

# 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.

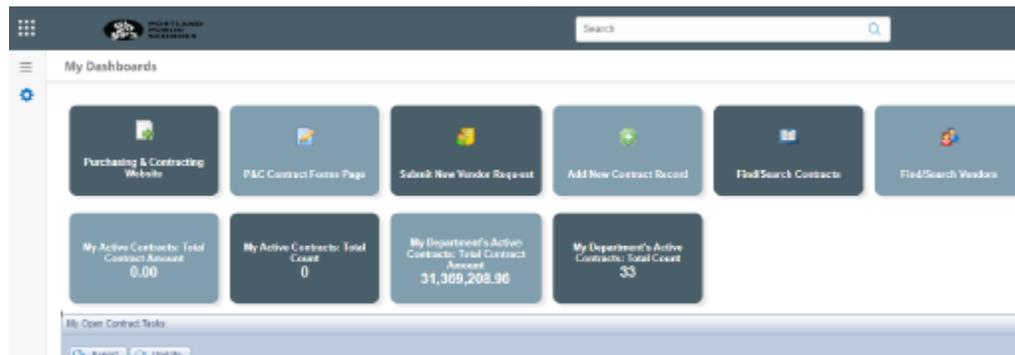
- Each report can be filtered to search by the column headers as shown below

The screenshot shows a table titled "My Department's Active Contracts" with columns: View Contract ID, Contract Number, Legacy Contract Number, Contractor/Vendor, Contract Title, Type Name, Contract Description, Department, Effective Date, and Expiration Date. A filter dropdown menu is open over the Department column, showing options: NoFilter, Contains, DoesNotContain, StartsWith, EndsWith, EqualTo, NotEqualTo, GreaterThan, LessThan, GreaterThanOrEqualTo, LessThanOrEqualTo, and Between. The "Contains" option is highlighted.

View Contract ID	Contract Number	Legacy Contract Number	Contractor/Vendor	Contract Title	Type Name	Contract Description	Department	Effective Date	Expiration Date
<a href="#">View</a>	PS86300	PS57430	Portland General Electric / PGE	Solar PV system	Personal Services (PS)	Standard net metering contract with PGE for the solar PV system on the DaVinci High Performance Classroom. No cost K.	FAM Management (5591)		3/13/2099
<a href="#">View</a>	PS85206	PS62611	1Government Procurement Alliance	Lead in coop procurements	Personal Services (PS)	Master agreement for participation as lead agency in cooperativew procurements.			1/1/2026

- 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.)

**PORTLAND PUBLIC SCHOOLS**

### Find/Search Contracts

Standard Search    Advanced Search    Search Files    Search Notes

**Find Where** [Start Over](#)

Filter Category

- Administering Agency Contract Number
- Administering Contracting Agency
- Amount Encumbered
- Board Agenda Date
- BOLI Prevailing Wages Required?
- Budget Amount
- Category
- Closing
- Collaboration Type
- Contact Address
- Contact Email
- Contact Name
- Contact Phone
- Contract Analyst
- Contract Description
- Contract Manager**
- Contract Manager Email
- Contract Number

10	...	▶	▶▶
Department	Contract Title		
		▼	▼
ESL/Bilingual Services Mgmt			
Teen Parent/Facs			

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

[Find Where](#) [Start Over](#)

Filter Category:  is equal to Filter Value:

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.

[Standard Search](#) [Advanced Search](#) [Search Files](#) [Search Notes](#)

[Find Where](#) [Start Over](#)

Filter Category:  is equal to Filter Value:

« 1 2 3 4 5 6 7 8 9 10 ... »

	Contract Number	Legacy Contract Number	VendorName	Department	Contract Title	Contract Description	Type
▶ <a href="#">View</a>	PS70956	PS52938		ESL/Bilingual Services Mgmt		PPS Dropout Prevention Project	Per Ser (PS

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.

