

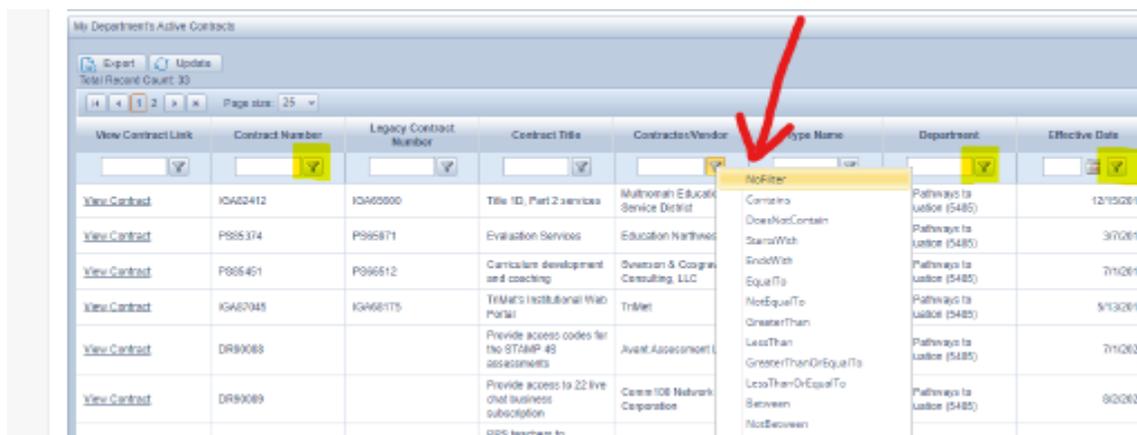
# Cobblestone End User Instructions

CobbleStone sign in - <https://pps.cobblestone.software/core/default.aspx>

- Enter your PPS username and password

When you log in, you will land on your dashboard. **My Dashboard** has multiple reports on it to help you easily see and navigate to both the contracts you manage as well as the contracts in your department/school. These include: My Open Contract Tasks, My Active Contracts, My Pending Contracts, My Pending Amendments, My Contracts Expiring Within 90 Days, etc. Each report can be expanded by clicking the triangle in the upper right corner of the header.

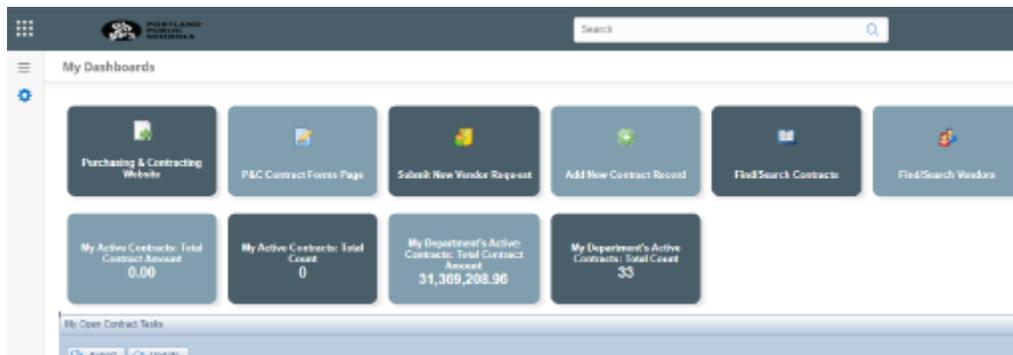
- Each report can be filtered to search by the column headers as shown below



