

About Professional Services Contracts

Cardinal allows Contract Administrators to add and manage Professional Services contracts at any time. As an enhancement, each contract has a related Purchase Order specific to the contract, so that all Task Orders and vendor invoices can be simply tracked. Cardinal identifies contract activities to include vouchers and payments to date. Any Supplemental Agreements or Modifications to a contract are done so by creating a new Version. Versioning tracks contract changes, where the current version makes all previous versions unavailable.

ENTERING A NEW CONTRACT:

- 1 Navigate: **Main Menu > Procurement Contracts > Add/Update Contracts**



- 2 Select **Add a New Value** tab. SetID = **STATE**
- 3 Contract ID defaults to **NEXT**. DO NOT change.
- 4 Contract Process Option defaults to **Purchase Order**. DO NOT change.
- 5 Click **Add** button.

Contract Entry

Contract

SetID: STATE [Copy From Contract](#)

Contract ID: NEXT

*Status: Approved

Administrator/Buyer: **MIKE HALL** Hall, Mike (VDOT)

Contract Version

Version: 1 Status: Current

Approval Due Date: []

Header

Process Option: Purchase Order

Vendor: **PARSONS BR-00** [Vendor Search](#) [Contract Activities](#) [Activity Log](#)

*Vendor ID: 0000002102 [Parsons Brinckerhoff Inc](#) [Document Status](#)

*Begin Date: 01/26/2012 [Primary Contact Info](#) [Thresholds & Notifications](#)

Expire Date: 01/25/2014 [Contract Releases](#) [Contract Reference](#)

Renewal Date: []

Currency: USD [CRRNT](#)

Primary Contact: []

Vendor Contract Ref: **John Jones- XXX District CA**

Description: **CEI INSPECTION SERVICES-NOVA**

Master Contract ID: []

Tax Exempt

Amount Summary

Maximum Amount: **5,000,000.00** USD

Line Item Released Amount: 0.00

Category Released Amount: 0.00

Open Item Released Amount: 0.00

Total Released Amount: 0.00

- 6 Enter values specific to your contract, e.g., **Administrator/Buyer**, **Vendor ID**, **Begin Date**, **Expire Date**, **Vendor Contract Ref** (i.e. Contract Administrator), **Description** and **Maximum Amount**.

Note: If multiple Contract Administrators are assigned, use the **Contract Activities** hyperlink to keep additional records.

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date: 01/26/2012

Corporate Contract Adjust Vendor Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order *Dispatch Method: [Print](#) [Dispatch](#)

[PO Defaults](#) [Add Open Item Price Adjustments](#) [Price Adjustment Template](#)

Contract Items

[Catalog Search](#) [Item Search](#) [Search for Contract Lines](#)

Lines [Order By Amount](#) [Item Information](#) [Default Schedule](#) [Release Amounts](#) [Release Quantities](#) [Line Groupings](#) [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

Line	Item	Description	UOM	Category	Include for Release	Status
1		CEI SERVICES- NOVA	HUR	9184201	<input checked="" type="checkbox"/>	Active

[View Category Hierarchy](#) [Category Search](#)

Contract Categories

Lines [Details](#) [Pricing Options](#) [Release Amounts](#) [Customize](#) [Find](#) [View All](#) [First](#) [1 of 1](#) [Last](#)

Line	Category	Description	Status
1			Active

- 7 Enter **Description**, **UOM**, and **Category**.

