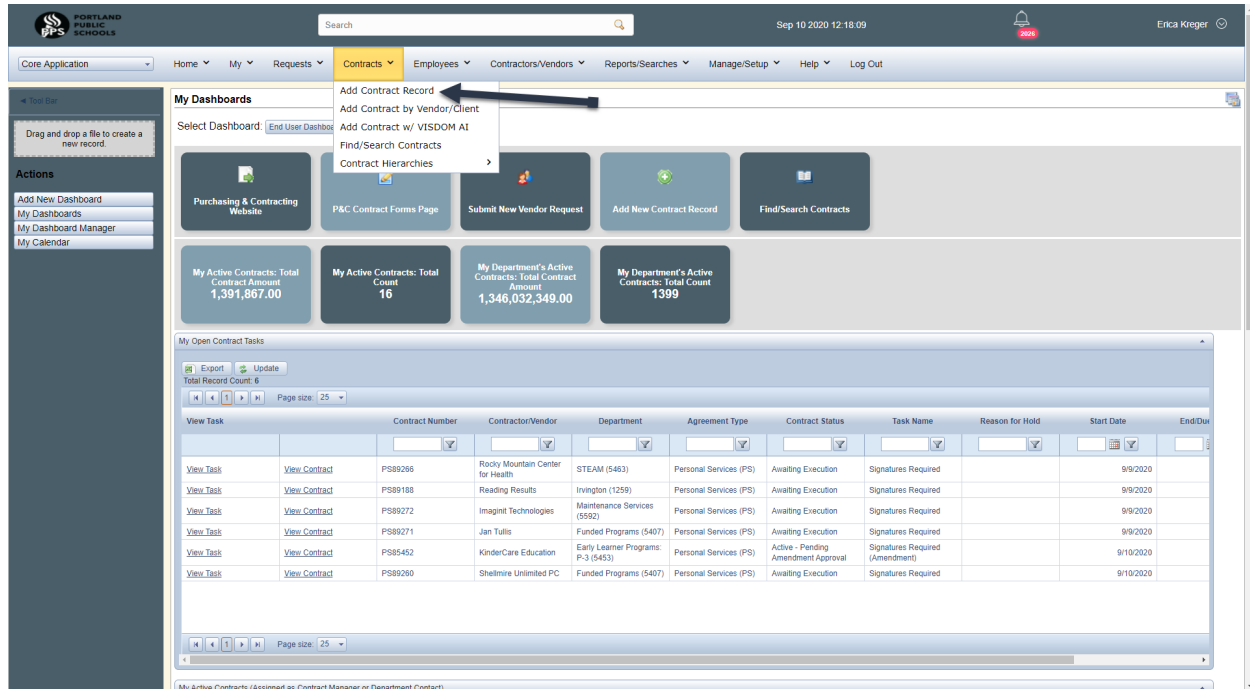


New Contract Record

To create a contract in Cobblestone go to the Contracts drop down at the top of the screen.

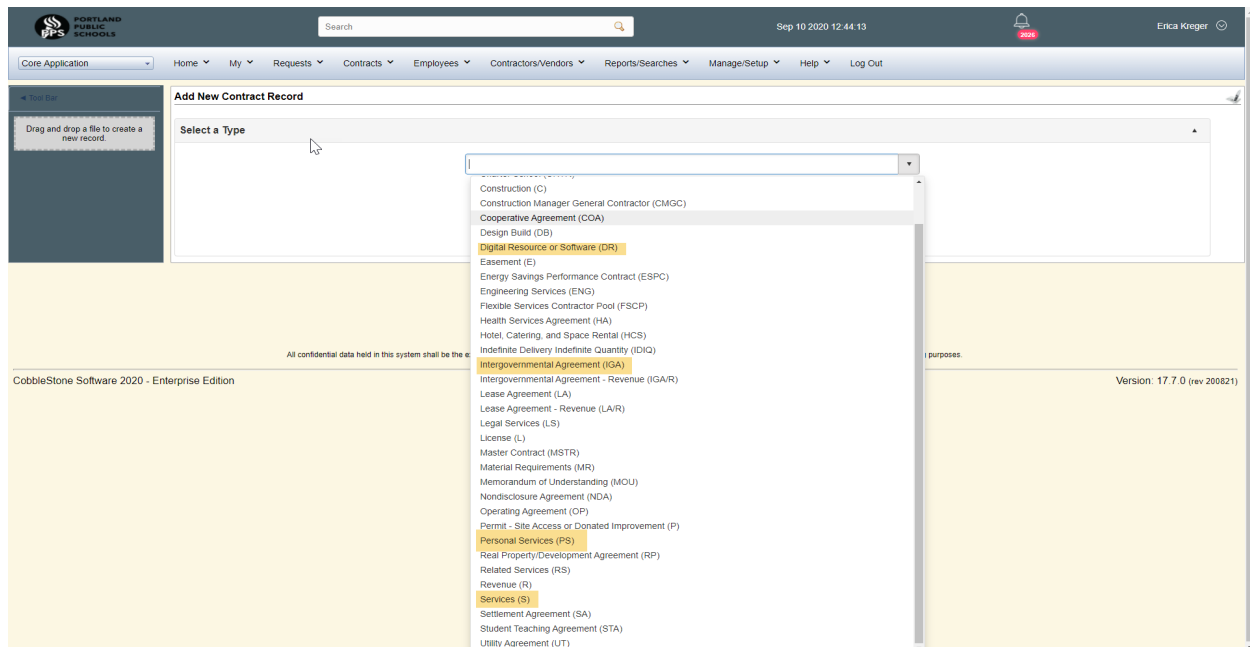
- Select Add Contract Record



Select the type of contract you want to create.

- Click continue

Some frequently used templates are highlighted in the screenshot below.



On the **Add New Contract Record** page, complete all fields with the red asterisks.

- Click 'save and continue'

Add New Contract Record
Add New Personal Services (PS) Record

Details

*Contractor Name

*Contract Title

*Contract Type

*Originating Department or School

*Contract Manager

*Contract Manager Email

*Department Contact

*Department Contact Email

*Contract Description

Status

Status

Unsupervised Contact with Students

Legacy Contract Number

Legacy Contract Manager

Legacy Department Contact

Contractor/Vendor Contact

Contracts Details

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

Files / Attachments

Upload File(s) Info.

File Notes:

Access Level:

File Category:

Single File Upload:

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's an 'Access Level' dropdown set to 'Internal' and a 'Single File Upload' section with a 'Browse' button and an 'Import From Cloud' button. Below this is a large blue 'Drop Files Here' button. A green message below the button states 'Uploaded Successfully: 89260-PS contract.pdf'. To the left is a 'File Browser / Explorer: Root Folder' sidebar with a 'Show All Files' button and a 'Root Folder' button. The main area is a table with columns: Actions, View File, Notes, Doc Type, Category, Entry Date, and Entered By. A row is visible for '89260-PS contract.pdf' with an entry date of '9/11/2020 4:26:46 PM' and entered by 'Kreger, Erica'. A dashed arrow points from the 'Uploaded Successfully' message to the 'Doc Type' 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 the 'Tasks, E-mails, Workflow, Alerts' section. At the top, there's 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 is visible for 'Contract Submission' by 'Erica Kreger' with a status of 'Open'. The 'Approve' button is highlighted in yellow. Below the table is a 'Notes, Comments, Diary Log' section with a text area for notes and a 'Save Note' button. A note at the bottom states: 'Note: when editing the notes, the edited text will be displayed in the notes text editor above.'

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

Buttons: 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

Buttons: 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.