View Contract Link	Contract Number	Legacy Contract Number	Contract Title	Contractor/Vendor	Contract Type Name	Department	Effective Date
<a href="#">View Contract</a>	IG462412	IG465900	Title 10, Part 2 services	Multnomah Education Service District	Contracts	Pathways to Justice (5485)	12/15/2017
<a href="#">View Contract</a>	PS85374	PS95871	Evaluation Services	Education Northwest	DoesNotContain	Pathways to Justice (5485)	3/7/2018
<a href="#">View Contract</a>	PS85451	PS96512	Curriculum development and coaching	Swanson & Cogswell Consulting, LLC	StartsWith	Pathways to Justice (5485)	7/1/2018
<a href="#">View Contract</a>	IG467045	IG468175	TriMet's Institutional Web Portal	TriMet	EndsWith	Pathways to Justice (5485)	5/13/2019
<a href="#">View Contract</a>	DR90089		Provide access codes for the STAMP 48 assessments	Avalon Assessment	EqualTo	Pathways to Justice (5485)	7/1/2021
<a href="#">View Contract</a>	DR90089		Provide access to 22 live chat business subscription	Comcast Network Corporation	NotEqualTo	Pathways to Justice (5485)	9/2/2021
			PPS teachers to		GreaterThan		
					LessThan		
					GreaterThanOrEqualTo		
					LessThanOrEqualTo		
					Between		
					NotBetween		

- From any of your dashboard reports, you can click **View Contract** to navigate directly to the contract record (described in greater detail below)

The dashboard also includes multiple radial buttons including links to the Purchasing & Contracting website and directly to the P&C templates and forms page. There are summary tiles as well that give you the details about the contracts in your department, including the number and dollar value of your own and your department's active contracts.



My Dashboards

- Purchasing & Contracting Website
- P&C Contract Forms Page
- Submit New Vendor Request
- Add New Contract Record
- Find Search Contracts
- Find Search Vendors

