Entering and Maintaining Procurement Contracts Overview

The Procurement Contracts module in Cardinal supports VDOT in building, managing, and storing all contract-related information throughout the procurement lifecycle. It integrates with Strategic Sourcing, Requisitions, and Purchase Orders, enabling efficient contract creation, versioning, renewal tracking, threshold monitoring, and automated notifications. Contract details may originate from external contracts, SiteManager interfaces, or Strategic Sourcing events.

This job aid also outlines how VDOT maintains procurement contracts, including creating new versions, updating or closing contracts, managing items and supplier relationships, and communicating modifications. Daily interfaces with SiteManager ensure construction and maintenance contract data remains accurate. By capturing essential terms, pricing, and supplier details, procurement contracts streamline VDOT's purchasing process and support the creation of requisitions and POs without repeated price-quote requests.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

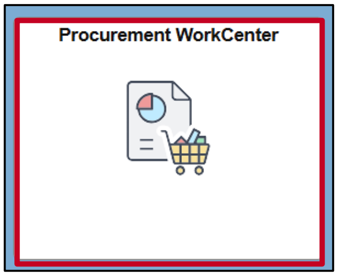
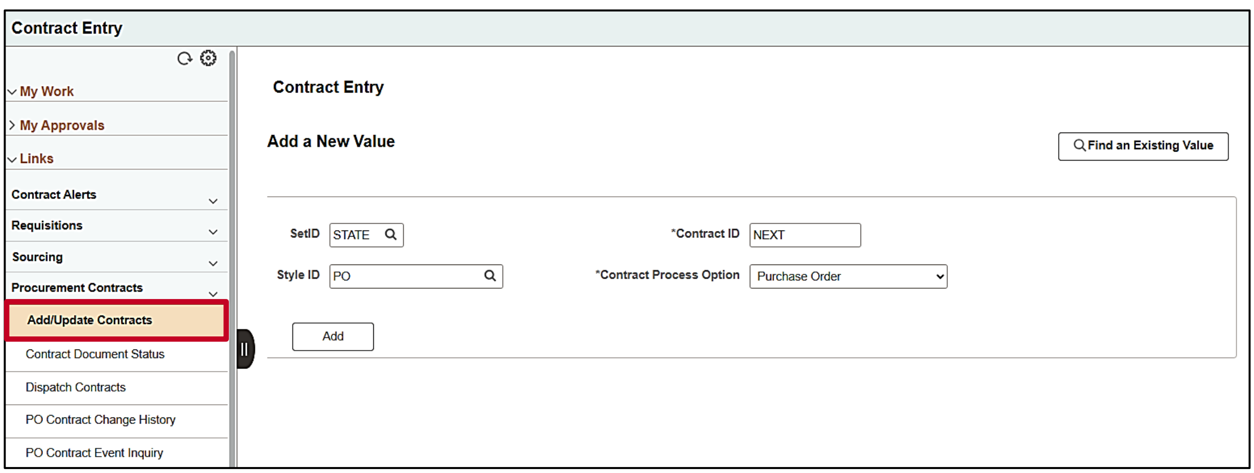
Table of Contents

Revision History

Revision Date	Summary of Changes
9/1/2026	Baseline.

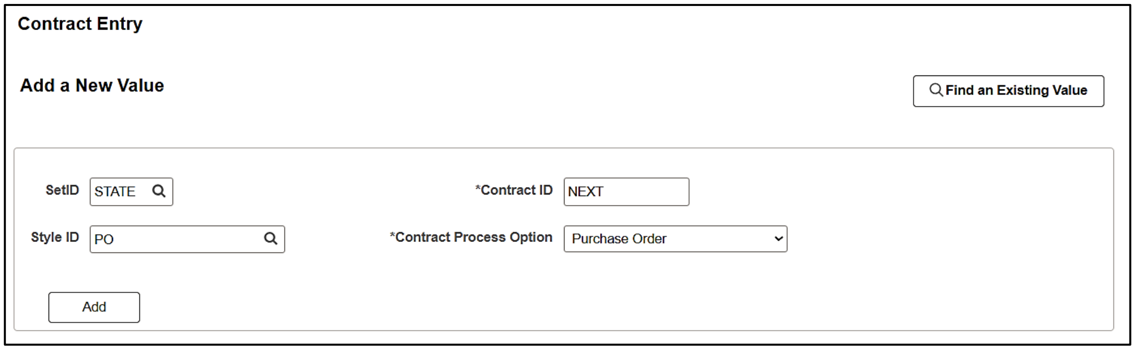
Entering a Procurement Contract

Outside or Ad-Hoc contracts must be entered manually.

Step	Action
1.	Navigate to the **Contract Entry** page by clicking the **Procurement WorkCenter** tile. 
ℹ	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Procurement Contracts > Add/Update Contracts** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
ℹ	Users can also access the **Contract Entry** page using the following navigation path: **NavBar > Menu > Procurement Contracts > Add/Update Contracts**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Contract Entry Add a New Value** page displays.



</td></tr>
<tr><td></td><td>

SetID defaults to “STATE”. Do not update.

Contract ID defaults to "NEXT". Do not update. The contract number will automatically generate upon save.

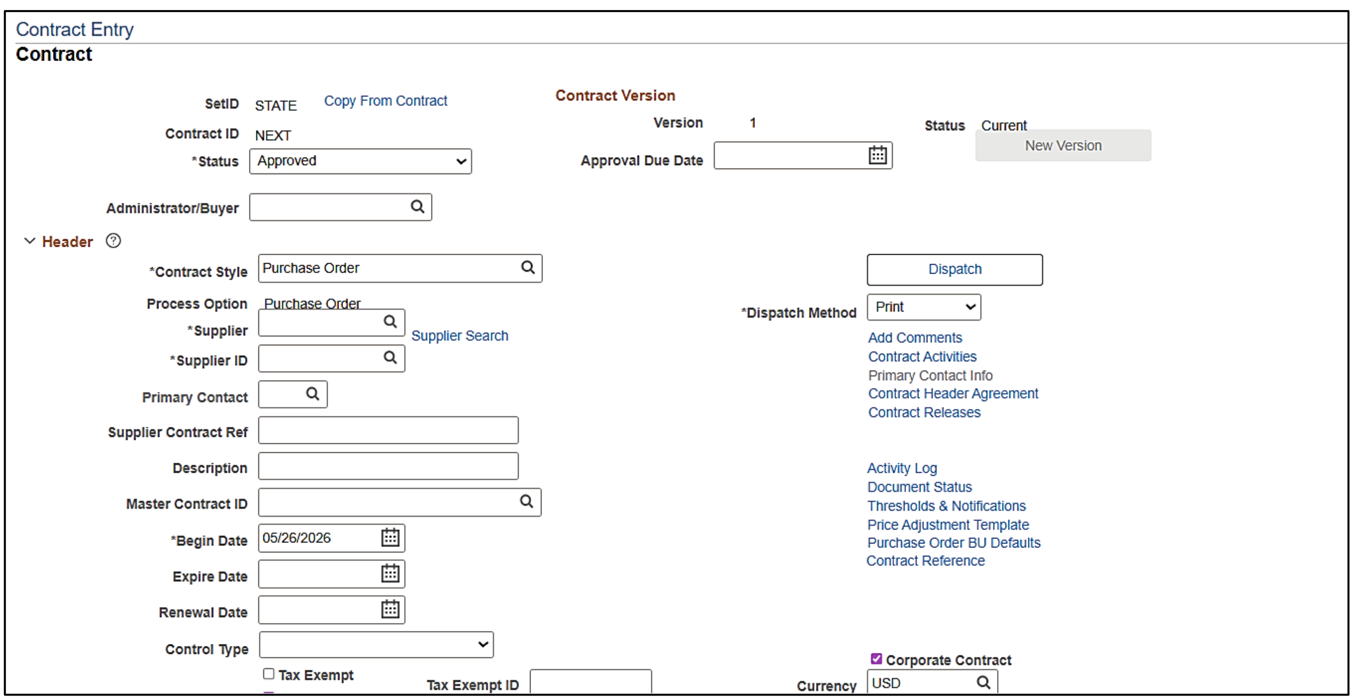
Contract Process Option defaults to "Purchase Order" and **Style ID** defaults to "PO". Do not update these fields.

</td></tr>
<tr><td>3.</td><td>

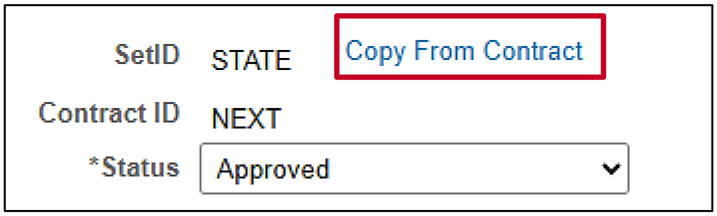
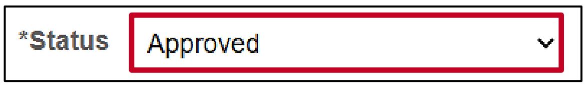
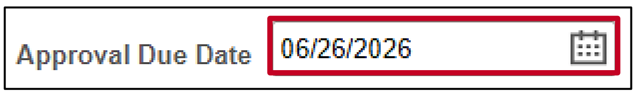
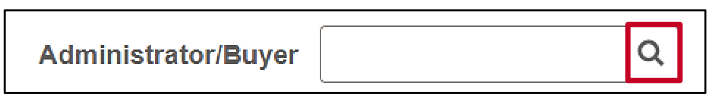
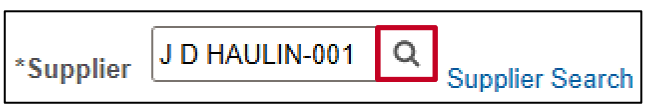
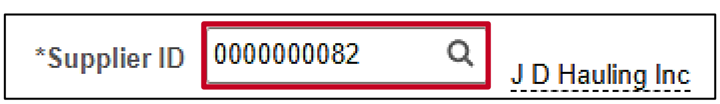
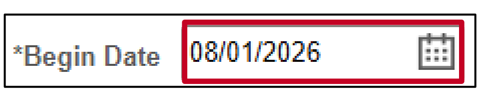
Click the **Add** button.

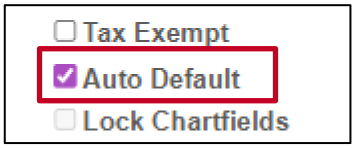
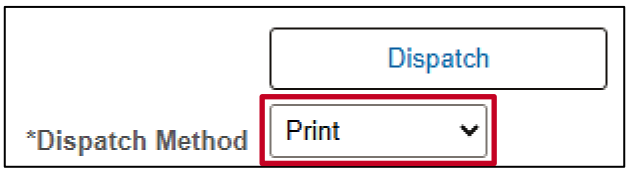
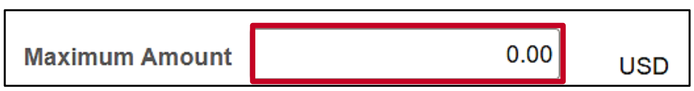
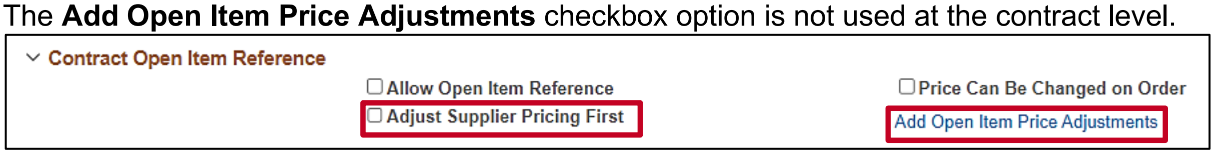
</td></tr>
<tr><td colspan="2">

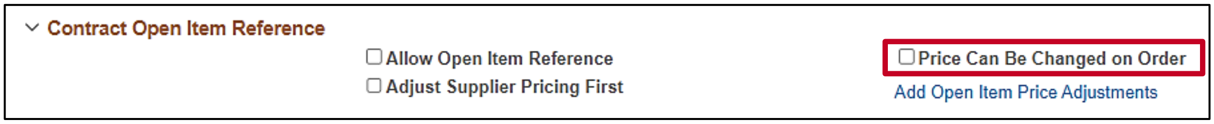
The **Contract Entry Contract** page displays.



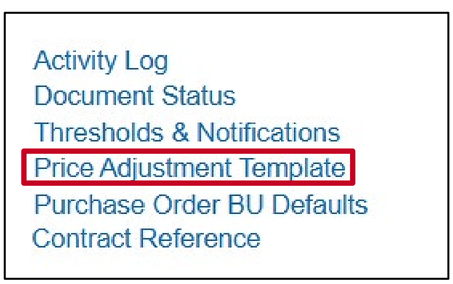
</td></tr>
</table>

Step	Action
	Click the **Copy From Contract** link to copy the following field values from an existing Contract: **Administrator/Buyer**, **Supplier**, **Supplier ID**, **Supplier Contact Ref**, **Begin Date**, **Expire Date**, **Renewal Date**, **Description**, **Maximum Amount** (if applicable), **Contract Category**, and **Responsible Org**. 
4.	The **Status** field defaults to “Approved”. When a Contract is saved in this status, the **Approval Due Date** is saved as the Approval Date. 
5.	Click the **Approval Due Date** Calendar icon and select the appropriate contract approval date. 
6.	Click the **Administrator/Buyer Look up** icon and select the applicable Contract Administrator/Buyer. 
7.	Click the **Supplier Look Up** icon and select the applicable Supplier. 
The **Supplier ID** field is populated automatically. 	
8.	Enter the Contract’s start date in the **Begin Date** field. 

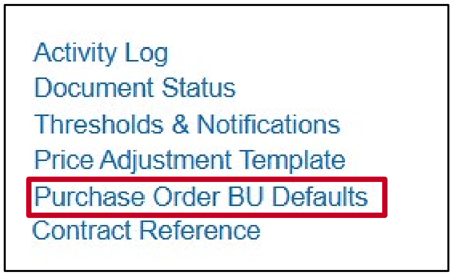
Step	Action
	Do not change the following fields in the **Header** section: **Auto Default**: defaults to selected.  **Dispatch Method**: defaults to "Print".  **Allow Multicurrency PO**: defaults to selected. 
9.	In the **Amount Summary** section, enter a value in the **Maximum Amount** field, if applicable. 
	In the **Contract Open Item Reference** section, note the following: The **Adjust Supplier Pricing First** checkbox option defaults to unselected. The **Add Open Item Price Adjustments** checkbox option is not used at the contract level. 
10.	Select the **Allow Open Item Reference** checkbox option if the contract will not be restricted to specific items. This option allows the contract to be referenced on a requisition or PO line. This checkbox may be used when creating a Parts/Catalog type contract. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11.</td><td>Select the Price Can Be Changed on Order checkbox option if applicable. Selecting this option gives Buyers the capability to change the contract price on a PO when ordering against a contract. If this checkbox is not selected, the price fields on the PO are unavailable for entry.

</td></tr>
<tr><td></td><td>The Contract Activities link opens a page for tracking contract activities, assigning Due Dates and marking them Done. This is especially useful when multiple VDOT Contract Administrators are assigned.

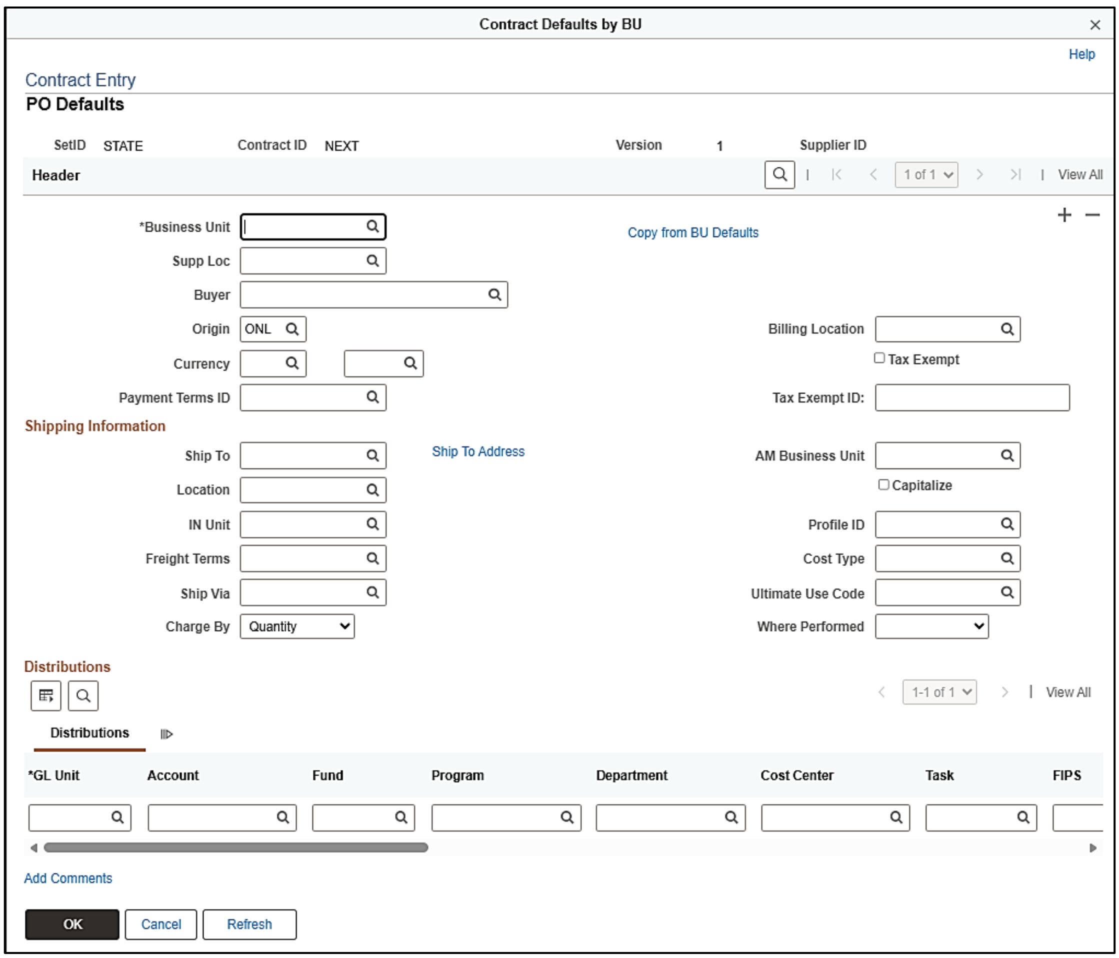
</td></tr>
<tr><td></td><td>The Activity Log link opens a page for showing who entered, last updated, and approved the contract and when they did so.

</td></tr>
<tr><td></td><td>The Price Adjustment Template link is not used at the Contract level.

</td></tr>
</table>

Step	Action
12.	Click the **Purchase Order BU Defaults** link.

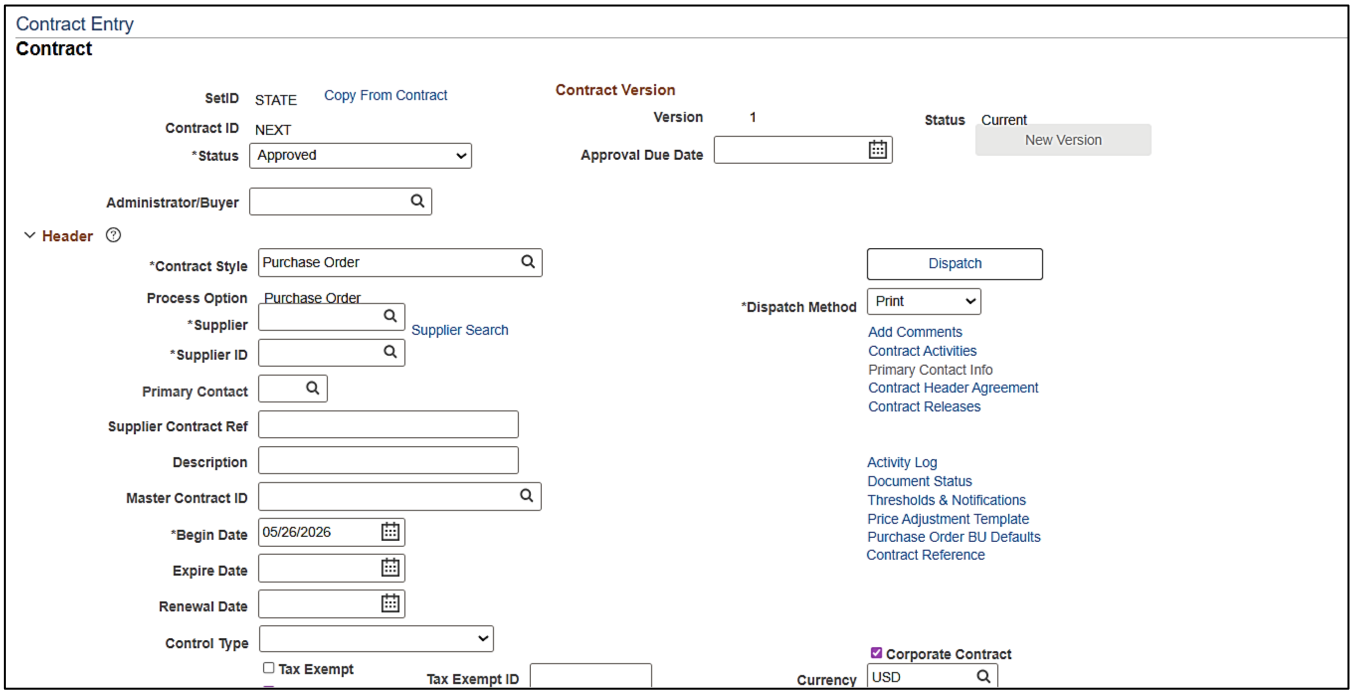
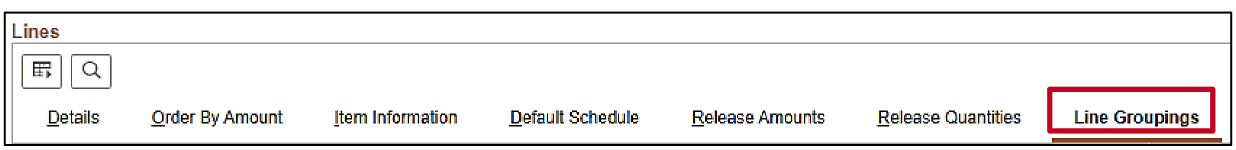


The **Contract Entry PO Defaults** page displays in a pop-up window.



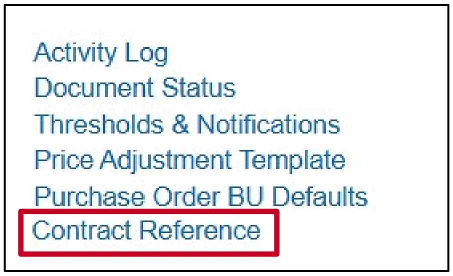
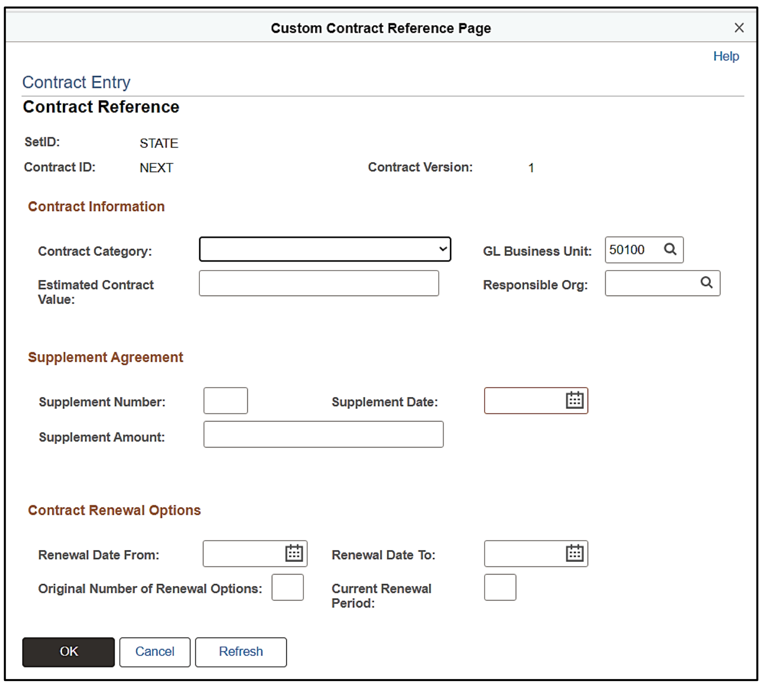
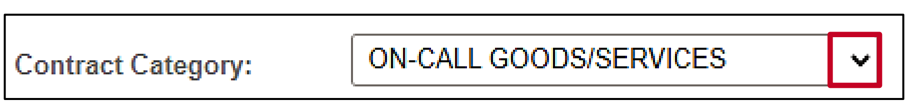
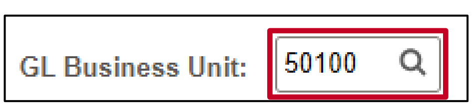
Step	Action
13.	Set the accounting distribution and payment terms on the Contract, which then default to the Purchase Orders created from this Contract.
ℹ	The **Payment Terms ID** field for Professional Service contracts is typically set to “00 – Due Now”.

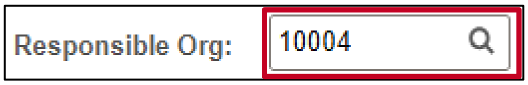
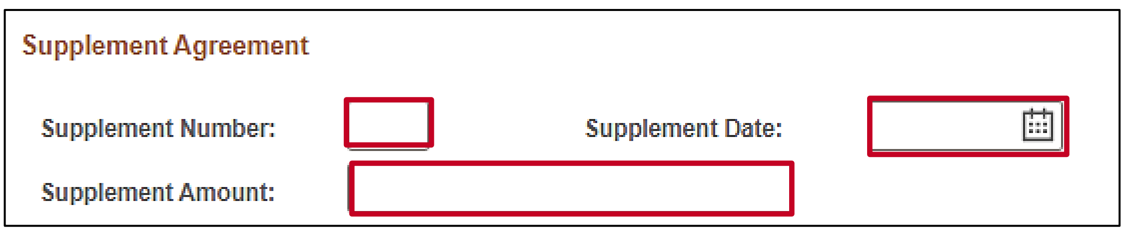
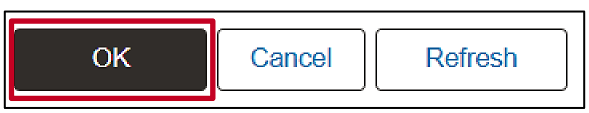
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14.</td><td>Click the OK button.

</td></tr>
<tr><td colspan="2">The Contract Entry Contract page redisplays.

</td></tr>
<tr><td></td><td>The Line Groupings tab is not used.


The Contract Categories section is not used.

