides users with a hard copy contract for signature. The steps are very similar to that of the print function.

Navigate using the following path:

Main Menu > Procurement Contracts > Dispatch Contracts

Favorites ▾Main Menu ▾ > Procurement Contracts ▾ > Dispatch Contracts

Dispatch Contracts

Run Control ID testLanguage English ▾Specified LanguageRecipient's Language

Run

Process Request Parameters

SetIDSTATE 🔍

Business Unit50100 🔍

Contract ID00000000000000000000000045035 🔍

Supplier ID 🔍

Fax Cover Page 🔍

Dispatch Methods to Include

☒ Print☒ FAX

☒ E-Mail☒ Phone

Miscellaneous Options

☒ Test Dispatch☐ Print Duplicate

☒ Print Copy

Number Of Copies1

SaveReturn to SearchNotifyAddUpdate/Display

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Dispatch Contract for Signature (continued)

Dispatch Contract for Signature Process Scheduler Request:

Process Scheduler Request

User ID PPS1_KAREN.GHOLSON

Run Control ID test

Server Name

Run Date

11/07/2019

31

Recurrence

Run Time

12:16:14PM

Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Contract Dispatch & Email	CONDISP	PSJob	(None) ▼	(None) ▼	Distribution
<input checked="" type="checkbox"/>	Vendor Contract Dispatch/Print	POCNT100	SQR Report	Web ▼	PDF ▼	Distribution
<input type="checkbox"/>	Email	PO_CON_EMAIL	Application Engine	Web ▼	TXT ▼	Distribution

OK

Cancel



Lesson 2: Summary

2

Create or Update Procurement Contracts.

In this lesson, you learned:

- A contract is used to capture an agreement between the agency and the seller of the goods or services.
- The primary contract type used is a Purchase Order Contract.
- You use the **Contract Entry** page to enter contract specific information.
- You use the **Contract Items - Lines** section to define basic information for contract line items.
- Setting the contract to an **Approved** status allows the contract to be used on requisitions and POs.
- To print a contract, use the **Order Contracts** report or the **Dispatch Contracts** report and select a PDF format.
- The **Dispatch Contracts** report provides for a hard (print) copy of the contract with a signature line.



Lesson 3: Introduction

3

Maintain Contracts

This lesson covers the following topics:

- Search for Contracts
- Contract Versioning
- Update Contracts
- View Contract Change History
- Cancel/Close Contracts



Search for Contracts

Modifications to a contract may be needed throughout the life of the contract. We refer to these updates or changes as maintaining the contract.

To make modifications to a contract, navigate using the following path:

Main Menu > Procurement Contracts > Add/Update Contracts

Using the **Find an Existing Value** tab, search for a specific contract by entering the **Contract ID**.

Alternatively, find all contracts associated to a supplier by entering in the **Supplier Name**.

Click **Search**. Select the hyperlink for the contract to be modified.

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 000000000000032111

Contract Version = 6

Version Status = Current

Contract Style begins with Purchase Order Order

Contract Process Option = Purchase Order Order

Short Supplier Name begins with SUPERIOR

Supplier Name begins with Superior Concrete

Master Contract ID begins with 000000000000032111

Description begins with 000000000000032111

☐ Correct History ☐ Case Sensitive

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

Search Results

View All

SetID	Contract ID	Contract Version	Version Status	Contract Style	Contract Process Option	Supplier ID	Short Supplier Name	Supplier Name	Expire Date	Contract Status
STATE	000000000000032111	6	Current	Purchase Order Order		0000028540	SUPERIOR C-003	Superior Concrete	05/31/2014	Approved
STATE	000000000000032111	5	History	Purchase Order Order		0000028540	SUPERIOR C-003	Superior Concrete	05/31/2014	Approved
STATE	000000000000032111	4	History	Purchase Order Order		0000028540	SUPERIOR C-003	Superior Concrete	05/31/2013	Approved



Contract Versioning

Create a new version when material changes need to be made to an approved contract. This includes the addition of lines, price changes, expiration date changes, other modifications, and closing.

Cardinal copies all contract information from the current version to the new draft version and sets the new version status to **Draft**. From the **Contract Entry – Contract** page:

- Click **New Version**.
- A warning message will be displayed. Click **Yes**. The **Reason Code** pop up will be displayed.

The screenshot shows the 'Contract Entry - Contract' page. The breadcrumb trail is 'Favorites > Main Menu > Procurement Contracts > Add/Update Contracts'. The page displays contract details for SetID STATE, Contract ID 000000000000032111, Version 6, and Status Current. The *Status is set to 'Approved' and the Approved Date is 07/18/2013. The Administrator/Buyer is REBECCA.SMITH. A red box highlights the 'New Version' button in the top right corner.

This screenshot shows the same 'Contract Entry - Contract' page, but with a 'Message' dialog box open. The dialog box contains the following text: 'Contract must be saved before a Draft can be created. (10400,577)' and '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.' There are 'Yes' and 'No' buttons at the bottom of the dialog box. The 'New Version' button is still visible in the background.



Contract Versioning (continued)

In the **Reason Code** pop-up window, select a **Reason Code** using the magnifying glass icon next to the field. Then enter a comment on what the change will entail and click **OK**. The new version, in draft status, will open for editing.

Reason Code Page

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

SetID STATE Contract ID 000000000000032111

Reason Code

Comment

☐ Use Same Reason Code

OK

Cancel

Refresh

Look Up Reason Code

SetID STATE

Reason Type Procurement Contract

Reason Code

Description

Look Up

Clear

Cancel

Basic Lookup

Search Results


View 100 First 1-4 of 4 Last

Reason Code	Description
EXTENSION	Contract Extension
OTHER	MODIFICATION
PRICE_INCR	Price Increase
RENEWAL	Contract Renewal



Contract Versioning (continued)

- Cardinal displays the new draft version number and sets the contract **Status** for the draft version to **Open**.
- The **Version** number increments by 1.
- The **Delete Version** button is enabled.
- Any field may be changed and adding or cancelling lines is done the same way as when entering the contract.