My Active Contracts: Total Contract Amount: 0.00

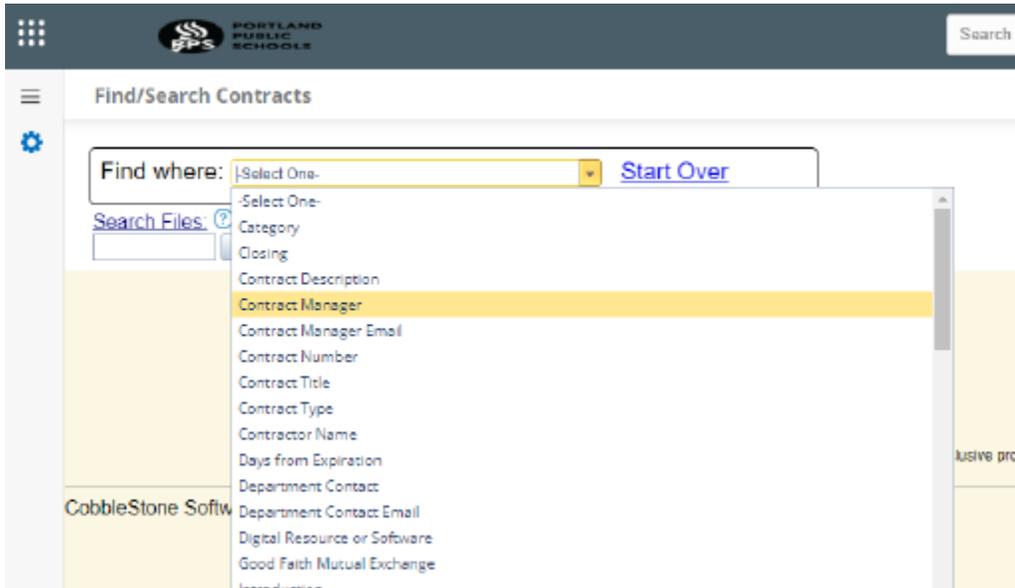
My Active Contracts: Total Count: 0

My Department's Active Contracts: Total Contract Amount: 31,389,208.96

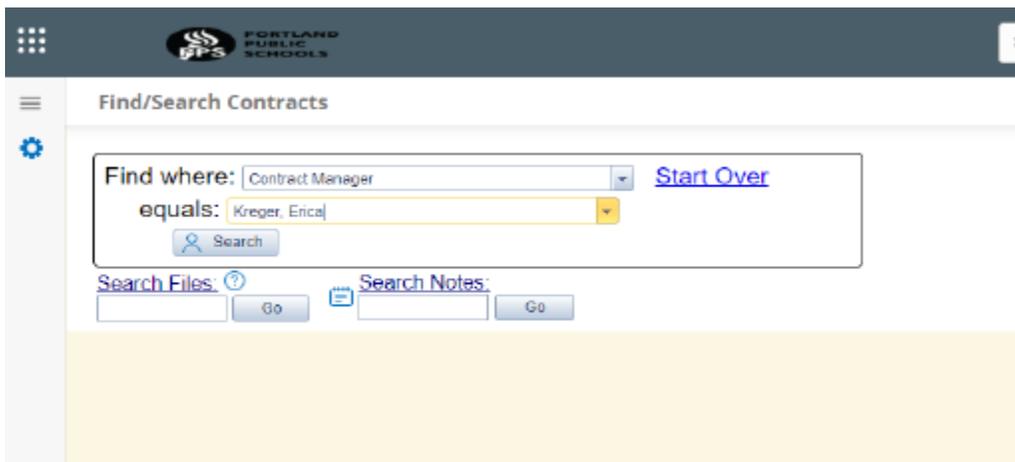
My Department's Active Contracts: Total Count: 33

My Open Contract Tasks

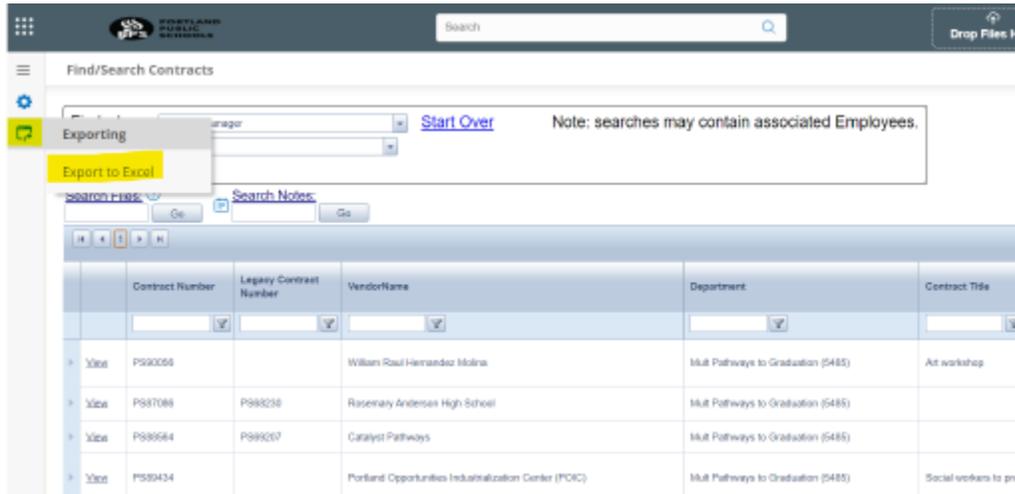
One way to search for contracts is to use the **Find/Search Contracts** button at the top of your dashboard. Once selected you will be taken to the page as seen below. Here you can select from the dropdown to search any field on the contract details page. You can search by Contract Manager, Contract Type, Originating Department or School, etc. (Please note that you will only be able to see those contracts for the department(s) or school(s) to which you are assigned.)



Once a field is selected, choose from the “equals” dropdown. This will generate a report under the requested criteria.

