



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.

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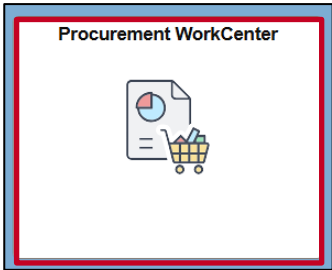
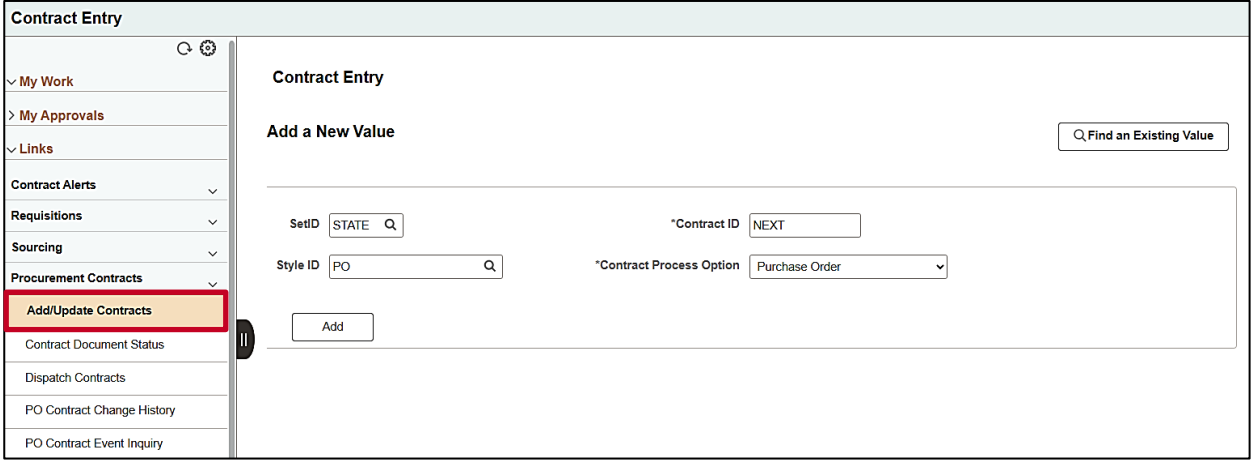


Revision History

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. 
	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. 
	Users can also access the Contract Entry page using the following navigation path: NavBar > Menu > Procurement Contracts > Add/Update Contracts



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Step	Action
	The Contract Entry Add a New Value page displays. Contract Entry Add a New Value Find an Existing Value SetID STATE *Contract ID NEXT Style ID PO *Contract Process Option Purchase Order Add
i	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.
3.	Click the Add button. Add
	The Contract Entry Contract page displays. Contract Entry Contract SetID STATE Copy From Contract Contract ID NEXT *Status Approved Contract Version 1 Status Current Approval Due Date Administrator/Buyer Header *Contract Style Purchase Order Process Option Purchase Order *Supplier Supplier Search *Supplier ID Primary Contact Supplier Contract Ref Description Master Contract ID *Begin Date 05/26/2026 Expire Date Renewal Date Control Type Tax Exempt Tax Exempt ID Currency USD Dispatch Print Add Comments Contract Activities Primary Contact Info Contract Header Agreement Contract Releases Activity Log Document Status Thresholds & Notifications Price Adjustment Template Purchase Order BU Defaults Contract Reference Corporate Contract