Favorites ▾		Main Menu ▾		> Procurement Contracts ▾		> Add/Update Contracts	
Contract Entry							
Contract							
SetID		STATE					
Contract ID		000000000000032111					
*Status		Open ▾					
Administrator/Buyer		REBECCA.SMITH		Smith, Susie (VDOT)			
<div>Contract Version</div> <div>Version 8 Status Draft</div> <div>Approval Due Date <input type="text"/> </div> <div>Delete Version</div>							



Contract Versioning (continued)

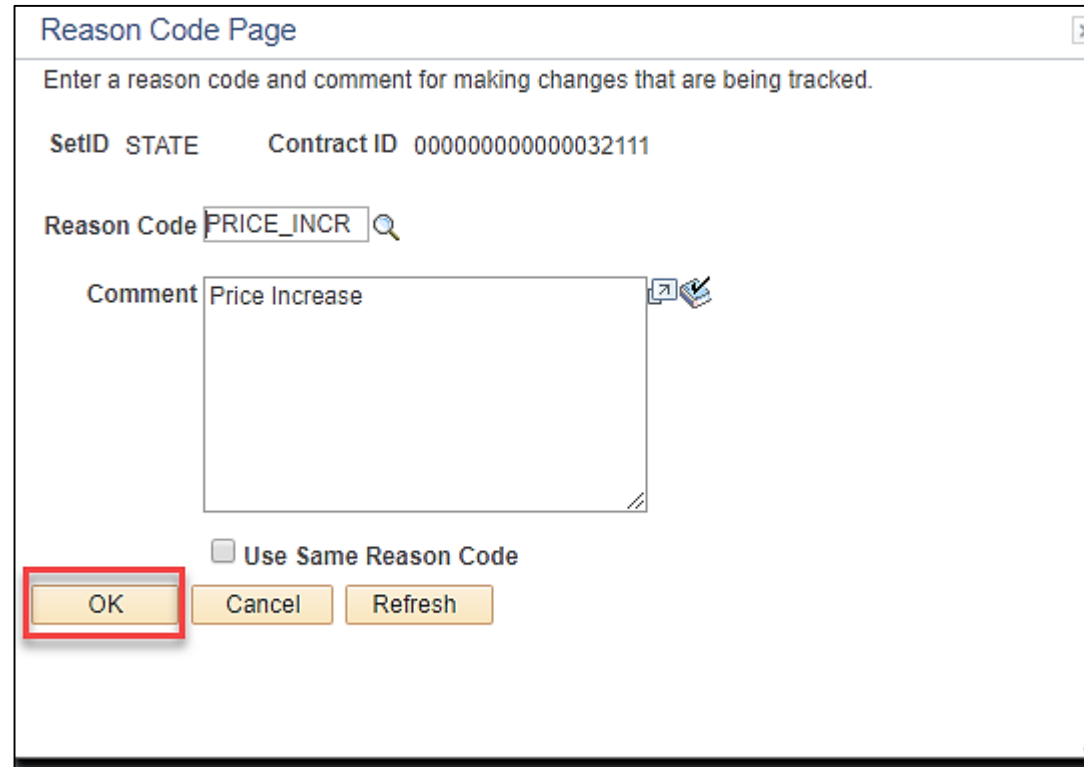
- Once all modifications are complete, change the contract **Status** to **Approved**.
- Changing the **Status** prompts a message to appear: “This action will make the Draft version become the Current version when you Save.” Click **OK**.

The screenshot shows the 'Contract Entry' form in a web application. The breadcrumb trail at the top reads: Favorites > Main Menu > Procurement Contracts > Add/Update Contracts. The form is titled 'Contract Entry' and 'Contract'. It contains several fields: 'SetID STATE', 'Contract ID 000000000000032111', '*Status Approved' (highlighted with a red box), 'Version 8', 'Status Draft', and 'Approval Due Date'. Below these, there are fields for 'Administrator/Buyer REBECCA.SMITH' and 'Smith, Susie (VDOT)'. A 'New Version' button is visible. A 'Header' section is expanded, showing 'Contract Style Purchase Order', 'Process Option Purchase Order', 'Supplier SUPERIOR C-003', 'Supplier ID 0000028540', 'Primary Contact', 'Supplier Contract Ref', and 'Description Ready Mix - Page, R'ham & She'. A 'Message' dialog box is overlaid on the form, containing the text: 'This action will make the Draft version become the Current version when you Save (10400,591)' and '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.' An 'OK' button is highlighted with a red box in the dialog.



Contract Versioning (continued)

- The **Reason Code** pop up displays. After making the reason code selection click on **OK**.



A screenshot of a software dialog box titled "Reason Code Page". The dialog box has a close button (X) in the top right corner. Below the title bar, there is a text instruction: "Enter a reason code and comment for making changes that are being tracked." Below this, there are two labels: "SetID STATE" and "Contract ID 000000000000032111". Below these, there is a "Reason Code" label followed by a text input field containing "PRICE_INCR" and a magnifying glass icon. Below the "Reason Code" field, there is a "Comment" label followed by a text area containing "Price Increase" and a magnifying glass icon. Below the text area, there is a checkbox labeled "Use Same Reason Code". At the bottom of the dialog box, there are three buttons: "OK", "Cancel", and "Refresh". The "OK" button is highlighted with a red rectangular border.



Contract Versioning (continued)

- Click **Save** to commit the changes. The **Draft** version becomes the **Current** version and the previous **Current** version's status is set to **History**. The new **Current** version is available for use.

Contract Entry

Contract

SetID STATE
Contract ID 000000000000032111
*Status Approved

Contract Version
Version 9 Status Current
Approved Date 11/07/2019 New Version

Administrator/Buyer REBECCA.SMITH Smith, Susie (VDOT)

▼ Header ?

