



Procurement Contract Overview

Understanding Contract Versioning:

Core-CT allows for the creation of new versions to existing contracts. Versioning is only used when the *expiration date* of a current contract is being changed. All other changes are made by updating and saving the current version of the contract.

Contracts can have three version statuses:

- Draft
- Current
- History

A contract may can have only one Draft version, one Current version, but multiple History versions.

Version, Version Status, and Expiration Date are displayed in contract search results for ease of access to see this type of change.

Navigation:

Procurement Contracts > Add / Update Contracts

Create New Contract Version:

1. Under the **Find and Existing Value** tab, enter the designated fields to find the desired contract
2. Click **Search**

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

Contract Version =

Version Status = Current

Contract Style begins with Current, Draft, History

Contract Process Option =

Short Supplier Name begins with

Vendor Name begins with

Master Contract ID begins with

Description begins with

Correct History Case Sensitive

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

Search Clear Basic Search Save Search Criteria

3. Click the desired contract
- Note: You can view the contract version, version status, and expiration date without going to the individual contract page.

Search Results
300 of 78857 results are displayed.

View All

SetID	Contract ID	Contract Version	Version Status	Contract Style	Contract Process Option	Supplier ID	Short Supplier Name	Vendor Name	Expire Date	Contract Status	Master Contract ID	Description
STATE TESTFY14		2	Draft	General Contract	General	CSUM4	CSU-EAST-001	EASTERN CT STATE UNIVERSITY	09/30/2013	Open	(blank)	(blank)
STATE TESTFY14		1	Current	General Contract	General	CSUM4	CSU-EAST-001	EASTERN CT STATE UNIVERSITY	09/30/2013	Approved	(blank)	(blank)
STATE TEST1234		1	Current	Purchase Order	Order	0000010009	061043422F-001	SUBURBAN STATIONERS INC	09/20/2020	Approved	(blank)	(blank)
STATE TEST123		1	Current	Purchase Order	Order	0000010009	061043422F-001	SUBURBAN STATIONERS INC	09/12/2020	Open	(blank)	(blank)
STATE TEST		1	Current	Purchase Order	Order	0000011180	060860903F-001	ALSO CORNERSTONE INC	06/30/2007	Closed	(blank)	test
STATE TA-23400-170-8-8000		1	Current	Purchase Order	Order	0000011129	061347778F-001	BARAN INSTIT OF TECHNOLOGY INC	09/30/2004	Canceled	(blank)	TAA TRAINING
STATE STORMWISE		1	Current	Purchase Order	Order	0000020266	060653531F-001	CONNECTICUT AUDUBON SOCIETY	09/01/2016	Approved	(blank)	22597-Stormwise
STATE STATE		1	Current	Purchase Order	Order	0000011536	066066491F-001	URBAN LEAGUE OF GREATER HARTFORD INC	09/30/2004	Closed	(blank)	HARTFORD YOUTH PROJECT
STATE SOUTHERN CONN RAILROAD		1	Current	General Contract	General	0000015914	030353222F-001	CONNECTICUT SOUTHERN RAILROAD	12/31/2020	Canceled	(blank)	UTILITIES
STATE SOS2016-24959		1	Current	Purchase Order	Order	0000156253	452841472F-001	NEW CONNECTICUT FOUNDATION INC	05/31/2017	Approved	(blank)	To perform services to the SOS
STATE SF-UU-1016A-ENG		1	Current	Purchase Order	Order	0000013302	061154532F-001	NATHAN L JACOBSON & ASSOC INC	(blank)	Approved	(blank)	HAMMONASSET PARK CAMP/CONCESS
STATE SDE00105AA		1	Current	Recuring PO Voucher	PO Vchr	0000011961	045389054S-001	GAIL MANGS	09/30/2004	Closed	(blank)	(blank)
STATE RL87104-A		3	Current	General Contract	General	0000015640	061325780F-001	ALEXANDER TYLER CORP	07/31/2017	Approved	(blank)	Rental Lease Renewal
STATE RL87104-A		2	History	General Contract	General	0000015640	061325780F-001	ALEXANDER TYLER CORP	07/31/2016	Approved	(blank)	Rental Lease Renewal
STATE RL87104-A		1	History	General Contract	General	0000015640	061325780F-001	ALEXANDER TYLER CORP	12/31/2015	Approved	(blank)	Rental Lease Renewal
STATE RI 87104		1	Current	General Contract	General	0000015640	061325780F-001	ALEXANDER TYLER CORP	12/31/2011	Closed	(blank)	WILLI OFFICE LEASE & IMPROVEME

4. Click **New Version**

The screenshot shows the 'Contract Entry' interface. At the top, there are fields for 'SetID STATE', 'Contract ID STORMWISE', and 'Contract Version 1'. A 'Status' dropdown is set to 'Approved', and the 'Approved Date' is '12/04/2013'. A 'New Version' button is highlighted with a red box. Below this, there are sections for 'Header', 'Amount Summary', and 'Order Contract Options'. The 'Header' section includes 'Contract Style Purchase Order', 'Supplier ID 000020266', 'Begin Date 09/30/2013', and 'Expire Date 09/01/2016'. The 'Amount Summary' table shows a 'Maximum Amount' of 20,694.00 USD and a 'Remaining Amount' of 20,694.00. The 'Order Contract Options' section includes checkboxes for 'Allow Multicurrency PO', 'Corporate Contract', and 'Auto Default'.