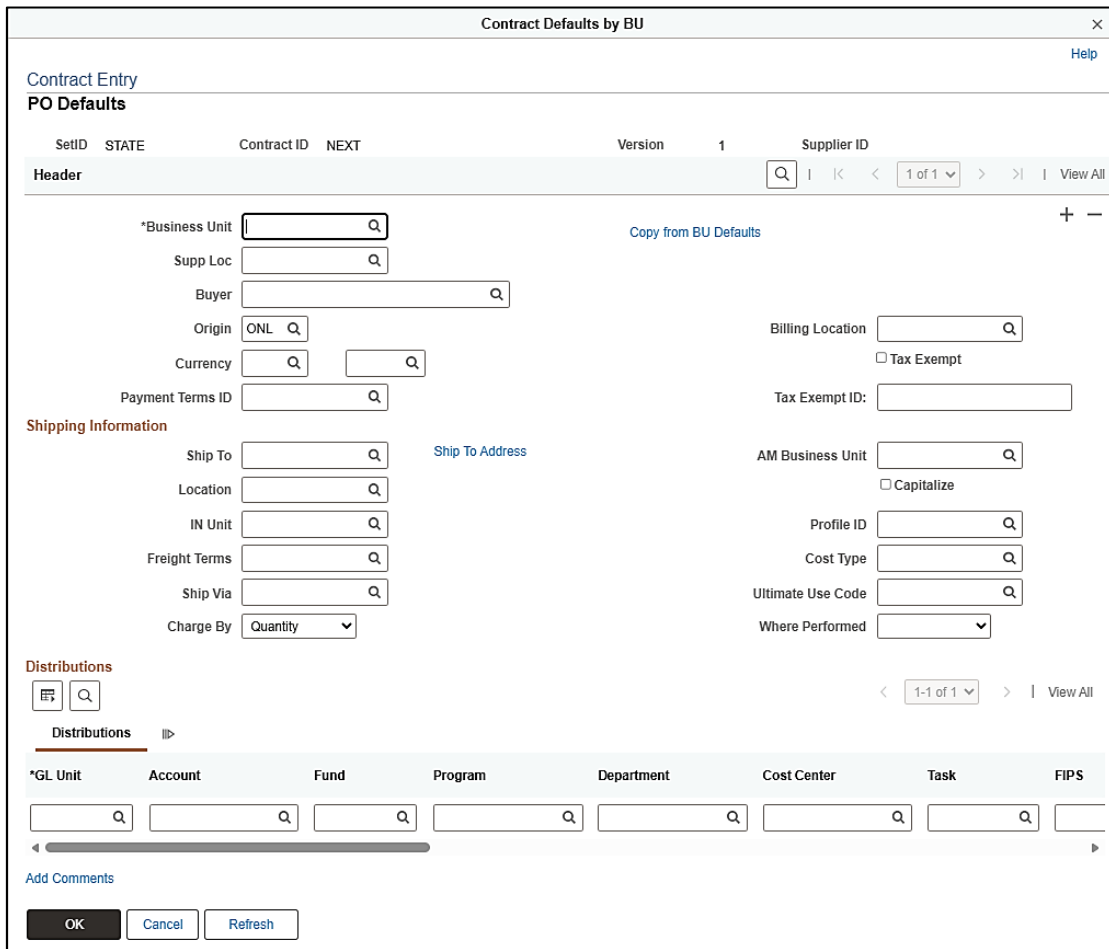
Step	Action
	Click the Copy From Contract link to copy the following field values from an existing Contract: Administrator/Buyer, Supplier, Supplier ID, Supplier Contact Ref, Begin Date, Expire Date, Renewal Date, Description, Maximum Amount (if applicable), Contract Category, and Responsible Org. SetID STATE Copy From Contract Contract ID NEXT *Status Approved ▼
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. *Status Approved ▼
5.	Click the Approval Due Date Calendar icon and select the appropriate contract approval date. Approval Due Date 06/26/2026 
6.	Click the Administrator/Buyer Look up icon and select the applicable Contract Administrator/Buyer. Administrator/Buyer 
7.	Click the Supplier Look Up icon and select the applicable Supplier. *Supplier J D HAULIN-001  Supplier Search
The Supplier ID field is populated automatically. *Supplier ID 0000000082  <u>J D Hauling Inc</u>	
8.	Enter the Contract's start date in the Begin Date field. *Begin Date 08/01/2026 

Step	Action
	Do not change the following fields in the Header section: Auto Default: defaults to selected. ☐ Tax Exempt ☒ Auto Default ☐ Lock Chartfields Dispatch Method: defaults to "Print". Dispatch *Dispatch Method Print ▼ Allow Multicurrency PO: defaults to selected. ☐ Must Use Contract Rate Date ☒ Allow Multicurrency PO
9.	In the Amount Summary section, enter a value in the Maximum Amount field, if applicable. Maximum Amount 0.00 USD
	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. ▼ Contract Open Item Reference ☐ Allow Open Item Reference ☐ Adjust Supplier Pricing First ☐ Price Can Be Changed on Order ☒ Add Open Item Price Adjustments
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. ▼ Contract Open Item Reference ☒ Allow Open Item Reference ☐ Adjust Supplier Pricing First ☐ Price Can Be Changed on Order ☐ Add Open Item Price Adjustments