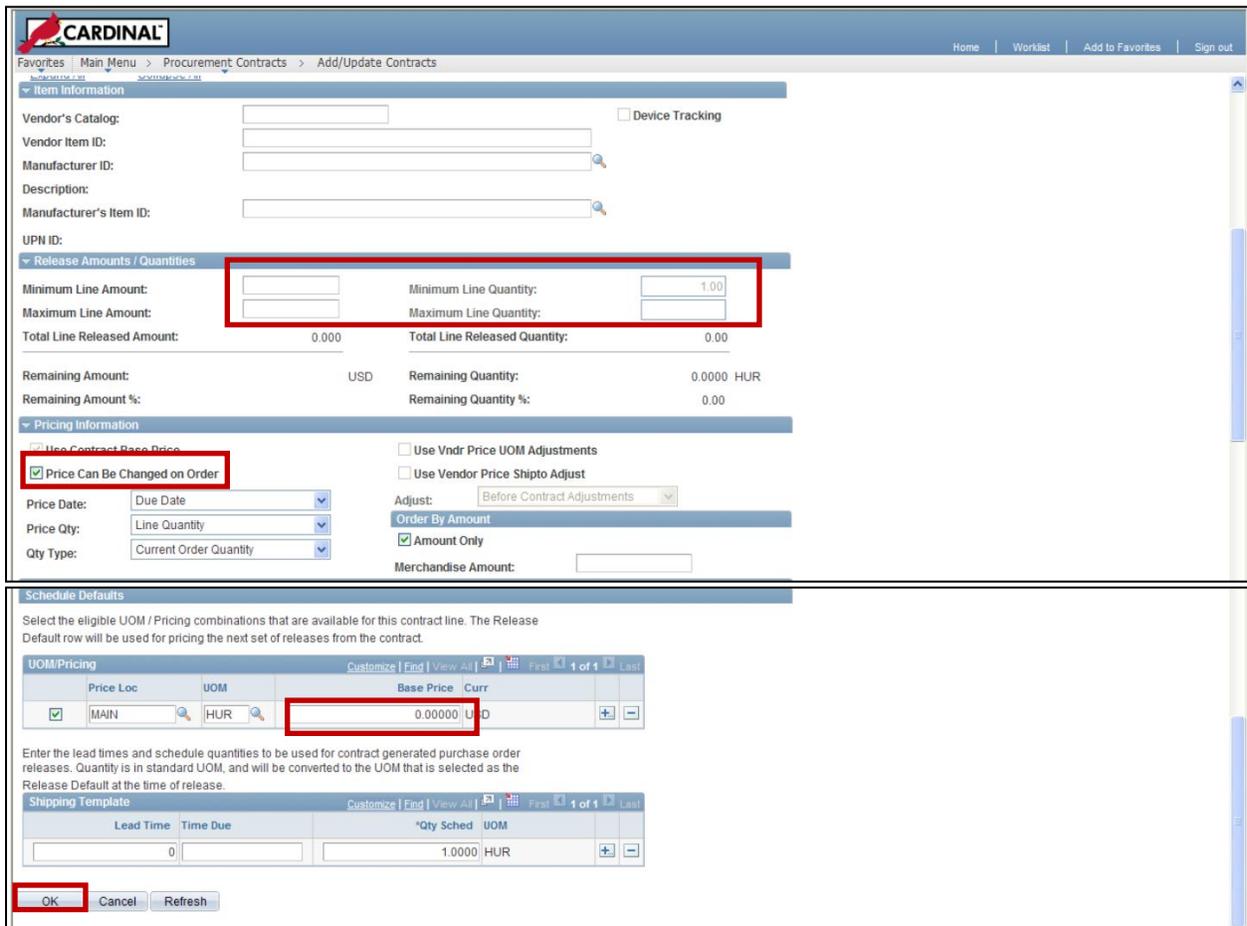
- 8 Click on **Order By Amount** tab.

The screenshot shows the 'Add/Update Contracts' interface. Under 'Contract Items', there is a table with columns: Line, Item, Description, Amt Only, Merchandise Amount, and Release as Milestone. The first row (Line 1) has a red box around the 'Line Details' icon in the 'Item' column and another red box around the checked 'Amt Only' checkbox. Below this is the 'Contract Categories' section with a table showing 'Active' status.

- 9 Check **AMT Only** box.
- 10 Click on the **Line Details** icon.

The screenshot shows the 'Details for Line 1' screen. It displays contract information: Contract ID: NEXT, Version: 1, Vendor: PARSONS BR-001, Line: 1, Item ID: CEI SERVICES-NOVA. Under 'Line Details', Category: 9184201, Description: CEI SERVICES-NOVA, Status: Active, Category ID: 08476, and Physical Nature: Services (highlighted with a red box). At the bottom, the 'Expand All' hyperlink is highlighted with a red box.

