

## 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

The screenshot shows the Cobblestone system interface. At the top, the 'Contracts' dropdown menu is open, and 'Add Contract Record' is highlighted with a blue arrow. Below the menu, the 'My Dashboards' section displays several tiles: 'Purchasing & Contracting Website', 'P&C Contract Forms Page', 'Submit New Vendor Request', 'Add New Contract Record', and 'Find/Search Contracts'. Below the dashboards, there are four summary tiles for active contracts and amounts. The 'My Open Contract Tasks' section is visible below, showing a table of tasks with columns for Contract Number, Contractor/Vendor, Department, Agreement Type, Contract Status, Task Name, Reason for Hold, Start Date, and End Date.

View Task	Contract Number	Contractor/Vendor	Department	Agreement Type	Contract Status	Task Name	Reason for Hold	Start Date	End Date
<a href="#">View Task</a>	<a href="#">View Contract</a>	PS89266	Rocky Mountain Center for Health	STEAM (5463)	Personal Services (PS)	Awaiting Execution	Signatures Required		9/9/2020
<a href="#">View Task</a>	<a href="#">View Contract</a>	PS89188	Reading Results	Irvington (1259)	Personal Services (PS)	Awaiting Execution	Signatures Required		9/9/2020
<a href="#">View Task</a>	<a href="#">View Contract</a>	PS89272	Imagint Technologies	Maintenance Services (5592)	Personal Services (PS)	Awaiting Execution	Signatures Required		9/9/2020
<a href="#">View Task</a>	<a href="#">View Contract</a>	PS89271	Jan Tullis	Funded Programs (5407)	Personal Services (PS)	Awaiting Execution	Signatures Required		9/9/2020
<a href="#">View Task</a>	<a href="#">View Contract</a>	PS85452	KinderCare Education	Early Learner Programs P-3 (5453)	Personal Services (PS)	Active - Pending Amendment Approval	Signatures Required (Amendment)		9/10/2020
<a href="#">View Task</a>	<a href="#">View Contract</a>	PS89260	Shelshire Unlimited PC	Funded Programs (5407)	Personal Services (PS)	Awaiting Execution	Signatures Required		9/10/2020

Select the type of contract you want to create.

- Click continue

Some frequently used templates are highlighted in the screenshot below.

The screenshot shows the 'Add New Contract Record' screen. A dropdown menu is open, displaying a list of contract types. The following types are highlighted in yellow: 'Digital Resource or Software (DR)', 'Intergovernmental Agreement (IGA)', and 'Personal Services (PS)'. Other visible types include Construction (C), Construction Manager General Contractor (CMGC), Cooperative Agreement (COA), Design Build (DB), Easement (E), Energy Savings Performance Contract (ESPC), Engineering Services (ENG), Flexible Services Contractor Pool (FSCP), Health Services Agreement (HA), Hotel, Catering, and Space Rental (HCS), Indefinite Delivery Indefinite Quantity (IDIQ), Intergovernmental Agreement - Revenue (IGA/R), Lease Agreement (LA), Lease Agreement - Revenue (LA/R), Legal Services (LS), License (L), Master Contract (MSTR), Material Requirements (MR), Memorandum of Understanding (MOU), Nondisclosure Agreement (NDA), Operating Agreement (OP), Permit - Site Access or Donated Improvement (P), Real Property/Development Agreement (RP), Related Services (RS), Revenue (R), Services (S), Settlement Agreement (SA), Student Teaching Agreement (STA), and Utility Agreement (UT).

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 +**

- Pending

**Unsupervised Contact with Students**

- Start typing...

**Legacy Contract Manager**

- Legacy Contract Manager
- Legacy Department Contact

Contractor/Vendor Contact

## Contracts Details

- Check all information for correctness

## Using Document Templates

In the contract record, scroll down to the **Merged Document Templates** section and click the "Merge Standard Template" button:

**Merged Document Templates**

- Merge Standard Template
- Merge External Template

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

Delete	Manage	Package Title	Type	Total Files	Template Title	Created By	Date Cre

No records to display.

The Document Process Manager page will appear. In the “Select Template” drop-down box, indicate whether you are creating a Contract Approval Form, Amendment, or initial Contract.

In the “Title” text box, indicate a title such as “Amendment 6.”