Contract Style Purchase Order
Process Option Purchase Order
Supplier SUPERIOR C-003
Supplier ID 0000028540 Superior Concrete
Primary Contact
Supplier Contract Ref
Description Ready Mix - Page, R'ham & Shen
Master Contract ID
Begin Date 06/01/2011
Expire Date 05/31/2014
Renewal Date
Control Type
☐ Tax Exempt Tax Exempt ID
☒ Auto Default
☐ Lock Chartfields

Dispatch
*Dispatch Method Print
Edit Comments
Contract Activities
Primary Contact Info
Contract Header Agreement
Contract Releases
Activity Log
Document Status
Thresholds & Notifications
Price Adjustment Template
View Changes
Current Change Reason
Purchase Order BU Defaults
Contract Reference



Update Contracts

Updates to Contracts: Contract Entry– Contract page, Header section:

On occasion you may need to update the expiration or renewal date. While the contract **Status** is **Open** and you are in **Draft** mode of your new version, you can modify the **Expire Date** or **Renewal Date**:

- Date ranges can cross fiscal years.
- When you change the **Expire Date**, you either shorten or lengthen the contract's coverage date range.

Remember if a contract expiration or renewal threshold notification has been set, an email and worklist item will appear when the **Expire Date** or **Renewal Date** is within the days set for notification.

The screenshot displays the 'Add/Update Contracts' page. At the top, the breadcrumb trail is 'Main Menu > Procurement Contracts > Add/Update Contracts'. The page title is 'Contract Entry' and 'Contract'. The contract details section shows 'SetID STATE' and 'Contract ID 0000000000000000000045036'. The status is 'Open' and the version is '2'. The 'Expire Date' is '08/10/2017' and the 'Renewal Date' is empty. The 'Header' section contains fields for 'Contract Style', 'Process Option', 'Supplier', 'Supplier ID', 'Primary Contact', 'Supplier Contract Ref', 'Description', 'Master Contract ID', 'Begin Date', and 'Dispatch Method'. The 'Dispatch' button is visible.



Update Contracts (continued)

While the contract **Status** is **Open** and in **Draft** mode of the new version, a contract's **Maximum Amount** can be increased or decreased:

- When reducing the contract maximum, the amount cannot be less than the total amount of the POs already released against the contract.
- Increase the contract maximum to any amount required.

Contract Entry

Contract

SetID STATE Contract ID 00000000000000000000000045036 Contract Version 2 Status Draft

*Status Open Approval Due Date [B] Delete Version

Administrator/Buyer CAROLINE.HUDGINS Hudgins, Caroline S. (VDOT)

▼ Header ?

*Contract Style Purchase Order Process Option Purchase Order *Supplier MATTHEWS L-001 Supplier Search *Supplier ID 0000100992 Matthews Leasing LLC Primary Contact 1 Patrick Matthews Supplier Contract Ref Description Stone Master Contract ID *Begin Date 08/11/2016 Expire Date 08/10/2017 Renewal Date Control Type Tax Exempt Tax Exempt ID Auto Default Lock Chartfields

Dispatch

*Dispatch Method Print Edit Comments Contract Activities Primary Contact Info Contract Header Agreement Contract Releases Activity Log Document Status Thresholds & Notifications Price Adjustment Template View Changes Current Change Reason Purchase Order BU Defaults Contract Reference

▼ Amount Summary ?

Maximum Amount	0.00	USD
Line Item Released Amount	116,345.20	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	116,345.20	



Add or Cancel Contract Lines

Updates to Contracts: Contract Entry– Contract page, Contract Items - Lines section:

New lines can be added by clicking the **+** icon at the end of the line on any tab. Enter in the specific item information, price, description, etc. See Lesson 2 for details on adding **Lines** to contracts.

In some cases, the system allows cancellation or inactivation of the line and the Cancel button (a red **X**) appears on the **Details** tab for these actions to be performed.

Contract Items

Catalog Search

Item Search

Search for Contract Lines

BRIDGE AND RAILROAD CROSSING GATES

Lines

Personalize | Find | View All | [Icon] | [Icon] | First 1-7 of 10 Last

Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Spend Threshold | [Icon]

Line	Item	Description		UOM	Category						Include for Release	Status			
1	5500601000	BRIDGE AND RAILROAD CROSSING 		EA	5500601						<input checked="" type="checkbox"/>	Active			
2	9688480000	TRAFFIC CONTROL SERVICES TRAFFIC 		EA	9688480						<input checked="" type="checkbox"/>	Active			
3	9688480000	TRAFFIC CONTROL SERVICES TRAFFIC 		EA	9688480						<input checked="" type="checkbox"/>	Active			
4	9688480000	TRAFFIC CONTROL SERVICES TRAFFIC 		EA	9688480						<input checked="" type="checkbox"/>	Active			
5	9688480000	TRAFFIC CONTROL SERVICES TRAFFIC 		EA	5500601						<input checked="" type="checkbox"/>	Active			
6	5500601000	BRIDGE AND RAILROAD CROSSING 		EA	5500601						<input checked="" type="checkbox"/>	Active			

View Category Hierarchy

Category Search



Cancel a Contract Line

Contract Items - Lines section, continued:

Both cancellation and inactivation of a line result in no future orders being allowed for that line item. If no purchase orders have been placed against a line then the line can be cancelled. If purchase orders have been placed, the line will be inactivated.

- Click the **Cancel (X)** on the line to be cancelled/inactivated. A pop-up window will appear indicating the line is being cancelled/inactivated. Click **Yes** to continue.

Contract Items

Catalog Search

Item Search

Search for Contract Lines

BRIDGE AND RAILROAD CROSSING GATES

Lines

Personalize | Find | View All | [Icons] | First 1-7 of 10 Last

Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Spend Threshold | [Icons]

Line	Item	Description		UOM	Category					Include for Release	Status		
1	5500601000	BRIDGE AND RAILROAD CROSSING 		EA	5500601					<input checked="" type="checkbox"/>	Active		
2	9688480000	TRAFFIC CONTROL SERVICES TRAFFIC 		EA	9688480					<input checked="" type="checkbox"/>	Active		
3	9688480000	TRAFFIC CONTROL SERVICES TRAFFIC 		EA	9688480					<input checked="" type="checkbox"/>	Active		
4	9688480000	TRAFFIC CONTROL SERVICES TRAFFIC 		EA	9688480					<input checked="" type="checkbox"/>	Active		
5	9688480000	TRAFFIC CONTROL SERVICES TRAFFIC 		EA	5500601					<input checked="" type="checkbox"/>	Active		
6	5500601000	BRIDGE AND RAILROAD CROSSING 		EA	5500601					<input checked="" type="checkbox"/>	Active		

View Category Hierarchy

Category Search

Message

This action will cancel line 2 for this contract. Continue? (10400,462)

The action that you are taking will cancel this line for this Contract. If you do not want to cancel this line, then you cannot perform the action at this time.