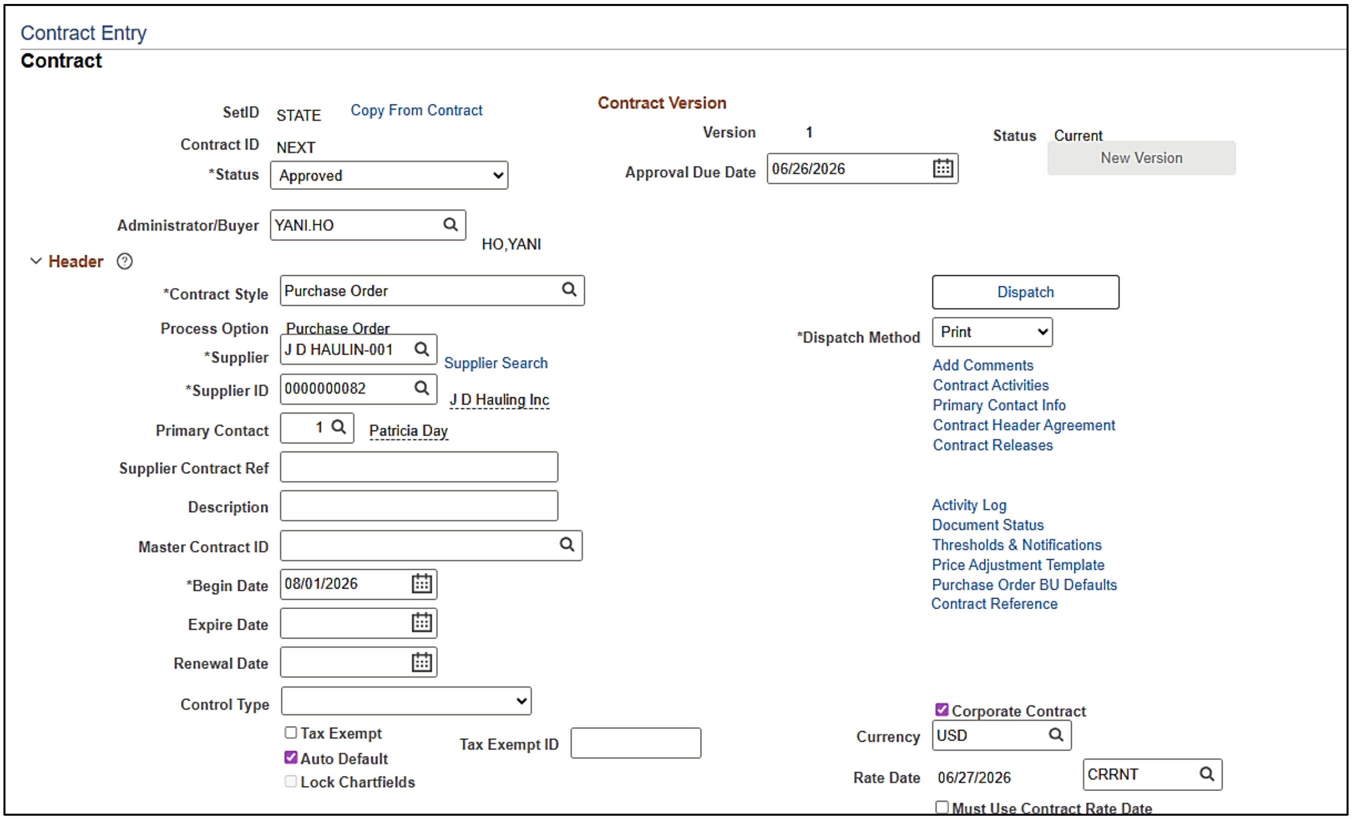
</td></tr>
</table>

Step	Action
15.	Click the **Contract Reference** link. 
The **Custom Contract Reference Page** displays in a pop-up window. 	
	Information must be entered in the **Contract Information** section of the **Custom Contract Reference Page**, or the Contract will not be able to be saved.
16.	Click the **Contract Category** dropdown button and select the appropriate category. This field helps to categorize contracts for ease in the search and reporting process. This is required. 
17.	Verify that "50100" is in the **GL Business Unit** field. 

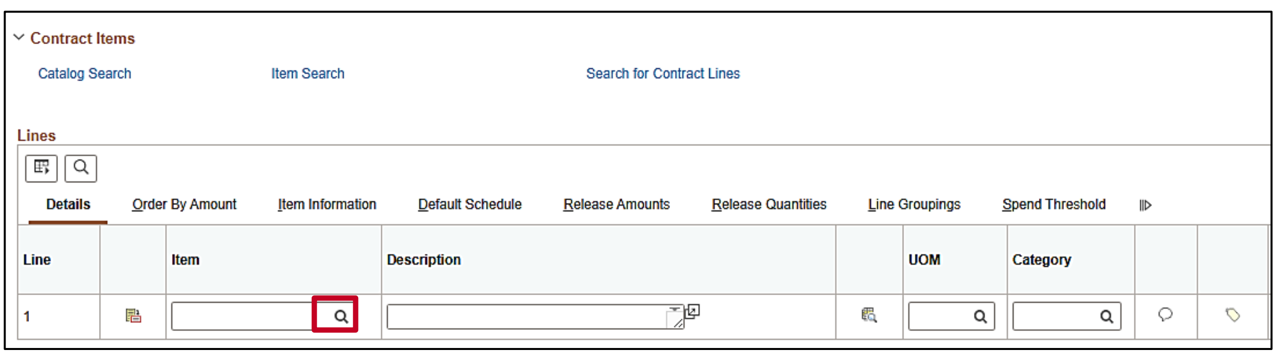
Step	Action
18.	Enter a value in the **Estimated Contract Value** field for all Contracts, including Requirements Contracts. 
19.	Enter the appropriate department number in the **Responsible Org** field. 
	Supplemental agreements are usually related to professional service contracts where there is an addendum (add on) to the contract. **Supplement Number**: The number or reference field on the addendum. This could also be the Agency number. Consult Agency supplemental agreements procedures. **Supplement Date**: The date of the addendum. **Supplement Amount**: The addendum amount. 
20.	Click the **OK** button. 

Step	Action

The **Contract Entry Contract** page redisplays.

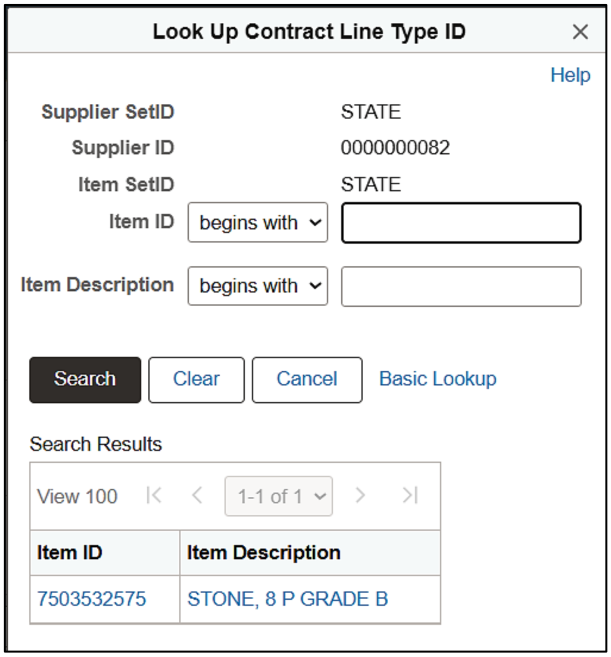


21. In the **Lines** section, click the **Item Look up** icon and select the applicable Item ID to add to the Contract.



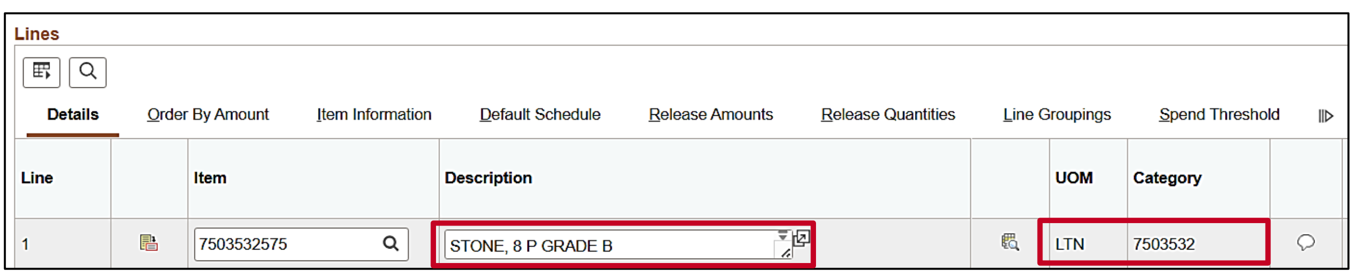
Step	Action

The **Look Up Contract Line Type ID** page displays in a pop-up window.

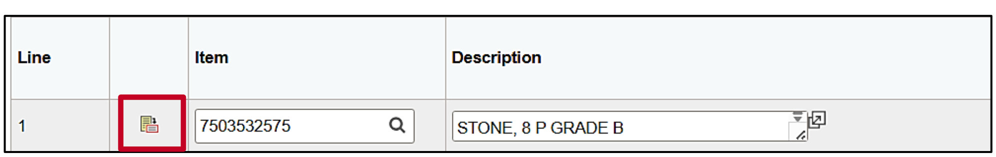


22. Click the applicable **Item ID**.

The **Lines** section redisplays and the **Description**, **Unit of Measure (UOM)**, and **Category** fields are automatically populated based on the Item selected.

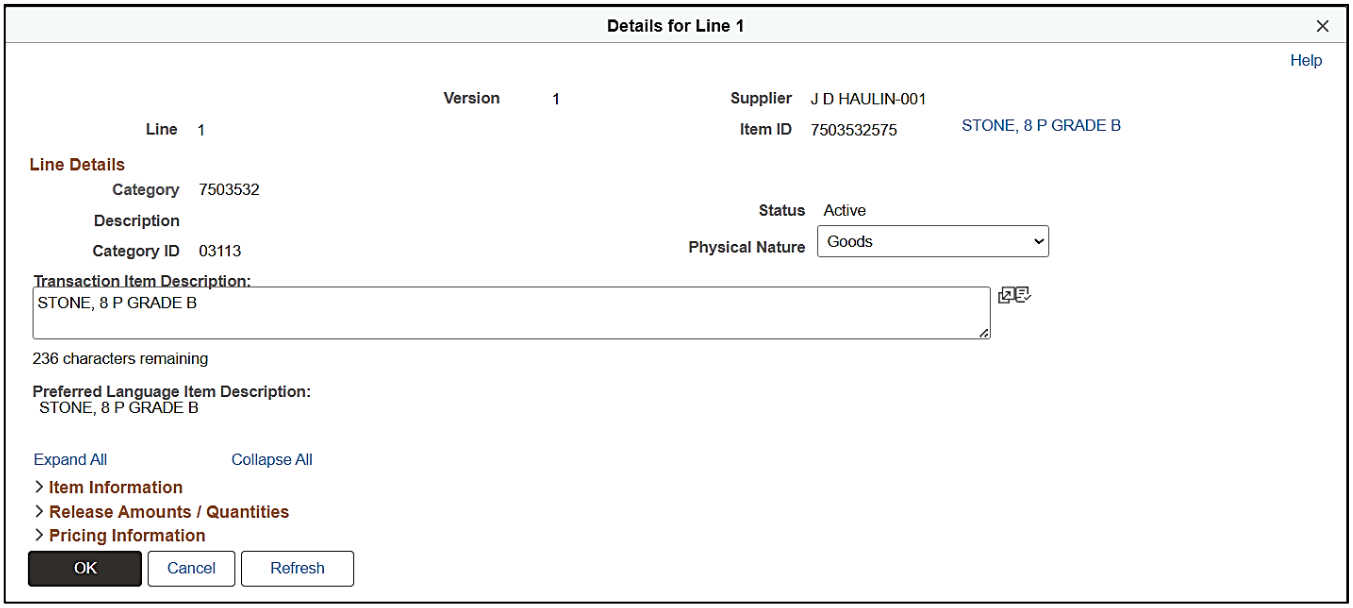


23. Click the **Line Details** icon.

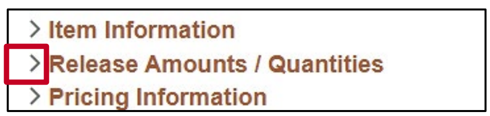


Step	Action

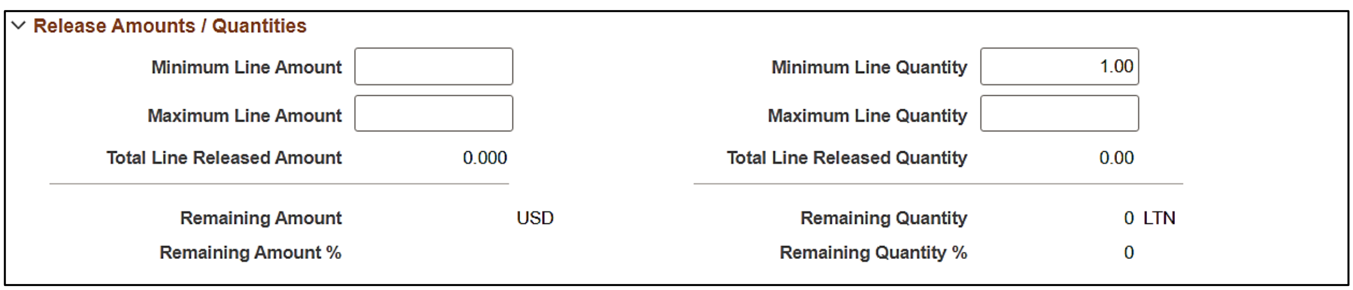
The **Details for Line** page displays in a pop-up window.



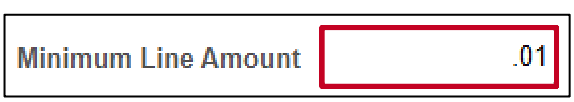
24. Click the **Expand Section Release Amounts / Quantities** icon (**>**).

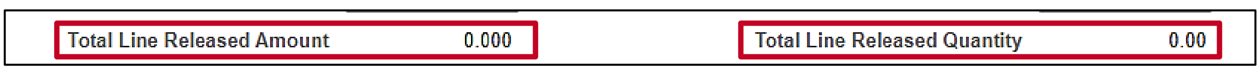
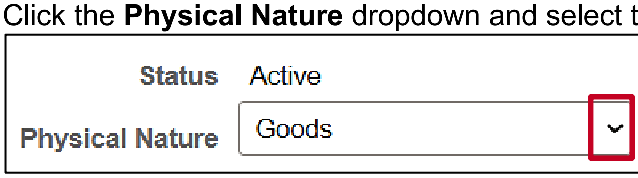


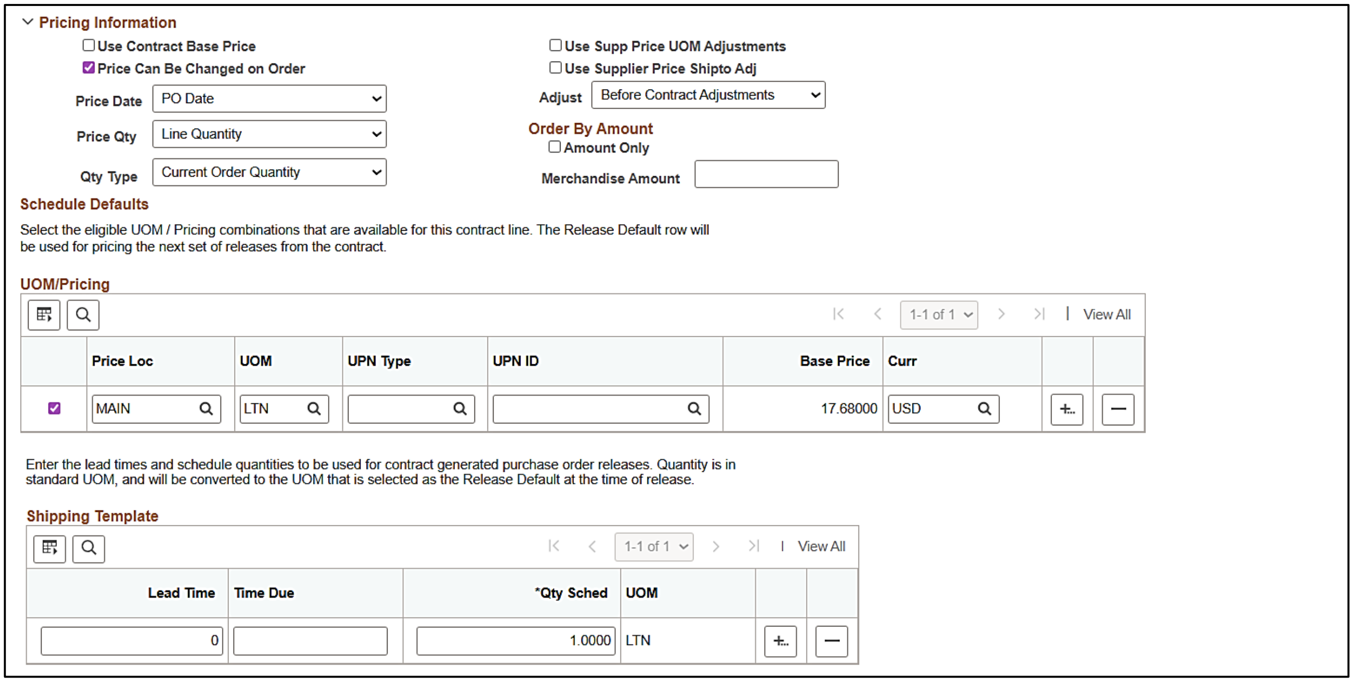
The **Release Amounts / Quantities** section displays.

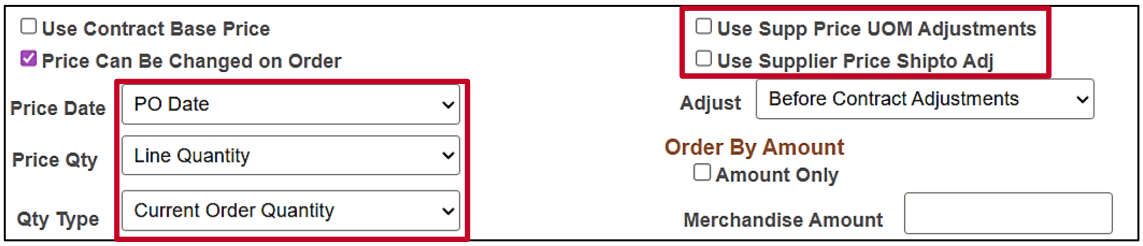
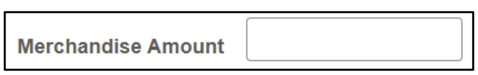
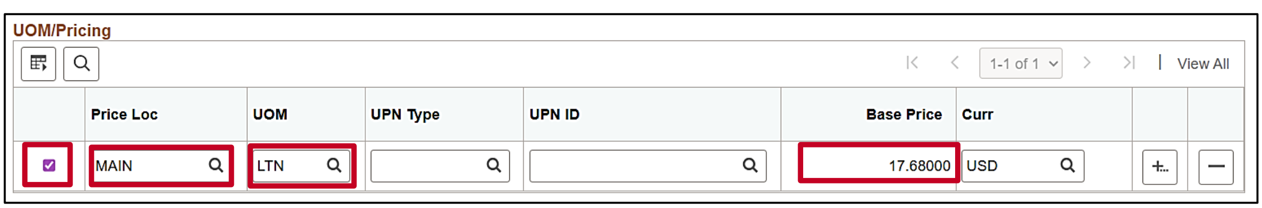


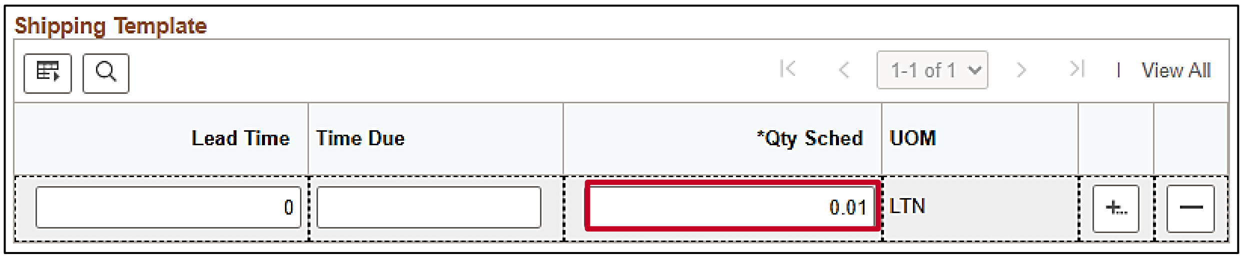
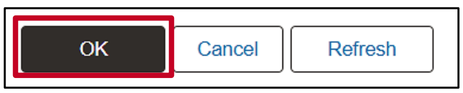
25. Enter the minimum amount that can be ordered for a line at one time in the **Minimum Line Amount** field. This is generally set to .01.

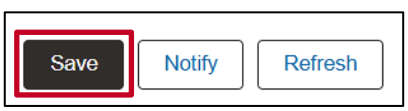


Step	Action
26.	Enter the maximum amount that is allowed for all orders in the **Maximum Line Amount** field. This is generally left blank to allow for any amount. 
27.	Enter the minimum quantity that can be ordered for a line at one time in the **Minimum Line Quantity** field. This is generally set to .01. 
28.	Enter the maximum quantity that is allowed for all orders in the **Maximum Line Quantity** field. This is generally left blank to allow for any quantity. 
	The **Total Line Released Amount** and **Total Line Released Quantity** fields reflect increases and decreases on Purchase Orders from Change Orders and are updated by the system. No user intervention is needed. 
29.	Click the **Physical Nature** dropdown and select the appropriate option.  **Note**: For Professional Service contracts, select “Services”.
30.	Click the **Expand Section Pricing Information** icon (**>**). 

Step	Action
	The **Pricing Information** section displays. 
31.	Select the **Use Contract Base Price** checkbox option if the price from the Contract should be used on the PO, and not the Item/Supplier relationship price. 
32.	Select the **Price Can Be Changed on Order** checkbox option to allow the Buyer to change the contract line price on the PO. This would be used if the contract line price is a price range rather than a fixed price. 

Step	Action
	The **Price Date** field defaults to “PO Date” – do not change. The **Price Qty** field defaults to “Line Quantity” – do not change. The **Qty Type** field defaults to “Current Order Quantity” – do not change. The **Use Supp Price UOM Adjustments** field defaults to unselected – do not change. The **Use Supplier Price Shipto Adj** field defaults to unselected – do not change. 
33.	Select the **Amount Only** checkbox option when the contract line needs to be ordered as amount only. In this case, the quantity is set to 1 to allow receiving to be done by amount (dollars) instead of quantity. Generally, this is used for Professional Services contracts or services that are invoiced along the way. 
	The **Merchandise Amount** field will be automatically populated from the **Base Price** field upon saving. 
	In the **UOM Pricing** section, the **UOM/Pricing** checkbox option defaults to selected. The **Price Loc** field defaults to the item location based on the supplier. The **UOM** field defaults based on the line item from the previous page. The **Base Price** field displays the price of the contract line item. The price defaults from the supplier/item relationship or awarded sourcing event. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>34.</td><td>In the Shipping Template section, update the Qty Sched field as applicable.
The Shipping Template section is used to pre-set the values which will default on the PO:
Note: Set the Qty Sched field to 1 if PO cannot be issued for a quantity less than 1.
When a contract is set to “Amount Only”, the Qty Sched field must be set to 1.

</td></tr>
<tr><td>35.</td><td>Click the OK button.

</td></tr>
<tr><td colspan="2">The Contract Entry Contract page redisplays.

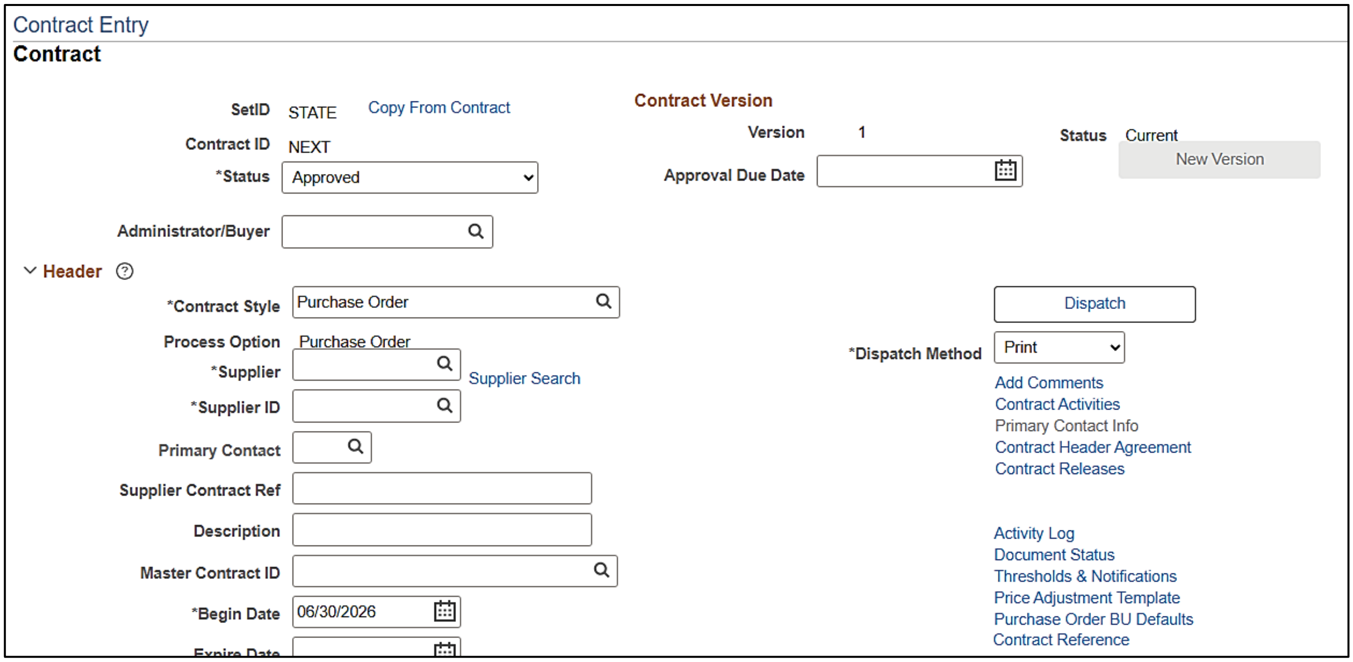
</td></tr>
<tr><td>36.</td><td>Scroll down and click the Save button.

</td></tr>
<tr><td colspan="2">The Contract ID field is updated with an assigned number. The Approved Date field is updated with the current date.

</td></tr>
</table>

Adding Comments

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

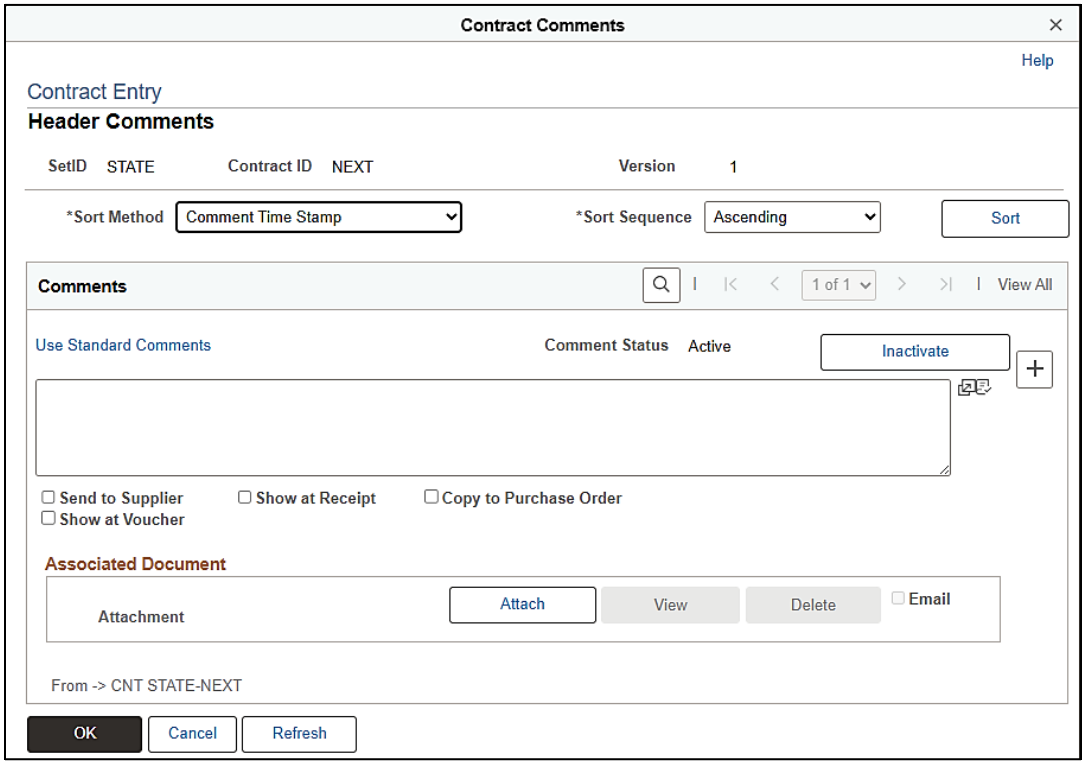
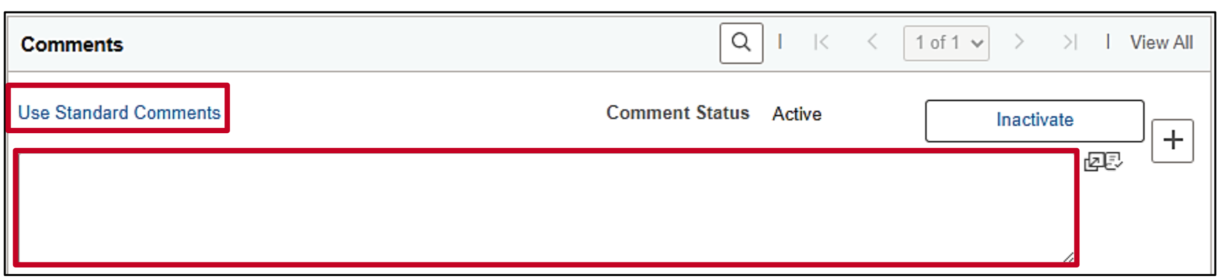
When entering a Contract, comments and attachments can be added from the **Header** section of the **Contract Entry Contract** page.