- 11 **Physical Nature**: Select Goods or Services from the dropdown menu.
- 12 Click on the **Expand All** hyperlink



The screenshot shows the 'Add/Update Contracts' screen in the CARDINAL system. The interface is divided into several sections:

- Item Information:** Fields for Vendor's Catalog, Vendor Item ID, Manufacturer ID, Description, and Manufacturer's Item ID. A 'Device Tracking' checkbox is also present.
- Release Amounts / Quantities:** Fields for Minimum Line Amount, Maximum Line Amount, Minimum Line Quantity (set to 1.00), and Maximum Line Quantity. Summary fields show Total Line Released Amount (0.000) and Total Line Released Quantity (0.00). Remaining Amount and Remaining Quantity are also displayed.
- Pricing Information:** Includes checkboxes for 'Price Can Be Changed on Order' (checked), 'Use Contract Base Price', 'Use Vndr Price UOM Adjustments', and 'Use Vendor Price Shipto Adjust'. Price Date is set to 'Due Date', Price Qty to 'Line Quantity', and Qty Type to 'Current Order Quantity'. The 'Adjust:' dropdown is set to 'Before Contract Adjustments'.
- Schedule Defaults:** A table for 'UOM/Pricing' with columns for Price Loc, UOM, Base Price, and Curr. The first row shows 'MAIN', 'HUR', '0.00000', and 'U'. Below this is a 'Shipping Template' table with columns for Lead Time, Time Due, *Qty Sched, and UOM. The first row shows '0', an empty field, '1.0000', and 'HUR'.

Red boxes in the original image highlight the following elements:

- The 'Release Amounts / Quantities' section.
- The 'Price Can Be Changed on Order' checkbox.
- The 'Base Price' field in the UOM/Pricing table.
- The 'OK' button at the bottom of the Schedule Defaults section.

- 13 Enter **Minimum Line Amount / Maximum Line Amount** and **Minimum Line Quantity / Maximum Line Quantity** (as applicable).
- 14 Check **Price Can Be Changed on Order** box.
- 15 Enter **Base Price** (as applicable)
- 16 Click **OK**

Contract Entry
Contract

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

Administrator/Buyer: MIKE HALL Hall, Mike (VDOT)

Header

Process Option: Purchase Order [Add Comments](#) [Activity Log](#)
 Vendor: PARSONS BR-00 [Vendor Search](#) [Contract Activities](#) [Document Status](#)
 *Vendor ID: 0000002102 Parsons Brinckerhoff Inc Primary Contact Info [Thresholds & Notifications](#)
 *Begin Date: 01/26/2012 [Contract Releases](#)
 Expire Date: 01/25/2014 **Contract Reference**
 Renewal Date:
 Currency: USD CRRNT **Amount Summary**
 Primary Contact:
 Vendor Contract Ref: John Jones- XXX Distri CA
 Description: CEI INSPECTION SERVICES-NOVA
 Master Contract ID:
 Tax Exempt

Maximum Amount: 5,000,000.00 USD
 Line Item Released Amount: 0.00
 Category Released Amount: 0.00
 Open Item Released Amount: 0.00
 Total Released Amount: 0.00

[Order Contract Options](#)

17 Click on **Contract Reference** hyperlink.

Contract Reference

SetID: STATE Contract Version: 1
 Contract ID: NEXT

Contract Information

Contract Category: CONSULTANT - PROF. INSPECTION GL Business Unit: 50100
 Estimated Contract Value: 5,000,000 Responsible Org: 10003

Supplement Agreement

Supplement Number: Supplement Date:
 Supplement Amount:

Contract Renewal Options

Renewal Date From: 01/26/2014 Renewal Date To: 01/25/2015
 Original Number of Renewal Options: 2 Current Renewal Period: 0

OK Cancel Refresh

18 Enter **Contract Category**, **Estimated Contract Value**, **Renewal Date From** and **Renewal Date To** values.

19 Click **OK**.

Contract Entry
Contract

SetID: STATE [Copy From Contract](#)

Contract ID: NEXT

*Status: Approved

Administrator/Buyer: MIKE.HALL Hall, Mike (VDOT)

Contract Version
Version: 1 Status: Current
[New Version](#) Approval Due Date: []

Header

Process Option: Purchase Order [Add Comments](#) [Activity Log](#)

Vendor: PARSONS BR-00 [Vendor Search](#) [Contract Activities](#) [Document Status](#)
Primary Contact Info **Thresholds & Notifications**

*Vendor ID: 0000002102 [Parsons Brinckerhoff Inc](#)

*Begin Date: 01/26/2012 [Contract Releases](#)

Expire Date: 01/25/2014 [Contract Reference](#)

Renewal Date: []

Currency: USD [CRRNT](#)

Primary Contact: []

Vendor Contract Ref: John Jones - XXX District CA

Description: CEI INSPECTION SERVICES-NOVA

Master Contract ID: []

Tax Exempt

Amount Summary

Maximum Amount:	5,000,000.00	USD
Line Item Released Amount:	0.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
Total Released Amount:	0.00	

[Order Contract Options](#)

20 Click on **Thresholds & Notifications** hyperlink.

Contract Entry
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: 01/25/2014 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

Notify User when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount.