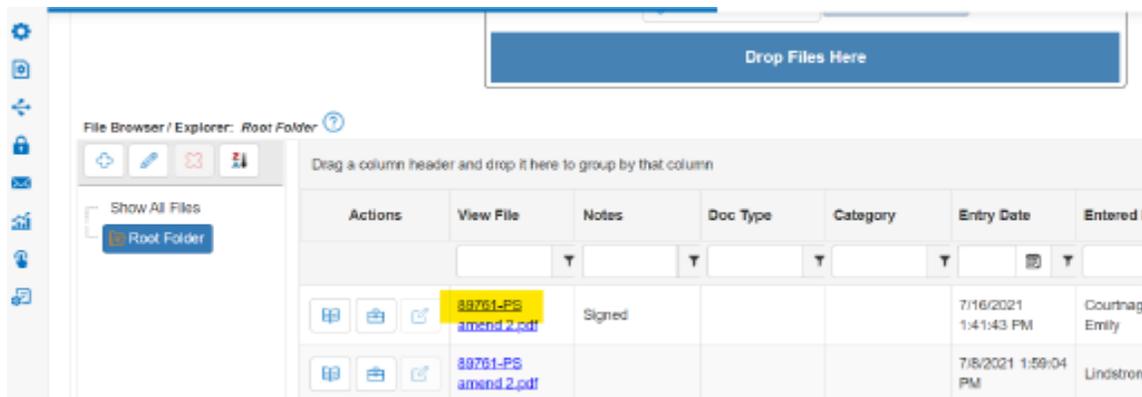


When the report populates, you can view individual contracts by selecting the **view** link next to the contract number. You can also export the report for easier sorting in Excel.

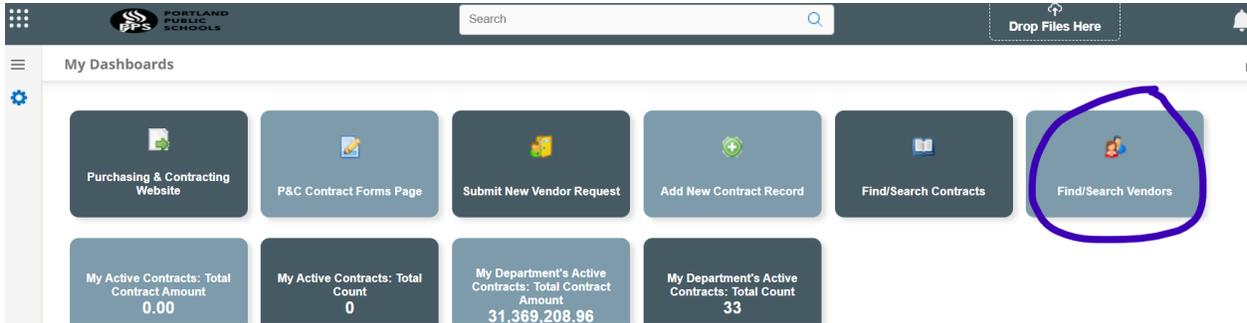


If you **View** the contract record, you will be able to see all of the contract details, including parties, dates, financial information, Board approval (if any), Amendments (if any), PeopleSoft financial information (including vouchers paid to date), and all contract documents.

**Viewing contract documents:** If you scroll down to the lower half of the contract record, you can click on a hyperlink to view the documents that are attached. These generally include the contract documents themselves and well as internal work documents, including the Contract Approval Form and other approval documents.



The **Search Vendors** button at the top of your dashboard allows you to look up vendor details for a particular vendor as well as access a list of all of your department or school's contracts with that vendor.



Company List Back to Top ↑

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		Company Name	Email	TypeName	Comp
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	#Enough: Plays to End Gun Violence	enoughplays@gmail.com	Vendor	5861
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	1 to 1 Tutoring		Vendor	169
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	1 World Chorus		Vendor	5288
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	1:1 Online Tutoring Services		Vendor	170
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	107st Independent Trust DBA Timbers Army Football Club		Vendor	5289
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	141 Eyewear		Vendor	171
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	1Government Procurement Alliance		Vendor	4834
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	1Hood Media		Vendor	172
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	1st All File Recovery		Vendor	173
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	24 Knots, LLC		Vendor	174
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	27 Wonders Photography		Vendor	175
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	2717 Group, Inc		Vendor	176
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	2KG Contractors Inc		Vendor	177
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	3 Diamond Construction, LLC	ofelia@3diamondcontractors.com	Vendor	6612
<a href="#">View Details</a>	<a href="#">View Contract(s)</a>	3 Kings Environmental, Inc		Vendor	178

Clicking on **View Contracts** allows you to see a list of all active, pending, or expired contracts associated with the vendor.