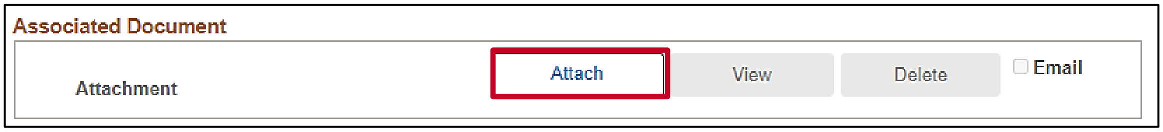
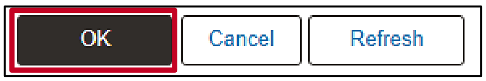
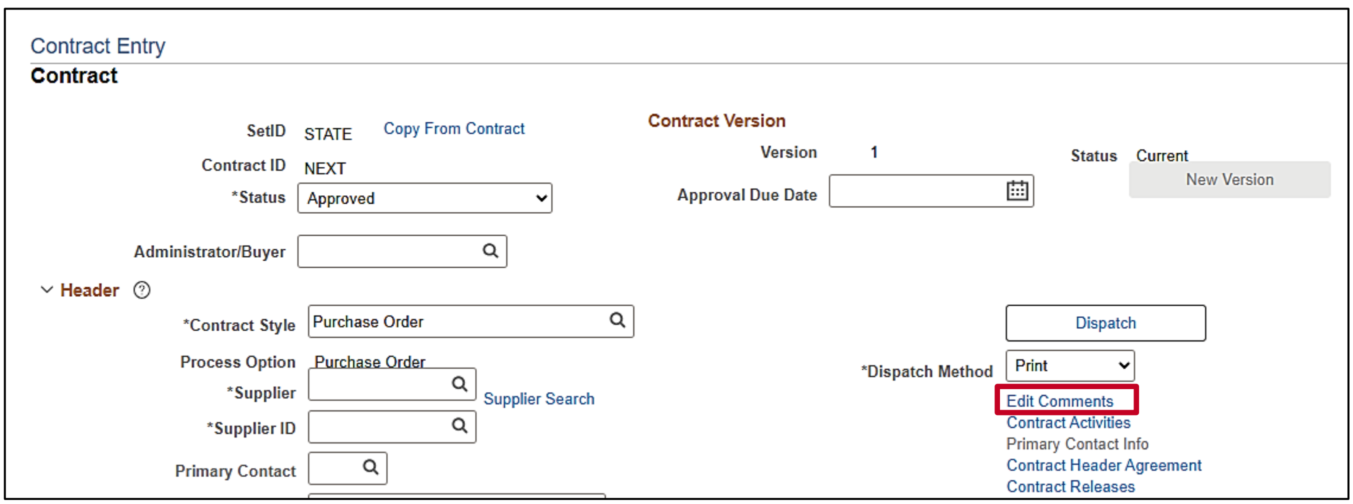
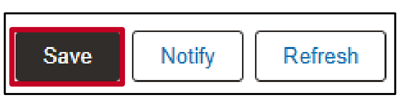


</td></tr>
<tr><td>1.</td><td>

Click the **Add Comments** link.

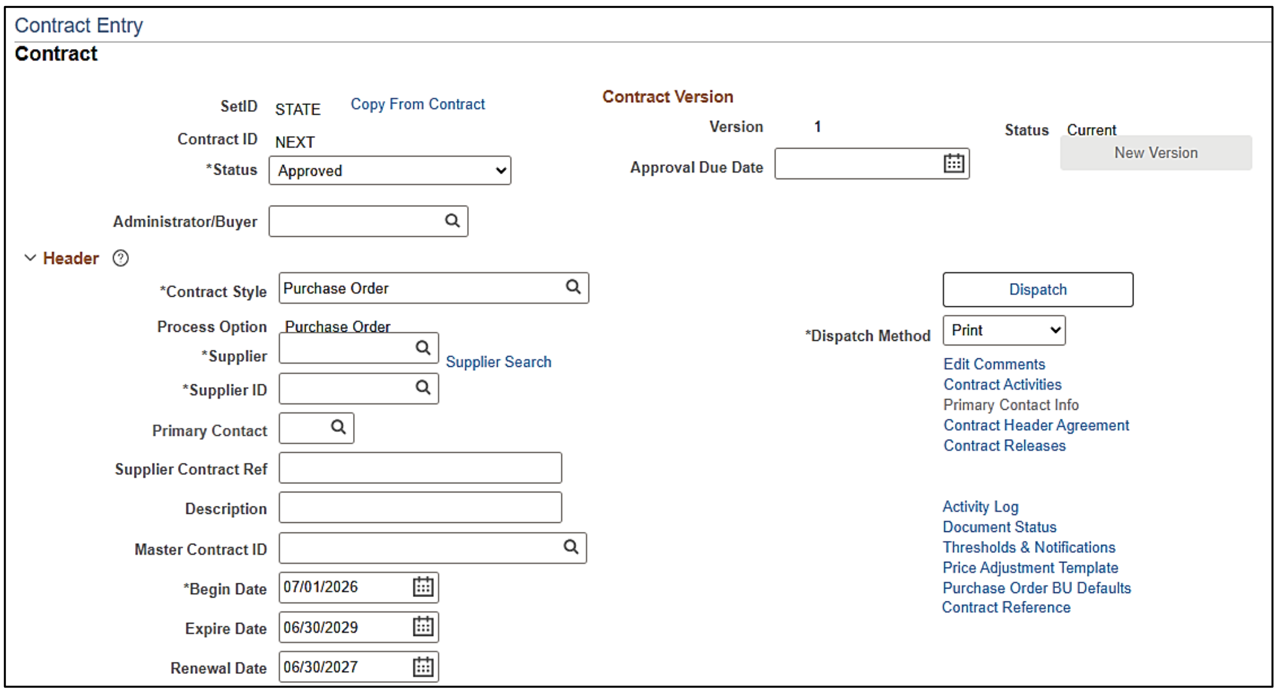
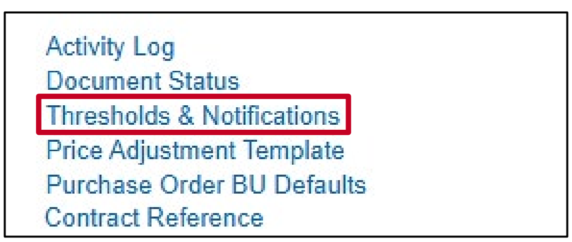
</td></tr>
</table>

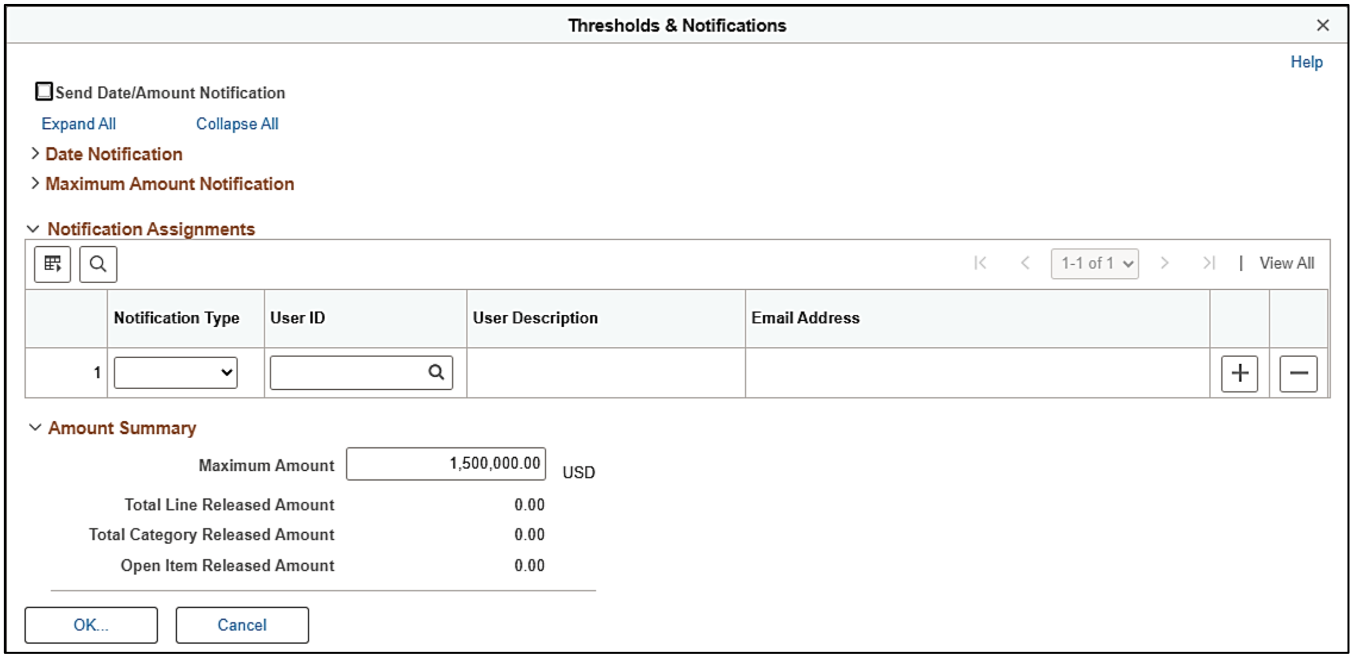
Step	Action
	The **Contract Entry Header Comments** page displays in a pop-up window. 
2.	Click the **Use Standard Comments** link to choose from prepopulated comments or type unique comments in the **Comments** field. 
3.	Select the **Send to Supplier** checkbox option to have the comment print on the contract. 
4.	Select the **Copy to Purchase Order** checkbox option to have the comment print on the PO. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>Click the Attach button to add a document. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the Allowed Extensions on Attachments in Cardinal section of this Job Aid.

</td></tr>
<tr><td>6.</td><td>Click the OK button.

</td></tr>
<tr><td colspan="2">The Contract Entry Contract page displays. Note that the Add Comments link is now the Edit Comments link.

</td></tr>
<tr><td>7.</td><td>Scroll down and click the Save button to update the contract with the new comment.

</td></tr>
</table>

Adding Thresholds and Notifications

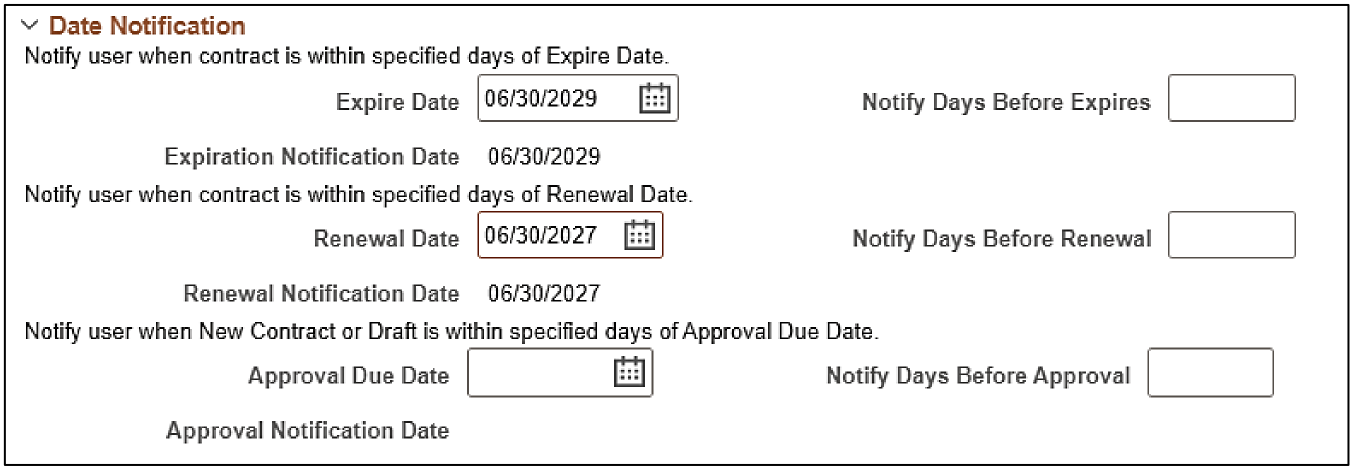
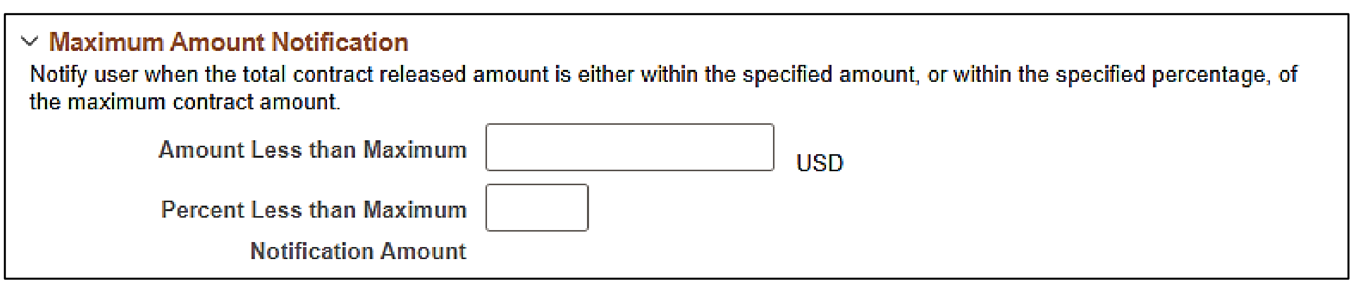
The Thresholds and Notifications feature allows for notification to specified Cardinal users when threshold dates or amounts are met. Cardinal sends an email and puts an item on the user's Contract Thresholds page each week until the condition triggering the notification (expiration date, renewal date, or contract maximum) is updated, or the Contract is set to a "Closed" status.

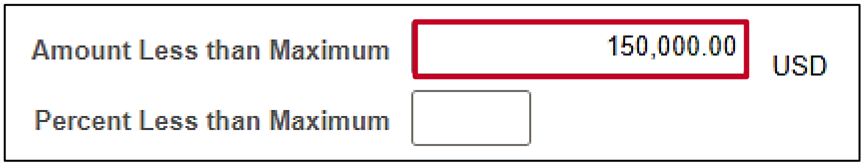
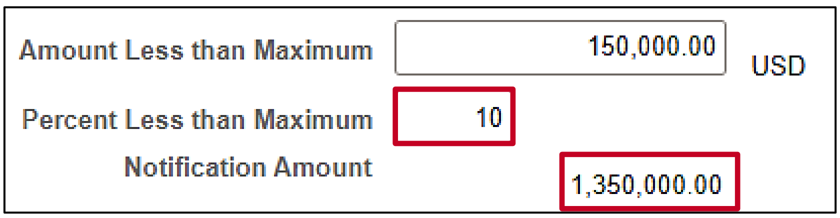
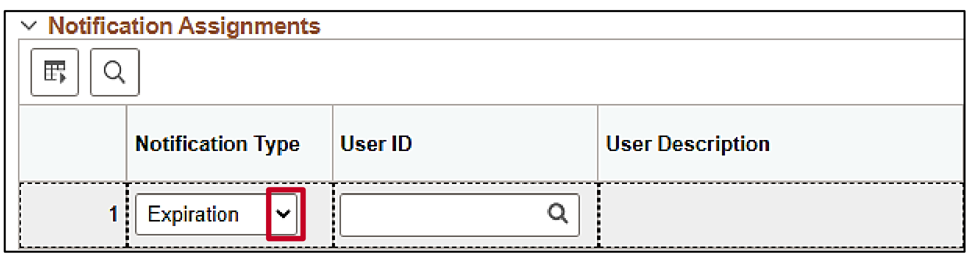
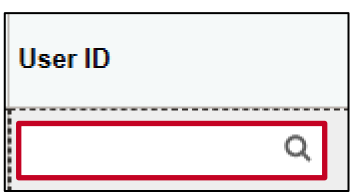
Step	Action
	To access the **Thresholds & Notifications** page, navigate to the **Contract Entry Contract** page. 
1.	Click the **Thresholds & Notifications** link. 

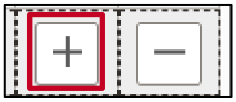
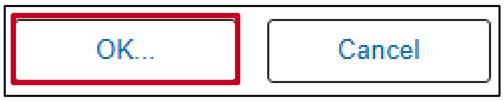
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Thresholds & Notifications page displays in a pop-up window.

</td></tr>
<tr><td>2.</td><td>The Send Date/Amount Notification checkbox option must be selected for the notification functionality to work.

</td></tr>
<tr><td>3.</td><td>Click the Expand Section Date Notification icon (>).

</td></tr>
</table>

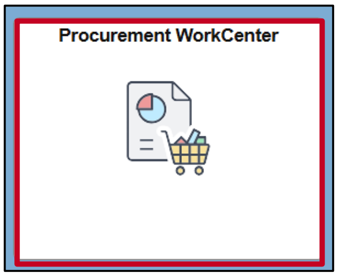
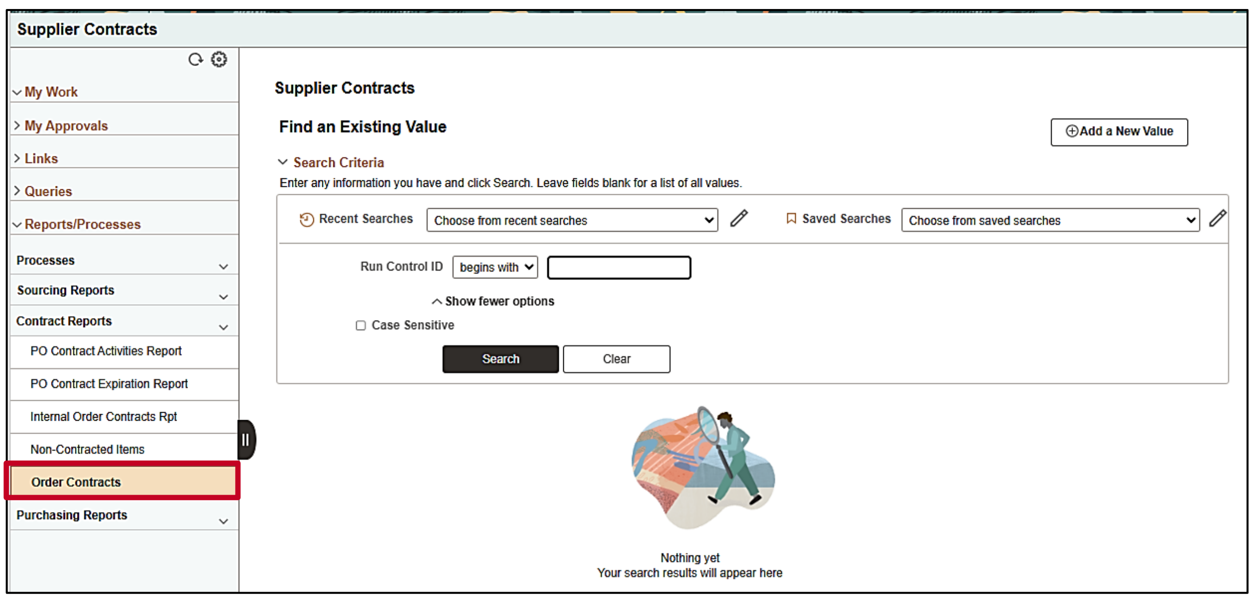
Step	Action
	The **Date Notification** section displays. 
4.	Enter an Expire Date notification by entering the number of days prior to expiration in the **Notify Days Before Expires** field. There must be a date in the **Expire Date** field in the **Contract Header** section of the **Contract Entry Contract** page for this notification to work. 
5.	Enter a Renewal Date notification by entering the number of days prior to renewal in the **Notify Days Before Renewal** field. There must be a date in the **Renewal Date** field in the **Contract Header** section of the **Contract Entry Contract** page for this notification to work. 
6.	Click the **Expand Section Maximum Amount Notification** icon (**>**). 
	The **Maximum Amount Notification** section displays. 

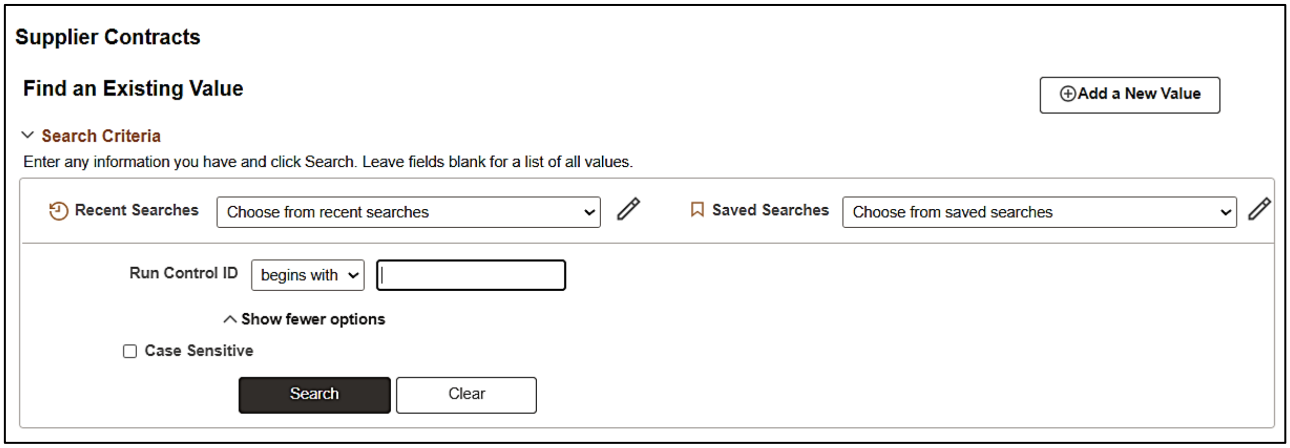
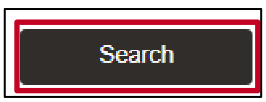
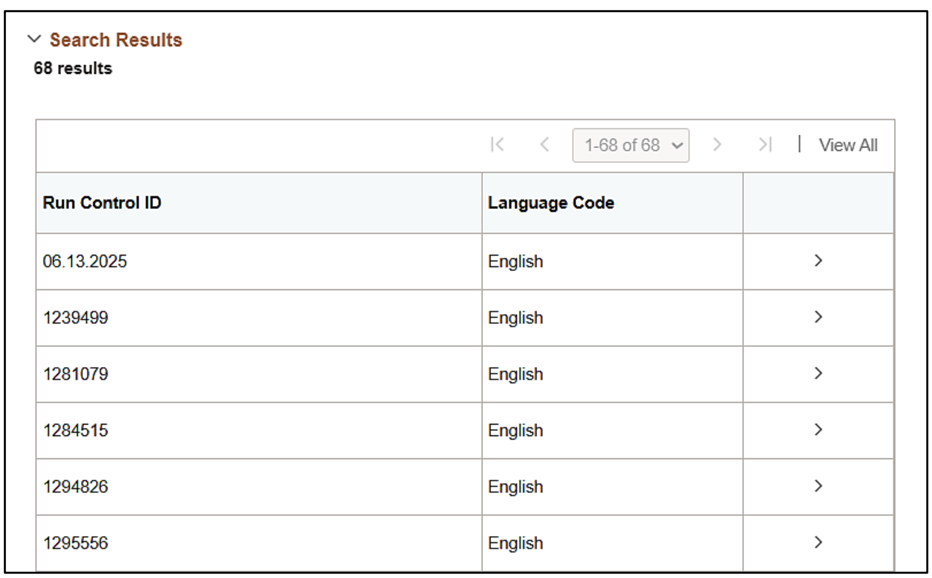
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Enter a monetary amount in the Amount Less than Maximum field or a percentage in the Percent Less than Maximum field. For this notification to work, there must be an amount in the Maximum Amount field section in the Contract Entry Contract page.

</td></tr>
<tr><td>8.</td><td>Tab out of the completed field.</td></tr>
<tr><td colspan="2">The field not entered is automatically updated based on the entry in the other field, and the Notification Amount field is updated to show the threshold that will trigger any Maximum Amount notifications.

</td></tr>
<tr><td>9.</td><td>In the Notification Assignments section, click the Notification Type dropdown button and select the appropriate option (Approval Due Date, Expiration, Maximum Amount, or Renewal).

</td></tr>
<tr><td>10.</td><td>Enter the User ID of the Cardinal user to be notified in the User ID field.

</td></tr>
<tr><td></td><td>A new notification line must be created for each new notification type and for each user receiving the notification.</td></tr>
</table>

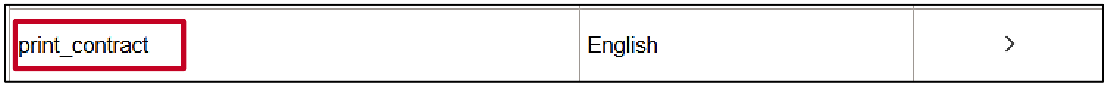
Step	Action
	Multiple users may be set up to receive notifications. Click the **Add Row** (**+**) icon to add a user. 
11.	Click the **OK** button. 

Printing a Contract

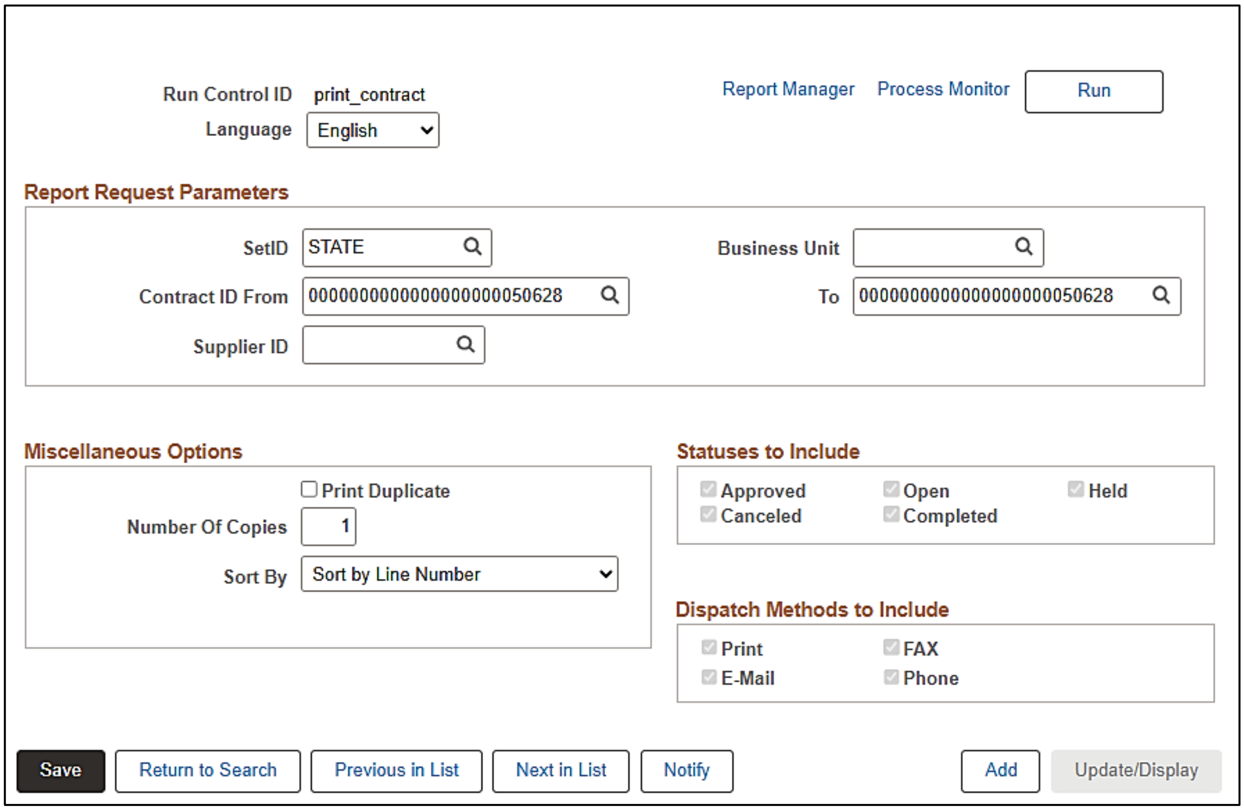
Users with the role of Contact Administrator have the ability to print procurement contracts. The Print contract function provides users with a hard copy contract to review or file, but without an authorized signature block.