Amount Less than Maximum: 4,750,000.00 USD

Percent Less than Maximum: 95.00

Notification Amount: 250,000.00

Notification Assignments

Notification Type	User ID	User Description	Email Address
Maximum A	JEFF.RODG@	RODGERS, JEFFREY	xxjeff.rodgers@vdot.virginia.gov

Amount Summary

Maximum Amount:	5,000,000.00	USD
Total Line Released Amount:	0.00	
Total Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
Total Released Amount:	0.00	

21 Check **Send Date / Amount Notification** box.

22 Enter **Percent Less than Maximum** (example shown).

23 Select **User ID** and **Maximum Amount** from the dropdown box under **Notification Type**.

24 Click **OK**

Contract Entry
Contract

SetID: STATE Copy From Contract
 Contract ID: NEXT
 *Status: Approved
 Administrator/Buyer: MIKE HALL Hall, Mike (VDOT)

Contract Version
 Version: 1 Status: Current
 Approval Due Date: []

Header

Process Option: Purchase Order
 Vendor: PARSONS BR-00 Vendor Search
 *Vendor ID: 0000002102 Parsons Brinckerhoff Inc
 *Begin Date: 01/26/2012
 Expire Date: 01/25/2014
 Renewal Date: []
 Currency: USD CRRNT
 Primary Contact: []
 Vendor Contract Ref: John Jones- XXX Distri CA
 Description: CEI INSPECTION SERVICES-NOVA
 Master Contract ID: []
 Tax Exempt

[Add Comments](#)
[Activity Log](#)
[Contract Activities](#)
[Document Status](#)
[Primary Contact Info](#)
[Thresholds & Notifications](#)
[Contract Releases](#)
[Contract Reference](#)

Amount Summary

Maximum Amount:	5,000,000.00	USD
Line Item Released Amount:	0.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
Total Released Amount:	0.00	

Order Contract Options

25 Click on **Add Comments** hyperlink.

Contract Entry
Header Comments

SetID: STATE Contract ID: NEXT Version: 1

*Sort Method: Comment Time Stamp *Sort Sequence: Ascending Sort

Comments

Use Standard Comments Comment Status: Active

This contract is a result of RFP # XXXXXX for CEI services in the Northern Region. This is a Task Order type contract, not to exceed 5,000,000 for the first term. Etc, Etc, Etc.