Yes No

Message

Would you like to put the contract quantity back to the related sourcing award? (10400,537)

Yes No



Cancel a Contract Line (continued)

Contract Items - Lines section, **Details** tab continued:

- After clicking **Cancel (X)**, the line still appears but the fields are protected and the **Reactivate** icon is available.
The line **Status** has been updated to **Cancelled**.
- Click the **Reactivate Line** icon and the line returns to its active state as if nothing ever happened.

Contract Items

Catalog SearchItem SearchSearch for Contract Lines

STONE

Lines

Personalize | Find | View All | First 1-7 of 7 Last

Details | Order By Amount | Item Information | Default Schedule | Release Amounts | Release Quantities | Line Groupings | Spend Threshold

Line	Item	Description	UOM	Category					Include for Release	Status			
1	7503548485	STONE, CRUSHED GRADE 26	LTN	7503548					<input type="checkbox"/>	Cancelled			
2	7503548485	STONE, CRUSHED GRADE 26	LTN	7503548					<input checked="" type="checkbox"/>	Active			
3	7503532205	STONE NO. 57, STONE	LTN	7503532					<input checked="" type="checkbox"/>	Active			
4	7503532205	STONE NO. 57, STONE	LTN	7503532					<input checked="" type="checkbox"/>	Active			
5	7503532205	STONE NO. 57, STONE	LTN	7503532					<input checked="" type="checkbox"/>	Active			
6	7503532205	STONE NO. 57, STONE	LTN	7503532					<input checked="" type="checkbox"/>	Active			
7	7503532205	STONE NO. 57, STONE	LTN	7503532					<input checked="" type="checkbox"/>	Active			

View Category HierarchyCategory Search



Cancel a Contract Line (continued)

Cancel/Inactivate a Line continued:

- After reviewing the modifications, change the contract **Status** to **Approved**.
 - A pop-up window will appear with the message “This action will make the Draft version become the Current version when you Save.” Click **OK** to return to the **Contract Entry – Contract** page.
 - To commit the contract modifications, scroll down to the bottom of the **Contract Entry– Contract** page and click **Save**.

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



Cancel a Contract Line (continued)

Once a draft version's **Status** is changed to **Approved** and the contract is saved, the cancelled/inactivated line(s) cannot be re-activated. The line remains on the contract but cannot be sourced to a PO.

After approving and saving, each line will have an updated **Status** and the **Reactivate** option is no longer available.

▼ Contract Items

Catalog Search

Item Search

Search for Contract Lines

BELTS, ABRASIVE, ALUMINUM OXIDE

Lines

Personalize | Find | View All |

First 1-2 of 2 Last

Details	Order By Amount	Item Information	Default Schedule	Release Amounts	Release Quantities	Line Groupings				Include for Release	Status
Line	Item	Description		UOM	Category						
1	0051404000	ABRASIVES, PLASTONE ABRASIVES, PLASTONE		EA	0051404				<input checked="" type="checkbox"/>	Active	
2		Category Description		HUR	0051408				<input type="checkbox"/>	Cancelled	

View Category Hierarchy






















Category Search












Update Contract Line Price Adjustments

The **Price Adjustments** feature enables users to change the price by amount or percentage. **Price Adjustments** are always calculated against the contract **Base Price**. The first price adjustment may be done by percentage, however subsequent adjustments must be done by amount.

- From the **Contract Items - Lines** section, **Details** tab, click the **Price Adjustments** icon next to the line to be updated. The **Price Adjustments for Item Line XX** page will display. **Note:** The option to adjust price only available for transactions in an open status. If the contract is in an approved status and a price adjustment is necessary, a new version of the contract will need to be created.

Note: Contract lines set to **Amt Only**, as seen on the **Order By Amount** tab, cannot be modified using the **Price Adjustments** page.

STONE												
Lines												
Personalize Find View All   First 1-7 of 7 Last												
Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings Spend Threshold 												
Line	Item	Description	UOM	Category						Include for Release	Status	
1	 7503548485	STONE, CRUSHED GRADE 26 	LTN	7503548						<input checked="" type="checkbox"/>	Active	 
2	 7503548485	STONE, CRUSHED GRADE 26 	LTN	7503548						<input checked="" type="checkbox"/>	Active	 

Contract Items												
Catalog Search Item Search Search for Contract Lines												
STONE												
Lines												
Personalize Find View All   First 1-7 of 7 Last												
Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings Spend Threshold 												
Line	Item	Description	Amt Only	Merchandise Amount	Release as Milestone							
1	 7503548485	STONE, CRUSHED GRADE 26 	<input type="checkbox"/>	33,000.00	<input type="checkbox"/>							
2	 7503548485	STONE, CRUSHED GRADE 26 	<input checked="" type="checkbox"/>	93,000.00	<input type="checkbox"/>							



Update Contract Line Price Adjustments (continued)

Click on the **Price Adjustments** icon next to the line to be updated. The **Contract Entry - Price Adjustments for Item Line XX** pop-up window displays. The **Base Price** for the selected line is displayed.

Contract Price Adjustments

Contract Entry

Price Adjustments for Item Line 1

SetID STATE Contract ID 0000000000000000000045036 Version 2 Line: 1 STONE, CRUSHED GRADE 26

Price Adjustments

Find | View All First 1 of 1 Last

*Effective Date: 11/19/2019 *Status: Active *Calculation Method: Sum All Adjustments

Price Rule

Find | View All First 1 of 1 Last

Criteria

Method

Restrictions

Adjustment Detail

Personalize | Find | View All

First 1 of 1 Last

*Method	Percentage	Adjusted Price
Percentage		16.50000

OK

Cancel

Refresh

Note: The option to adjust price only available for transactions in an open status. If the contract is in an approved status and a price adjustment is necessary, a new version of the contract will need to be created.