Step	Action
11.	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. ✓ Contract Open Item Reference ☐ Allow Open Item Reference ☐ Adjust Supplier Pricing First ☒ Price Can Be Changed on Order Add Open Item Price Adjustments
	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. Add Comments Contract Activities Primary Contact Info Contract Header Agreement Contract Releases
	The Activity Log link opens a page for showing who entered, last updated, and approved the contract and when they did so. Activity Log Document Status Thresholds & Notifications Price Adjustment Template Purchase Order BU Defaults Contract Reference
	The Price Adjustment Template link is not used at the Contract level. Activity Log Document Status Thresholds & Notifications Price Adjustment Template Purchase Order BU Defaults Contract Reference

Step	Action
12.	Click the Purchase Order BU Defaults link. Activity Log Document Status Thresholds & Notifications Price Adjustment Template Purchase Order BU Defaults Contract Reference

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



Contract Defaults by BU

Contract Entry
PO Defaults

SetID STATE Contract ID NEXT Version 1 Supplier ID

Header

*Business Unit Copy from BU Defaults

Supp Loc

Buyer

Origin ONL

Currency

Payment Terms ID

Shipping Information

Ship To Ship To Address

Location

IN Unit

Freight Terms

Ship Via

Charge By

Billing Location

☐ Tax Exempt

Tax Exempt ID:

AM Business Unit

☐ Capitalize

Profile ID

Cost Type

Ultimate Use Code

Where Performed

Distributions

Distributions

*GL Unit	Account	Fund	Program	Department	Cost Center	Task	FIPS
Q	Q	Q	Q	Q	Q	Q	Q

Add Comments

OK Cancel Refresh

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

Step	Action
14.	Click the OK button.

The **Contract Entry Contract** page redisplay.

Contract Entry

Contract

SetID

STATE

Copy From Contract

Contract ID

NEXT

*Status

Approved

Administrator/Buyer

Contract Style

Purchase Order

Process Option

Purchase Order

*Supplier

*Supplier ID

Primary Contact

Supplier Contract Ref

Description

Master Contract ID

*Begin Date

05/26/2026

Expire Date

Renewal Date

Control Type

Tax Exempt

Tax Exempt ID

Currency

USD

Contract Version

Version 1

Status Current

Approval Due Date

Dispatch

Print

[Add Comments](#)
[Contract Activities](#)
[Primary Contact Info](#)
[Contract Header Agreement](#)
[Contract Releases](#)

[Activity Log](#)
[Document Status](#)
[Thresholds & Notifications](#)
[Price Adjustment Template](#)
[Purchase Order BU Defaults](#)
[Contract Reference](#)

☒ Corporate Contract



The **Line Groupings** tab is not used.

Lines

Details

Order By Amount

Item Information

Default Schedule

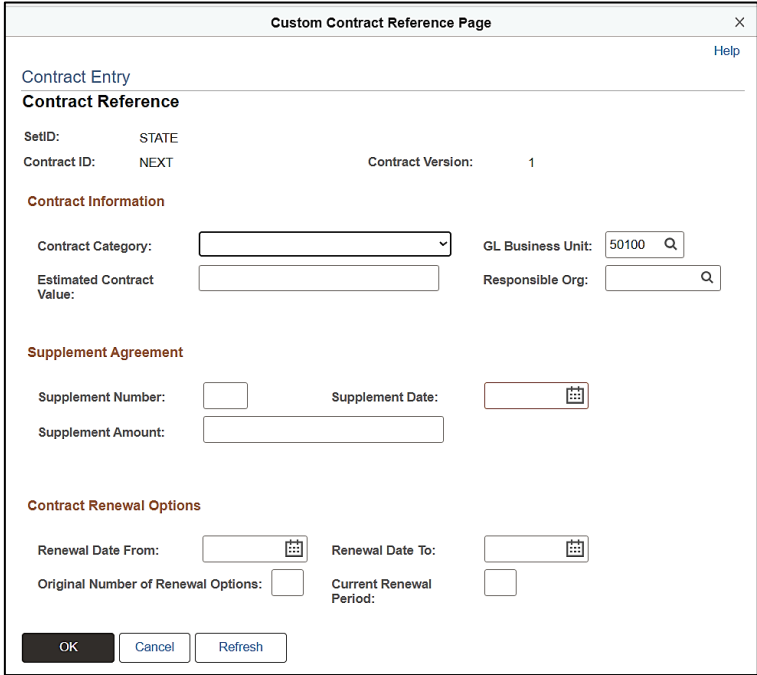
Release Amounts

Release Quantities

Line Groupings

The **Contract Categories** section is not used.