- 5. Enter **Extend** in the Reason Code field
- 6. Enter a complete **Comment** based on the circumstances for the contract extension
Note: *A simple comment has been added in this example, the user should provide a more detailed comment.*
- 7. Click **OK**

The screenshot shows the 'Reason Code Page' dialog box. It contains a 'Reason Code' field with 'EXTEND' entered and a 'Comment' field with 'Extend Contract Dates, ' entered. There are 'OK', 'Cancel', and 'Refresh' buttons at the bottom. The 'OK' button is highlighted with a red box.

- 8. A draft version of the contract displays in **Open** status
- 9. Change the **Expire Date**

The screenshot shows a 'Contract Entry' form with the following details:

- Contract Version:** Version 2, Status Draft, Approval Due Date []
- Contract ID:** STORMWISE
- Status:** Open
- Supplier:** CONNECTICUT AUDUBON SOCIETY
- Contract Style:** Purchase Order
- Contract Type:** MOU
- Begin Date:** 09/30/2013
- Expire Date:** 11/01/2016 (with a calendar pop-up for November 2016)
- Maximum Amount:** 20,694.00 USD
- Release Summary:**

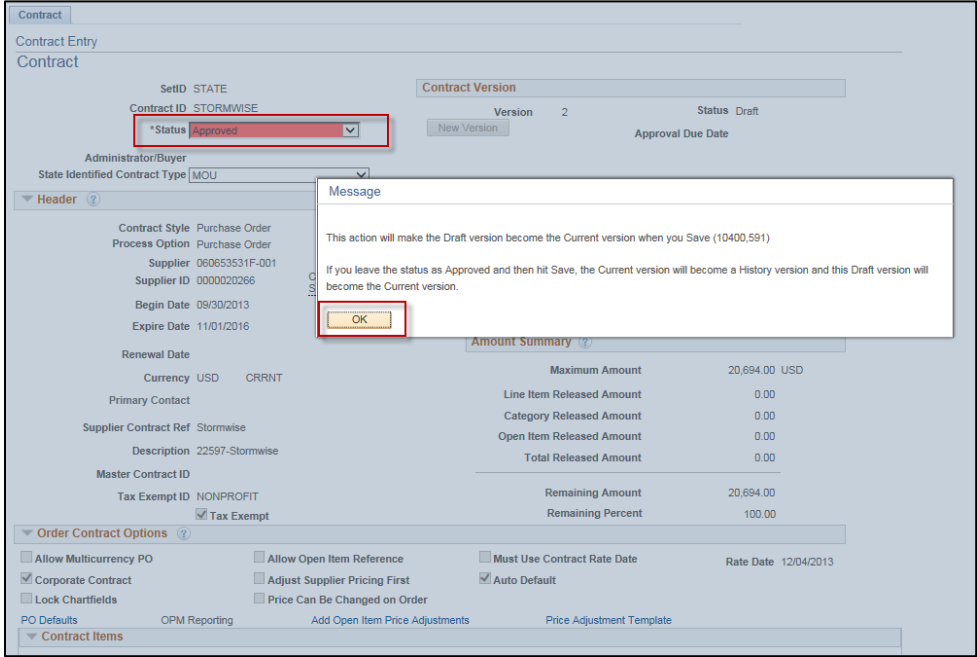
Line Item Released Amount	Category Released Amount	Open Item Released Amount	Total Released Amount
0.00	0.00	0.00	0.00
- Remaining Amount:** 20,694.00
- Remaining Percent:** 100.00

The draft can be saved in an Open status or changed to Approved if the user making the update is also authorized to approve it.

10. Select **Approved** from the Status drop down

A warning message will occur, selecting **Approved** will convert the Draft into the Current version of the contract after saving.

11. Click **OK**



12. Click **Save**

Supplier Contract Ref	Stormwise	Category Released Amount	0.00
Description	22597-Stormwise	Open Item Released Amount	0.00
Master Contract ID		Total Released Amount	0.00
Tax Exempt ID	NONPROFIT	Remaining Amount	20,694.00
<input checked="" type="checkbox"/> Tax Exempt		Remaining Percent	100.00

Order Contract Options

Allow Multicurrency PO Allow Open Item Reference Must Use Contract Rate Date Rate Date 12/04/2013
 Corporate Contract Adjust Supplier Pricing First Auto Default
 Lock Chartfields Price Can Be Changed on Order

PO Defaults OPM Reporting Add Open Item Price Adjustments Price Adjustment Template

Contract Items

Catalog Search Item Search Search for Contract Lines

All Items

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

Line	Item	Description	UOM	Category	Include for Release	Status
1		Stormwise: An innovative approach to Forest Stewardship, public outreach and stakeholder collaboration at the landscape scale	EA	00000000	<input checked="" type="checkbox"/>	Active

View Category Hierarchy Category Search

Contract Categories

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

Line	Category	Description	Status
1			Active

The screenshot below shows the **Contract Search** page. Note: *The contract version, version status, and expiration date* have all updated.