Update Contract Line Price Adjustments (continued)

From the **Contract Entry - Price Adjustments for Item Line XX** pop-up window, for all types of **Price Adjustments**:

Price Adjustments section:

- Click on the **+** icon to add an effective-dated row.
- Enter an **Effective Date** for the price adjustment to start. Future effective-dated pricing may be used.
- The **Status** defaults to **Active**.

Price Rule Section:

- The **Sequence** defaults to **1**.
- The **Supp Loc** must be selected; in most cases, select **MAIN**.

Contract Price Adjustments

Contract Entry
Price Adjustments for Item Line 1

SetID STATE Contract ID 000000000000000000045036 Version 2 Line: 1 STONE, CRUSHED GRADE 26

Price Adjustments Find | View All First 1 of 1 Last

*Effective Date: 11/19/2019 *Status: Active *Calculation Method: Sum All Adjustments

Price Rule Find | View All First 1 of 1 Last

Criteria Method Restrictions

Sequence: 1
Supp Loc:

☐ General Adjustment
☐ Match Shipto
Ship To:
☐ Match UOM
UOM:

☐ Hard Price
☐ Ignore If Other Adjustments
☐ Stop Price Calculation Here

Adjustment Detail Personalize | Find | View All | First 1 of 1 Last

*Method	Percentage	Adjusted Price
Percentage	<input type="text"/>	16.50000

OK Cancel Refresh



Update Contract Line Price Adjustments (continued)

If the first modification to the price is based on Consumer Price Index (CPI) or Producer Price Index (PPI), as per the terms of the contract, use the **General Adjustment** method.

Method section:

- Select **General Adjustment**.

Adjustment Detail section:

- Enter the CPI or PPI **Percentage**.
Tab out of this field and the **Adjusted Price** will be updated and displayed on the new **Effective Date**.
- Click **OK** to return to the **Contract Entry – Contract** page.

To save the modifications, you must **Save** the draft version and set its **Status** to **Approved** on the **Contract Entry – Contract** page.

Contract Price Adjustments

Contract Entry

Price Adjustments for Item Line 1

SetID STATE Contract ID 000000000000000000045036 Version 2 Line: 1 STONE, CRUSHED GRADE 26

Price Adjustments Find | View All First 1 of 2 Last

*Effective Date: 11/19/2019 *Status: Active *Calculation Method: Sum All Adjustments

Price Rule Find | View All First 1 of 1 Last

Criteria

Sequence: 1

Supp Loc: MAIN

Method

☒ General Adjustment

☐ Match Shipto

Ship To:

☐ Match UOM

UOM:

Restrictions

☐ Hard Price

☐ Ignore If Other Adjustments

☐ Stop Price Calculation Here

Adjustment Detail Personalize | Find | View All | First 1 of 1 Last

*Method	Percentage	Adjusted Price
Percentage	1.5000	16.74750

OK Cancel Refresh



Update Contract Line Price Adjustments (continued)

Price changes using amount or percent can be done with a new effective dated row and entering the difference between the base price and the new price. Use the **Match UOM** method.

Method section:

- Select the **Match UOM** checkbox and the system will display the **UOM** field. The **UOM** value selected must be the same as the **UOM** on the contract line.
- **Match Ship to** – DO NOT CHECK

Adjustment Detail section:

- **Method** - This may be set to either **Amount** or **Percentage**. The adjacent field will change to either **Amount** or **Percentage** based on the **Method** you select.
- Enter the change **Amount** or **Percentage**.
 - To enter a price reduction, enter a minus (-) sign before the number in the **Amount** or **Percentage** field.
- Click **OK** to accept the changes.

Contract Price Adjustments

Contract Entry

Price Adjustments for Item Line 1

SetID STATE Contract ID 000000000000000000045036 Version 2 Line: 1 STONE, CRUSHED GRADE 26

Price Adjustments Find | View All First 1 of 1 Last

*Effective Date: 11/20/2019 *Status: Active *Calculation Method: Sum All Adjustments

Price Rule Find | View All First 1 of 1 Last

Criteria

Sequence: 1

Supp Loc: MAIN

Currency: USD

Method

☐ General Adjustment

☐ Match Shipto

Ship To:

☒ Match UOM

UOM: LTN

Restrictions

☐ Hard Price

☐ Ignore If Other Adjustments

☐ Stop Price Calculation Here

Adjustment Detail Personalize | Find | View All First 1 of 1 Last

*Min Qty	Max Qty	*Method	Percentage	Adjusted Price
1.0000	999999999.9999	Percentage		16.50000

OK Cancel Refresh



Update Contract Line Price Adjustments (continued)

Adjustment Detail section:

- **Min Qty:** The minimum quantity default is 1. To allow the user to order a **Min Qty** of less than one, set the **Min Qty** to .01. (For example, stone is priced by the ton. However, a user may order ½ of a ton.) If the **Min Qty** is left at 1, and a user orders less than 1, the user will receive an error message indicating they must either modify the quantity ordered to meet the minimum or modify the contract minimum quantity.
- The **Min Qty** must be equal to or greater than (\geq) the **Minimum Quantity** set on the item Purchasing Attributes.
- To have the new price applied to all quantities on an order, the **Min Qty** must be changed to the minimum quantity of the item.