The screenshot shows a web application interface for creating a new document package. At the top, there is a navigation bar with menu items: Home, My, Requests, Contracts, Employees, and Contractors/vendors. Below this is a header section titled "Document Process Manager: Create New Document Package".

The form is divided into two main sections:

- Record Information:** This section contains two fields: "For:" with the value "Contracts & Committals" and "Record:" with the value "District-wide bottled water - ID: 85263".
- Document Information:** This section contains three fields:
  - "\* Type:" with a dropdown menu set to "Document Package".
  - "\* Select Template:" with a dropdown menu showing "Amendment" as the selected option. The dropdown list also includes "Amendment", "Contract Approval Form (CAF)", and "Services Contract".
  - "\* Title:" which is currently empty.

Below the "Document Information" section is a section titled "\* Select Sub Table Items for Mergeable Clauses:". This section contains a table with the following structure:

Amendment Number
Select Items for: Amendments
Drag a column header and drop it here to group by that column

For amendments, you must select the appropriate amendment in the Amendment and Amendment Amounts subtables. So, if you are creating a new Amendment 6, be sure to click the box next to Amendment 6 in the two amendment subtables. This will ensure that the correct amendment information is pre-filled.

Select Items for: Amendments							
Drag a column header and drop it here to group by that column							
<input type="checkbox"/> Select Rows	Amendment Number	Amendment Description	Effective Date	New Expiration Date	Amendment Status	Amendment Amount	Total Contract Amount
<input type="checkbox"/>	1	Add \$ to existing contract.	1/1/1900	8/16/2017	Expired	150,000.00	2,300,000.00
<input type="checkbox"/>	2	Provide District-wide water dispenser services.	1/1/1900	8/16/2018	Expired	900,000.00	2,300,000.00
<input type="checkbox"/>	3	Provide District wide water dispenser services. Extends service 3 months	8/17/2018	11/16/2018	Expired	0.00	2,300,000.00
<input type="checkbox"/>	4	Provide District wide water dispenser services.	1/1/1900	8/16/2019	Expired	500,000.00	2,300,000.00
<input type="checkbox"/>	5	Provide district wide water dispenser services. Extend contract for an additional year, only.	8/17/2019	8/16/2020	Expired	0.00	2,300,000.00
<input checked="" type="checkbox"/> Selected	6	Provide District wide water dispenser service: extend for one year only, no additional costs.	8/17/2020	8/16/2021	Active	0.00	2,300,000.00

Amendment Amount Table							
Select Items for: Amendments							
Drag a column header and drop it here to group by that column							
<input type="checkbox"/> Select Rows	Amendment Number	Amendment Description	Effective Date	New Expiration Date	Amendment Status	Amendment Amount	Total Contract Amount
<input type="checkbox"/>	1	Add \$ to existing contract.	1/1/1900	8/16/2017	Expired	150,000.00	2,300,000.00
<input type="checkbox"/>	2	Provide District-wide water dispenser services.	1/1/1900	8/16/2018	Expired	900,000.00	2,300,000.00
<input type="checkbox"/>	3	Provide District wide water dispenser services. Extends service 3 months	8/17/2018	11/16/2018	Expired	0.00	2,300,000.00
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<input type="checkbox"/>	5	Provide district wide water dispenser services. Extend contract for an additional year, only.	8/17/2019	8/16/2020	Expired	0.00	2,300,000.00
<input checked="" type="checkbox"/> Selected	6	Provide District wide water dispenser service: extend for one year only, no additional costs.	8/17/2020	8/16/2021	Active	0.00	2,300,000.00

Click "Save and Continue"

On the Document Process Manager page, click the arrow next to the template you created to expand the menu.

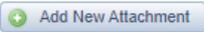
**Document Process Manager: Manage Files/Attachments**

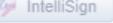
**Record Information**

For: **Contracts & Committals**  
Record: **District-wide bottled water - ID: 85263**

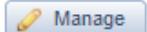
**Document Information**

Document ID: **110**  
Document Title: **Amendment**  
Document Template: **Amendment**  
Process Type: **Document Package**



Delete	Actions	ID	File Title/Notes	Published Version
			<input type="text"/>	
	  	110	Amendment	 Initial

The linked template will appear. Click the link to access the document.