Send to Vendor Show at Receipt Copy to Purchase Order
 Show at Voucher

Associated Document

Attachment: Email

From -> CNT STATE-NEXT

26 Enter comments (up to 2500 characters).

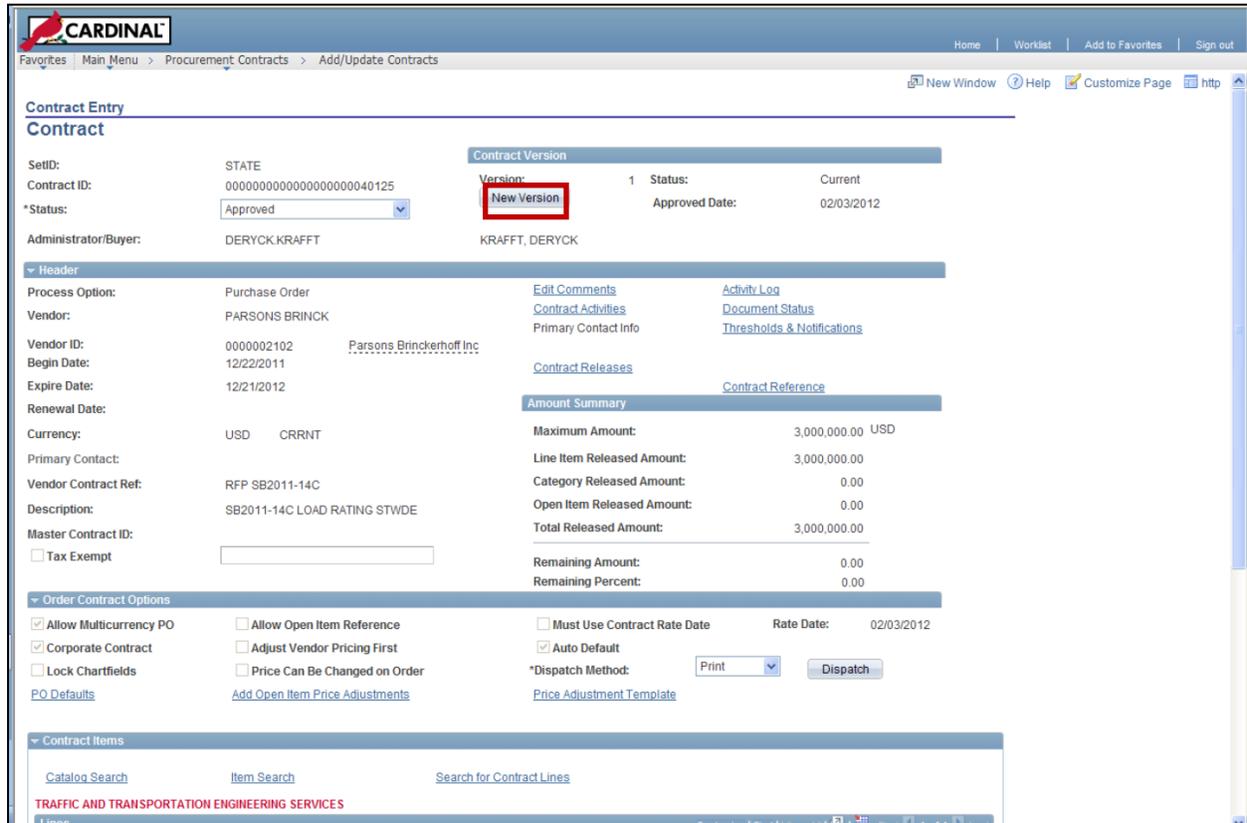
27 Check **Send to Vendor** box (if you want the comment to print on the Contract and PO).

28 **NOTE:** You may attach electronic document(s), e.g. RFPs, Supplemental Agreements, Contractor Performance Reports, etc. You may also add up to 999 additional comments fields by checking the blue + box.

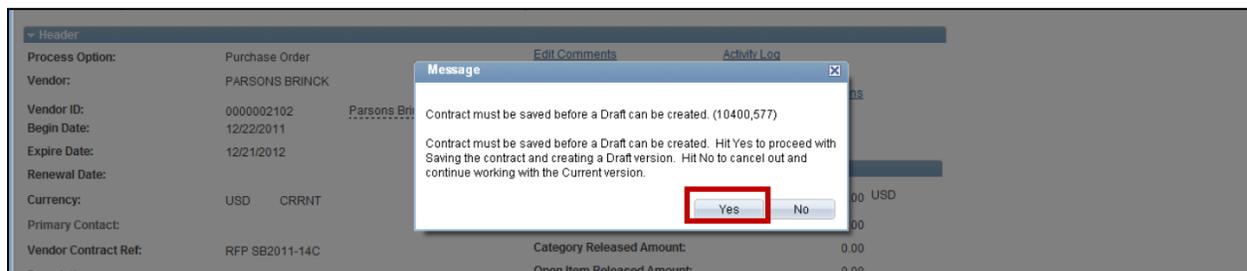
29 Click **OK**

UPDATING A PROCUREMENT CONTRACT:

- 1 Navigate as shown and display your existing contract.