Contract Price Adjustments

Contract Entry

Price Adjustments for Item Line 1

SetID STATE Contract ID 0000000000000000000000000045036 Version 2 Line: 1 STONE, CRUSHED GRADE 26

Price Adjustments Find | View All First 1 of 1 Last

*Effective Date: 11/20/2019 *Status: Active *Calculation Method: Sum All Adjustments

Price Rule Find | View All First 1 of 1 Last

Criteria	Method	Restrictions
Sequence: 1 Supp Loc: MAIN Currency: USD	<input type="checkbox"/> General Adjustment <input type="checkbox"/> Match Shipto Ship To: <input checked="" type="checkbox"/> Match UOM UOM: LTN	<input type="checkbox"/> Hard Price <input type="checkbox"/> Ignore If Other Adjustments <input type="checkbox"/> Stop Price Calculation Here

Adjustment Detail Personalize | Find | View All First 1 of 1 Last

*Min Qty	Max Qty	*Method	Amount	Adjusted Price
1.0000	999999999.9999	Amount	2.50000	19.00000

OK Cancel Refresh



Update Contract Line Price Adjustments (continued)

Adjustment Detail section continued:

- **Max Qty:** The maximum quantity defaults, and should remain at, **999999999.9999**.
- Click **OK** to return to the **Contract Entry – Contract** page.

Contract Price Adjustments

Contract Entry
Price Adjustments for Item Line 1

SetID STATE Contract ID 000000000000000000045036 Version 2 Line: 1 STONE, CRUSHED GRADE 26

Price Adjustments

Find | View All First 1 of 1 Last

*Effective Date: 11/20/2019 *Status: Active *Calculation Method: Sum All Adjustments

Price Rule

Find | View All First 1 of 1 Last

Criteria

Sequence: 1
Supp Loc: MAIN
Currency: USD

Method

☐ General Adjustment
☐ Match Shipto
Ship To:
☒ Match UOM
UOM: LTN

Restrictions

☐ Hard Price
☐ Ignore If Other Adjustments
☐ Stop Price Calculation Here

Adjustment Detail

Personalize | Find | View All First 1 of 1 Last

*Min Qty	Max Qty	*Method	Amount	Adjusted Price
1.0000	999999999.9999	Amount	2.50000	19.00000

OK Cancel Refresh



Update Contract Line Price Adjustments (continued)

Match UOM example:

The original base price was \$16.50 and the price is increasing to \$19.00. In the **Method** section, **Match UOM** is selected. The **UOM** field is automatically populated and matches the **UOM** on the contract line.

In the **Method** field select **Amount**. The **Amount** field appears and **2.50** is entered as this is the difference between the base price of \$16.50 and the new price of \$19.00. The **Adjusted Price** will automatically update to **\$19.00** after the **Amount** is entered and tab out of the field or Click **OK**.

Click **OK** to accept the change.

Contract Price Adjustments

Contract Entry
Price Adjustments for Item Line 1

SetID STATE Contract ID 0000000000000000000045036 Version 2 Line: 1 STONE, CRUSHED GRADE 26

Price Adjustments Find | View All First 1 of 1 Last
*Effective Date: 11/20/2019 *Status: Active *Calculation Method: Sum All Adjustments

Price Rule Find | View All First 1 of 1 Last

Criteria	Method	Restrictions
Sequence: 1 Supp Loc: MAIN Currency: USD	<input type="checkbox"/> General Adjustment <input type="checkbox"/> Match Shipto Ship To: <input checked="" type="checkbox"/> Match UOM UOM: LTN	<input type="checkbox"/> Hard Price <input type="checkbox"/> Ignore If Other Adjustments <input type="checkbox"/> Stop Price Calculation Here

Adjustment Detail Personalize | Find | View All First 1 of 1 Last

*Min Qty	Max Qty	*Method	Amount	Adjusted Price
1.0000	9999999999.9999	Amount	2.50000	19.00000

OK Cancel Refresh



- Contract Entry

Contract

SetID STATE

Contract ID 0000000000000000000045036

*Status Open

Contract Version

Version 2

Status Draft

Approval Due Date

Delete Version

Administrator/Buyer CAROLINE.HUDGINS Hudgins, Caroline S. (VDOT)

Header

Contract Items

Contract Categories

Save

Return to Search

83



Update Amount Only Contract Line Price Adjustments

Updating the price for a contract line that is marked **Amt Only** differs from updating the normal contract line pricing. **Amount Only** pricing adjustments cannot be entered on the **Price Adjustments** page and cannot be effective-dated.

To adjust **Amount Only** Lines from the **Contract Entry– Contract** page, **Contract Items - Lines** section, either:

- Uncheck the **Amt Only** checkbox and follow instructions from the prior page; or
- From the **Oder by Amount** tab click the **Line Details** icon to display the **Contract Entry– Details for Line XX** page.

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

Contract Entry
Contract

SetID STATE
Contract ID 0000000000000000000045036
*Status Open ▾
Administrator/Buyer CAROLINE.HUDGINS 🔍 Hudgins, Caroline S. (VDOT)

Contract Version
Version 2
Status Draft
Approval Due Date
Delete Version

▶ Header ?

Contract Items

Catalog SearchItem SearchSearch for Contract Lines

STONE

Lines
DetailsOrder By AmountItem InformationDefault ScheduleRelease AmountsRelease QuantitiesLine GroupingsSpend Threshold

Line	Item	Description	Amt Only	Merchandise Amount	Release as Milestone			
1	7503548485	STONE, CRUSHED GRADE 26	<input type="checkbox"/>	33,000.00	<input type="checkbox"/>			
2	7503548485	STONE, CRUSHED GRADE 26	<input checked="" type="checkbox"/>	93,000.00	<input type="checkbox"/>			



Update Amount Only Contract Line Price Adjustments (continued)

To Adjust **Amount Only** Lines continued:

- From the **Contract Entry– Details for Line XX** pop-up window:
 - Scroll down and expand the **Pricing Information** section.
 - In the **Order By Amount** section, update the **Merchandise Amount** field to the new price.
 - Scroll down to the bottom of the page and click **OK** to return to the **Contract Entry – Contract** page.
- To save the modifications, you must **Save** the draft version and set its **Status** to **Approved** on the **Contract Entry – Contract** page.