Delete	Actions	ID	File Title/Notes	Published Version
	  	110	Amendment	 Initial Version
File/Attachment Vers				
Actions	ID	View File/Attachment	Version Title	
 	111	<a href="#">Amendment 111819.docx</a> 	Amendment 111819	

Clicking on the linked document will download a template pre-filled with contractor name and contact info, contract number, contract manager name and contact info, contract amounts, etc.

Click through to complete any fillable sections.



**AMENDMENT 6**  
**to the CONTRACT**  
**between**  
**SCHOOL DISTRICT NO. 1J, MULTNOMAH COUNTY, OREGON**  
**(PORTLAND PUBLIC SCHOOLS)**  
**and**  
**EARTH 20**

Contract No. **S85263**

This Amendment changes certain contract provisions during the contract term for the above-numbered contract between School District No. 1J, Multnomah County, Oregon ("Portland Public Schools" or "District") and EARTH 20 ("Contractor"). The parties agree as follows:

1. This Amendment becomes on the date on which the Amendment is fully executed by both parties. **No party shall perform work under this Amendment before the effective date.**
2. This Amendment changes the contract as follows: Describe here any and all changes to the scope, costs, payment terms, end date, or other terms, and list any new exhibits. Please DELETE these instructions before finalizing.

CONTRACT AMOUNTS	
A. Original Contract Amount	\$750,000.00
<b>B. AMOUNT OF THIS AMENDMENT</b>	<b>\$0.00</b>
C. New Total Contract Amount	\$2,300,000.00

3. All other terms and conditions of this Contract shall remain the same.

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**CONTRACTOR DATA**

**Contractor Name:** EARTH 20  
**Contact Name:** Nick Seifert  
**Address:** PO BOX 70  
**City, State, ZIP:** CULVER, OR 97734  
**Telephone:** 541-335-1297  
**Email:** nseifert@earth2o.com

**District Point of Contact:** Emily Courtnage (ecourtnage@pps.net), Purchasing & Contracting (5552), Portland Public Schools, P.O. Box 3107, Portland, Oregon 97208-3107

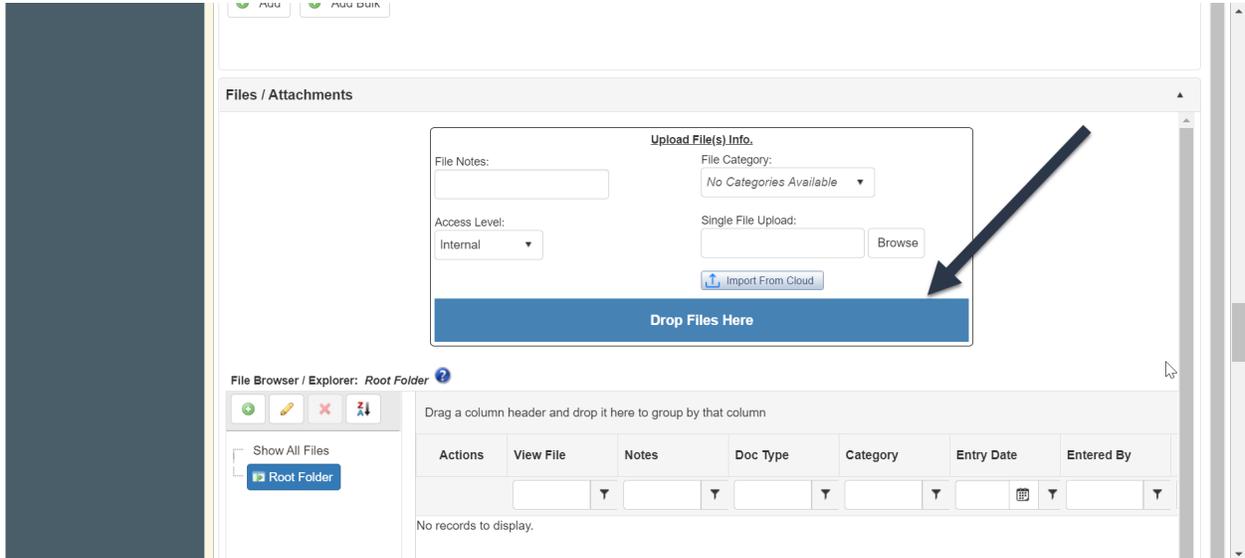
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I HAVE READ THIS CONTRACT AND ITS ATTACHED EXHIBITS, IF ANY. I CERTIFY THAT I HAVE THE AUTHORITY