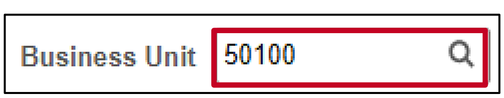
Step	Action
1.	Navigate to the **Supplier Contracts** page by clicking the **Procurement WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Reports/Processes > Contract Reports > Order Contracts** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Supplier Contracts** page using the following navigation path: **NavBar > Menu > Procurement Contracts > Reports > Order Contracts**

Step	Action
The **Supplier Contracts Find an Existing Value** page displays. 	
3.	Click the **Search** button to find an existing Run Control ID. 
	If necessary, click the **Add a New Value** button to create a new Run Control ID. 
The **Search Results** section displays existing Run Control IDs. 	

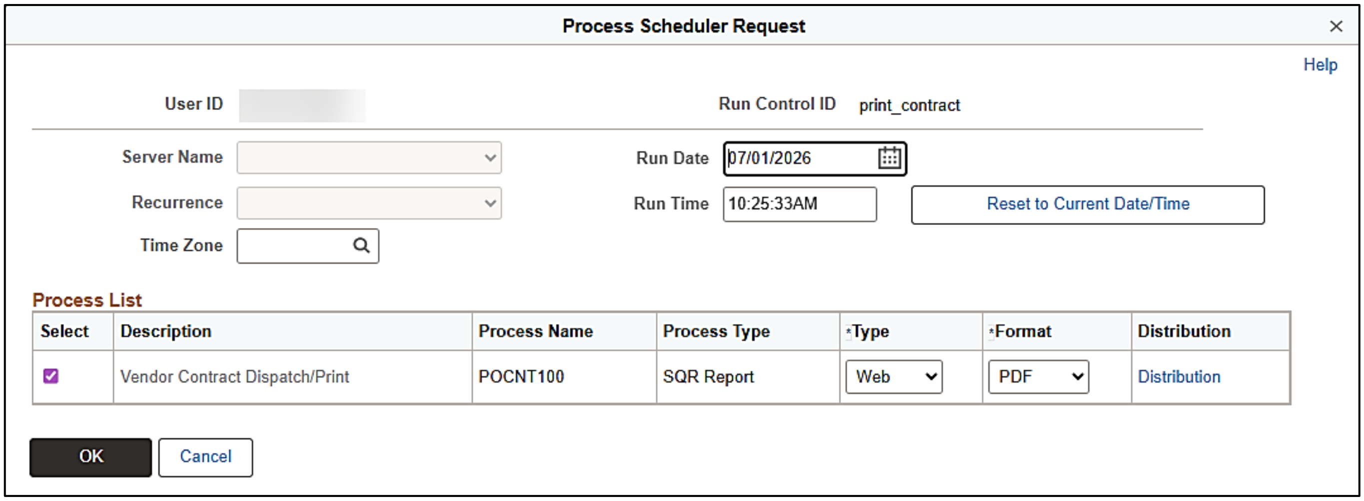
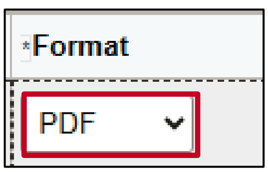
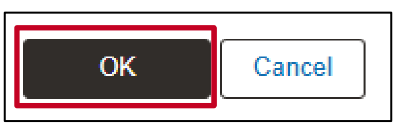
Step	Action
4.	Click the applicable Run Control ID. 

The **Supplier Contracts** run control page displays.



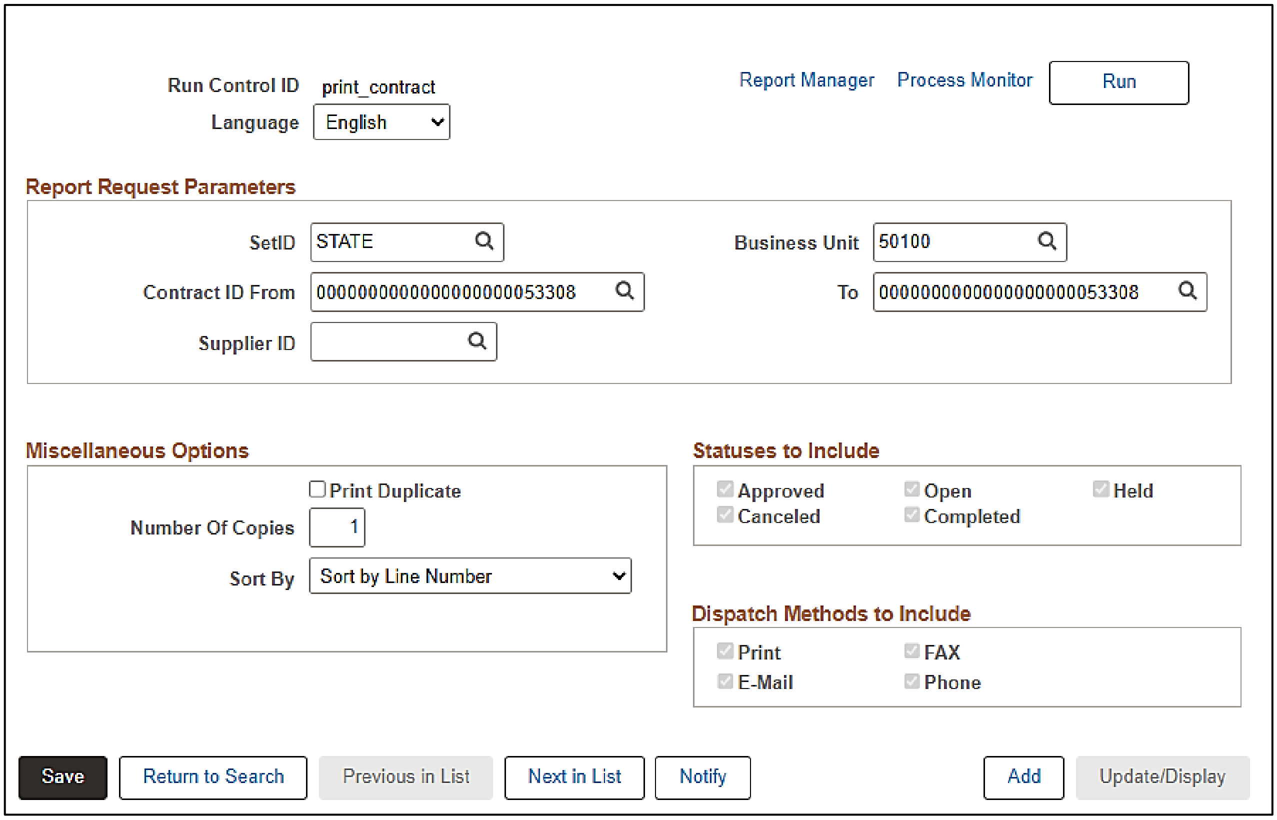
Step	Action
5.	Enter “STATE” in the **SetID** field. 
6.	Enter “50100” in the **Business Unit** field. 
7.	Enter the appropriate Contract ID in the **Contract ID From** and **To** fields. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>Click the Run button.

</td></tr>
<tr><td colspan="2">The Process Scheduler Request page displays in a pop-up window.

</td></tr>
<tr><td>9.</td><td>Click the Format dropdown button and select “PDF”.

</td></tr>
<tr><td>10.</td><td>Click the OK button.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Supplier Contracts** page redisplays.

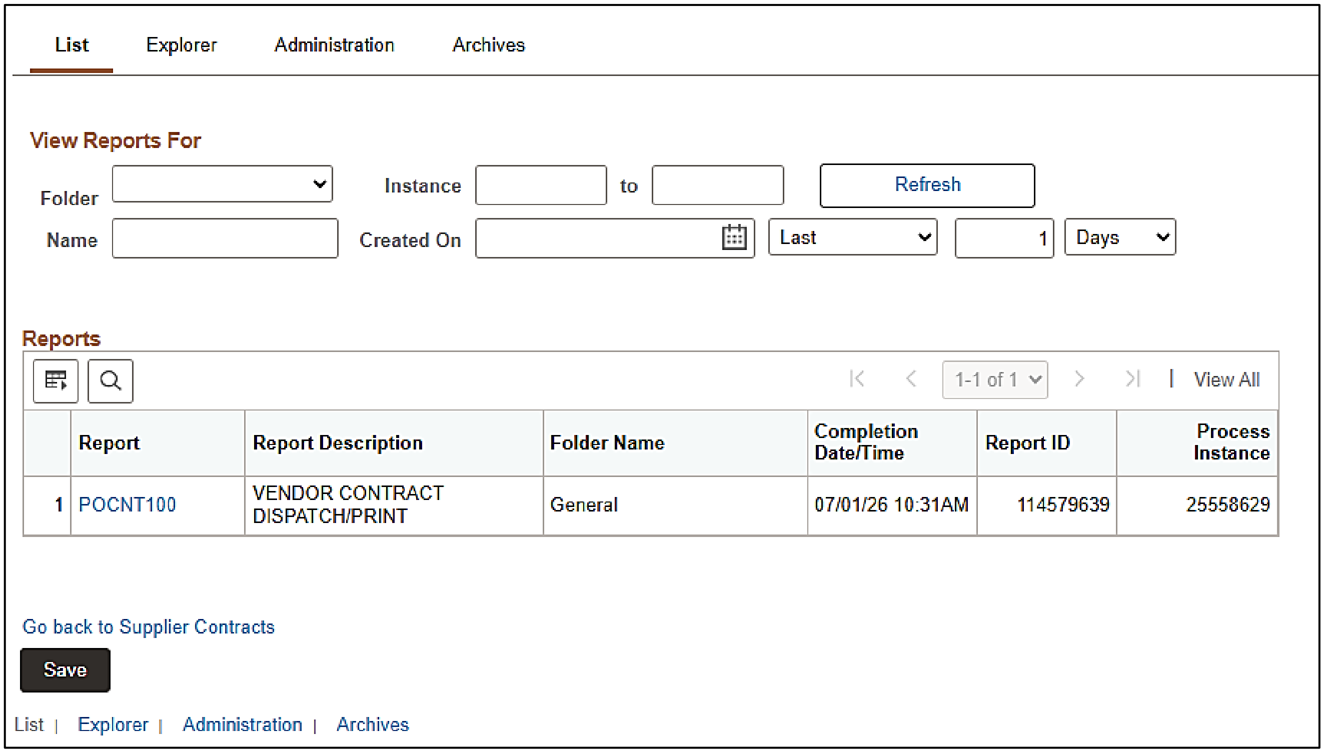


</td></tr>
<tr><td>11.</td><td>

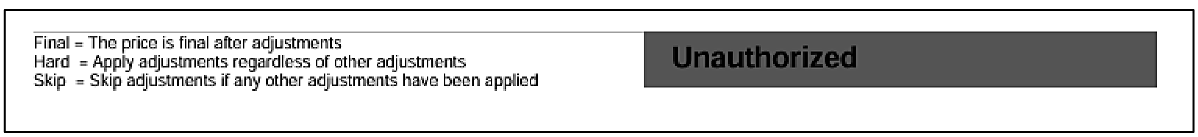
Click the **Report Manager** link.

</td></tr>
</table>

Step	Action
	The **Report Manager** page displays, with the Contract's PDF listed.

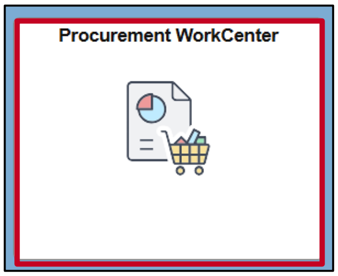
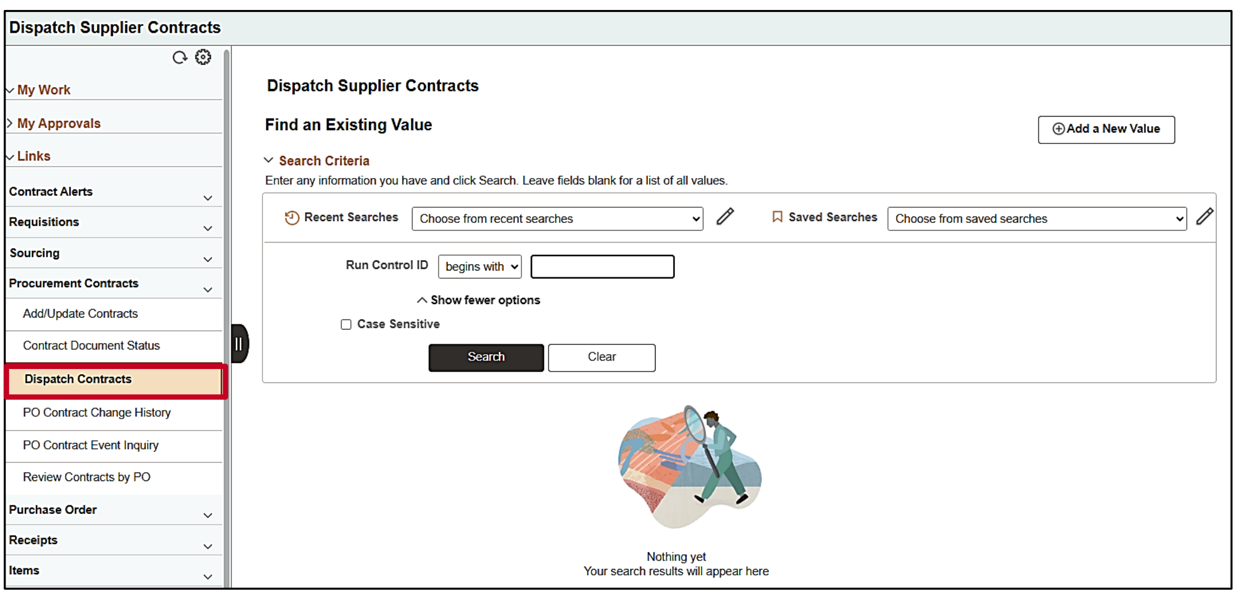


i	The printed contract includes an unauthorized signature block.

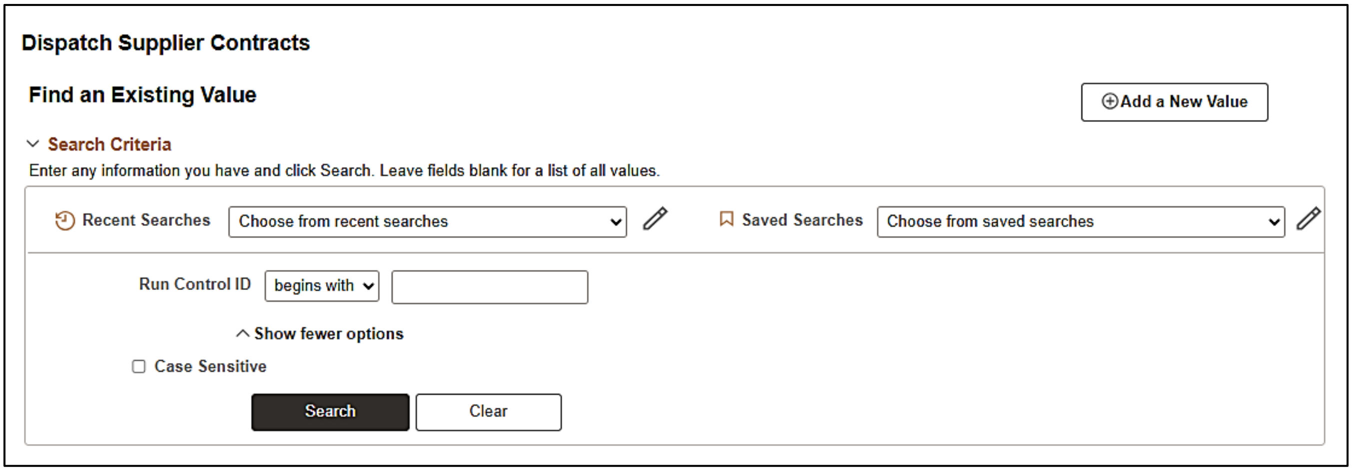


Dispatching a Contract for Signature

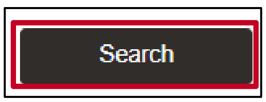
Users with the role of Contact Administrator have the ability to print procurement contracts. The Dispatch contract function provides users with a hard copy contract with an authorized signature block.

Step	Action
1.	Navigate to the **Dispatch Supplier Contracts** page by clicking the **Procurement WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Procurement Contracts > Dispatch Contracts** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Dispatch Supplier Contracts** page using the following navigation path: **NavBar > Menu > Procurement Contracts > Dispatch Contracts**

Step	Action
	The **Dispatch Supplier Contracts Find an Existing Value** page displays.

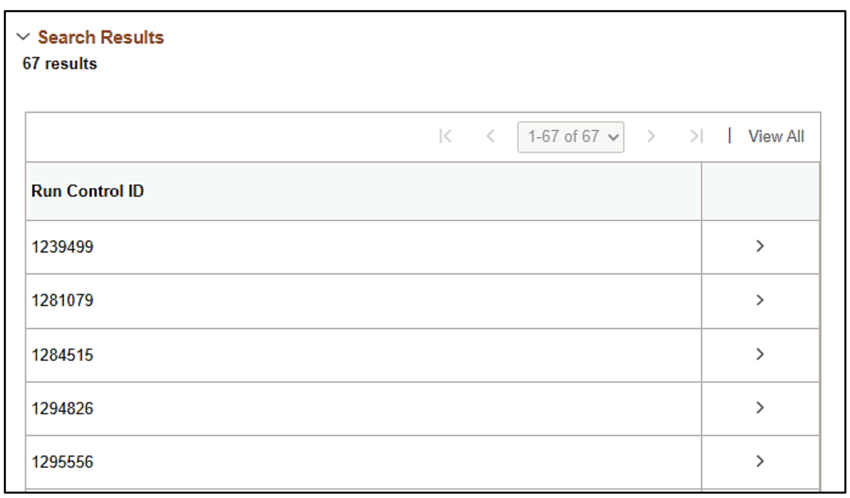


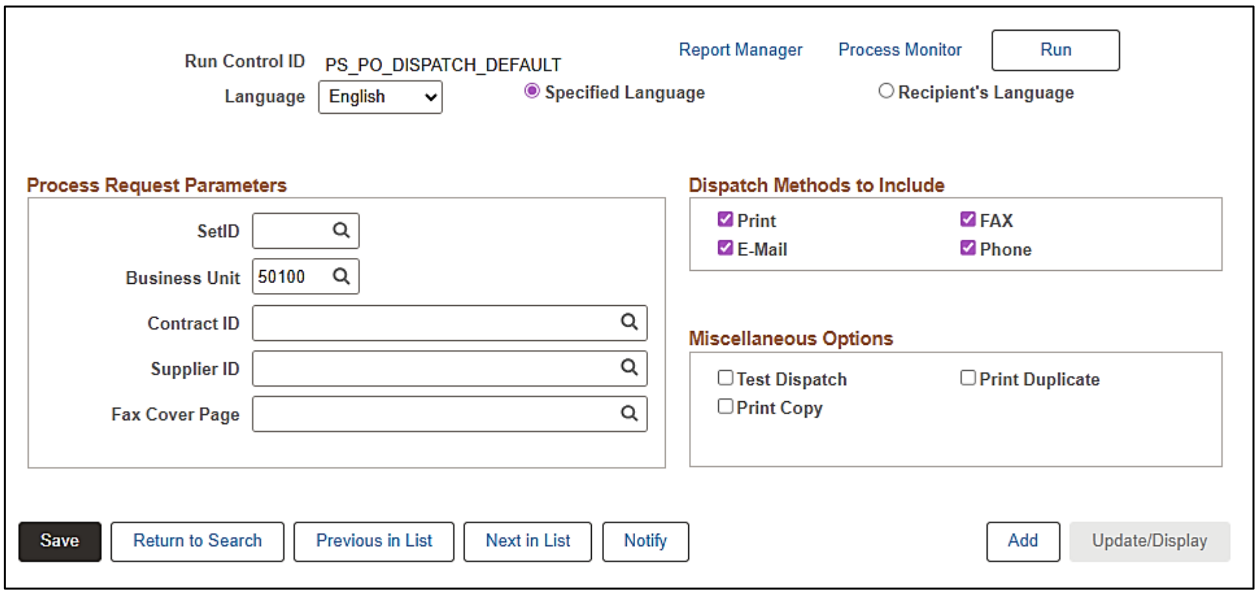
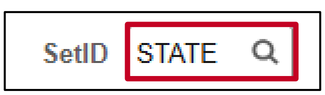
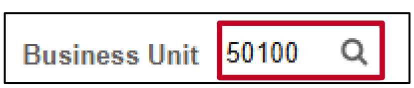
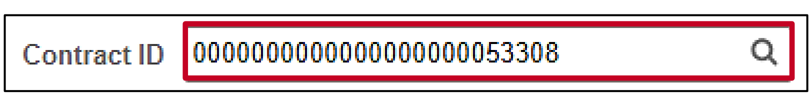
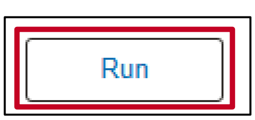
Step	Action
3.	Click the **Search** button to find an existing Run Control ID.



Step	Action
	If necessary, click the **Add a New Value** button to create a new Run Control ID.

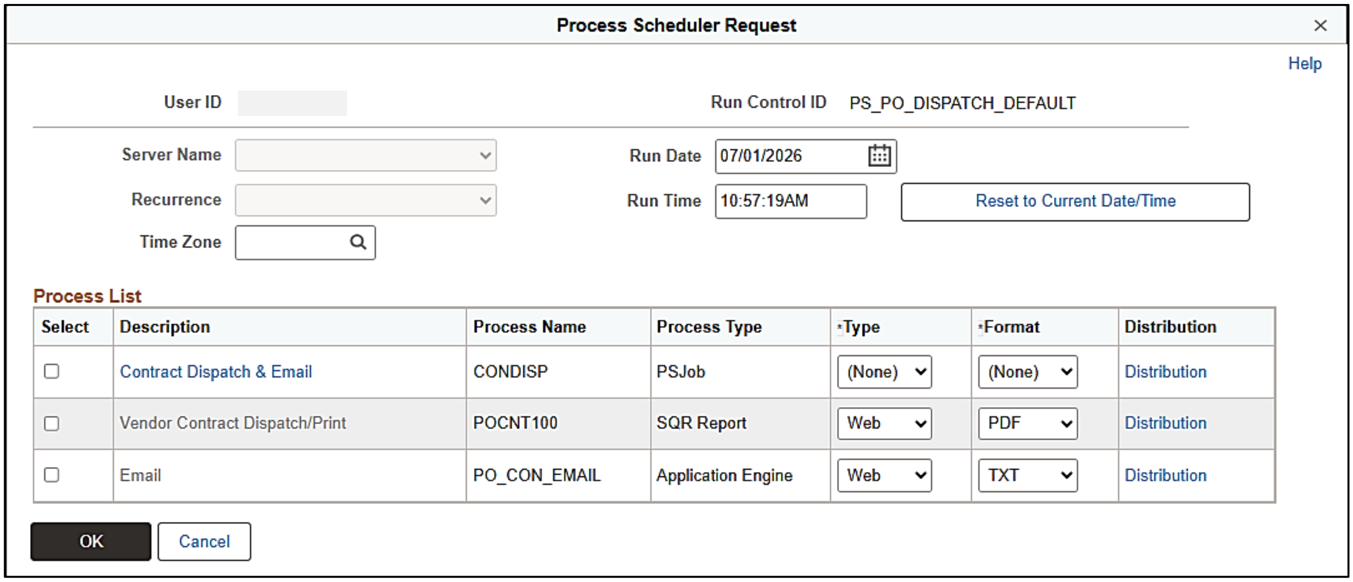
The **Search Results** section displays existing Run Control IDs.



Step	Action
4.	Click the applicable Run Control ID. 
The **Dispatch Supplier Contracts** run control page displays. 	
5.	Enter “STATE” in the **SetID** field. 
6.	Enter “50100” in the **Business Unit** field. 
7.	Enter the appropriate Contract ID in the **Contract ID** field. 
8.	Click the **Run** button. 

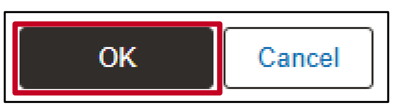
Step	Action

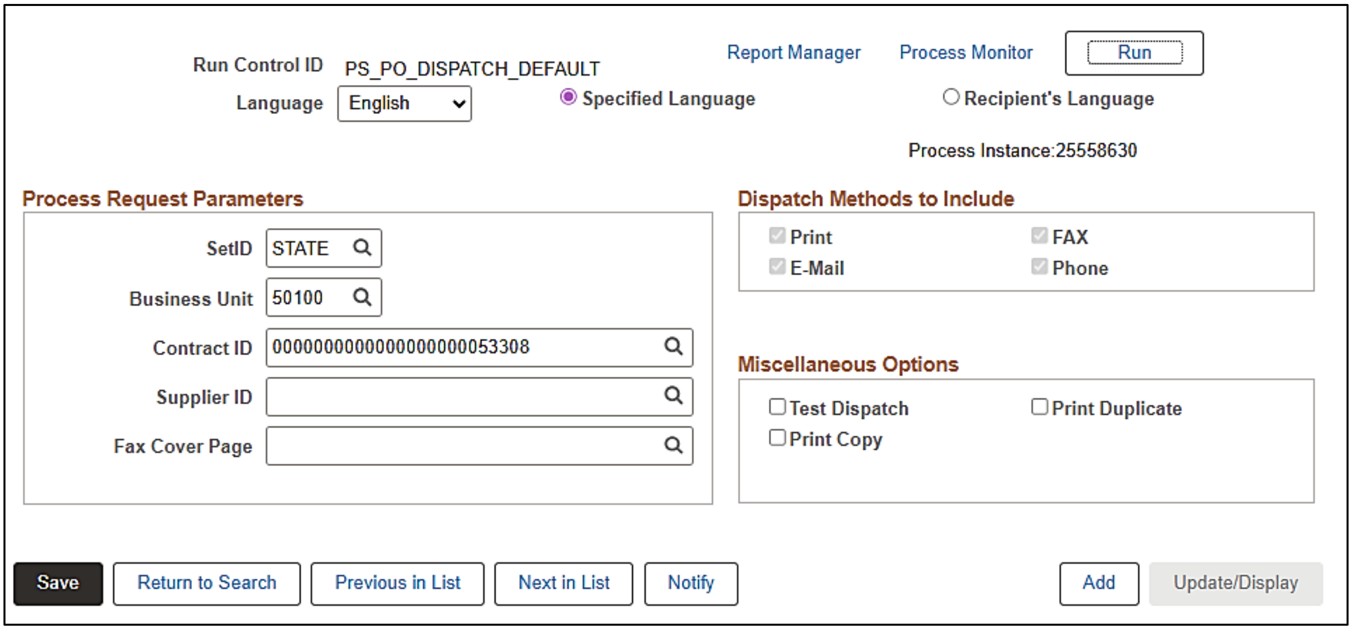
The **Process Scheduler Request** page displays in a pop-up window.