Details for Line 2

Line 2 Version 2 Supplier MATTHEWS L-001
Item ID 7503548485 STONE, CRUSHED GRADE 26

Line Details

Category 7503548 Status Active
Description Physical Nature Goods
Category ID 02073

Transaction Item Description:
STONE, CRUSHED GRADE 26

231 characters remaining
Preferred Language Item Description:
STONE, CRUSHED GRADE 26

Expand All Collapse All

▶ **Item Information**

▶ **Release Amounts / Quantities**

▼ **Pricing Information**

☒ Use Contract Base Price ☐ Use Supp Price UOM Adjustments
☐ Price Can Be Changed on Order ☐ Use Supplier Price Shipto Adj

Price Date PO Date Adjust Before Contract Adjustments
Price Qty Line Quantity
Qty Type Quantity To Date

Order By Amount

☒ Amount Only
Merchandise Amount 93000.00



View Contract Change History

Use the **Contract Change History** page, to view all changes to a contract. This page details the contract version, change type, description, date, reason code, and individual who made the change.

Navigate to the **Contract Change History** page using the following two methods:

- Navigate using the following path:

Main Menu > Procurement Contracts > Add/Update Contracts

- Click on the **View Changes** hyperlink on the **Contract Entry – Contract** page.

Note: Also on the **Contract Entry – Contract** page is the **Current Change Reason** hyperlink which may be used to view the last change reason code and any related comments.

The screenshot displays the 'Contract Entry - Contract' page. The top navigation bar includes 'Favorites', 'Main Menu', 'Procurement Contracts', and 'Add/Update Contracts'. The page title is 'Contract Entry Contract'. The contract details section shows: SetID STATE, Contract ID 0000000000000000000045036, Status Open, Version 2, and Administrator/Buyer CAROLINE.HUDGINS. The 'Header' section contains various fields for contract information, including Contract Style, Process Option, Supplier, Supplier ID, Primary Contact, Supplier Contract Ref, Description, Master Contract ID, Begin Date, Expire Date, Renewal Date, and Control Type. On the right side, there is a list of links including 'View Changes' and 'Current Change Reason', both of which are highlighted with a red box.



View Contract Change History (continued)

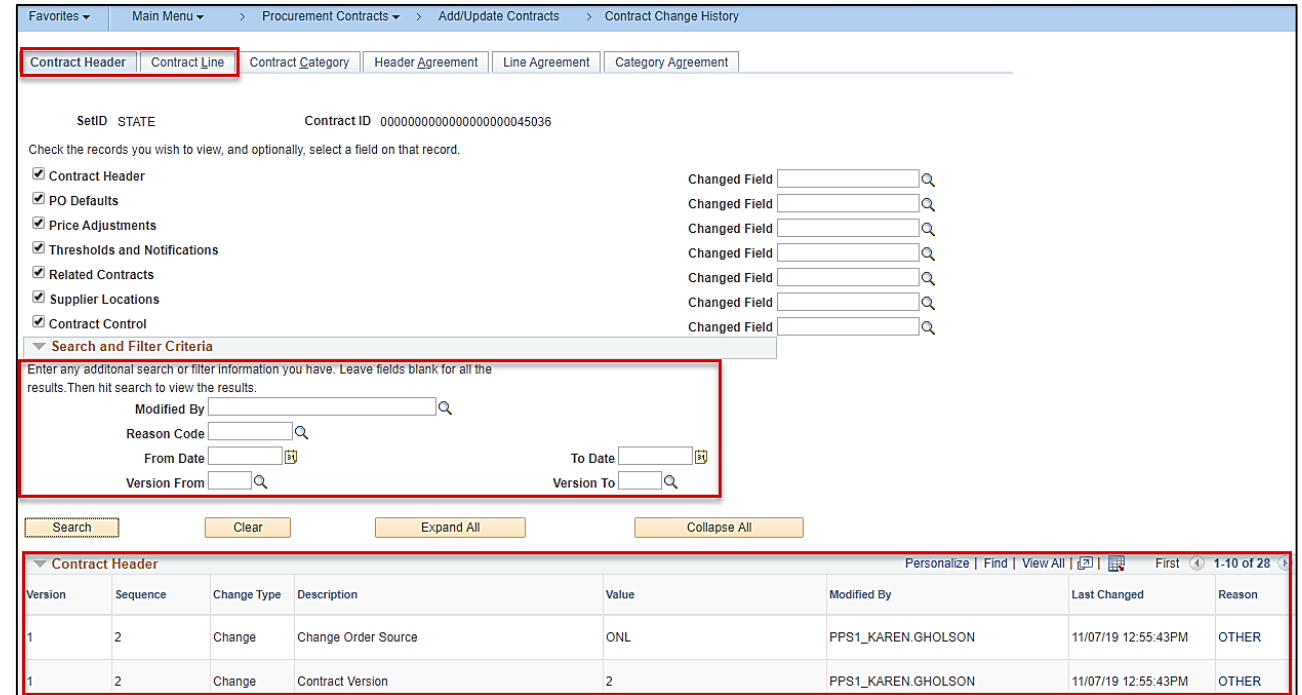
From the **Contract Change History** page, it is possible to search to locate a specific change using the fields in the **Search and Filter Criteria** section or view all results by leaving all fields blank and clicking the **Search** button.

Main Menu > Procurement Contracts > Add/Update Contracts > Contract Change History

Change Type:

- **Change** indicates a changed field and its value.
- **Original** indicates the original field and its value. The **Original** value applies only to the original contract with a sequence of zero.

On the **Contract Change History** page, only the **Contract Header** and **Contract Line** tabs are used.



The screenshot shows the 'Contract Change History' page. At the top, there is a breadcrumb trail: 'Main Menu > Procurement Contracts > Add/Update Contracts > Contract Change History'. Below this, there are tabs for 'Contract Header', 'Contract Line', 'Contract Category', 'Header Agreement', 'Line Agreement', and 'Category Agreement'. The 'Contract Header' tab is selected. The page displays 'SetID: STATE' and 'Contract ID: 00000000000000000000000045036'. A section titled 'Check the records you wish to view, and optionally, select a field on that record.' contains several checkboxes: 'Contract Header', 'PO Defaults', 'Price Adjustments', 'Thresholds and Notifications', 'Related Contracts', 'Supplier Locations', and 'Contract Control'. To the right of these checkboxes are six 'Changed Field' labels, each followed by a search icon. Below this is a 'Search and Filter Criteria' section with a text box for 'Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results.' and several search fields: 'Modified By', 'Reason Code', 'From Date', 'To Date', 'Version From', and 'Version To'. Below the search fields are four buttons: 'Search', 'Clear', 'Expand All', and 'Collapse All'. At the bottom, there is a table titled 'Contract Header' with columns: 'Version', 'Sequence', 'Change Type', 'Description', 'Value', 'Modified By', 'Last Changed', and 'Reason'. The table contains two rows of data.