On the **Contract Details** page, the areas of interest are tabs at the top of the page. Click on each tab to view its contents.

[Contract Details](#) [Amendments](#) [Board Approval](#) [Invoices & Payments](#) [Attachments & Templates](#) [Tasks & Emails](#) [Notes & Comments](#) [Deliverables](#) [Vendor Contracts](#)

## Contract Details tab

Contract Details		
Details		
Contract Number PS87086	Contractor Name Rosemary Anderson High School [717 N Killingsworth Court Portland OR 97217 USA]	Contract Title
Contract Type Personal Services (PS)	Originating Department or School Mult Pathways to Graduation (5485)	Contract Manager Stavis, Erica
Contract Manager Email <a href="mailto:stavis@psd.net">stavis@psd.net</a>	Department Contact French, Patricia	Department Contact Email <a href="mailto:pfrench@psd.net">pfrench@psd.net</a>
Contract Description Contract to provide services to PPS High School students during the summer of 2019	Status Expired	Unsupervised Contact with Students
Legacy Contract Number PS68230	Legacy Contract Manager Contact: ; Phone: 63812	Legacy Department Contact 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		
Dates		
Effective Date 6/25/2019	Current Expiration Date 7/12/2019	Days to Notify Before Expiration 60
Expiration Warning Date 5/13/2019	Original Expiration Date 7/12/2019	
Financial/Budgetary		
Original Contract Amount 144,450.00	Total Amendment Amount 0.00	Total Contract Amount 144,450.00
Total/Original Amount 1.00	Fund	Financial Impact
Grant Funds?	Grant Number	Federally Funded? No
Payment Method	MultiYear 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	Contract Analyst	Signer
9/6/2023	Niles, Brandon	Courtage, Emily
Board Agenda Date	Reason for Hold	
9/5/2023		

## Amendments tab

Select the View link to see the amendment information.

Contract Details	<b>Amendments</b>	Board Approval	Invoices & Payments	Attachments & Templates	Tasks & Emails	Notes & Comme
<b>Amendments</b>						
Drag a column header and drop it here to group by that column						
	Amendment Number	Amendment Description	Effective Date	New Expiration Date		
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<a href="#">View</a>	1	Extends contract for an additional year	9/1/2025	6/23/2026		

When adding an amendment, select the Add button. Complete each section that has a red asterisk. Once saved, this will initiate a task for you to approve. Once you attach the signed amendment and CAF, approve the task to send notice to Purchasing & Contracting for our review.

**Details**

*Amendment Number <input type="text" value="Start typing..."/>	*Amendment Description <div style="border: 1px solid #ccc; height: 40px;"></div>	*Effective Date <input type="text"/>
New Expiration Date <input type="text"/>	Amendment Status <input type="text" value="Pending"/>	*Property or Equipment Lease? <input type="text" value="No"/>

**Financial/Budgetary**

*Amendment Amount <input type="text"/>	Contract Amount (Before Amendment) <input type="text" value="8,000,000.00"/>	*Amendment Contains Grant Funds' <input type="text" value="Start typing..."/>
*Amendment is Federally Funded? <input type="text" value="Start typing..."/>	Grant Number <input type="text"/>	Fund <input type="text"/>
Contract Contains Grant Funds? <input type="text" value="No"/>	Contract is Federally Funded? <input type="text" value="No"/>	*Financial Impact <input type="text" value="Expenditure"/>

**Record Info**

Date Entered <input type="text" value="6/23/2025 3:54 PM"/>	Entered By <input type="text" value="Kreger, Erica"/>	Updated By <input type="text" value="Kreger, Erica"/>
AmendmentsID <input type="text"/>	Contract_ID <input type="text" value="93883"/>	ContractTypeID <input type="text" value="96"/>

**Review and Signing Info**

Signature Date <input type="text"/>	Contract Analyst <input type="text" value="Start typing..."/>	Signer <input type="text" value="Start typing..."/>
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## Board Approval tab

If your contract has gone to the Board for approval, the pertinent information will show here.