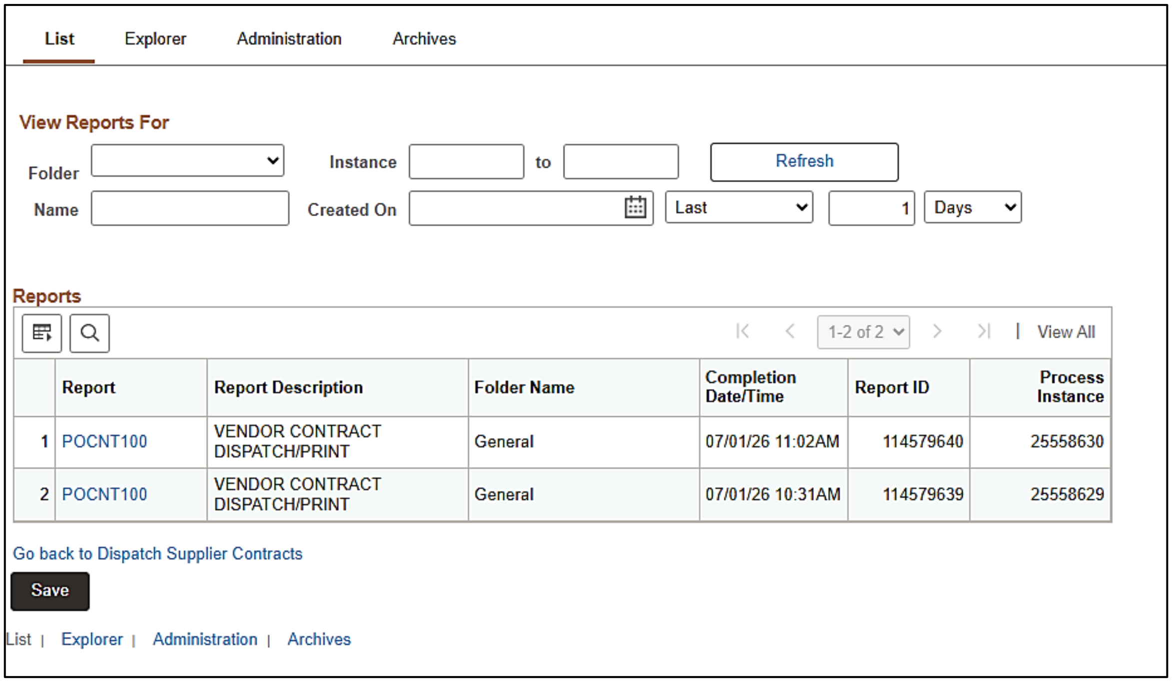
9. Select the **Vendor Contract Dispatch/Print** checkbox option.

10. Click the **OK** button.

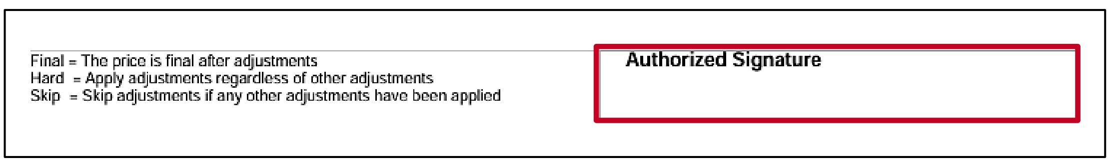


Step	Action
	The **Dispatch Supplier Contracts** run control page redisplays. 
11.	Click the **Report Manager** link. 

Step	Action
The **Report Manager** page displays, with the dispatched Contract's PDF listed.	



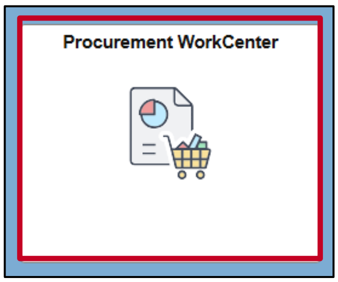
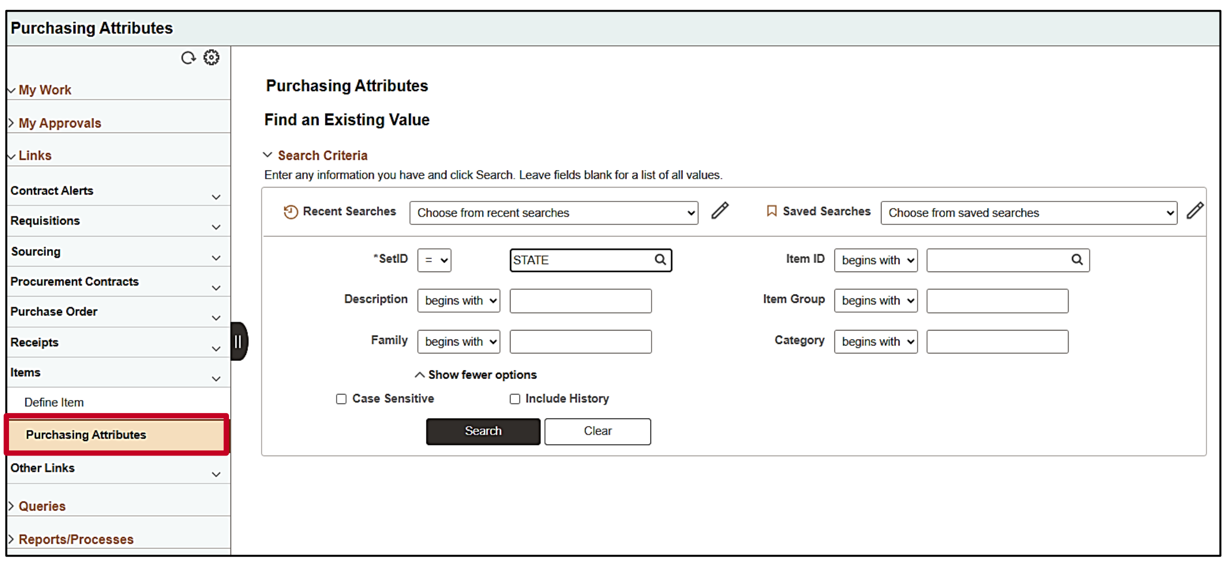
	The dispatched contract includes an **Authorized Signature** block.

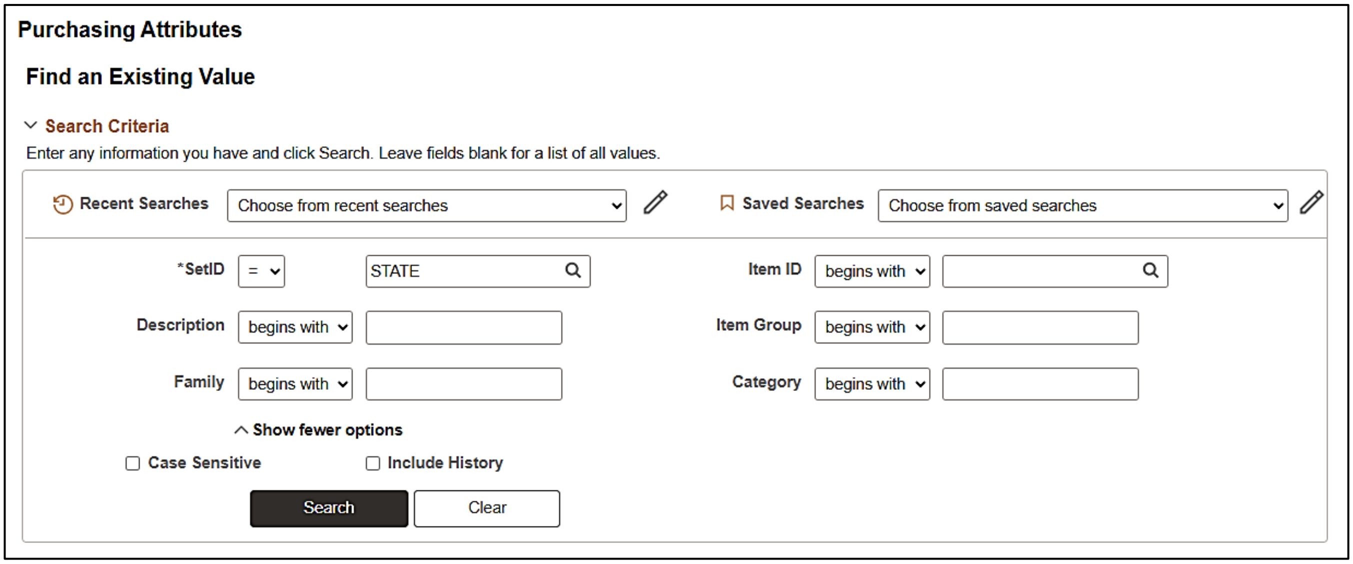
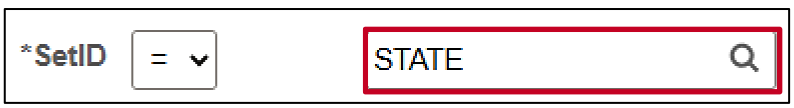
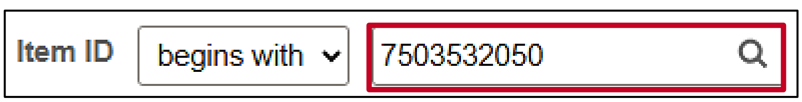
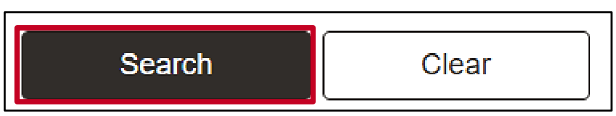


Adding a Supplier/Item Relationship

On an ad-hoc contract, (i.e., a contract which is not from SiteManager or a Strategic Sourcing Event), a supplier/item relationship may not already exist. If the relationship does not exist when the item ID is entered into the contract, an error message will be displayed.

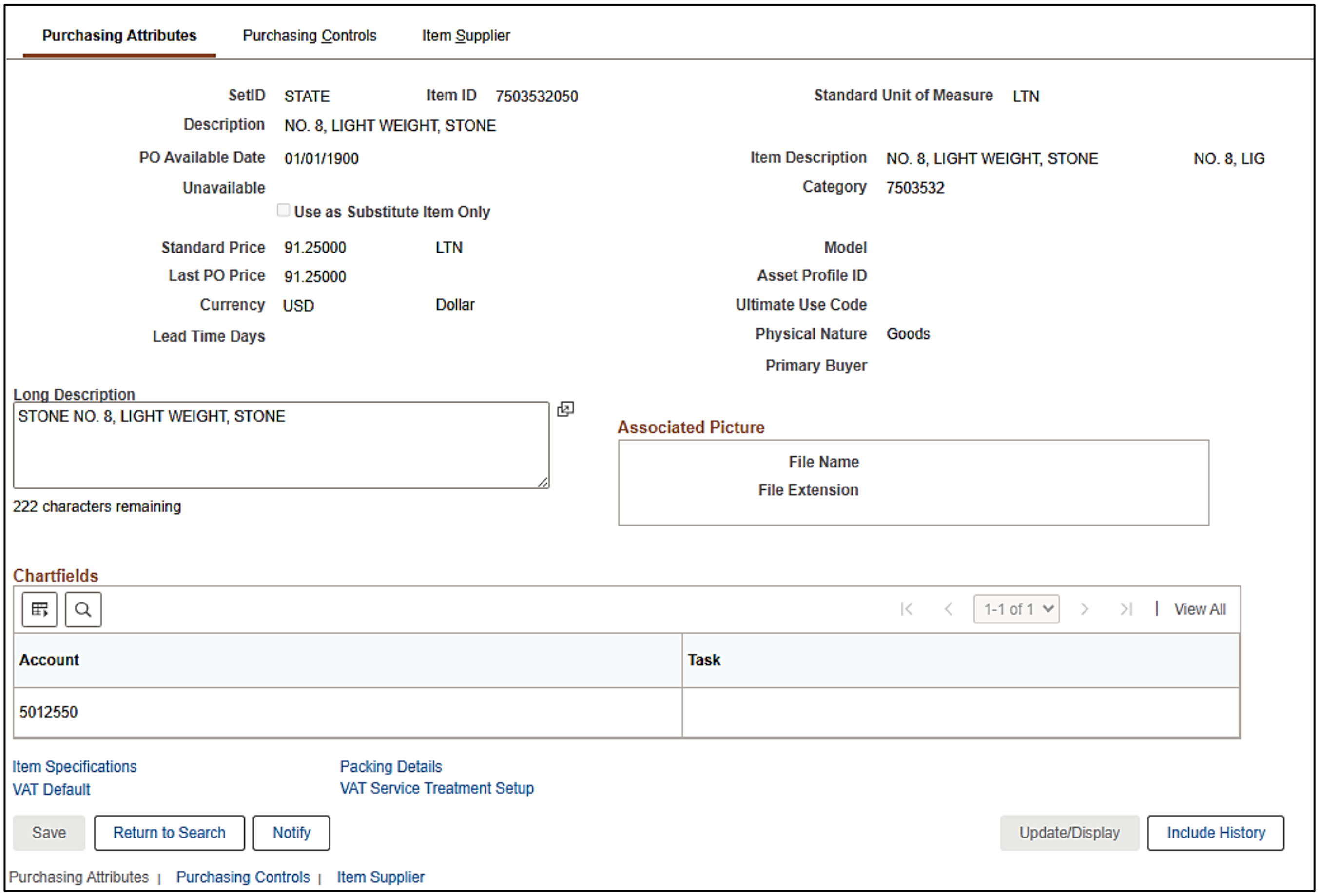
Create a supplier/item relationship for an item by inserting a new row on the **Item Supplier** tab of the **Purchasing Attributes** page.

Step	Action
1.	Navigate to the **Purchasing Attributes** page by clicking the **Procurement WorkCenter** tile. 
	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Items > Purchasing Attributes** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the **Purchasing Attributes** page using the following navigation path: **NavBar > Menu > Items > Define Items and Attributes > Purchasing Attributes**

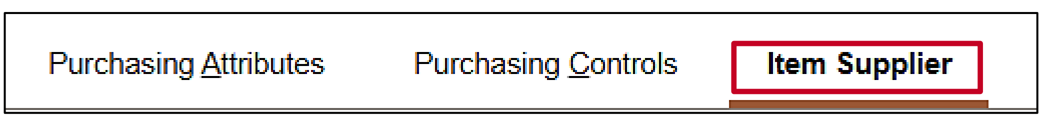
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Purchasing Attributes Find an Existing Value page displays.

</td></tr>
<tr><td>3.</td><td>Enter the applicable value in the SetID field.

</td></tr>
<tr><td>4.</td><td>Enter the Item ID of the Item to add a new Supplier relationship to in the Item ID field.

</td></tr>
<tr><td>5.</td><td>Click the Search button.

</td></tr>
</table>

Step	Action

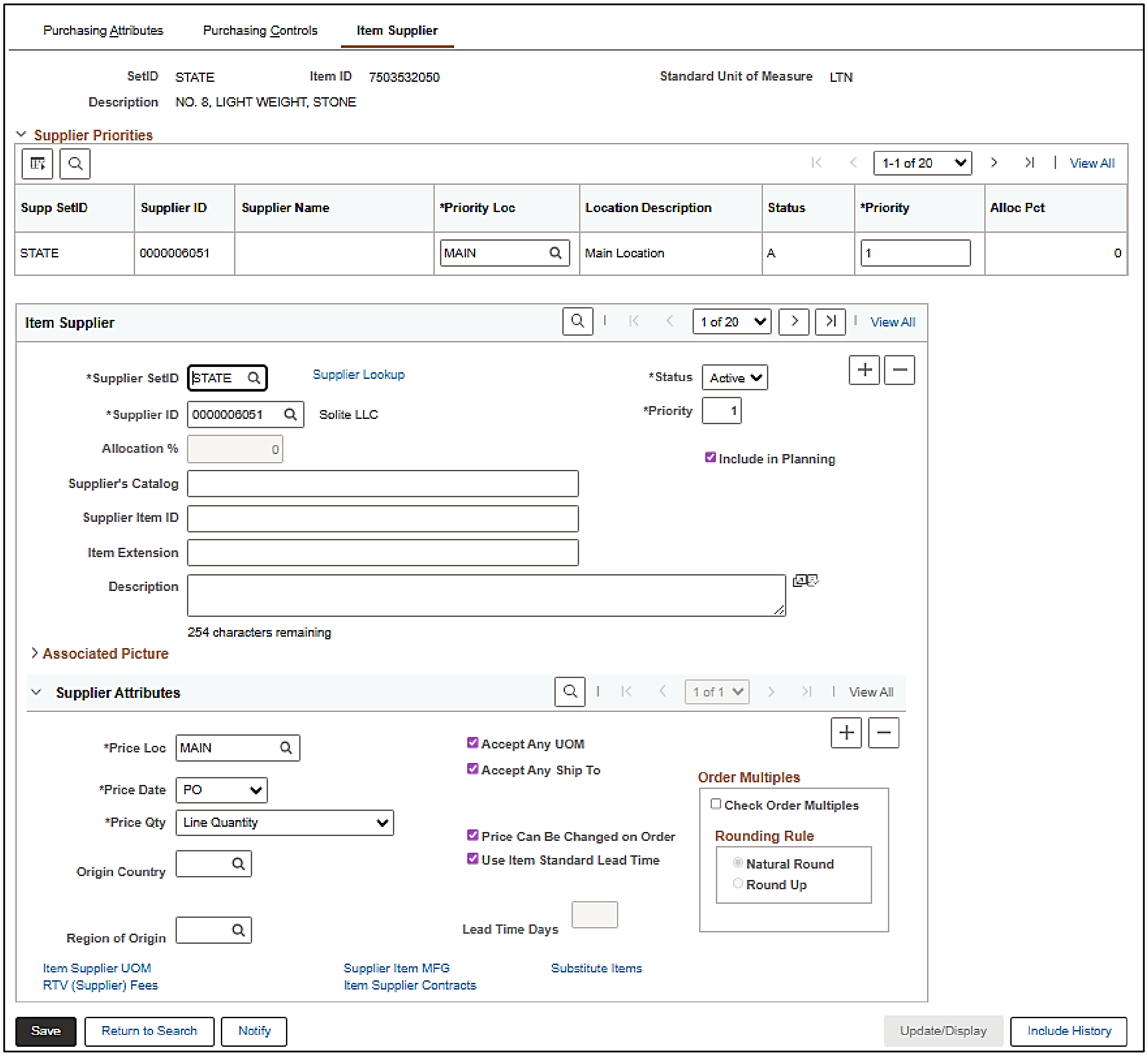
The **Purchasing Attributes** page displays.



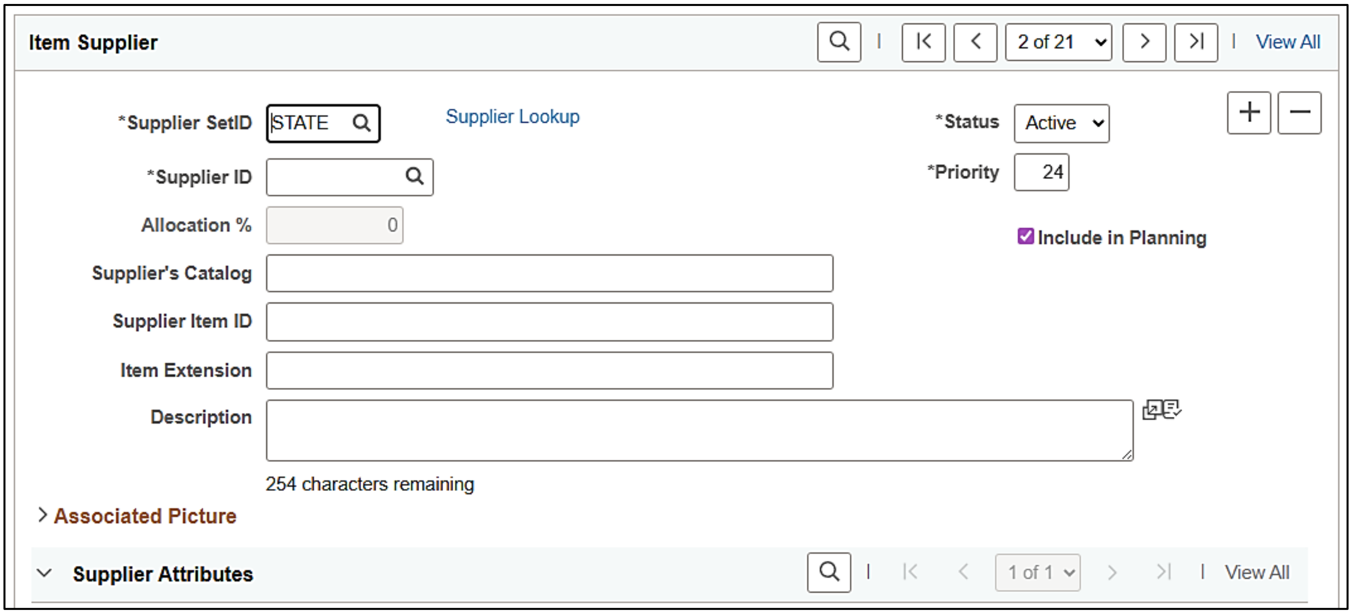
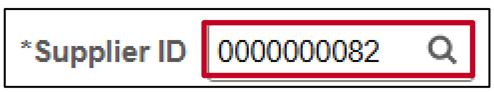
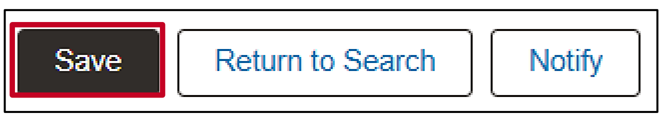
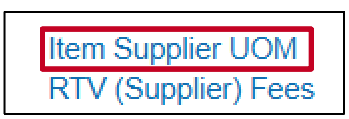
6. Click the **Item Supplier** tab

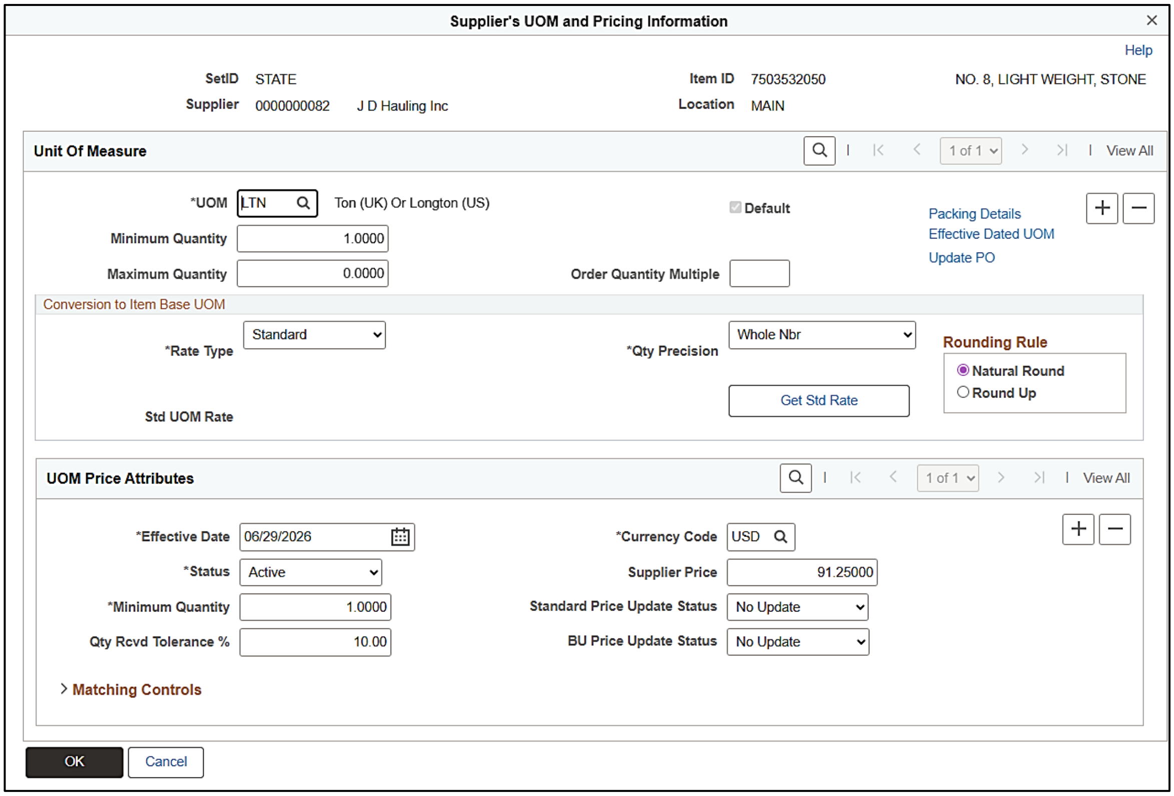
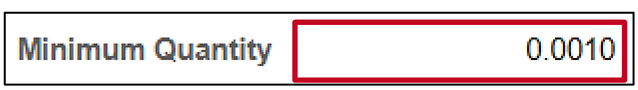
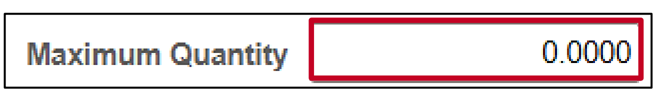
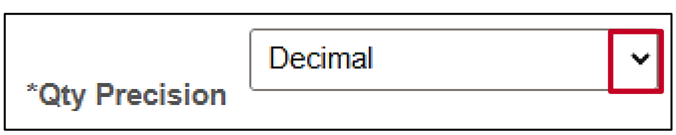
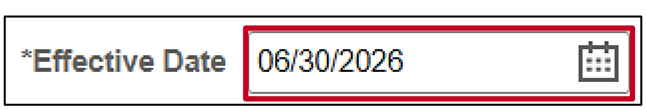


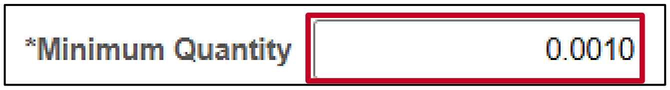
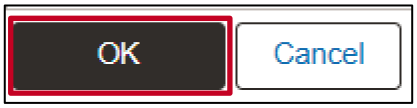
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Item Supplier tab displays.


</td></tr>
<tr><td>7.</td><td>Click the Add a New Row (+) icon in the Item Supplier list.

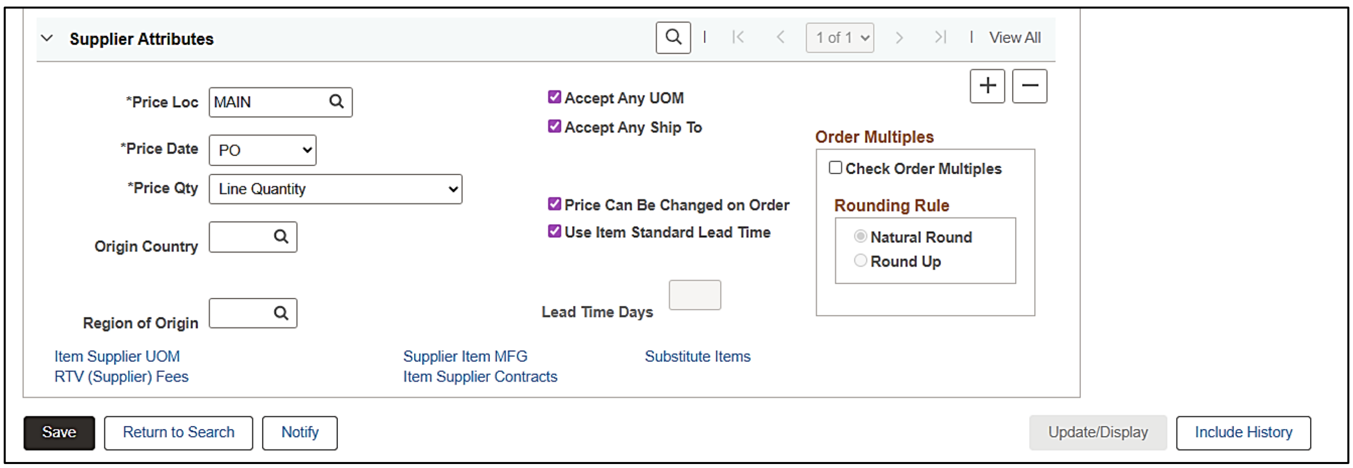

</td></tr>
</table>

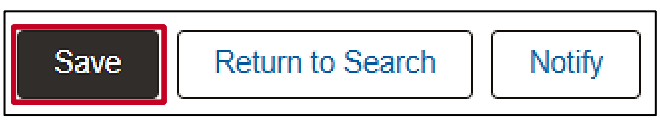
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">A new Item Supplier form displays.

</td></tr>
<tr><td>8.</td><td>Enter the applicable Supplier ID in the Supplier ID field, and leave other default values.

</td></tr>
<tr><td>9.</td><td>Click the Save button.

</td></tr>
<tr><td>10.</td><td>Click the Item Supplier UOM link in the Supplier Attributes section.

</td></tr>
</table>

Step	Action
	The **Supplier's UOM and Pricing Information** page displays in a pop-up window. 
11.	In the **Unit of Measure** header section, update the **Minimum Quantity** field to reflect the minimum quantity that can be ordered for that item. 
12.	To allow for an unlimited order quantity, set the **Maximum Quantity** field to "0.0000". 
13.	If applicable, click the **Qty Precision** dropdown button and select "Decimal". 
14.	In the **UOM Price Attributes** section, update the **Effective Date** field as appropriate. 