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 STORMWISE

Contract Version = 2

Version Status = Current

Contract Style begins with Purchase Order

Contract Process Option = Order

Short Supplier Name begins with CONNECTICUT AUDUBON SOCIETY

Vendor Name begins with

Master Contract ID begins with

Description begins with

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 First 1 of 1 Last

SetID	Contract ID	Contract Version	Version Status	Contract Style	Contract Process Option	Supplier ID	Short Supplier Name	Vendor Name	Expire Date	Contract Status	Master Contract ID	Description
STATE	STORMWISE	2	Current	Purchase Order	Order	000020266 060653531F-001	CONNECTICUT AUDUBON SOCIETY		11/01/2016	Approved	(blank)	22597-Stormwise

Find an Existing Value | Add a New Value

Review Contract Change History:

Changes made to contracts are tracked in Core-CT. Use the **Contract Change History** page to review changes to the contract header or a contract line for a specific version of a contract.

Navigation:

Procurement Contracts > Review Contract Information > Contract Change History

OR

Add / Update Contracts > **View History** from the **Contract Header** page

Note: *For the second navigation, you must have access to Add / Update Contracts*

Searching and Viewing Results:

1. The **Contract Header** page displays

Note: **Contract Header** and **Contract Line** pages are the only pages utilized to review change history

The top section of each page allows the user to define the search criteria that limits the number of contract history records returned.

2. Click **Search**

The results section at the bottom of the page is organized into collapsible sections. I.e. the **Contract Header** results section displays key findings like:

- Versioning – displays the contract version
- Sequence – indicates how many times
- Change type – can be change or original
- Description and Value – vary with the change

Each change event is associated to a **Change Order Status** row

Contract Header Contract Line Contract Category Header Agreement Line Agreement Category Agreement

SetID STATE Contract ID STORMWISE

Check the records you wish to view, and optionally, select a field on that record.

- Contract Header Changed Field
- PO Defaults Changed Field
- Price Adjustments Changed Field
- Thresholds and Notifications Changed Field
- Related Contracts Changed Field
- Supplier Locations Changed Field

Search and Filter Criteria

Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results.

Modified By
Reason Code
From Date To Date
Version From Version To

Search Clear Expand All Collapse All

Version	Sequence	Change Type	Description	Value	Modified By	User Name	Last Changed	Reason
1	1	Change	Change Order Source	ONL	BeattieD	OPM-Beattie Doug	10/12/16 12:03:35PM	EXTEND
1	1	Change	Contract Version	2	BeattieD	OPM-Beattie Doug	10/12/16 12:03:35PM	EXTEND
1	0	Original	Allow Open Item Reference	N	BeattieD	OPM-Beattie Doug	10/12/16 12:03:03PM	EXTEND
1	0	Original	Maximum Amount	20694	BeattieD	OPM-Beattie Doug	10/12/16 12:03:03PM	EXTEND
1	0	Original	Buyer		BeattieD	OPM-Beattie Doug	10/12/16 12:03:03PM	EXTEND

The **Contract Line** page looks similar, but the options are appropriate for finding and reviewing contract line changes.

Contract Header Contract Line Contract Category Header Agreement Line Agreement Category Agreement

SetID STATE Contract ID STORMWISE

Check the records you wish to view, and optionally, select a field on that record.

- Contract Line Changed Field
- Unit of Measure Changed Field
- Distribution Details Changed Field
- Price Adjustments Changed Field

Search and Filter Criteria

Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results.

Modified By
Reason Code
From Date To Date
Version From Version To
Line From Line To

Search Clear Expand All Collapse All

Version	Line	Sequence	Change Type	Description	Value	Modified By	User Name	Last Changed	Reason
1		0							Reason Code

Unit of Measure

The following image shows this page with the **Contract Lines** and the **Unit of Measure** options unchecked at the top so that those result sections are hidden at the bottom of the page.

Contract Header | **Contract Line** | Contract Category | Header Agreement | Line Agreement | Category Agreement

SetID STATE Contract ID STORMWISE

Check the records you wish to view, and optionally select a field on that record.

Contract Line
 Unit of Measure
 Distribution Details
 Price Adjustments

Changed Field
Changed Field
Changed Field
Changed Field

Search and Filter Criteria

Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results.

Modified By
Reason Code
From Date
Version From
Line From
To Date
Version To
Line To

Contract Lines Filter

Item ID Category
Description
Supplier's Catalog Supplier Item ID
Manufacturer ID Mfg Item ID

Distribution Details Personalize | Find | View All | |

Version	Line	Contract Type	Distribution Line	Sequence	Change Type	Description	Value	Modified By	User Name	Last Changed	Reas
1				0							Reas

Price Adjustments Personalize | Find | View All | |

Version	Line	Effective Date	Price Adjustment	Minimum Quantity	Sequence	Change Type	Description	Value	Modified By	User Name	Last Changed
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