Contract Categories

Step	Action
15.	Click the Contract Reference link. Activity Log Document Status Thresholds & Notifications Price Adjustment Template Purchase Order BU Defaults Contract Reference
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. Contract Category: ON-CALL GOODS/SERVICES 
17.	Verify that "50100" is in the GL Business Unit field. GL Business Unit: 50100 

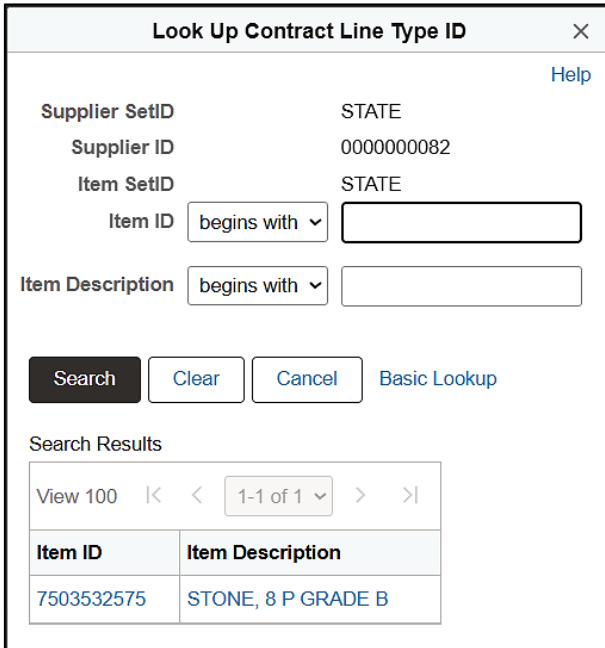
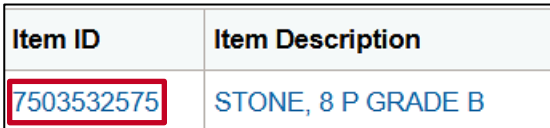
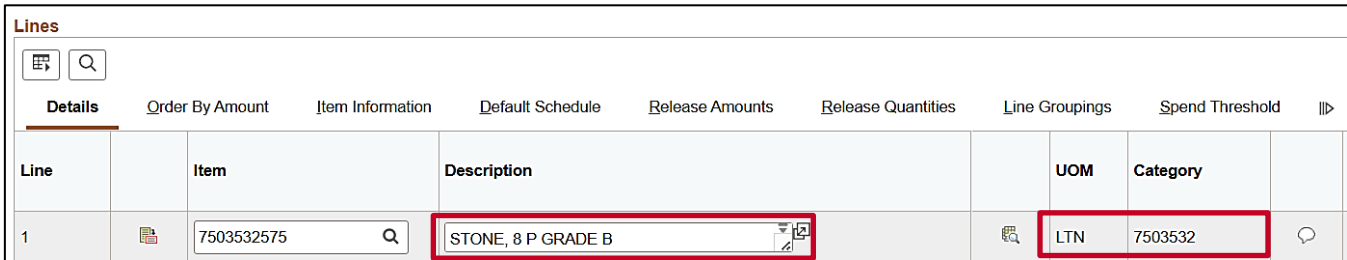
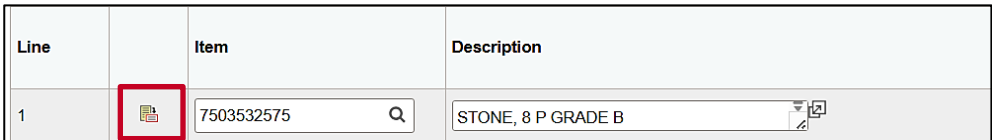
Step	Action
18.	Enter a value in the Estimated Contract Value field for all Contracts, including Requirements Contracts. Estimated Contract Value: 1,800,000
19.	Enter the appropriate department number in the Responsible Org field. Responsible Org: 10004
	Supplemental agreements are usually related to 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. Supplement Agreement Supplement Number: Supplement Date: Supplement Amount:
20.	Click the OK button. OK Cancel Refresh