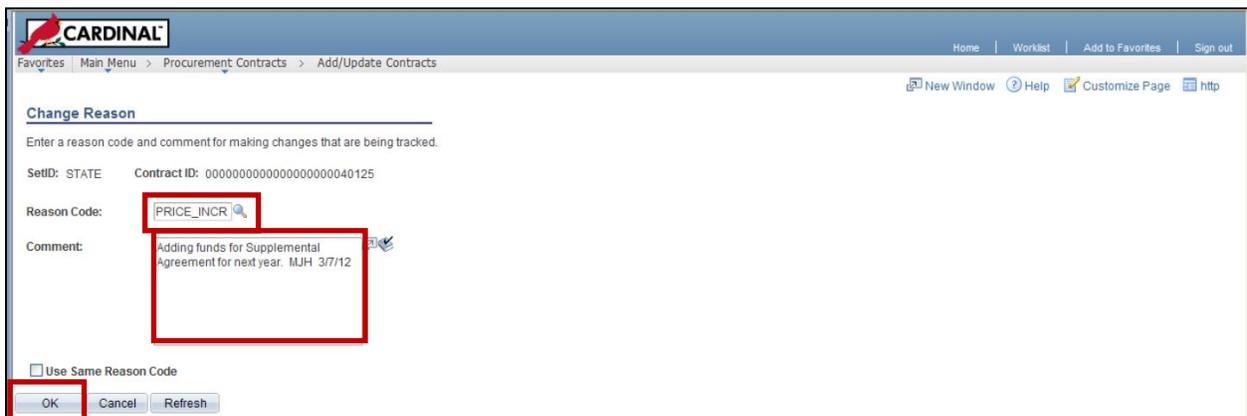
- 2 Click on **New Version** button.



- 3 Message is displayed as shown.
- 4 Click **Yes** to update the contract with new values.



5 Change Reason page displays as shown.



6 Select change reason and insert a comment supporting the change, to include your identifier and date.

7 Click **OK**.

Contract Entry
Contract

SetID: STATE
Contract ID: 0000000000000000000040125
*Status: Open
Administrator/Buyer: DERYCK.KRAFFT

Contract Version
Version: 2 Status: Draft
Approval Due Date: []

Header

Process Option: Purchase Order
Vendor: PARSONS BRINCKHOFF INC
*Vendor ID: 0000002102
*Begin Date: 12/22/2011
Expire Date: 12/21/2012
Renewal Date: []
Currency: USD
Primary Contact: []
Vendor Contract Ref: RFP SB2011-14C
Description: SB2011-14C LOAD RATING STWDE
Master Contract ID: []
 Tax Exempt

Amount Summary

Maximum Amount:	3,000,000.00 USD
Line Item Released Amount:	3,000,000.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	3,000,000.00
Remaining Amount:	0.00
Remaining Percent:	0.00

8 All Fields (to include **Maximum Amount**) are open for edit.

Contract Entry
Contract

SetID: STATE
Contract ID: 0000000000000000000040125
*Status: Open
Administrator/Buyer: DERYCK.KRAFFT

Contract Version
Version: 2 Status: Draft
Approval Due Date: []

Header

Process Option: Purchase Order
Vendor: PARSONS BRINCKHOFF INC
*Vendor ID: 0000002102
*Begin Date: 12/22/2011
Expire Date: 12/21/2012
Renewal Date: []
Currency: USD
Primary Contact: []
Vendor Contract Ref: RFP SB2011-14C
Description: SB2011-14C LOAD RATING STWDE
Master Contract ID: []
 Tax Exempt

Amount Summary

Maximum Amount:	4,000,000.00 USD
Line Item Released Amount:	3,000,000.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	3,000,000.00
Remaining Amount:	1,000,000.00
Remaining Percent:	25.00

Order Contract Options

Allow Multicurrency PO
 Corporate Contract
 Lock Chartfields
PO Defaults

Allow Open Item Reference
 Adjust Vendor Pricing First
 Price Can Be Changed on Order
Add Open Item Price Adjustments

Must Use Contract Rate Date
Rate Date: 02/03/2012
 Auto Default
*Dispatch Method: Print
Dispatch

Contract Items

Catalog Search Item Search Search for Contract Lines

TRAFFIC AND TRANSPORTATION ENGINEERING SERVICES

9 Change/Update Price (example shown). **NOTE: Remaining Amount** values have changed.

10 Click on **Contract Reference** hyperlink.

Contract Entry

Contract Reference

SetID: STATE
 Contract ID: 0000000000000000000040125 Contract Version: 2

Contract Information

Contract Category: CONSULTANT - PROFESSIONAL GL Business Unit: 50100
 Estimated Contract Value: 3,000,000.000 Responsible Org: 10004

Supplement Agreement

Supplement Number: 1 Supplement Date: 03/07/2012
 Supplement Amount: 1,000,000

Contract Renewal Options

Renewal Date From: 12/22/2011 Renewal Date To: 12/21/2013
 Original Number of Renewal Options: 2 Current Renewal Period:

