

New Amendment to a Contract Record

To create an amendment in Cobblestone go to the Contract record

- Select the View link next to the appropriate contract

The screenshot shows the Cobblestone system dashboard. At the top, there is a search bar and a 'Drop Files Here' button. Below the search bar, there is a 'My Dashboards' section with a 'Select Dashboard' dropdown menu set to 'End User Dashboard (System)'. There are six dashboard cards: 'Purchasing & Contracting Website', 'P&C Contract Forms Page', 'Submit New Vendor Request', 'Add New Contract Record', 'Find/Search Contracts', and 'Find/Search Vendors'. Below these cards are four summary cards showing contract statistics: 'My Active Contracts: Total Contract Amount 8,286,867.00', 'My Active Contracts: Total Count 2', 'My Department's Active Contracts: Total Contract Amount 1,999,846,458.77', and 'My Department's Active Contracts: Total Count 1698'. Below the summary cards is a section for 'My Open Contract Tasks' and 'My Active Contracts (Assigned as Contract Manager or Department Contact)'. This section includes an 'Export' button, an 'Update' button, and a 'Total Record Count: 2'. Below this is a table with columns: View Contract ID, Contract Number, Legacy Contract Number, Contractor/Vendor, Contract Title, Type Name, Effective Date, Expiration Date, Contract Amount, Total Amendment Amount, Total Contract Amount, and Total Amount Paid. The table contains two rows of data. The first row has a 'View' link in the first column, Contract Number DR85741, Legacy Contract Number SW68640, Contractor/Vendor CobbleStone Software, Contract Title Cobblestone contract management software, Type Name Digital Resource or Software (DR), Effective Date 9/24/2019, Expiration Date 9/23/2024, Contract Amount 250,000.00, Total Amendment Amount 36,867.00, Total Contract Amount 286,867.00, and Total Amount Paid 270.00. The second row has a 'View' link, Contract Number MSTR93883, Legacy Contract Number, Contractor/Vendor Multnomah Education Service District / MESD, Contract Title District wide contract to request services from MESD, Type Name Master Contract (MSTR), Effective Date 7/1/2023, Expiration Date 6/30/2025, Contract Amount 8,000,000.00, Total Amendment Amount 0.00, Total Contract Amount 8,000,000.00, and Total Amount Paid 456.10.

View Contract ID	Contract Number	Legacy Contract Number	Contractor/Vendor	Contract Title	Type Name	Effective Date	Expiration Date	Contract Amount	Total Amendment Amount	Total Contract Amount	Total Amount Paid
View	DR85741	SW68640	CobbleStone Software	Cobblestone contract management software	Digital Resource or Software (DR)	9/24/2019	9/23/2024	250,000.00	36,867.00	286,867.00	270.00
View	MSTR93883		Multnomah Education Service District / MESD	District wide contract to request services from MESD	Master Contract (MSTR)	7/1/2023	6/30/2025	8,000,000.00	0.00	8,000,000.00	456.10

Once in the contract record, scroll down the Contract Details page to the Amendments section

- Click the Add button

The screenshot shows the 'Amendments' section of the Cobblestone system. It features a header 'Amendments' and two buttons: 'Add' and 'Add Bulk'. The 'Add' button is highlighted with a yellow background. Below the buttons is a section for 'Board Approval'.

Amendment Details

- Enter the information for all the red asterisk fields
- Click save and Continue (the page will not move forward if all required fields are not completed)

Details

*Amendment Number <input type="text" value="Start typing..."/>	*Amendment Description <input type="text"/>	*Effective Date <input type="text"/>
New Expiration Date <input type="text"/>	Amendment Status Pending	*Property or Equipment Lease? No

Financial/Budgetary

*Amendment Amount <input type="text"/>	Contract Amount (Before Amendment) 0	*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? No	Contract is Federally Funded? No	*Financial Impact Zero Dollar

Record Info

Date Entered 1/24/2025 10:09 AM	Entered By Kreger, Erica	Updated By Kreger, Erica
AmendmentsID <input type="text"/>	Contract_ID 96117	ContractTypeID 100

- Upload the Contract Approval Form (“CAF”), Amendment, and any other documents needing review from Purchasing & Contracting
 - Please ensure the file naming convention is simple (for example, “CAF” or “Amendment 1” or “Email approval”)

Files / Attachments

Upload File(s) Info.