Version	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason
1	2	Change	Change Order Source	ONL	PPS1_KAREN.GHOLSON	11/07/19 12:55:43PM	OTHER
1	2	Change	Contract Version	2	PPS1_KAREN.GHOLSON	11/07/19 12:55:43PM	OTHER



Cancel/Close Contracts

Cancel or close a contract from the **Contract Entry - Contract** page.

Navigate to this page using the following path:

Main Menu > Procurement Contracts > Add/Update Contracts

Cancel:

A contract can be cancelled when there are no related requisitions or POs.

Close:

Once a contract has expired or otherwise ended, and is not going to be renewed, it must be **Closed**.

To Cancel/Close:

- Set the **Status** to **Cancelled** or **Closed**.
- Unselect the **Send Date/Amount Notification** checkbox on the **Thresholds & Notifications** page to stop future notifications.
- Scroll to the bottom of the page and click **Save**.

The screenshot shows the 'Contract Entry - Contract' page. The breadcrumb trail at the top is 'Favorites > Main Menu > Procurement Contracts > Add/Update Contracts'. The page title is 'Contract Entry Contract'. The contract details include: SetID, STATE, Contract ID 000000000000032193, Contract Version 3, Status Current, Approved Date 09/19/2012, and Administrator/Buyer IAMS, CALISHA. A dropdown menu for '*Status' is open, showing options: Closed (selected), Approved, Canceled, Closed, On-Hold, and Open. The 'Contract Style' is 'Purchase Order'. A 'Dispatch' button is visible at the bottom right.



Lesson 3: Summary

3

Maintain Contracts

In this lesson, you learned:

- When searching for a contract, you can search for a specific contract by entering a contract ID.
- A material update to a contract requires a new version to be created.
- You can view changes to a contract, such as changes to the contract header or contract lines, on the **Contract Change History** page.
- You can cancel a contract that has not been added to a requisition or a PO. You cancel a contract using the **Contract Entry – Contract** page at the header level by selecting the contract **Status** of **Cancelled**.



Lesson 3: Hands-On Practice

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Course Summary

PR348

Entering Procurement Contracts

In this course, you learned how to:

- Understand procurement contract concepts, processes, integrations, and interfaces
- Enter, update, and maintain contracts
- Enter contract thresholds, notifications, and items
- Understand contract versioning
- Close or cancel contracts



Course Evaluation

Congratulations! You successfully completed the **501 PR348: Entering Procurement Contracts** course.

Your instructor will provide instructions on how to access the evaluation survey for this course.





Appendix

- Key Terms
- Allowed Extensions on Attachments in Cardinal
- Flowchart Key



Key Terms

Attachments: Attachments are additional files (documentation) that provide more detail about the document and that support agreement verification steps.

Contract Modification: Modifications are updates or changes to an existing contract. A modification to a contract can result from changes in source transactions, contract terms, etc. Modifications are captured using versioning.

Contract Reference: Displays additional contract information including **Resp Org** and **Contract Category**.

Contract Version: Contract versions refer to the revision of a purchasing contract transaction. This functionality provides you a method to revise the transactional contract as a new draft version while the prior version of the transactional contract is still active within procurement.

Corporate Contract: A contract used statewide by all state agencies or business units. A non-corporate contract is a contract that is restricted by business unit; business units are assigned on the **PO Defaults** page in Contract Entry.

Procurement Contracts: A procurement contract is a contract that exists as the binding understanding between a state agency and a supplier. This includes procurement contract information such as supplier name, maximum amounts, terms & conditions, line items, and pricing. Procurement contracts may originate from Strategic Sourcing events, SiteManager, or outside of Cardinal.

Retainage: Retainage is a portion of the agreed upon contract price deliberately withheld until the work is substantially complete to assure that contractor or subcontractor will satisfy its obligations and complete a construction project.





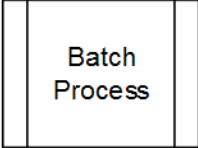
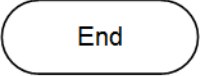
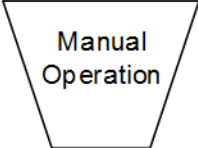
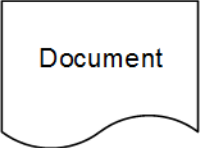
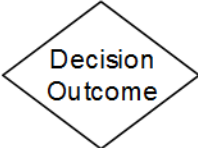
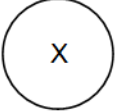
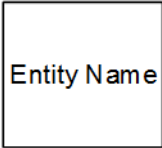
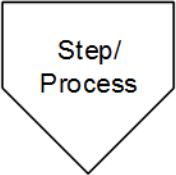
Allowed Extensions on Attachments in Cardinal

The following is a list of file extensions that are allowed on attachments uploaded to Cardinal. You should only attach key supporting documents that either enhance the electronic Cardinal transaction approval process or are instrumental as part of the transaction history. The Cardinal system should not be relied upon to maintain agency documentation and should not be considered the official retention source of the agency. Supporting documents, as required by all applicable regulatory/governing bodies, should be maintained by the agency apart from the Cardinal attachment functionality.

Allowed Extensions on Attachments in Cardinal		
.BMP	.CSV	.DOC
.DOCX	.JPE	.JPEG
.JPG	.MSG	.PDF
.PNG	.PST	.RTF
.TIF	.TIFF	.TXT
.XLS	.XLSX	.XML



Flowchart Key

	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is preformed manually.		Depicts a document of any kind, either electronic or hard copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.