OK Cancel Refresh

11 Enter **Supplement Agreement** information.

12 Click **OK**.

Contract Entry

Contract

SetID: STATE Contract Version: 2 Status: Draft
 Contract ID: 0000000000000000000040125 Version: 2 Status: Draft
 *Status: Open Approval Due Date:

Administrator/Buyer: DERYCK.KRAFFT KRAFFT, DERYCK

Header

Process Option: Purchase Order **Edit Comments** Activity Log
 Vendor: PARSONS BRINCKERHOFF INC Vendor Search Document Status
 *Vendor ID: 0000002102 Parsons Brinckerhoff Inc Primary Contact Info
 *Begin Date: 12/22/2011 Contract Releases
 Expire Date: 12/21/2012 Contract Reference
 Renewal Date: Currency: USD CRRNT
 Primary Contact: Amount Summary
 Vendor Contract Ref: RFP SB2011-14C Maximum Amount: 4,000,000.00 USD
 Description: SB2011-14C LOAD RATING STWDE Line Item Released Amount: 3,000,000.00
 Master Contract ID: Total Released Amount: 3,000,000.00
 Tax Exempt Remaining Amount: 1,000,000.00
 Remaining Percent: 25.00

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date: 02/03/2012
 Corporate Contract Adjust Vendor Pricing First Auto Default
 Lock Chartfields Price Can Be Changed on Order *Dispatch Method: Print Dispatch
[PO Defaults](#) [Add Open Item Price Adjustments](#) [Price Adjustment Template](#)

13 Click on **Edit Comments** hyperlink.

14 Edit comment shown or add a comment by clicking the blue + sign.

15 Add **Comments** (example shown). **Note:** you may attach a pdf. and/or other related documents, using the **Attach** button.

16 Click **OK**.

Contract Entry

Contract

SetID: STATE
 Contract ID: 0000000000000000000040125
 *Status: **Approved** (Selected)
 Administrator/Buyer: KRAFFT, DERYCK

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

Header
 Process Option: Open
 Vendor: PARSONS BRINCKHOFF
 *Vendor ID: 0000002102
 *Begin Date: 12/22/2011
 Expire Date: 12/21/2012
 Renewal Date: []
 Currency: USD
 Primary Contact: []
 Vendor Contract Ref: RFP SB2011-14C
 Description: SB2011-14C LOAD RATING STWDE
 Master Contract ID: []
 Tax Exempt

Amount Summary

Maximum Amount:	4,000,000.00	USD
Line Item Released Amount:	3,000,000.00	
Category Released Amount:	0.00	
Open Item Released Amount:	0.00	
Total Released Amount:	3,000,000.00	
Remaining Amount:	1,000,000.00	
Remaining Percent:	25.00	

Order Contract Options

Allow Multicurrency PO
 Corporate Contract
 Lock Chartfields

Allow Open Item Reference
 Adjust Vendor Pricing First
 Price Can Be Changed on Order

Must Use Contract Rate Date Rate Date: 02/03/2012
 Auto Default
 *Dispatch Method: [Print] [Dispatch]