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Step	Action														
	The Contract Entry Contract page redispays. Contract Entry Contract SetID STATE Copy From Contract Contract ID NEXT *Status Approved Administrator/Buyer YANI.HO HO,YANI Header *Contract Style Purchase Order Process Option Purchase Order *Supplier J D HAULIN-001 Supplier Search *Supplier ID 000000082 J D Hauling Inc Primary Contact 1 Patricia Day Supplier Contract Ref Description Master Contract ID *Begin Date 08/01/2026 Expire Date Renewal Date Control Type ☐ Tax Exempt ☒ Auto Default ☐ Lock Chartfields Tax Exempt ID Contract Version Version 1 Approval Due Date 06/26/2026 Status Current New Version Dispatch *Dispatch Method Print Add Comments Contract Activities Primary Contact Info Contract Header Agreement Contract Releases Activity Log Document Status Thresholds & Notifications Price Adjustment Template Purchase Order BU Defaults Contract Reference ☒ Corporate Contract Currency USD Rate Date 06/27/2026 CRRNT ☐ Must Use Contract Rate Date														
21.	In the Lines section, click the Item Look up icon and select the applicable Item ID to add to the Contract. Contract Items Catalog Search Item Search Search for Contract Lines Lines Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings Spend Threshold ID <table border="1"><thead><tr><th>Line</th><th>Item</th><th>Description</th><th>UOM</th><th>Category</th><th></th><th></th></tr></thead><tbody><tr><td>1</td><td>Item Look up</td><td></td><td></td><td></td><td></td><td></td></tr></tbody></table>	Line	Item	Description	UOM	Category			1	Item Look up					
Line	Item	Description	UOM	Category											
1	Item Look up														

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 redisplay and the Description, Unit of Measure (UOM), and Category fields are automatically populated based on the Item selected. 
23.	Click the Line Details icon. 



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Step	Action
	The Details for Line page displays in a pop-up window. Details for Line 1 Version 1 Supplier J D HAULIN-001 Item ID 7503532575 STONE, 8 P GRADE B Line 1 Category 7503532 Description Category ID 03113 Status Active Physical Nature Goods Transaction Item Description: STONE, 8 P GRADE B 236 characters remaining Preferred Language Item Description: STONE, 8 P GRADE B Expand All Collapse All > Item Information > Release Amounts / Quantities > Pricing Information OK Cancel Refresh

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. Maximum Line 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. Minimum Line Quantity 0.01
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. Maximum Line 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. Total Line Released Amount 0.000 Total Line Released Quantity 0.00
29.	Click the Physical Nature dropdown and select the appropriate option. Status Active Physical Nature Goods  Note: For Professional Service contracts, select “Services”.
30.	Click the Expand Section Pricing Information icon (>).  Pricing Information



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Step

Action

The Pricing Information section displays.

▼ Pricing Information

☐ Use Contract Base Price

☒ Price Can Be Changed on Order

Price Date

PO Date

Price Qty

Line Quantity

Qty Type

Current Order Quantity

☐ Use Supp Price UOM Adjustments

☐ Use Supplier Price Shipto Adj

Adjust

Before Contract Adjustments

Order By Amount

☐ Amount Only

Merchandise Amount

Schedule Defaults

Select the eligible UOM / Pricing combinations that are available for this contract line. The Release Default row will be used for pricing the next set of releases from the contract.

UOM/Pricing

<<

<

1-1 of 1

>

>>

View All

	Price Loc	UOM	UPN Type	UPN ID	Base Price	Curr		
☒	MAIN	LTN			17.68000	USD	+	-

Enter the lead times and schedule quantities to be used for contract generated purchase order releases. Quantity is in standard UOM, and will be converted to the UOM that is selected as the Release Default at the time of release.

Shipping Template

<<

<

1-1 of 1

>

>>

View All

Lead Time	Time Due	*Qty Sched	UOM		
0		1.0000	LTN	+	-

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.

☐ Use Contract Base 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.