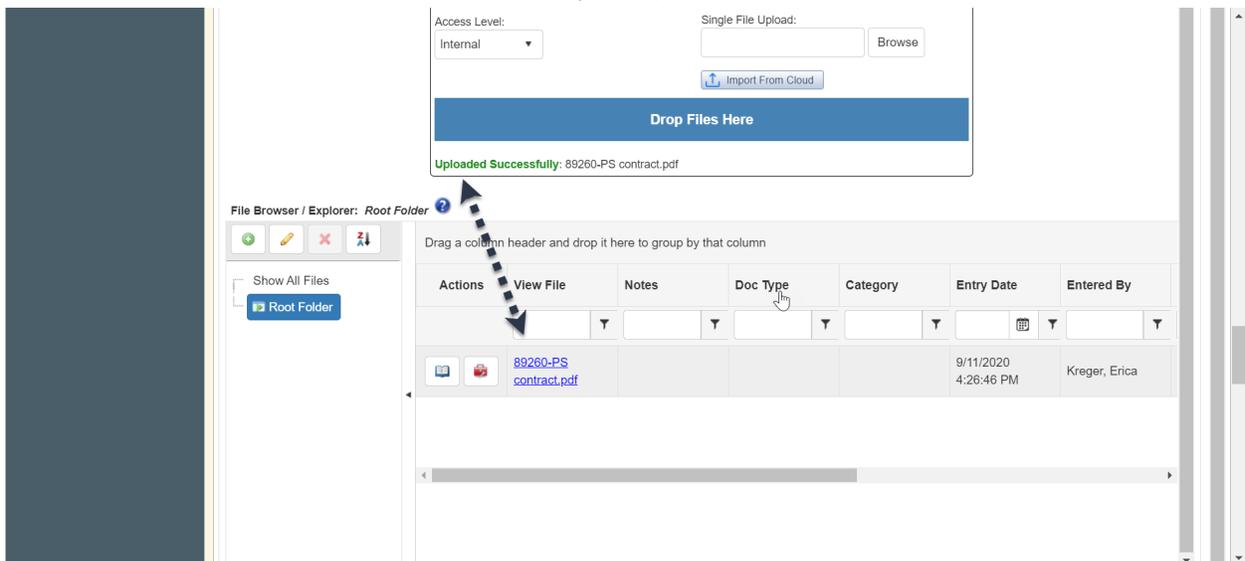
When you are done, save the document on your computer. To save the unsigned draft with the contract record in Cobblestone, return to the contract record (click "Return to Record Details" from the Document Process Manager page), scroll down to **Files/Attachments**, add a file note (e.g., "Draft contract") and drag and drop your saved document to the "Drop Files Here" section.

## Upload Documents to Record

- 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”)



These two areas show upload is successfully completed



## Submitting Contract for Purchasing & Contracting Review and Approval

Do not submit your contract for Purchasing & Contracting review until you have obtained the Budget Holder's signature on the Contract Approval Form and the contractor's signature on the Contract. Be sure to upload the signed copies to the Contract Record in Cobblestone.

When ready for submittal, 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 signed documents are uploaded

1 tasks remaining as of today

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 Completed	Approve	Reject
<a href="#">View</a> Contract Submission	Erica Kreger	9/11/2020	9/13/2020	2	9/11/2020	Open		<a href="#">Approve</a>	<a href="#">Reject</a>

**Notes, Comments, Diary Log**

Enter Notes Below and/or optionally enter a subject:  
note subject

Internal

Save Note Refresh

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**

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
<a href="#">View</a> Contract Submission	Erica Kreger	9/11/2020	9/13/2020	2	9/11/2020	Task Complete	9/11/2020
<a href="#">View</a> 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

The screenshot shows a dashboard with several sections. At the top, there are navigation buttons: 'Purchasing & Contracting Website', 'P&C Contract Forms Page', 'Submit New Vendor Request', 'Add New Contract Record', and 'Find/Search Contracts'. Below these are four summary cards: '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', and 'My Department's Active Contracts: Total Count 1405'. The main section is titled 'My Pending Contracts (Assigned as Contract Manager or Department Contact)'. It includes an 'Export' button, an 'Update' button, and a 'Total Record Count: 1'. Below this is a table with the following data:

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

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.