Contract Items

Catalog Search Item Search Search for Contract Lines

TRAFFIC AND TRANSPORTATION ENGINEERING SERVICE

17 Change Contract Status to Approved.

Contract Items

Catalog Search Item Search Search for Contract Lines

TRAFFIC AND TRANSPORTATION ENGINEERING SERVICE

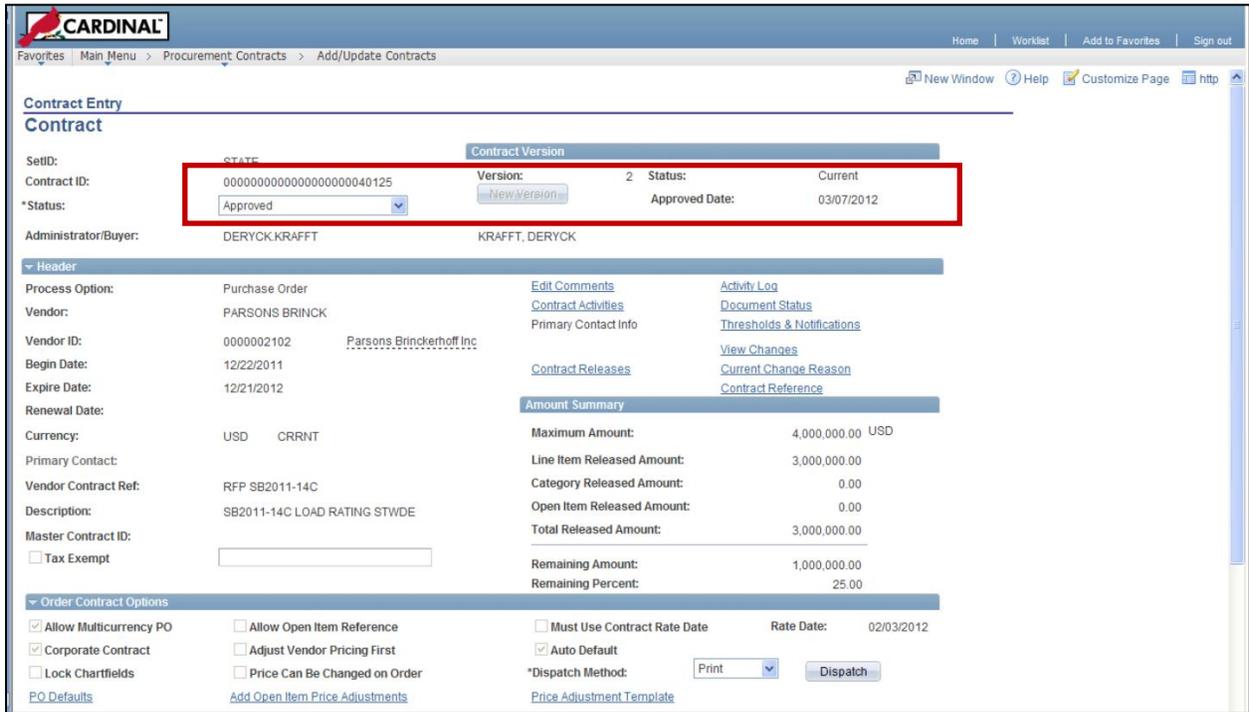
Line	Item	Description	UOM	Category	Include for Release	Status
1		RFP 2011-14C LIMITED SERVICE TERM CONTRACT FOR PERFORMING LOAD RATINGS OF EXISTING STRUCTURES - STATEWIDE	HUR	9259301	<input checked="" type="checkbox"/>	Active

Contract Categories

Line	Category	Description	Status
1			Active

Save Return to Search Notify Refresh Add Update/Display

18 Click Save.



Contract Entry

Contract

SetID: STATE Contract Version

Contract ID: 0000000000000000000040125 Version: 2 Status: Current

*Status: Approved Approved Date: 03/07/2012

Administrator/Buyer: DERYCK KRAFFT KRAFFT, DERYCK

Header

Process Option: Purchase Order [Edit Comments](#) [Activty Log](#)

Vendor: PARSONS BRINCK [Contract Activities](#) [Document Status](#)

Vendor ID: 0000002102 Parsons Brinckerhoff Inc. [Primary Contact Info](#) [Thresholds & Notifications](#)

Begin Date: 12/22/2011 [View Changes](#)

Expire Date: 12/21/2012 [Contract Releases](#) [Current Change Reason](#)

Renewal Date: [Contract Reference](#)

Currency: USD CRRNT

Primary Contact:

Vendor Contract Ref: RFP SB2011-14C

Description: SB2011-14C LOAD RATING STWDE

Master Contract ID:

Tax Exempt

Amount Summary

Maximum Amount:	4,000,000.00 USD
Line Item Released Amount:	3,000,000.00
Category Released Amount:	0.00
Open Item Released Amount:	0.00
Total Released Amount:	3,000,000.00
Remaining Amount:	1,000,000.00
Remaining Percent:	25.00

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date: 02/03/2012

Corporate Contract Adjust Vendor Pricing First Auto Default

Lock Chartfields Price Can Be Changed on Order *Dispatch Method:

[PO Defaults](#) [Add Open Item Price Adjustments](#) [Price Adjustment Template](#)

19 Contract Version 2 Status changes from **Draft** to **Current**.

NOTE: The existing related Purchase Order is to be updated to match the new contract value.

See: **Professional Services Purchase Orders** Jobaid for additional information.