Step	Action
15.	In the **UOM Price Attributes** section, update the **Minimum Quantity** field as appropriate. 
16.	Click the **OK** button. 

The **Item Supplier** tab displays.

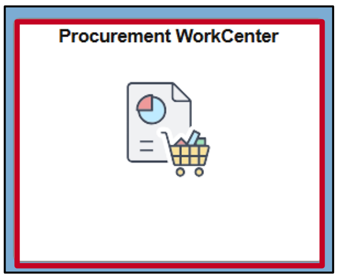


Step	Action
17.	Click the **Save** button. 

Adding a Contract Version

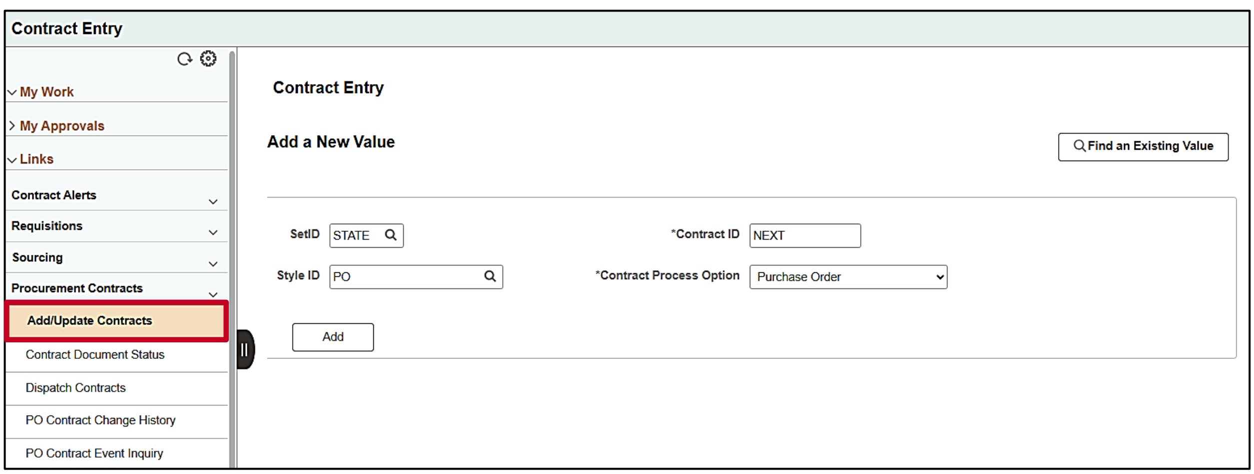
Create a new version when material changes need to be made to an approved contract. This includes the addition of lines, price changes, expiration date changes, other modifications, and closing.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Contract Entry page by clicking the Procurement WorkCenter tile.



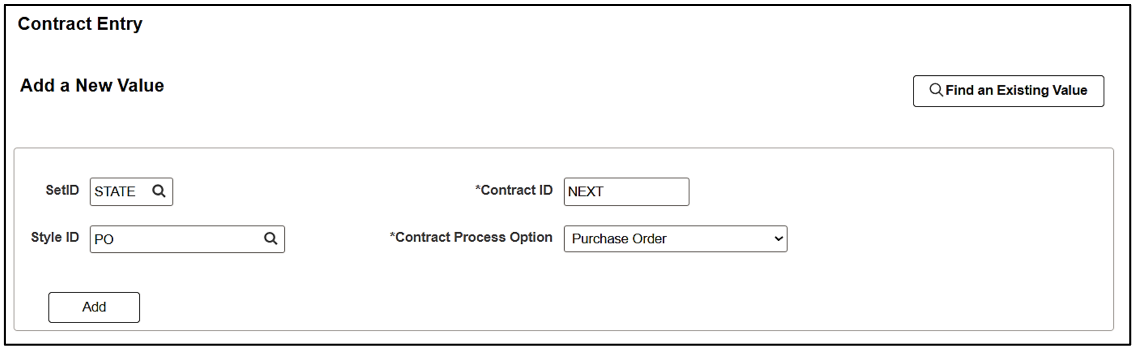
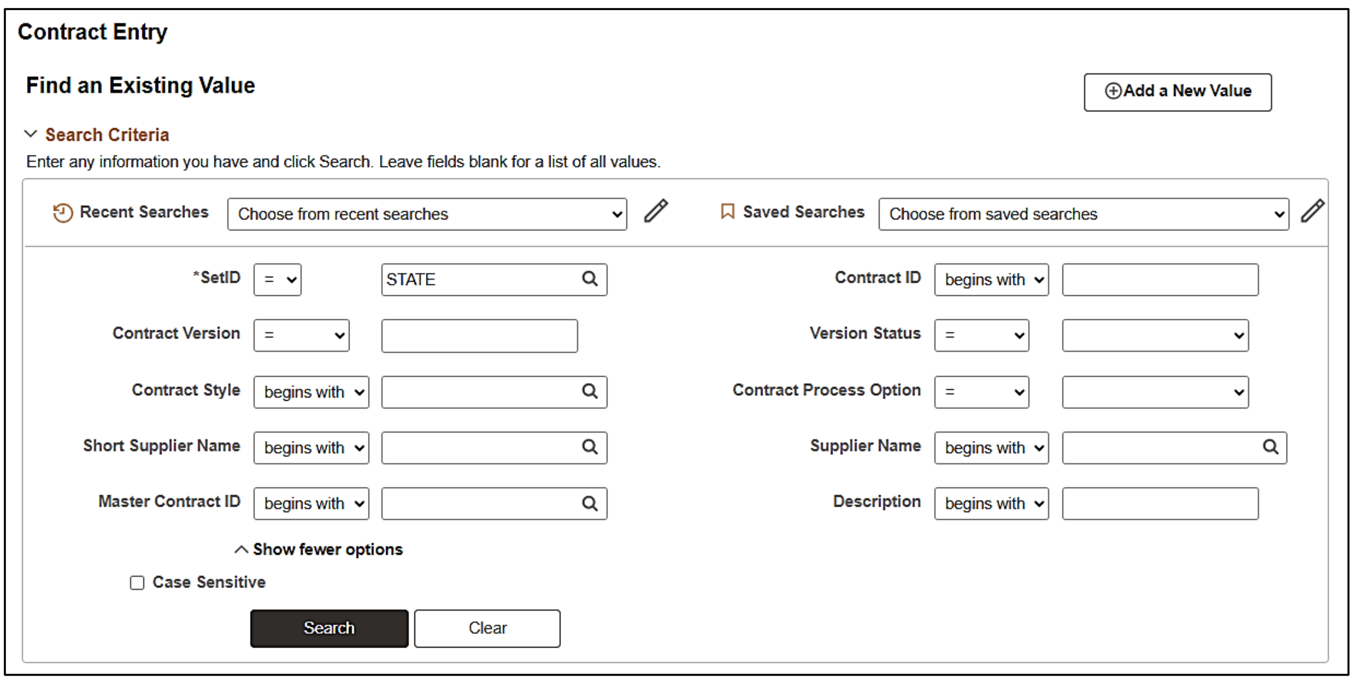
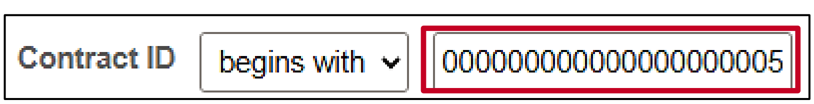
</td></tr>
<tr><td></td><td>For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>2.</td><td>Use the following navigation in the WorkCenter: Links > Procurement Contracts > Add/Update Contracts

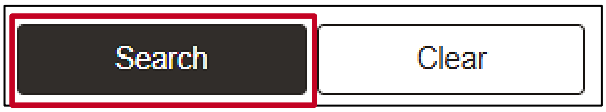
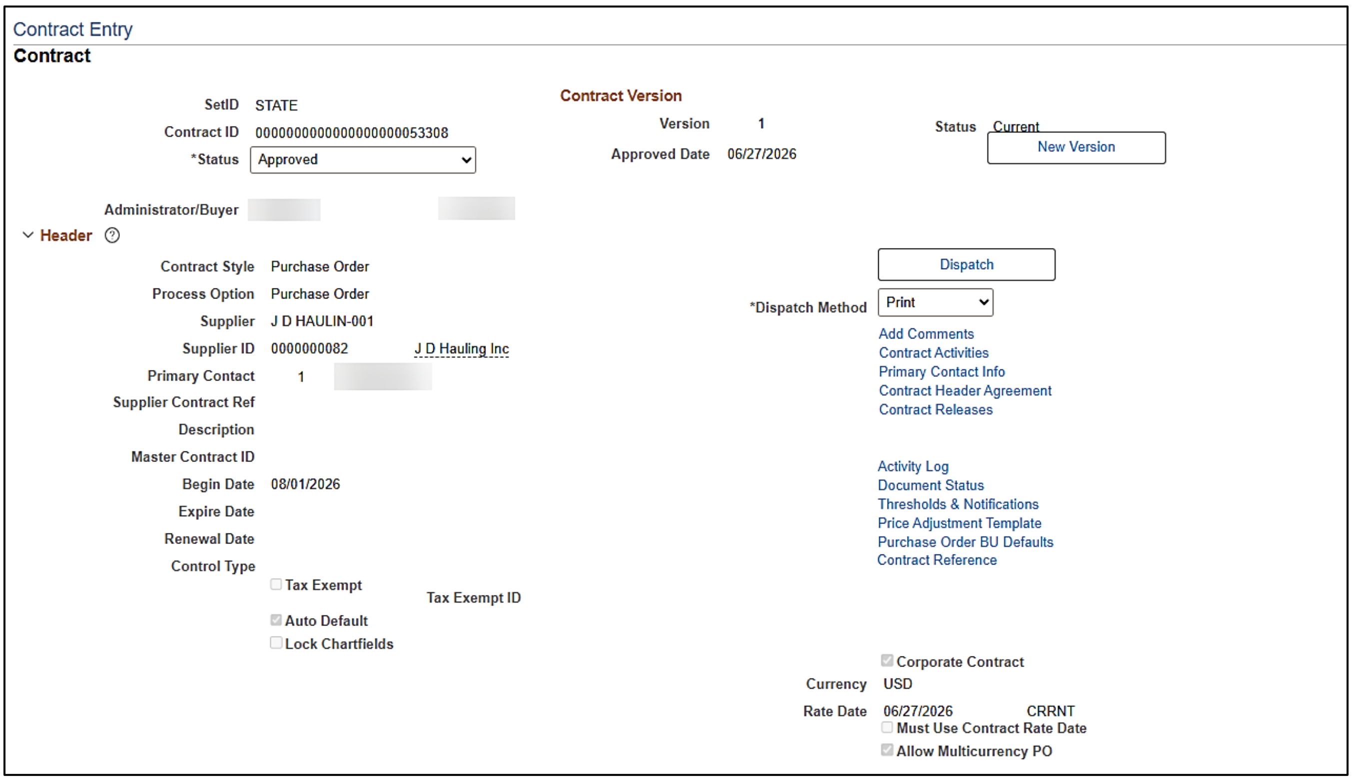
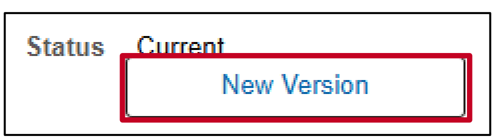
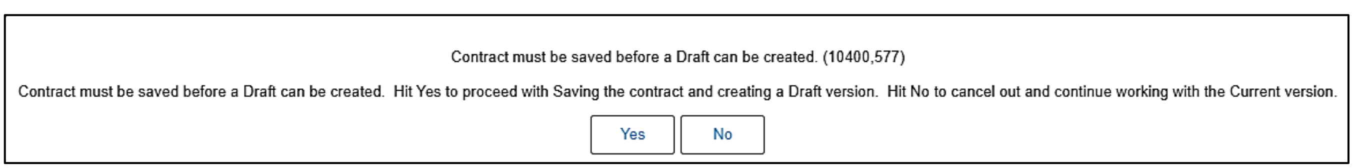
Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.

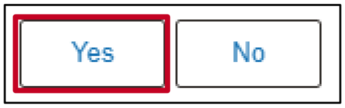
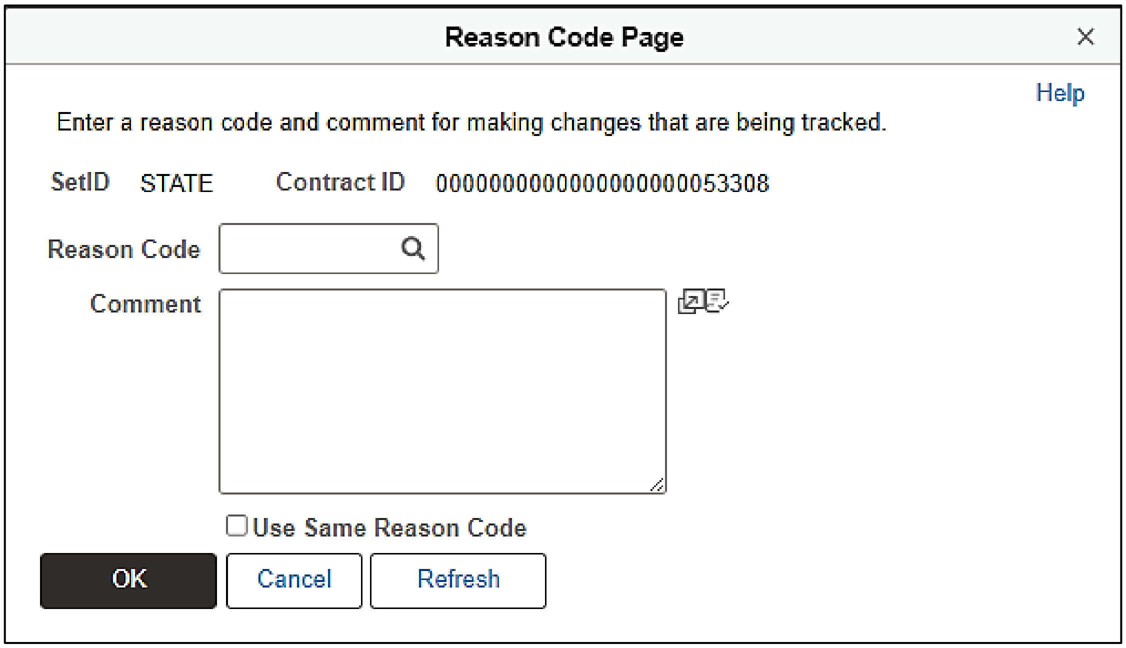
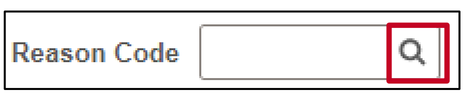


</td></tr>
<tr><td></td><td>Users can also access the Contract Entry page using the following navigation path:

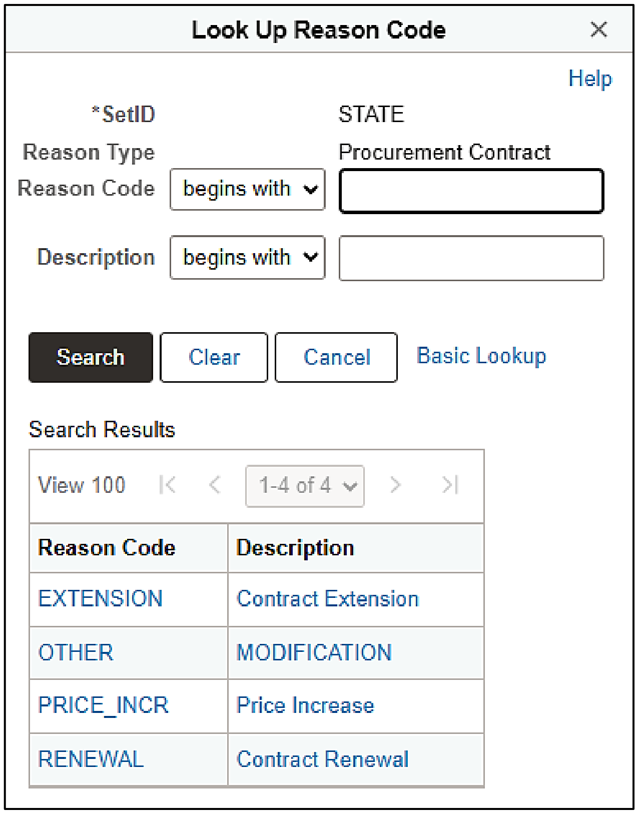
NavBar > Menu > Procurement Contracts > Add/Update Contracts</td></tr>
</table>

Step	Action
	The **Contract Entry Add a New Value** page displays. 
3.	Click the **Find an Existing Value** button. 
	The **Contract Entry Find an Existing Value** page displays. 
4.	Enter the applicable Contract ID in the **Contract ID** field. 

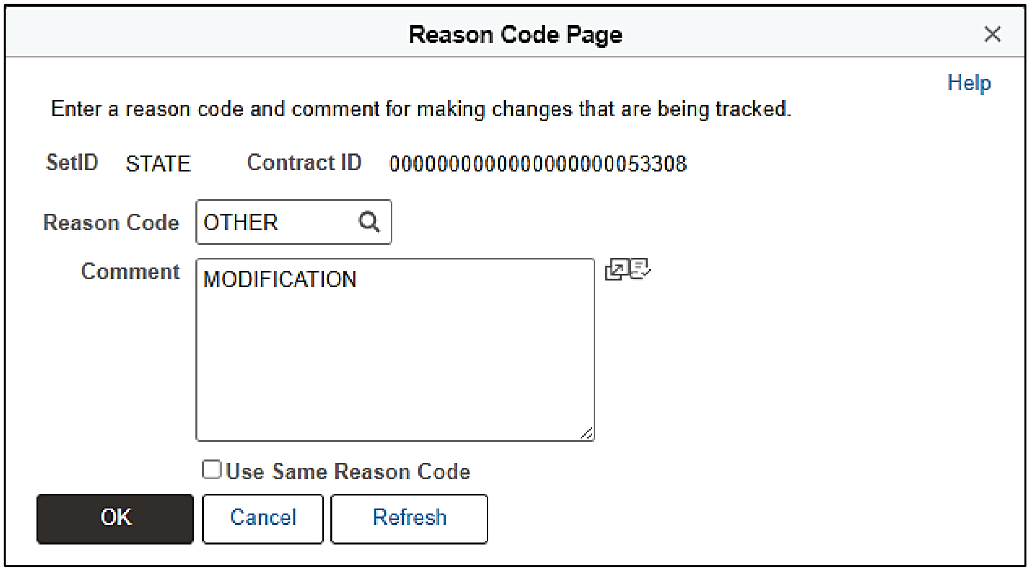
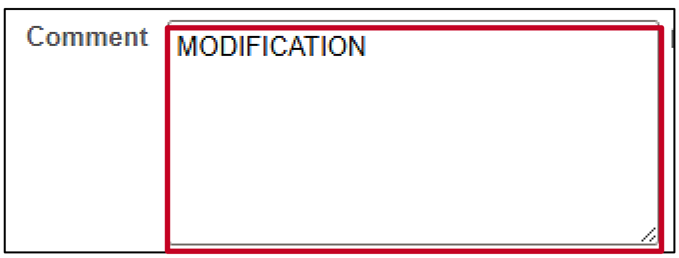
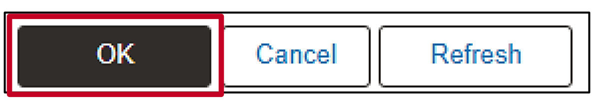
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>Click the Search button.

</td></tr>
<tr><td colspan="2">The Contract Entry Contract page displays.

</td></tr>
<tr><td>6.</td><td>Click the New Version button.

</td></tr>
<tr><td colspan="2">A warning message displays in a pop-up window.

</td></tr>
</table>

Step	Action
7.	Click the **Yes** button. 
	The **Reason Code Page** displays in a pop-up window. 
8.	Click the **Reason Code Look up** icon. 

Step	Action
	The **Look Up Reason Code** page displays in a pop-up window.
9.	Click the applicable Reason Code link.

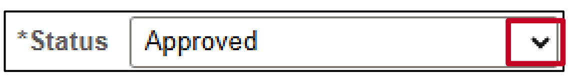
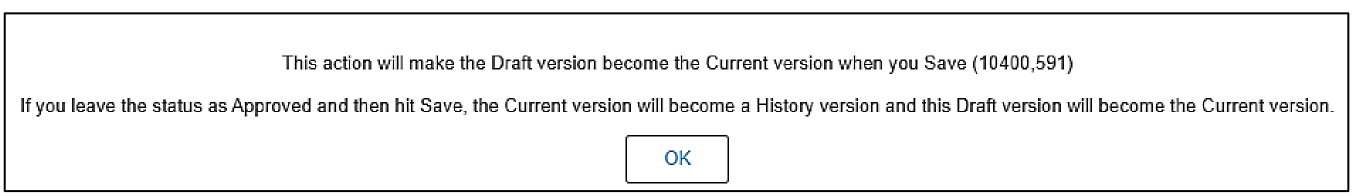
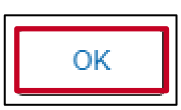


Reason Code	Description
EXTENSION	Contract Extension
OTHER	MODIFICATION
PRICE_INCR	Price Increase
RENEWAL	Contract Renewal

Step	Action
	The **Reason Code** page redisplays. 
10.	Enter what the change entails in the **Comment** field. 
11.	Click the **OK** button. 
	The **Contract Entry Contract** page redisplays. The new version, in draft status, is open for editing. The new draft **Version** number displays. The contract **Status** for the draft version is set to “Open”. 

Step	Action
i	Contract Version numbers increment by 1.  The **Delete Version** button is enabled. 
12.	Modify the Contract as appropriate. For more detailed instructions, see any of the following sections in this job aid: • Updating a Contract's Expire and Renewal Dates • Updating a Contract's Maximum Amount • Adding Contract Lines • Canceling Contract Lines • Updating Contract Line Price Adjustments

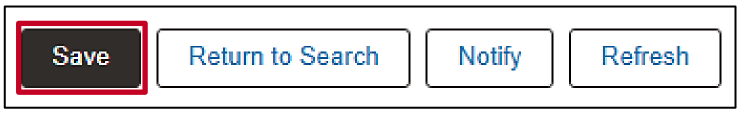
Approving and Saving a Contract Version

Step	Action
13.	Once all modifications are complete, click the **Status** dropdown button and select "Approved". 
A message displays stating: "This action will make the Draft version become the Current version when you Save." 	
14.	Click the **OK** button. 

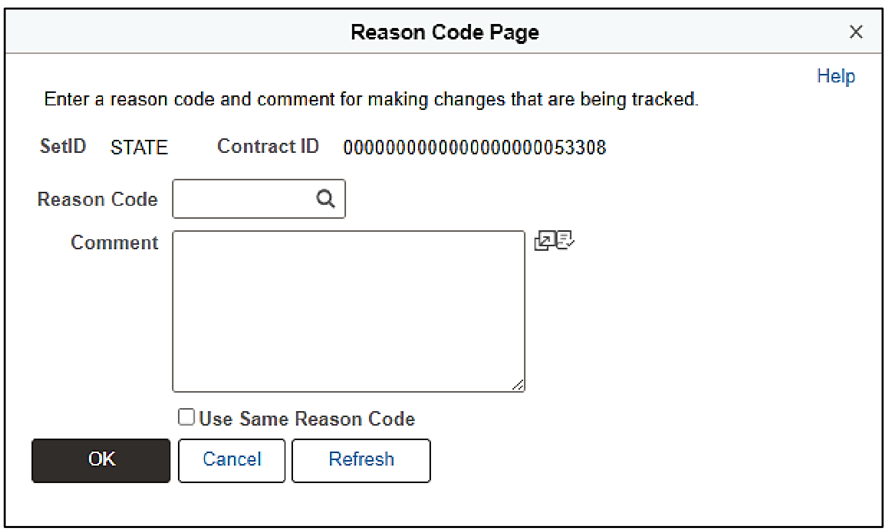
Step	Action

The **Contract Entry Contract** page redisplays.

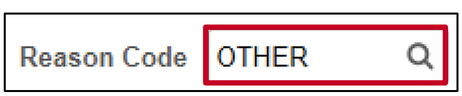
15. Click the **Save** button.



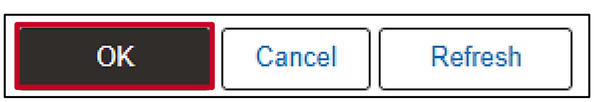
The **Reason Code** page displays in a pop-up window.



16. Select the applicable reason code in the **Reason Code** field.



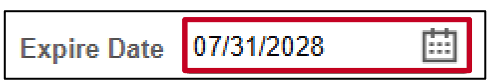
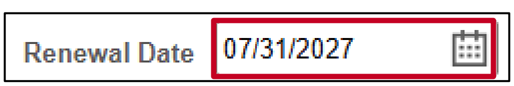
17. Click the **OK** button.



Step	Action
	The Draft version's **Status** field is set to "Current" and this Contract version is available for use. The previous Current version's **Status** field is set to "History". 

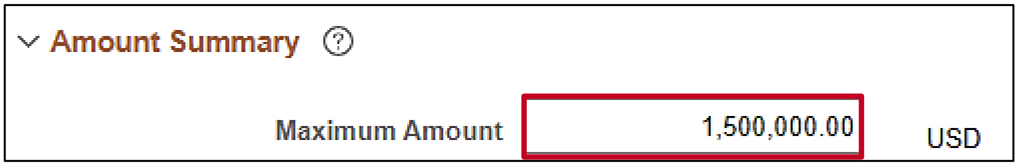
Updating a Contract's Expire and Renewal Dates

On occasion a user may need to update the expiration date or renewal date of a Contract. This can be done while the Contract Status is "Open" and the new version is in Draft mode. Date ranges can cross fiscal years.

Step	Action
1.	On the **Contract Entry Contract** page, in the **Header** section, update the **Expire Date** field as appropriate. 
	When the **Expire Date** field is changed, the Contract's coverage date range is either lengthened or shortened.
2.	Update the **Renewal Date** field as appropriate. 
	If a contract expiration or renewal threshold notification has been set, an email and an item on the Contract Thresholds page will appear when the Expire Date or Renewal Date is within the days set for notification.
3.	Approve and Save the Draft Version by following Steps 13-17 in the Adding a Contract Version section of this Job Aid.

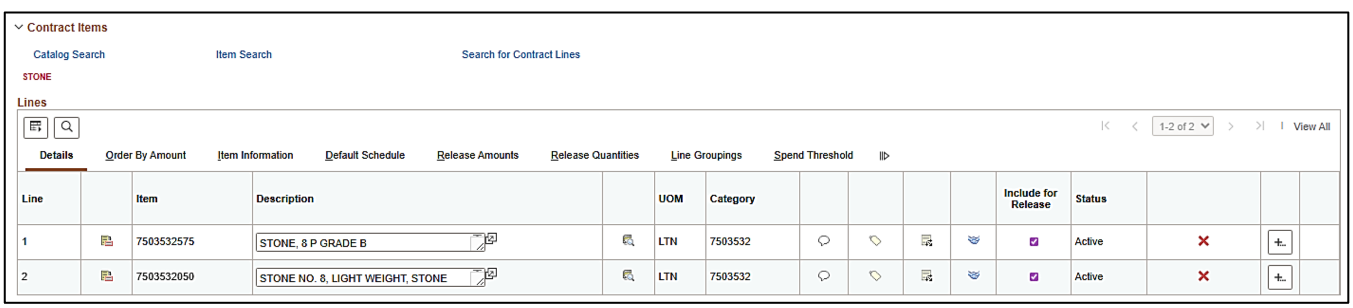
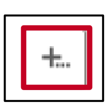
Updating a Contract's Maximum Amount

While the Contract Status is "Open" and the new version is in Draft mode, a Contract's maximum amount can be increased or decreased.

Step	Action
1.	On the **Contract Entry Contract** page, in the **Amount Summary** section, adjust the **Maximum Amount** field as appropriate. 
	When reducing the contract maximum, the amount cannot be less than the total amount of the Purchase Orders already released against the contract. Increase the contract maximum to any amount required.
2.	Approve and Save the Draft Version by following Steps 13-17 in the Adding a Contract Version section of this Job Aid.

Adding Contract Lines

While the Contract Status is "Open" and the new version is in Draft mode, new lines can be added to the Contract.