☒ Price Can Be Changed on Order

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. ☐ Use Contract Base Price ☒ Price Can Be Changed on Order Price Date PO Date Price Qty Line Quantity Qty Type Current Order Quantity ☐ Use Supp Price UOM Adjustments ☐ Use Supplier Price Shipto Adj Adjust Before Contract Adjustments Order By Amount ☐ Amount Only Merchandise Amount <tr><td>33.</td><td> 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. Order By Amount ☒ Amount Only Merchandise Amount <tr><td> </td><td> The Merchandise Amount field will be automatically populated from the Base Price field upon saving. Merchandise Amount <tr><td> </td><td> 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. UOM/Pricing ☒ 1-1 of 1 View All <table><tr><th></th><th>Price Loc</th><th>UOM</th><th>UPN Type</th><th>UPN ID</th><th>Base Price</th><th>Curr</th><th></th><th></th></tr><tr><td>☒</td><td>MAIN</td><td>LTN</td><td></td><td></td><td>17.68000</td><td>USD</td><td></td><td></td></tr></table> </td></tr></td></tr></td></tr>	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. Order By Amount ☒ Amount Only Merchandise Amount <tr><td> </td><td> The Merchandise Amount field will be automatically populated from the Base Price field upon saving. Merchandise Amount <tr><td> </td><td> 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. UOM/Pricing ☒ 1-1 of 1 View All <table><tr><th></th><th>Price Loc</th><th>UOM</th><th>UPN Type</th><th>UPN ID</th><th>Base Price</th><th>Curr</th><th></th><th></th></tr><tr><td>☒</td><td>MAIN</td><td>LTN</td><td></td><td></td><td>17.68000</td><td>USD</td><td></td><td></td></tr></table> </td></tr></td></tr>		The Merchandise Amount field will be automatically populated from the Base Price field upon saving. Merchandise Amount <tr><td> </td><td> 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. UOM/Pricing ☒ 1-1 of 1 View All <table><tr><th></th><th>Price Loc</th><th>UOM</th><th>UPN Type</th><th>UPN ID</th><th>Base Price</th><th>Curr</th><th></th><th></th></tr><tr><td>☒</td><td>MAIN</td><td>LTN</td><td></td><td></td><td>17.68000</td><td>USD</td><td></td><td></td></tr></table> </td></tr>		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. UOM/Pricing ☒ 1-1 of 1 View All <table><tr><th></th><th>Price Loc</th><th>UOM</th><th>UPN Type</th><th>UPN ID</th><th>Base Price</th><th>Curr</th><th></th><th></th></tr><tr><td>☒</td><td>MAIN</td><td>LTN</td><td></td><td></td><td>17.68000</td><td>USD</td><td></td><td></td></tr></table>		Price Loc	UOM	UPN Type	UPN ID	Base Price	Curr			☒	MAIN	LTN			17.68000	USD		
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☒	MAIN	LTN			17.68000	USD																			

Step	Action												
34.	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. Shipping Template < > 1-1 of 1 > > View All <table><tr><th>Lead Time</th><th>Time Due</th><th>*Qty Sched</th><th>UOM</th><th></th><th></th></tr><tr><td> 0</td><td> </td><td> 0.01 </td><td>LTN</td><td> +.. </td><td> — </td></tr></table>	Lead Time	Time Due	*Qty Sched	UOM			0		0.01	LTN	+..	—
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35.	Click the OK button. OK Cancel Refresh												
The Contract Entry Contract page redispays.													
Contract Entry Contract SetID STATE Copy From Contract Contract ID NEXT *Status Approved Contract Version Version 1 Approval Due Date Status Current New Version													
36.	Scroll down and click the Save button. Save Notify Refresh												
The Contract ID field is updated with an assigned number. The Approved Date field is updated with the current date.													
Contract Entry Contract SetID STATE Contract ID 000000000000000000053308 *Status Approved Contract Version Version 1 Approved Date 06/27/2026 Status Current New Version													

