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

Page state: 25 v Contract Number	Legacy Contract Number	Contract Tille	Contractes/Vendor	Ave Name	Department	Effective Date
Contract Number	Legacy Contract Number	Contract Title	Contractor/Vendor	Aven Name	Department	Effective Date
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ICA82412	IGA65500	Title 1D, Part 2 services	Multromati Educatio Service District	Contains	Pathways ta Lation (5485)	12/15/201
P985374	P965871	Evaluation Services	Education Northwes	DowsNotLontain StartsWith	Pathways to Lation (5485)	37201
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IGA87045	IG468175	TriMat's Institutional Wab Portai	TriMet	NotEqualTo GranterThem	Pathways to Lation (5485)	5/13(20)
DR9008		Provide access codes fair the STAMP 49 assessments	Avent Assessment L	LessThan GresterThanOrEquaTo	Pathways to Lation (5885)	7/1/202
DR90089		Provide access to 22 live chat business subscription	Comm100 Network Corporation	LessThanOrEqualTo Between	Pathways to Lation (5485)	8/2/24/2
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• 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.



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.)

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

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\equiv	Find/Search Contracts	
0	Find where: Contract Manager equals: Kreger, Erical Search Search Files: Go Go	

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.

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≡	Find/Search Contracts							
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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.

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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.



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64			Company Name	Email	TypeName	Comp		
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	View Details	View Contract(s)	#Enough: Plays to End Gun Violence	enoughplays@gmail.com	Vendor	5861		
	View Details	View Contract(s)	1 to 1 Tutoring		Vendor	169		
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			1:1 Online Tutoring Services		Vendor	170		
			107st Independent Trust DBA Timbers Army Football Club		Vendor	5289		
	View Details	View Contract(s)	141 Eyewear		Vendor	171		
	View Details	View Contract(s)	1Government Procurement Alliance		Vendor	4834		
	View Details	View Contract(s)	1Hood Media		Vendor	172		
	View Details	View Contract(s)	1st All File Recovery		Vendor	173		
	View Details	View Contract(s)	24 Knots, LLC		Vendor	174		
	View Details	View Contract(s)	27 Wonders Photography		Vendor	175		
	View Details	View Contract(s)	2717 Group, Inc		Vendor	176		
	View Details	View Contract(s)	2KG Contractors Inc		Vendor	177		
	View Details	View Contract(s)	3 Diamond Construction, LLC	ofelia@3diamondcontractors.com	Vendor	6612		
	View Details	View Contract(s)	3 Kings Environmental, Inc		Vendor	178		
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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								
٥	1		Contract Number Legacy Contract Number		VendorName	Department	Contract Title		
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	Þ	View	IGA/R90983		State of Oregon	Mult Pathways to Graduation (5485)	Department of Education		
	÷	<u>View</u>	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.



- 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



- **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? No
÷	Payment Method	MultiYear No	
× 111 €	Financial/Budgetary - PeopleSoft Data 🖉		
	PeopleSoft Contract Amount 144,450.00	Total Amount Paid 144,450.00	Unspent Contract Amount 0.00
	Procurement Details 🖉		
	Selection Process Direct Negotiation	Procurement Type	Procurement Number
	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)

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÷	Review and Signing Info 🖉		
₽	Date Signed by District 6/25/2019	Signer Courtnage, Emily	Contract Analyst
&	Board Agenda Date	Reason for Hold	
\$	Termination Details 🖉		
	Date of Early Termination Notice	Date of Early Termination (New Expiration Date)	Early Termination R
	Amendments		
	Add 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.

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Deliverab	les				
Add	Add Bulk	Ν.			
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	Deliverable Name	Deliverable Details	Due Date	Completed Date	Deliverable Attached to Record
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- 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.

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		Invoice Number	Invoice Date	Voucher Number	Voucher Amount	Pay Status	Payment Date	Payment Method	Check Number
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	View	480737	4/1/2021	01131848	47,315.00	Ρ	4/30/2021	ACH	043150
	View	480745	5/6/2021	01137642	113,575.00	Ρ	7/2/2021	ACH	044166

• **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 document as seen below 	note here first i v (e.g., "email fro	f you want a note to show up nex om vendor" or "quarterly report")	t to your
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			89761-PS amend 2.pdf	Signed				7/16/202 1:41:43	21 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)

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	Drag a	Drag a column header and drop it here to group by that column												
હ સ્વ ⊠	Task Name		Employee	Start Date	End/Due Date	Notify Days	Alert Date	Status	Da Co					
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æ	View	Auto Update Status - Contract Analysis Review	Purchasing Email	2/8/2021	2/8/2021	0	2/8/2021	Task Complete	2/8					
	View	Contract/Amendment for Record Keeping	Contracts Team	2/9/2021	2/9/2021	0	2/9/2021	Task Complete	2/5					
	View	PeopleSoft Updates	Brandon Niles	2/9/2021	2/9/2021	0	2/9/2021	Task Complete	2/*					
	View	Contract Submission	Kellie Lindstrom	2/8/2021	2/10/2021	2	2/8/2021	Task Complete	2/8					
	View	Contracts Team Intake	Contracts Team	2/8/2021	2/13/2021	5	2/8/2021	Task Complete	2/8					
	View	Grant Accounting Review	Grant Accounting Team	2/8/2021	2/13/2021	5	2/8/2021	Task Complete	2/8					
	View	Contract Analyst Review	Brandon Niles	2/8/2021	2/13/2021	5	2/8/2021	Task Complete	2/5					
	View	Signatures Required	Emily Courtnage	2/9/2021	2/14/2021	5	2/9/2021	Task Complete	2/§					