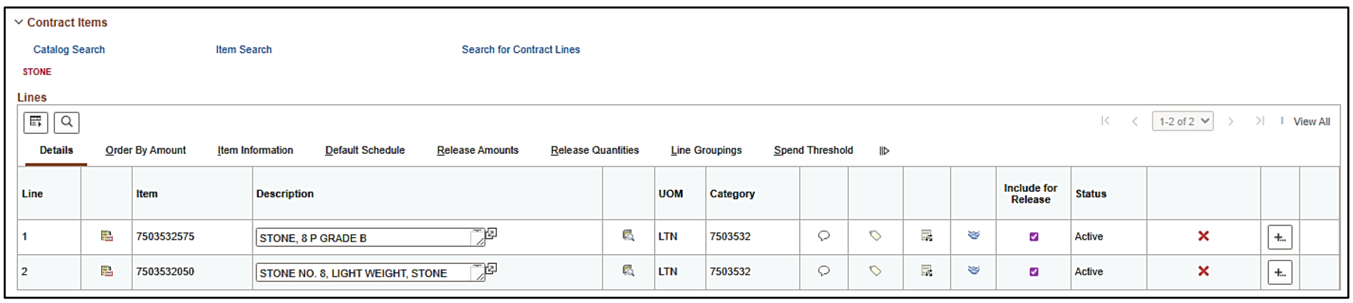
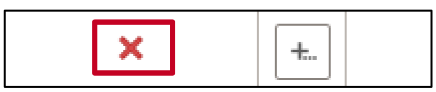
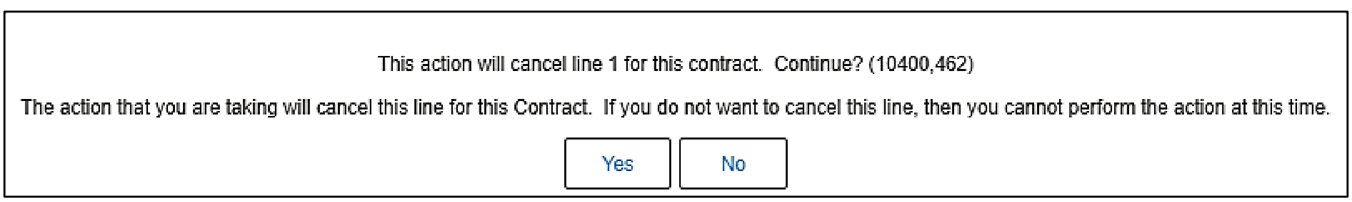
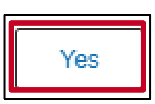
Step	Action
	Add Contract lines on the **Contract Entry Contract** page, in the **Contract Items Lines** section. 
1.	Click the **Add multiple new rows** (**+**) icon at the end of the line. 
2.	Enter the specific item information, price, description, etc.

Step	Action
3.	Approve and Save the Draft Version by following Steps 13-17 in the Adding a Contract Version section of this Job Aid.

Canceling Contract Lines

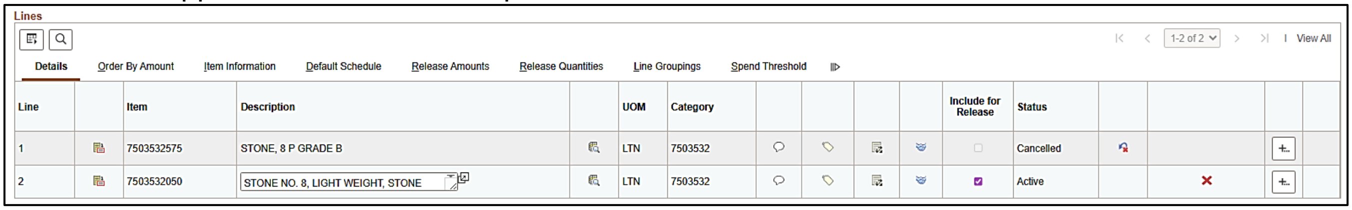
While the Contract Status is "Open" and the new version is in Draft mode, Contract lines can be canceled.

Both cancellation and inactivation of a line result in no future orders being allowed for that line item. If no purchase orders have been placed against a line then the line can be cancelled. If purchase orders have been placed, the line will be inactivated.

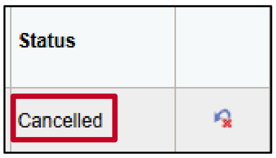
Step	Action
	Cancel Contract lines on the **Contract Entry Contract** page, in the **Contract Items Lines** section. 
1.	Click the **Cancel** icon on the line to be cancelled/inactivated. 
	A message displays in a pop-up window, indicating the line is being cancelled/inactivated. 
2.	Click the **Yes** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The line still appears but the fields are protected and the **Reactivate Line** icon is available.

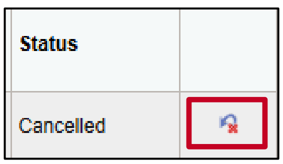


The line **Status** field has been updated to “Cancelled”.



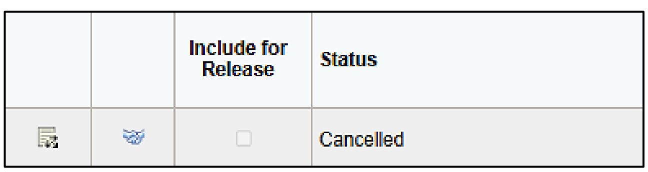
</td></tr>
<tr><td></td><td>

Click the **Reactivate Line** icon and the line returns to its active state as if nothing ever happened.



</td></tr>
<tr><td>3.</td><td>Approve and Save the Draft Version by following Steps 13-17 in the Adding a Contract Version section of this Job Aid.</td></tr>
<tr><td></td><td>

Once a draft version’s Status is changed to Approved and the contract is saved, the cancelled/inactivated line(s) cannot be re-activated. The line remains on the contract but cannot be sourced to a PO.



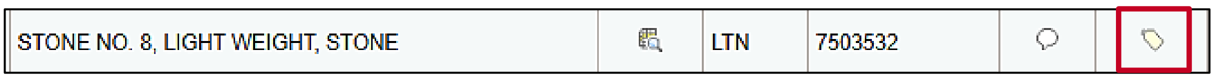
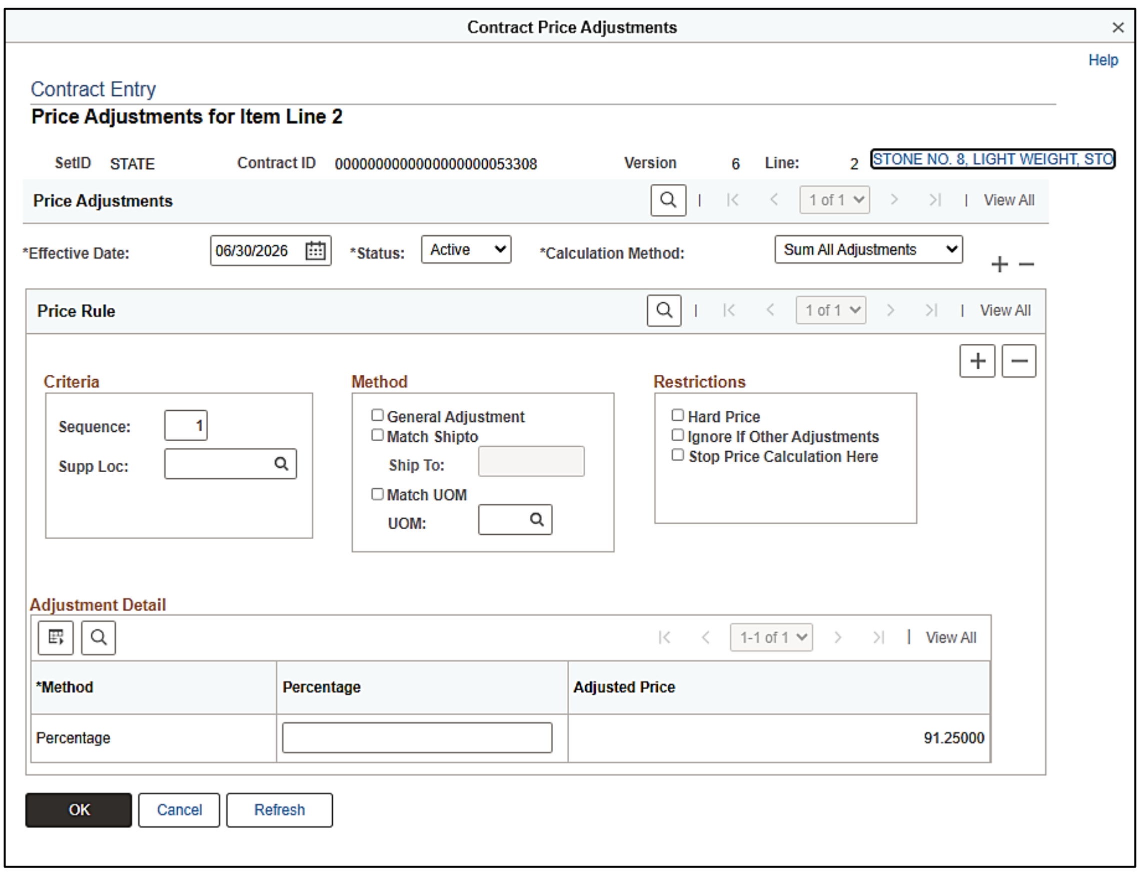
</td></tr>
</table>

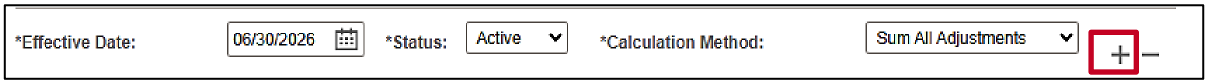
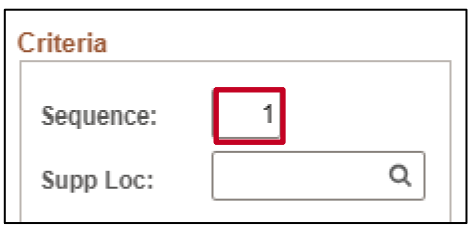
Updating Contract Line Price Adjustments

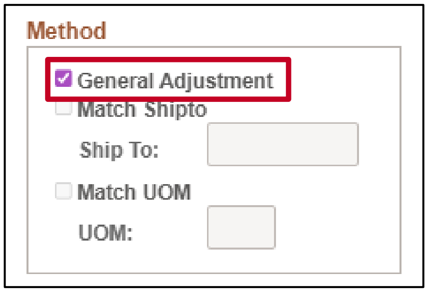
While the Contract Status is "Open" and the new version is in Draft mode, Price Adjustments can be updated on Contract lines.

The Price Adjustments feature enables users to change the price by amount or percentage. Price Adjustments are always calculated against the contract Base Price. The first price adjustment may be done by percentage, however subsequent adjustments must be done by amount.

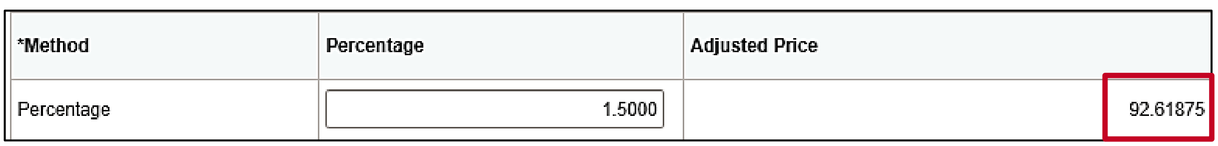
The option to adjust price is only available for transactions in an open status. If the contract is in an approved status and a price adjustment is necessary, a new version of the contract will need to be created.

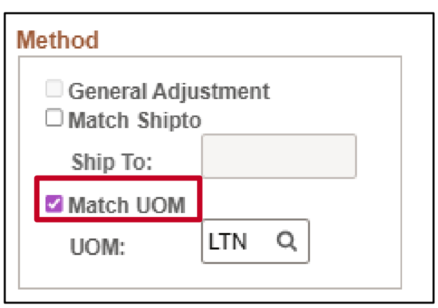
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>On the Contract Entry Contract page, Contract Lines section, Details tab, click the Price Adjustments icon next to the line to be updated.

</td></tr>
<tr><td colspan="2">The Price Adjustments for Item Line XX page displays.

</td></tr>
</table>

Step	Action
	Note: Contract lines set to Amt Only, as seen on the Order By Amount tab, cannot be modified using the **Price Adjustments** page.
2.	Click the **Add Row** (**+**) icon to add an effective-dated row. 
3.	Enter the date for the price adjustment to start in the **Effective Date** field. Future effective-dated pricing may be used. 
4.	Ensure the **Status** field is set to "Active". 
5.	In the **Price Rule Section**, the **Sequence** field defaults to "1". 
6.	Click the **Supp Loc** dropdown button and select "MAIN", in most cases. 
	Price Adjustments are always off the base price of the contract, even if a price adjustment has been previously created. All new adjustments are off the base price. For example, if the Base Price is 10.00 and is changed to 11.00 with a 1.00 adjustment the first time, the next time the user would have to make a 1.50 adjustment to update it to 11.50.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>
If the first modification to the price is based on Consumer Price Index (CPI) or Producer Price Index (PPI), as per the terms of the contract, use the General Adjustment method.
In the Method section, select the General Adjustment checkbox option.


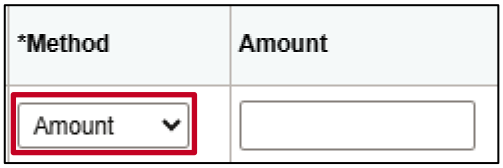
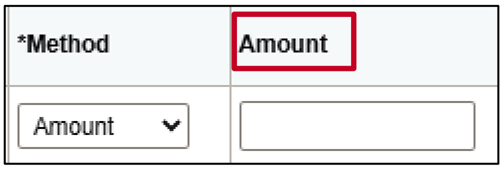
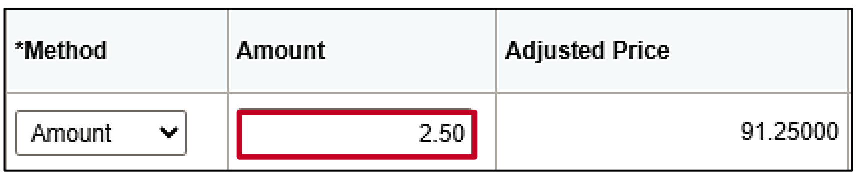
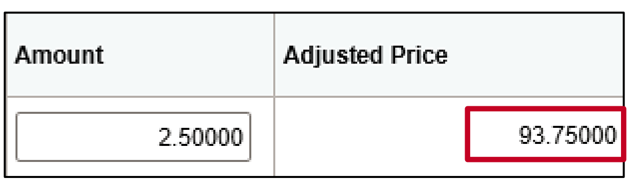
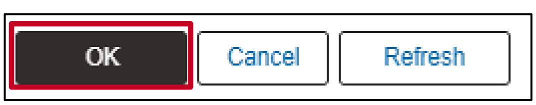
In the Adjustment Detail section, enter the CPI or PPI Percentage in the Percentage field.


Tab out of this field and the Adjusted Price field will be updated and displayed on the new Effective Date.


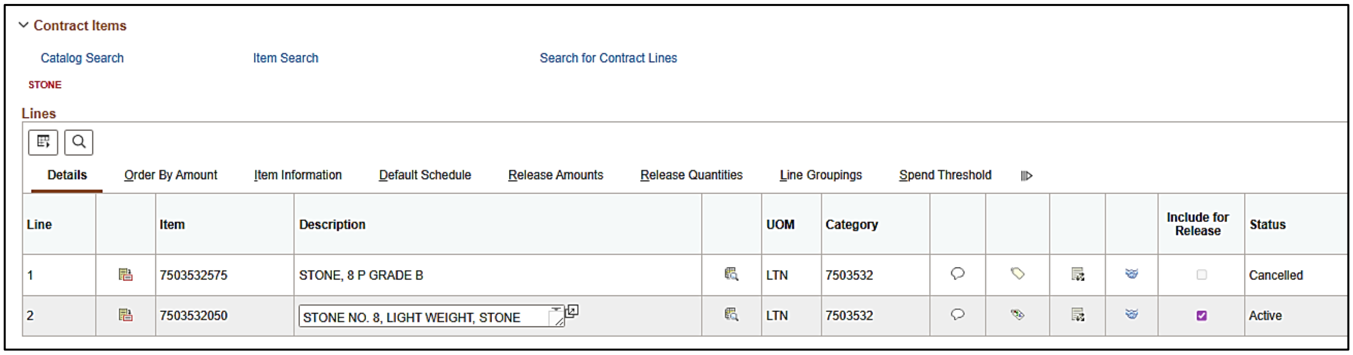
</td></tr>
<tr><td></td><td>
Price changes using amount or percent can be done with a new effective dated row and by entering the difference between the base price and the new price. Use the Match UOM method, outlined in the Steps below.
</td></tr>
<tr><td>7.</td><td>
In the Method section, select the Match UOM checkbox option.


The UOM from the Contract line displays in the UOM field.


</td></tr>
</table>

Step	Action
8.	In the **Adjustment Detail** section, click the **Method** dropdown button and select either "Amount" or "Percentage".  The adjacent field will change to either **Amount** or **Percentage** based on the Method selected. 
9.	In the **Amount** or **Percentage** field, enter the Amount or Percentage of the change. 
	To enter a price reduction, enter a minus sign (-) before the number in the **Amount** or **Percentage** field.
10.	Tab out of the **Amount** or **Percentage** field. The new price displays in the **Adjusted Price** field. 
11.	Click the **OK** button. 

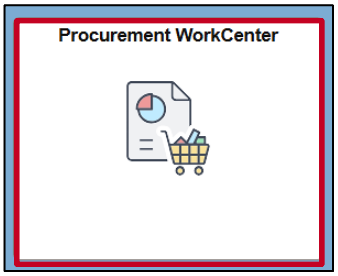
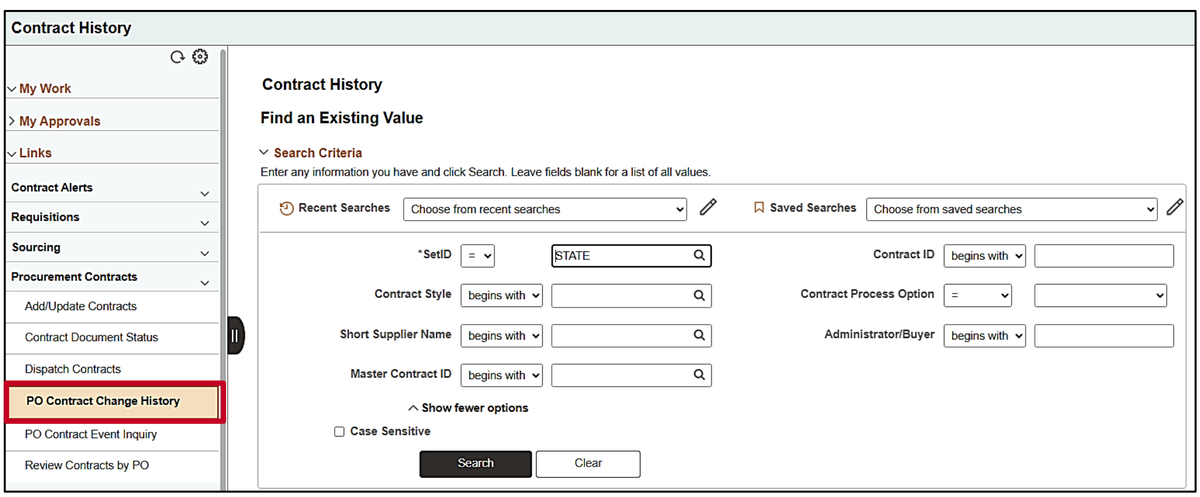
Step	Action
	The **Contract Entry Contract page** redisplays.

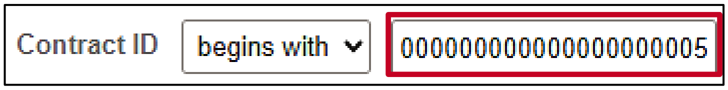
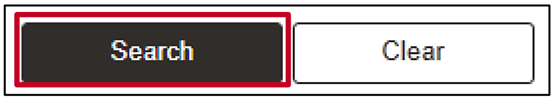
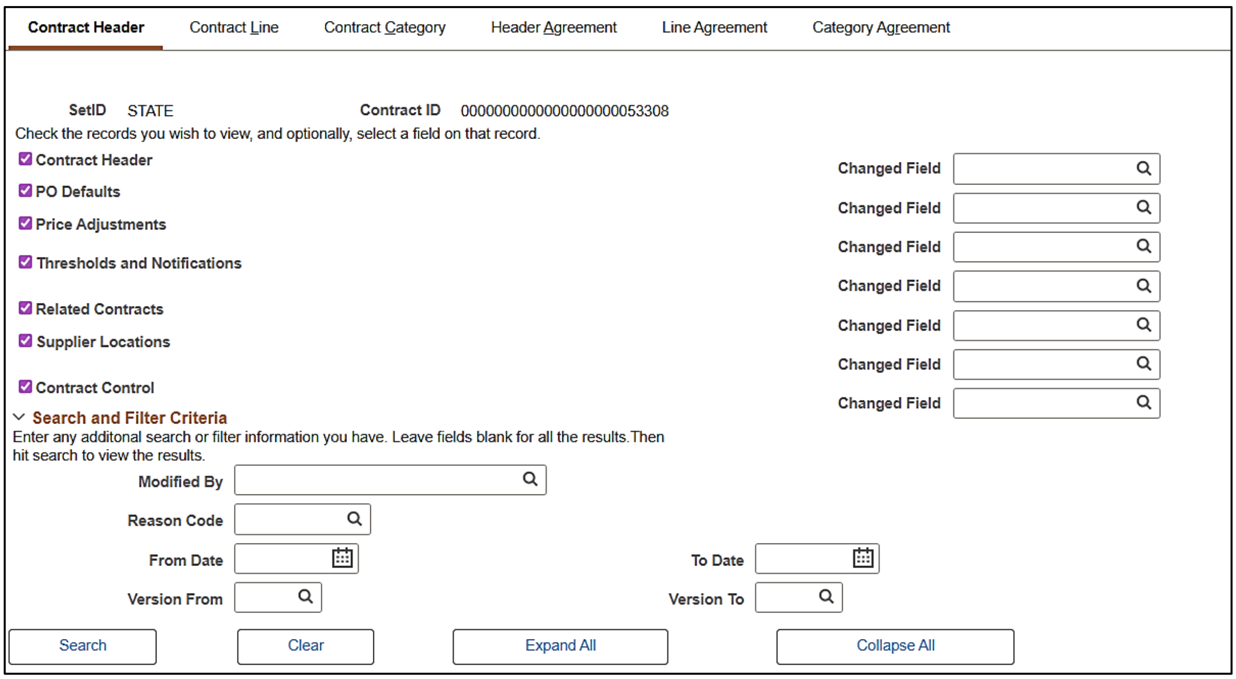


Step	Action
12.	Approve and Save the Draft Version by following Steps 13-17 in the Adding a Contract Version section of this Job Aid.

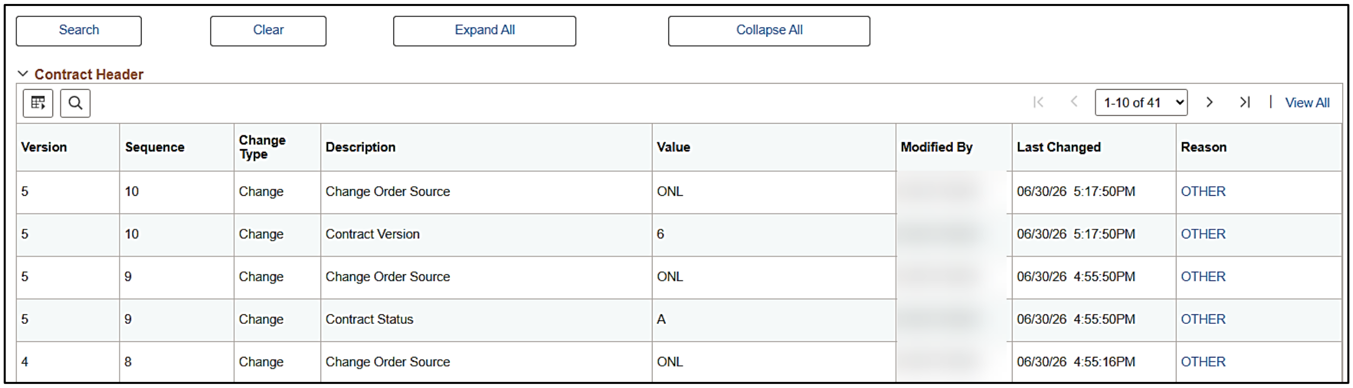
Viewing the Contract Change History

Use the **Contract Change History** to view all changes to a contract. This page details the Contract version, change type, description, date, reason code, and individual who made the change. This page is also available through the **View Changes** link on the **Contract Entry Contract** page.

Step	Action
1.	Navigate to the **Contract History** page by clicking the **Procurement WorkCenter** tile. 
i	For information about WorkCenters, see the Job Aid titled **Overview of the Cardinal Financials WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Procurement Contracts > PO Contract Change History** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
i	Users can also access the **Contract History** page using the following navigation path: **NavBar > Menu > Procurement Contracts > Add/Update Contracts > Contract Change History**

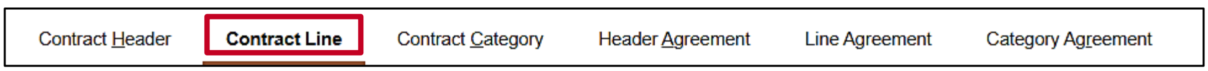
Step	Action
3.	Enter the applicable Contract ID in the **Contract ID** field. 
4.	Click the **Search** button. 
The **Contract History** page displays, with the **Contract Header** tab displayed by default. 	
5.	Click the **Search** button. 

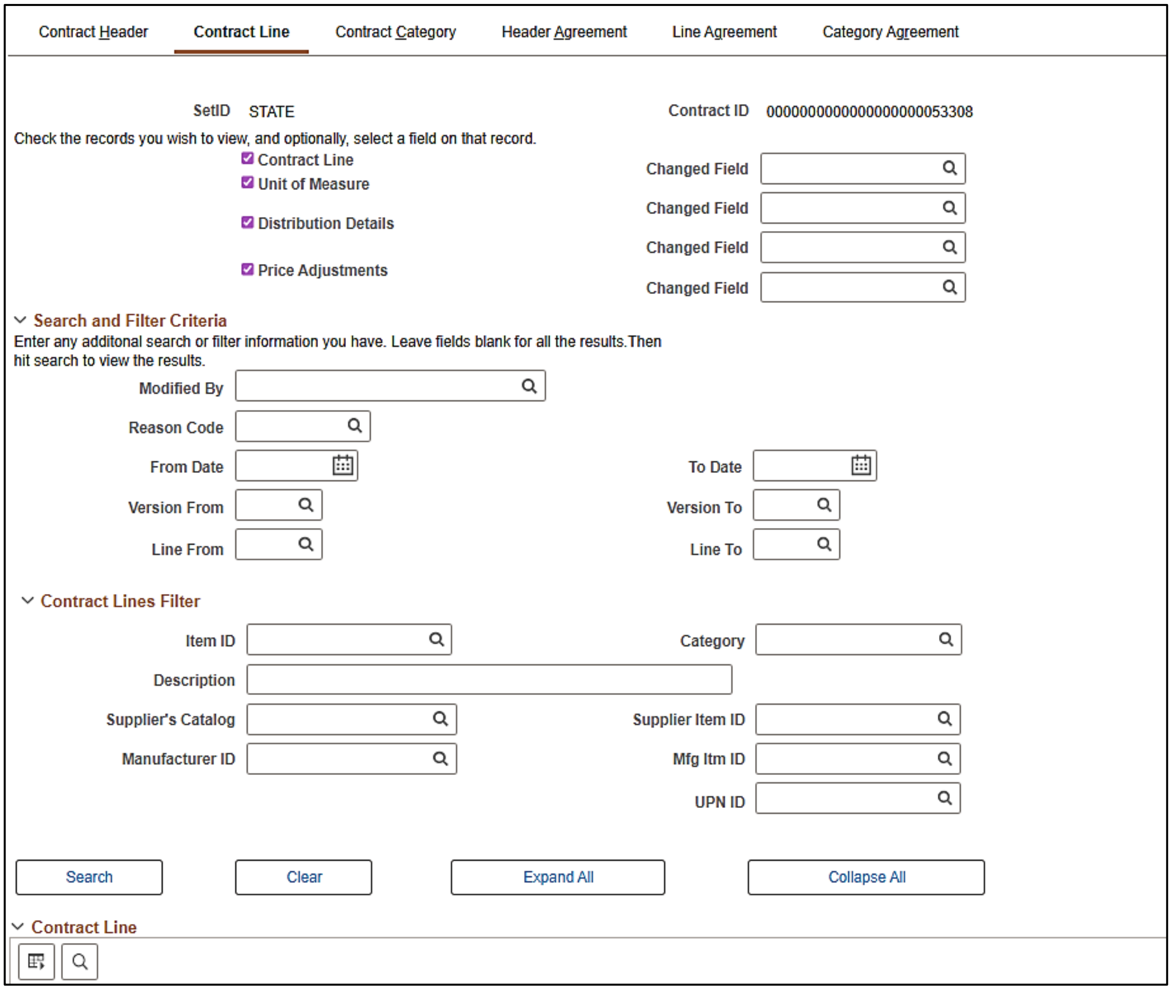
Step	Action
	The **Contract Header** section displays all changes to the overall Contract.