Search Contracts by Field Back to Top ↑

	Contract Number	Legacy Contract Number	VendorName	Department	Contract Title
<a href="#">View</a>	IGA/R90983		State of Oregon	Mult Pathways to Graduation (5485)	Department of Educatk
<a href="#">View</a>	IGA/R90982		State of Oregon	Mult Pathways to Graduation (5485)	ODE

Click **View** next to the contract you wish to see.

The contract **Details** page will populate showing all the information in the contract. This is called the “contract record” and is where you will also find the contract documents themselves. Below are multiple screenshots in which some key fields in the contract record are highlighted.

- **Status** shows you if your contract is active, pending, cancelled, or expired
- **Legacy Contract Number** is the pre-existing contract number for any pre-July 2020 contract record that was transferred from our old system. If a contract number is listed in this field, it should be the one you use in all communication, including requests for payments in Accounts Payable.

Contract Details

<b>Details</b>		
<b>Contract Number</b> PS87086	<b>Contractor Name</b> Rosemary Anderson High School [717 N Killingsworth Court Portland OR 97217 USA]	<b>Contract Title</b>
<b>Contract Type</b> Personal Services (PS)	<b>Originating Department or School</b> Mult Pathways to Graduation (5485)	<b>Contract Manager</b> Stavis, Erica
<b>Contract Manager Email</b> sstas@psd.net	<b>Department Contact</b> French, Patricia	<b>Department Contact Email</b> pfrench@psd.net
<b>Contract Description</b> Contract to provide services to PPS High School students during the summer of 2019	<b>Status</b> Expired	<b>Unsupervised Contact with Students</b>
<b>Legacy Contract Number</b> PS68230	<b>Legacy Contract Manager</b> Contact : Phone: 63812	<b>Legacy Department Contact</b> Contact : Phone: 63149

- **Current Expiration Date** shows when your contract is expiring
- **Original Contract Amount** shows the contract amount when it was first signed
- **Total Amendment Amount** totals the amounts of all amendments thus far, including any that are pending Purchasing & Contracting review and/or Board approval
- **Total Contract Amount** includes the original contract amount plus all amendments

Contract Details

<b>Dates</b>		
<b>Effective Date</b> 6/25/2019	<b>Current Expiration Date</b> 7/12/2019	<b>Days to Notify Before Expiration</b> 60
<b>Expiration Warning Date</b> 5/13/2019	<b>Original Expiration Date</b> 7/12/2019	
<b>Financial/Budgetary</b>		
<b>Original Contract Amount</b> 144,450.00	<b>Total Amendment Amount</b> 0.00	<b>Total Contract Amount</b> 144,450.00
<b>Total/Original Amount</b> 1.00	<b>Fund</b>	<b>Financial Impact</b>
<b>Grant Funds?</b>	<b>Grant Number</b>	<b>Federally Funded?</b> No
<b>Payment Method</b>	<b>MultiYear</b> No	

- **PeopleSoft Contract Amount** is the amount of the contract in PeopleSoft Financials. This should match the total contract amount. (Please email P&C if this is not the case)
- **Total Amount Paid** is the amount that has been paid against the contract in PeopleSoft.

- **Unspent Contract Amount** is the amount the contract has left to spend. This should help you determine when/if an amendment to add funds will be needed.