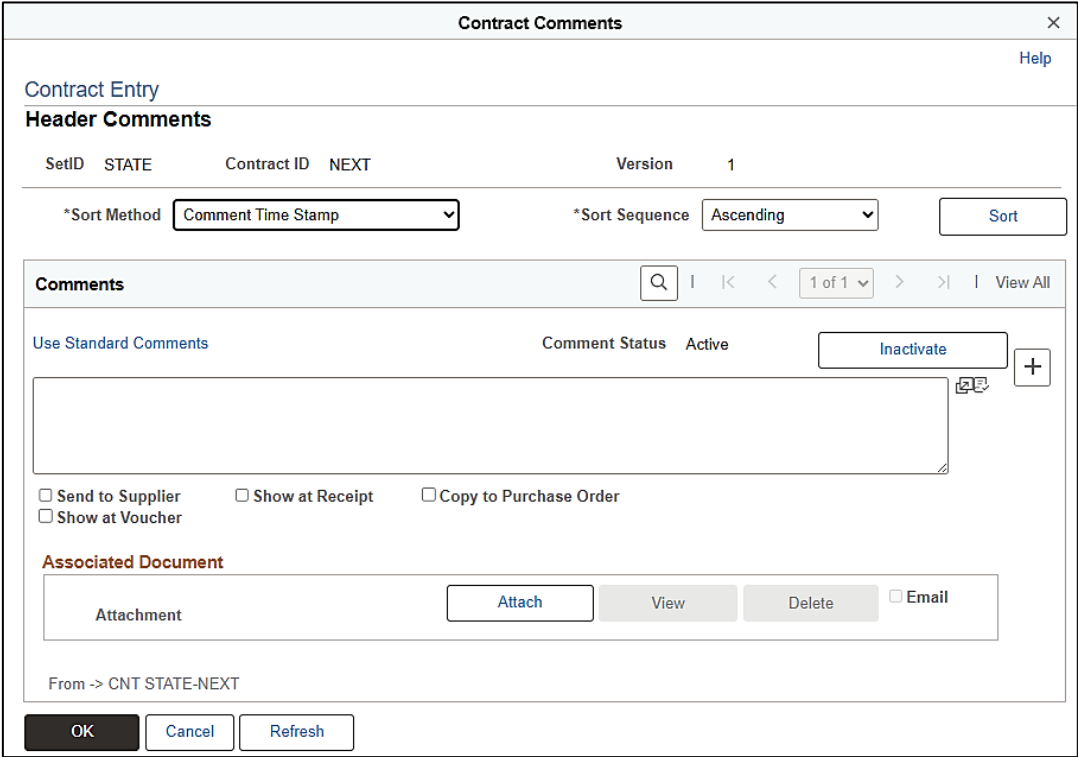
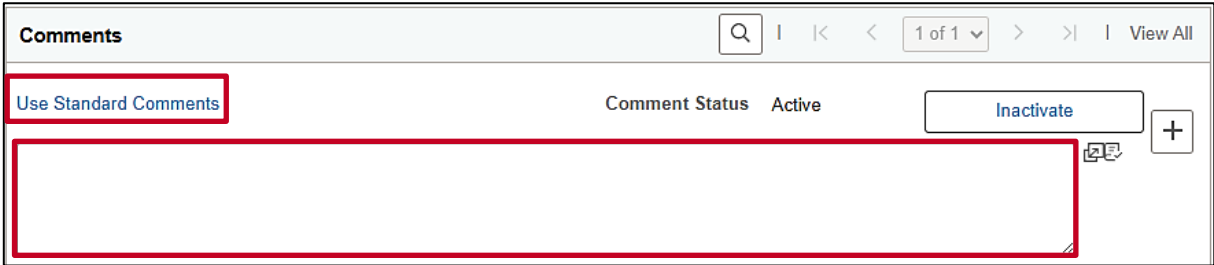
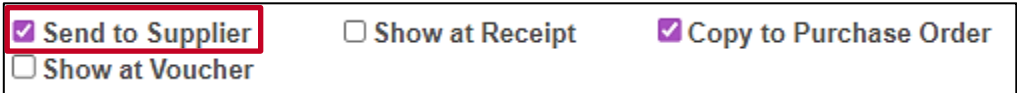
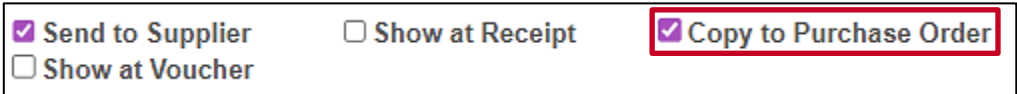


Procurement Job Aid

PR348 Entering and Maintaining Procurement Contracts (VDOT Only)

Adding Comments

Step	Action
	When entering a Contract, comments and attachments can be added from the Header section of the Contract Entry Contract page. Contract Entry Contract SetID STATE Copy From Contract Contract ID NEXT *Status Approved Administrator/Buyer ▼ Header ⓘ *Contract Style Purchase Order Process Option Purchase Order *Supplier Supplier Search *Supplier ID Primary Contact Supplier Contract Ref Description Master Contract ID *Begin Date 06/30/2026 ▼ Contract Version Version 1 Approval Due Date Status Current New Version Dispatch *Dispatch Method Print Add Comments Contract Activities Primary Contact Info Contract Header Agreement Contract Releases Activity Log Document Status Thresholds & Notifications Price Adjustment Template Purchase Order BU Defaults Contract Reference
1.	Click the Add Comments link. Dispatch *Dispatch Method Print Add Comments Contract Activities Primary Contact Info Contract Header Agreement Contract Releases

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. 