**Board Approval**

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

	Proposed Agenda Date	Board Resolution Number	Board Resolution Date	Responsible Administrator	Maximum Date and Amount Approved by Board	Board Approval Notes
<a href="#">View</a>	<input type="text"/>	<input type="text" value="6753"/>	<input type="text" value="9/5/2023"/>	<input type="text" value="Garcia, Jonathan"/>	<input type="text" value="6/30/25; \$8,000,000"/>	<input type="text"/>

## Invoices & Payments tab

- **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.

Invoicing									
<a href="#">Add</a> <a href="#">Add Bulk</a> <a href="#">Import Record(s)</a> <a href="#">Export Record(s)</a>									
PeopleSoft Vouchers (Payments Made)									
<a href="#">Add</a> <a href="#">Add Bulk</a> <a href="#">Import Record(s)</a> <a href="#">Export Record(s)</a>									
Drag a column header and drop it here to group by that column									
<span>«</span> <span>◀</span> <b>1</b> <span>▶</span> <span>»</span>					Page: <input type="text" value="1"/> of 5 <input type="button" value="Go"/>		Page size: <input type="text" value="25"/> <input type="button" value="Change"/>		
	Invoice Number	Invoice Date	Voucher Number	Voucher Amount	Pay Status	Payment Date	Payment Method	Check Number	
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>				
<a href="#">View</a>	AR437844	10/31/2023	01238467-1	203,563.00	P	12/15/2023	ACH	065017	
<a href="#">View</a>	AR437894	10/31/2023	01238502-1	20,168.46	P	12/15/2023	ACH	065029	

## Attachments & Templates tab

- **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”)

The screenshot displays the 'Contract Details' interface. At the top, there's a search bar and the Portland Public Schools logo. The main area contains a form with fields for 'File Notes' (highlighted in yellow), 'Access Level' (set to 'Internal'), 'Doc Type', and 'Single File Upload'. A 'Drop Files Here' button is circled in purple. Below the form is a 'File Browser / Explorer' section showing a table of documents.

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

This is also where you can create your contract through the Cobblestone system. See the “Create New Contract Document” instructions!

## Tasks & Emails tab

- **Tasks & Emails** - 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)

The screenshot shows the 'Tasks and Workflows' tab with a table of tasks. The table has columns for Task Actions, Task Name, Employee, Start Date, End/Due Date, Notify Days, Alert Date, Status, and Date Completed.

Task Actions	Task Name	Employee	Start Date	End/Due Date	Notify Days	Alert Date	Status	Date Completed
<a href="#">View</a>	Auto Update Contract Status	Purchasing Email	8/17/2023	8/17/2023	0	8/17/2023	Task Complete	8/17/2023
<a href="#">View</a>	Contract Submission	Kellie Lindstrom	8/17/2023	8/19/2023	2	8/17/2023	Task Complete	8/17/2023
<a href="#">View</a>	Contracts Team Intake	Contracts Team	8/17/2023	8/22/2023	5	8/17/2023	Task Complete	8/17/2023
<a href="#">View</a>	Board Approval Review	Board Desk Team	8/17/2023	8/31/2023	14	8/17/2023	Task Complete	9/6/2023
<a href="#">View</a>	Contract/Amendment for Record Keeping	Contracts Team	9/6/2023	9/6/2023	0	9/6/2023	Task Complete	9/6/2023
<a href="#">View</a>	PeopleSoft Updates	Brandon Niles	9/6/2023	9/6/2023	0	9/6/2023	Task Complete	9/13/2023

## Notes & Comments tab

- This is where you can view any notes reviewers have left. Ex. Grant Accountant changing the account code to use.

**Deliverables** - This section allows you to house your deliverables within the system. Making Cobblestone a comprehensive solution for your contract needs.