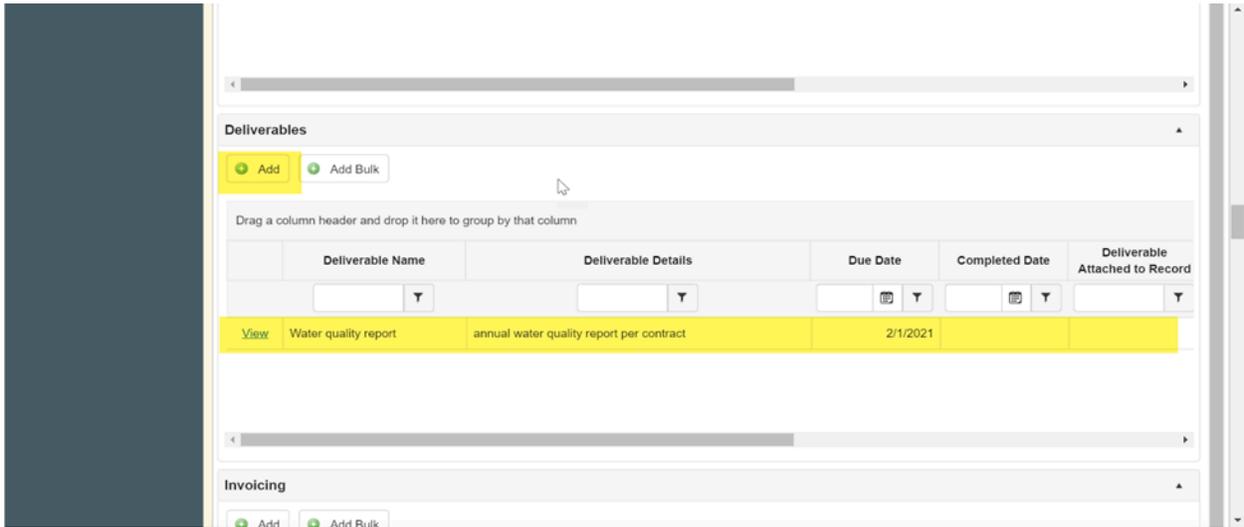
Grant Funds?	Grant Number	Federally Funded?
Payment Method	MultiYear	No
Financial/Budgetary - PeopleSoft Data		
PeopleSoft Contract Amount	Total Amount Paid	Unspent Contract Amount
144,450.00	144,450.00	0.00
Procurement Details		
Selection Process	Procurement Type	Procurement Number
Direct Negotiation		
Renewal Terms Included in Solicitation?	Renewal Terms	Exemption/Special Class Pro

- **Date Signed by District** is the date the contract was signed by the District signer
- **Contract Analyst** is the P&C staff who completes the initial review of the contract. This person may reach out to you with questions or request for additional documentation.
- **Reason for Hold** is where P&C staff note why they haven't moved the contract to the next review and approval step (e.g., if we require additional information from you or the vendor)

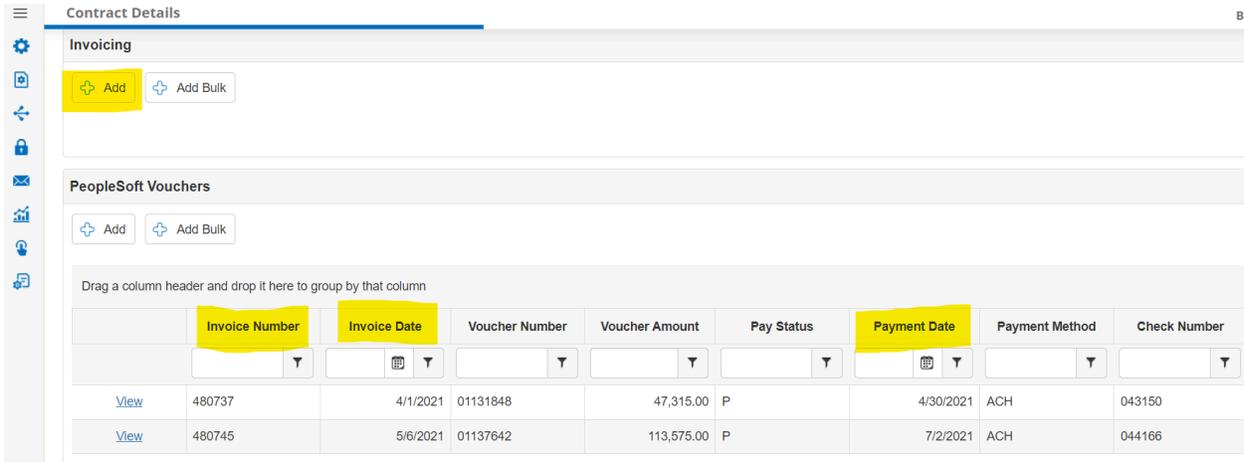
Review and Signing Info		
Date Signed by District	Signer	Contract Analyst
6/25/2019	Courtnage, Emily	
Board Agenda Date	Reason for Hold	
Termination Details		
Date of Early Termination Notice	Date of Early Termination (New Expiration Date)	Early Termination R
Amendments		
<input type="button" value="Add"/> <input type="button" value="Add Bulk"/>		