File Notes: <input type="text"/>	File Category: No Categories Available
Access Level: Internal	Single File Upload: <input type="text"/> <input type="button" value="Browse"/>
<input type="button" value="Import From Cloud"/>	
<input type="text" value="Drop Files Here"/>	

File Browser / Explorer: Root Folder

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

Actions	View File	Notes	Doc Type	Category	Entry Date	Entered By

No records to display.

These two areas show upload is successfully completed

The screenshot shows a file upload interface. At the top, there is an 'Access Level' dropdown set to 'Internal', a 'Single File Upload' field with a 'Browse' button, and an 'Import From Cloud' button. Below this is a blue 'Drop Files Here' area. A green message below the drop area reads 'Uploaded Successfully: 89260-PS contract.pdf'. Below the upload area is a 'File Browser / Explorer: Root Folder' section with a 'Show All Files' button and a 'Root Folder' button. To the right is a table with columns: Actions, View File, Notes, Doc Type, Category, Entry Date, and Entered By. A row in the table shows a PDF icon, a red document icon, the text '89260-PS contract.pdf', and the entry date '9/11/2020 4:26:46 PM' and entered by 'Kreger, Erica'. A dashed arrow points from the 'Drop Files Here' area to the 'View File' column header.

Scroll down the page until you see the **Tasks, E-mails, Workflow, Alerts** section

- Scroll to the right to and select Approve if all the information looks correct and all documents are uploaded

The screenshot shows a task management interface. At the top, there is a 'Show Auto Complete Tasks' checkbox and a status bar indicating '1 tasks remaining as of today'. Below this is a table with columns: Task Name, Employee, Start Date, End/Due Date, Notify Days, Alert Date, Status, Date Completed, Approve, and Reject. A row in the table shows a task named 'Contract Submission' assigned to 'Erica Kreger', with a start date of '9/11/2020' and an end date of '9/13/2020'. The status is 'Open' and there are '2' notify days. The 'Approve' button is highlighted in yellow. Below the table is a section titled 'Notes, Comments, Diary Log' with a text area for entering notes and a 'Save Note' button.

Once you have approved the task, you will see that it has been submitted to the Contracts Team in Purchasing & Contracting to start the intake process

Tasks, E-mails, Workflow, Alerts

Add Task Bulk Delete

Show Auto Complete Tasks

1 task

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	Date Complete
View Contract Submission	Erica Kreger	9/11/2020	9/13/2020	2	9/11/2020	Task Complete	9/11/2020
View Contracts Team Intake	Contracts Team	9/11/2020	9/16/2020	5	9/11/2020	Open	

Notes, Comments, Diary Log

Enter Notes Below and/or optionally enter a subject:

note subject

You can check the status of your contracts on your dashboard under the **My Pending Contracts** drop down

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

My Active Contracts: Total Contract Amount 1,391,867.00 | My Active Contracts: Total Count 16 | My Department's Active Contracts: Total Contract Amount 1,346,264,456.00 | My Department's Active Contracts: Total Count 1405

My Open Contract Tasks

My Active Contracts (Assigned as Contract Manager or Department Contact)

My Pending Contracts (Assigned as Contract Manager or Department Contact)

Export Update

Total Record Count: 1

Page size: 25

Status Name	Contract Number	Contract Title	Contractor/Vendor	Type Name	Department
View Contract Contracts Team Review	PS89285	Professional Development	DKS Associates	Personal Services (PS)	Purchasing & Contracting (5552)

Page size: 25

If you forget to include information or attach your signed CAF or Contract before submittal, the Contracts Team will reject your new contract submittal. You will receive an email notification and a new task (“Contracts Team Rejected”) on your dashboard. Click on “View Contract” from your dashboard and complete the record as requested. When finished, “Approve” your task in the **Tasks, E-mails, Workflow, Alerts** section to submit the contract record back to the Contracts Team.