Version	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason
5	10	Change	Change Order Source	ONL		06/30/26 5:17:50PM	OTHER
5	10	Change	Contract Version	6		06/30/26 5:17:50PM	OTHER
5	9	Change	Change Order Source	ONL		06/30/26 4:55:50PM	OTHER
5	9	Change	Contract Status	A		06/30/26 4:55:50PM	OTHER
4	8	Change	Change Order Source	ONL		06/30/26 4:55:16PM	OTHER

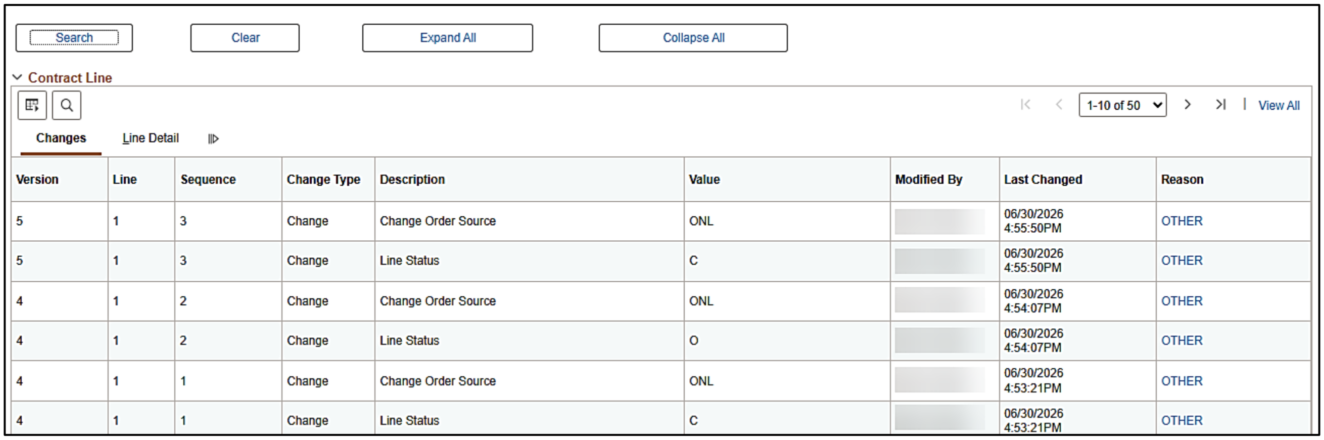
Step	Action
6.	Click the **Contract Line** tab.



Step	Action
The **Contract Line** tab displays. 	
	Click the **Search** button. 

Step	Action

The **Contract Line** section displays all changes to the Contract lines.



Search | Clear | Expand All | Collapse All

Contract Line

1-10 of 50 | View All

Changes | Line Detail

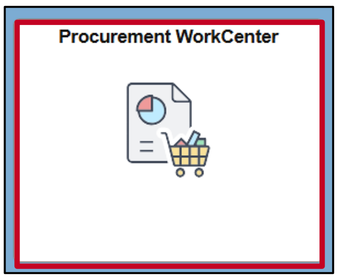
Version	Line	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason
5	1	3	Change	Change Order Source	ONL		06/30/2026 4:55:50PM	OTHER
5	1	3	Change	Line Status	C		06/30/2026 4:55:50PM	OTHER
4	1	2	Change	Change Order Source	ONL		06/30/2026 4:54:07PM	OTHER
4	1	2	Change	Line Status	O		06/30/2026 4:54:07PM	OTHER
4	1	1	Change	Change Order Source	ONL		06/30/2026 4:53:21PM	OTHER
4	1	1	Change	Line Status	C		06/30/2026 4:53:21PM	OTHER

Canceling or Closing a Contract

Contracts are canceled or closed from the **Contract Entry Contract** page.

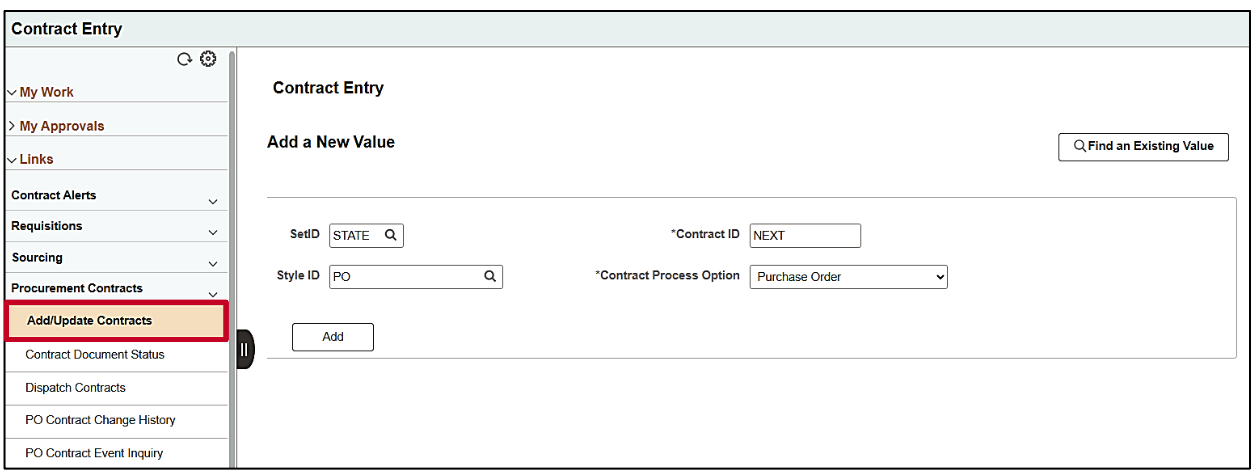
- A Contract can be Cancelled when there are no related Requisitions or Purchase Orders.
- Once a Contract has expired or otherwise ended and is not going to be renewed, it must be Closed.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Contract Entry page by clicking the Procurement WorkCenter tile.



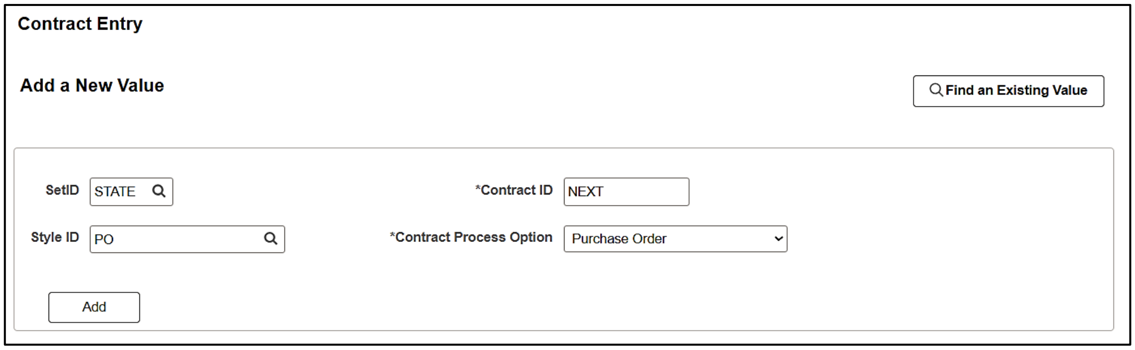
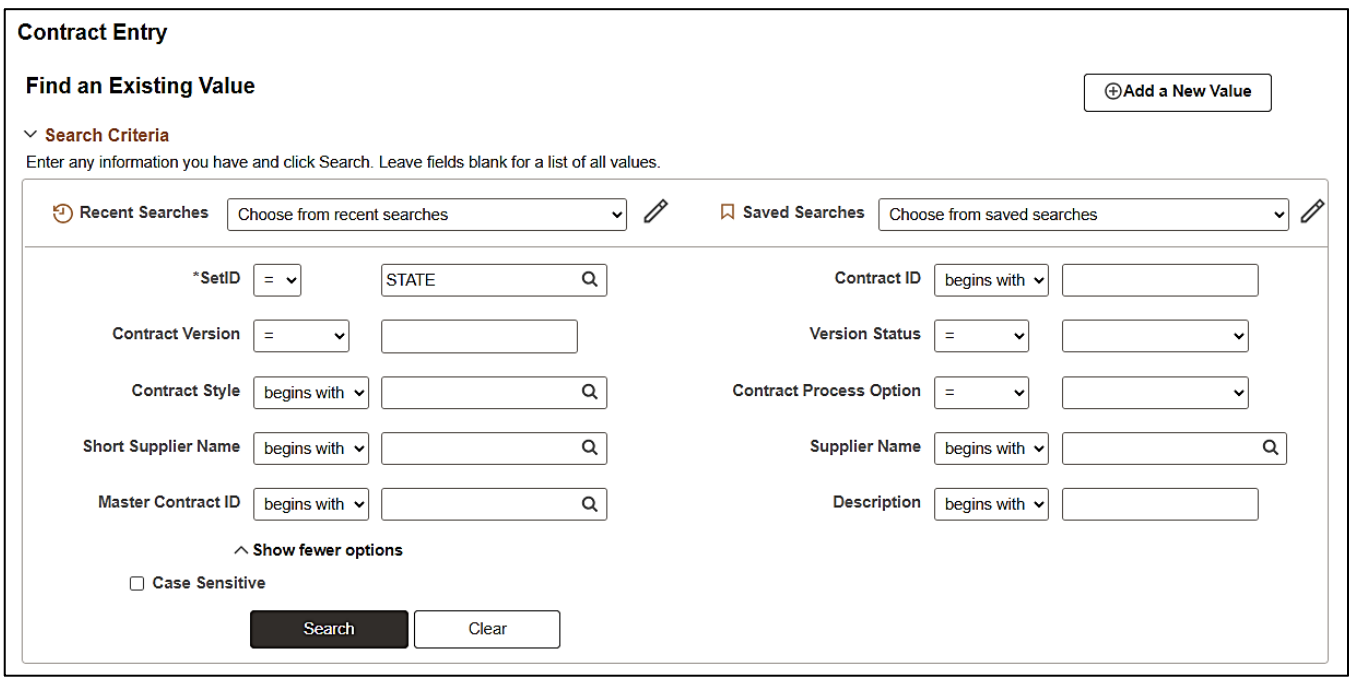
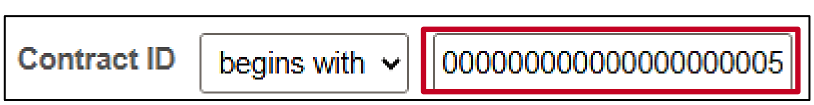
</td></tr>
<tr><td></td><td>For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>2.</td><td>Use the following navigation in the WorkCenter: Links > Procurement Contracts > Add/Update Contracts

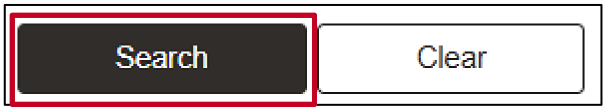
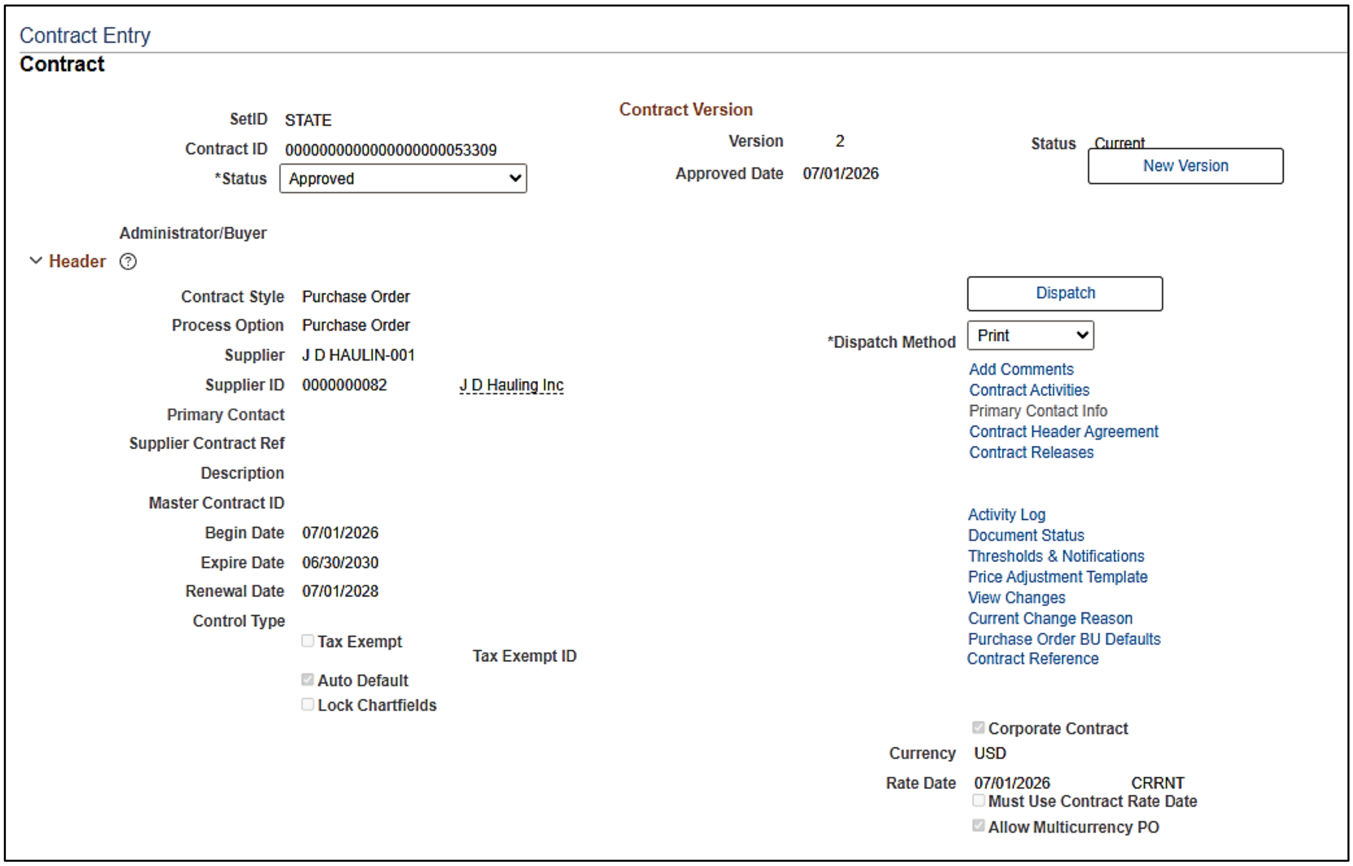
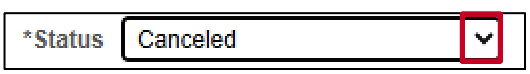
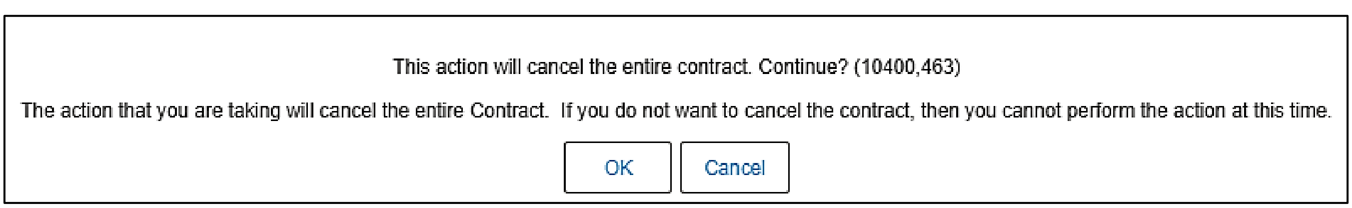
Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.

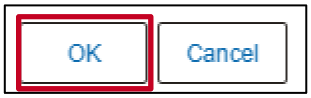
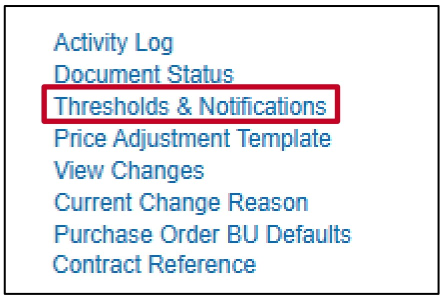
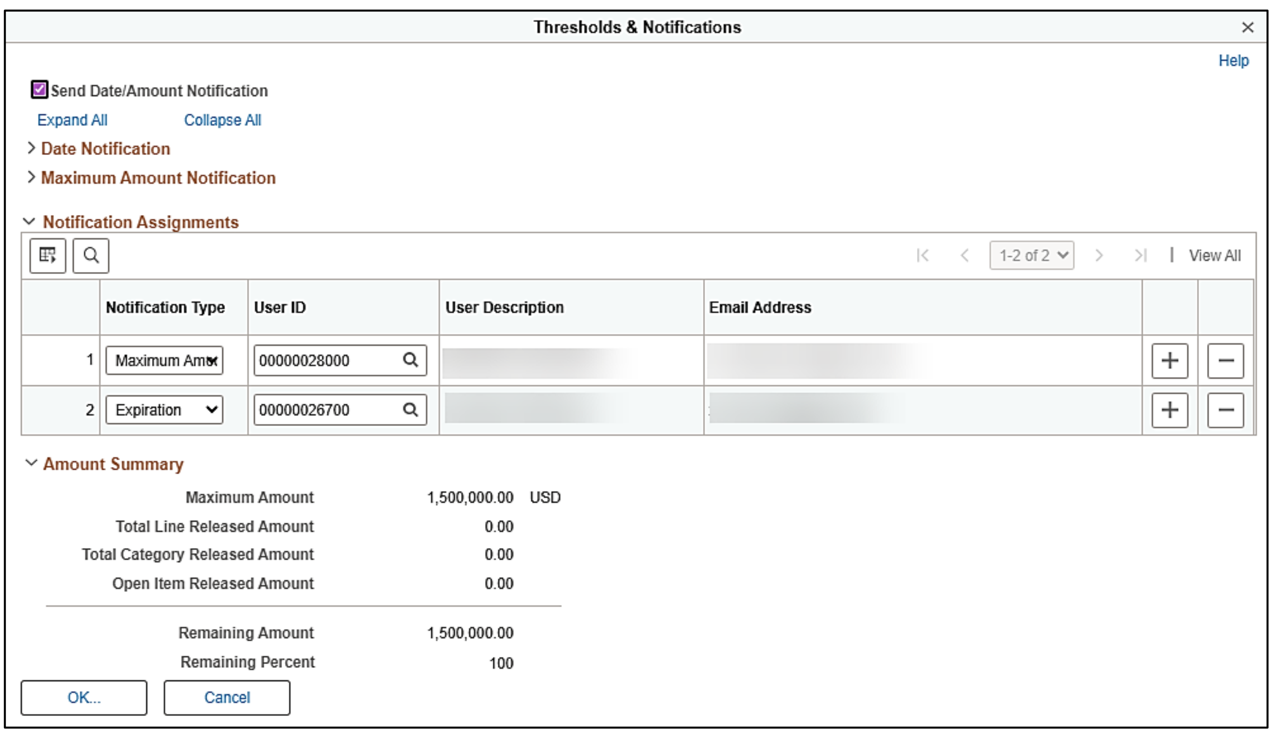
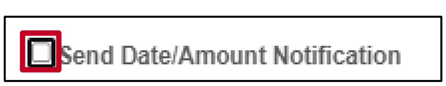


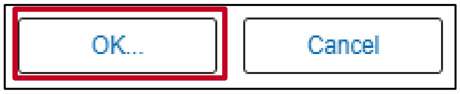
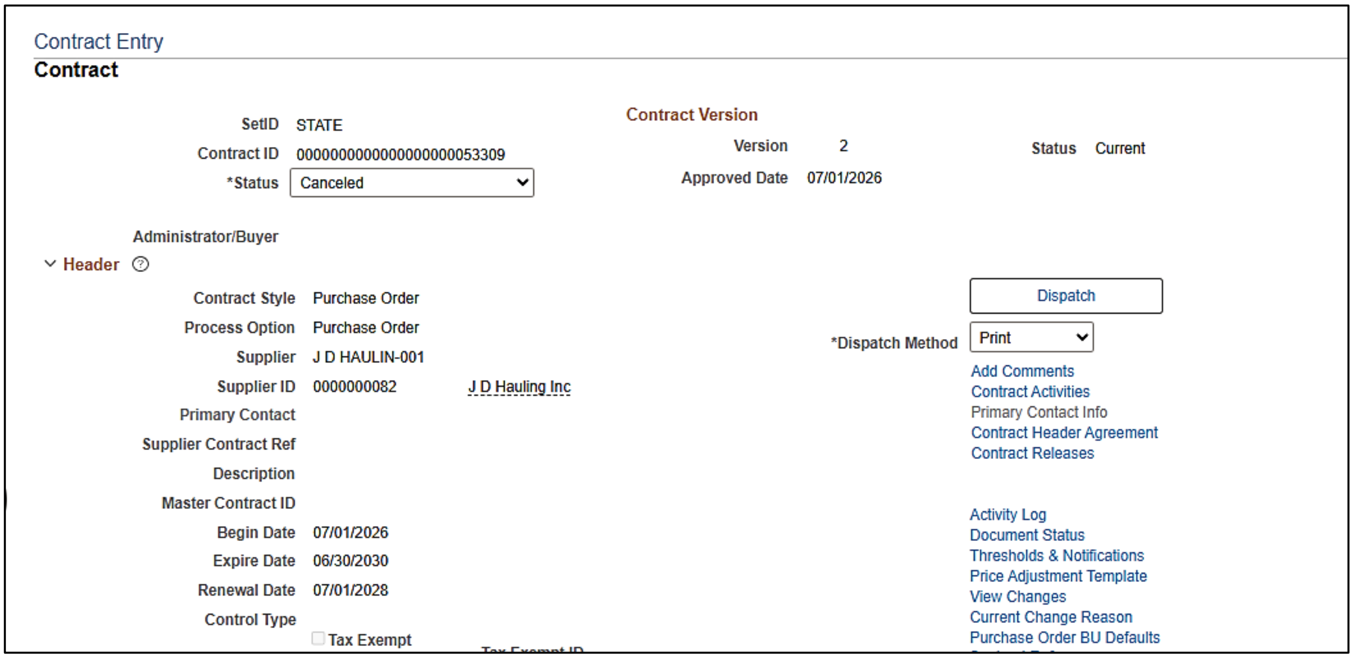
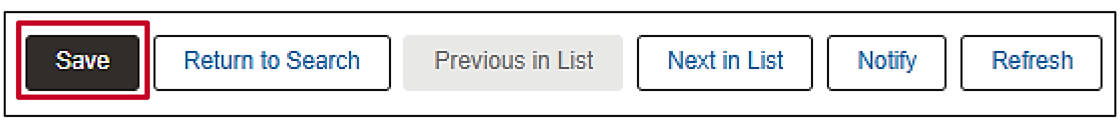
</td></tr>
<tr><td></td><td>Users can also access the Contract Entry page using the following navigation path:

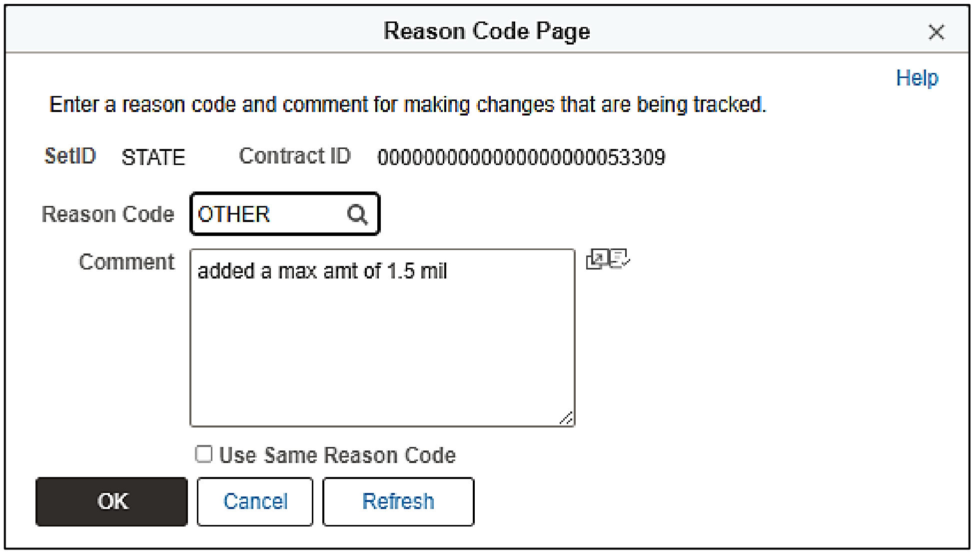
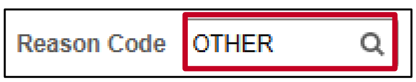
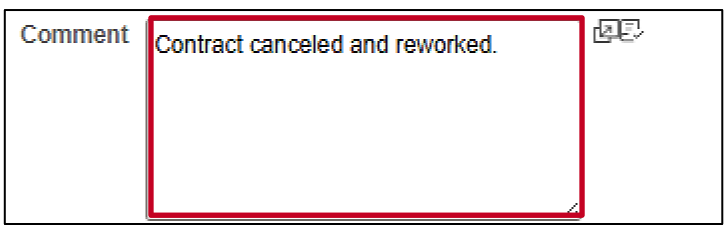
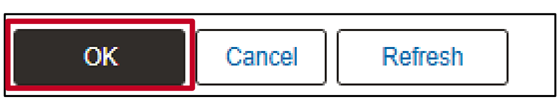
NavBar > Menu > Procurement Contracts > Add/Update Contracts</td></tr>
</table>

Step	Action
	The **Contract Entry Add a New Value** page displays. 
3.	Click the **Find an Existing Value** button. 
	The **Contract Entry Find an Existing Value** page displays. 
4.	Enter the applicable Contract ID in the **Contract ID** field. 

Step	Action
5.	Click the **Search** button. 
The **Contract Entry Contract** page displays. 	
6.	Click the Status dropdown button and select “Cancelled” or “Closed”. 
When a Contract is being cancelled, a message displays, explaining that the entire Contract is being cancelled. 	

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>Click the OK button.

</td></tr>
<tr><td>7.</td><td>Click the Thresholds & Notifications link.

</td></tr>
<tr><td colspan="2">The Thresholds & Notifications page displays.

</td></tr>
<tr><td>8.</td><td>Unselect the Send Date/Amount Notification checkbox option. This will stop future notifications.

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9.</td><td>Click the OK button.

</td></tr>
<tr><td colspan="2">The Contract Entry Contract page redisplays

</td></tr>
<tr><td>10.</td><td>Scroll down and click the Save button.

</td></tr>
</table>

Step	Action
The **Reason Code Page** displays. 	
	Enter an appropriate reason in the **Reason Code** field. 
	Enter an appropriate comment in the **Comment** field. 
	Click the **OK** button. 

Allowed Extensions on Attachments in Cardinal

The following is a list of file extensions that are allowed on attachments uploaded to Cardinal. Only attach key supporting documents that either enhance the electronic Cardinal transaction approval process or are instrumental as part of the transaction history. The Cardinal system should not be relied upon to maintain agency documentation and should not be considered the official retention source of the agency. Supporting documents, as required by all applicable regulatory/governing bodies, should be maintained by the agency apart from the Cardinal attachment functionality.

Allowed Extensions on Attachments in Cardinal		
.BMP	.CSV	.DOC
.DOCX	.JPE	.JPEG
.JPG	.MSG	.PDF
.PNG	.PST	.RTF
.TIF	.TIFF	.TXT
.XLS	.XLSX	.XML