- **Deliverables** - Use the Add button to add a note about any contract deliverables promised in the contract, such as quarterly or year-end reports or training attendance records. If you enter a due date, you will receive an automatic email reminder on the deliverable due date. This email, along with the deliverables report on your dashboard,

will help you remember to check for contractor compliance and deliverable completion. This is a discretionary section but we strongly recommend using it.



- **Invoicing** - Use the Add button to track the invoices you send to Accounts Payable for payment. This is a discretionary section but we strongly recommend using it to track invoice submittal and protect against duplicate invoice submittal. \*Note: The system does not send the invoice to Accounts Payable for you\*
- **PeopleSoft Vouchers** - This table shows all the invoices that have been paid. It pulls updated payment data from PeopleSoft nightly. You can sort by double clicking any of the column headers.



- **Drop file here** - This is where you can drag and drop documents from your computer. We strongly recommend that you save any contract reports or other written deliverables, along with any key contractor correspondence, here.
  - **File Note** - Please put a note here first if you want a note to show up next to your document as seen below (e.g., “email from vendor” or “quarterly report”)

**Contract Details**

File Notes: [Yellow Highlighted Box]

Access Level: Internal

Doc Type: [Text Field]

Single File Upload: [Text Field] [Browse]

[Add Web Document] [Import From Cloud]

**Drop Files Here**

File Browser / Explorer: Root Folder

Actions	View File	Notes	Doc Type	Category	Entry Date	Entered By
[Icons]	<a href="#">89761-PS amend 2.pdf</a>	Signed			7/16/2021 1:41:43 PM	Courtnage, Emily

- **Tasks and Workflows** - Here you can see where the contract or amendment is in the review and approval workflow (e.g., Grant Accounting Review, or Contracts Team Intake)

**Tasks and Workflows**

Drag a column header and drop it here to group by that column

Task Name	Employee	Start Date	End/Due Date	Notify Days	Alert Date	Status	Da Co
<a href="#">View</a> Auto Update Status - Contract Analysis Review	Purchasing Email	2/8/2021	2/8/2021	0	2/8/2021	Task Complete	2/8
<a href="#">View</a> Contract/Amendment for Record Keeping	Contracts Team	2/9/2021	2/9/2021	0	2/9/2021	Task Complete	2/8
<a href="#">View</a> PeopleSoft Updates	Brandon Niles	2/9/2021	2/9/2021	0	2/9/2021	Task Complete	2/8
<a href="#">View</a> Contract Submission	Kellie Lindstrom	2/8/2021	2/10/2021	2	2/8/2021	Task Complete	2/8
<a href="#">View</a> Contracts Team Intake	Contracts Team	2/8/2021	2/13/2021	5	2/8/2021	Task Complete	2/8
<a href="#">View</a> Grant Accounting Review	Grant Accounting Team	2/8/2021	2/13/2021	5	2/8/2021	Task Complete	2/8
<a href="#">View</a> Contract Analyst Review	Brandon Niles	2/8/2021	2/13/2021	5	2/8/2021	Task Complete	2/8
<a href="#">View</a> Signatures Required	Emily Courtnage	2/9/2021	2/14/2021	5	2/9/2021	Task Complete	2/8