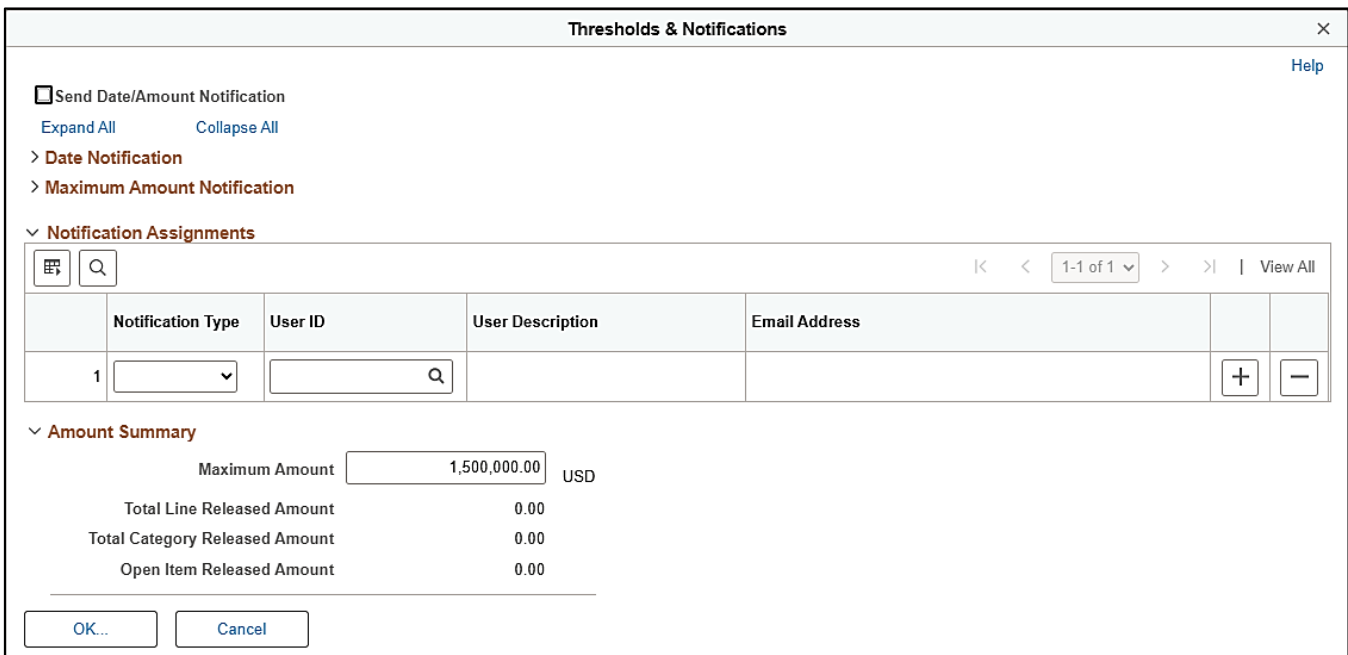
Step	Action
5.	Click the Attach button to add a document. For a detailed listing of the file extensions that are allowed as attachments in Cardinal, see the Allowed Extensions on Attachments in Cardinal section of this Job Aid. Associated Document Attachment Attach View Delete ☐ Email
6.	Click the OK button. OK Cancel Refresh
The Contract Entry Contract page displays. Note that the Add Comments link is now the Edit Comments link. Contract Entry Contract SetID STATE Copy From Contract Contract ID NEXT *Status Approved Approval Due Date Contract Version Version 1 Status Current New Version Administrator/Buyer Header *Contract Style Purchase Order Process Option Purchase Order *Supplier *Supplier ID Primary Contact Dispatch *Dispatch Method Print Edit Comments Contract Activities Primary Contact Info Contract Header Agreement Contract Releases	
7.	Scroll down and click the Save button to update the contract with the new comment. Save Notify Refresh



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. Contract Entry Contract SetID STATE Copy From Contract Contract ID NEXT *Status Approved Administrator/Buyer Contract Style Purchase Order Process Option Purchase Order *Supplier *Supplier ID Primary Contact Supplier Contract Ref Description Master Contract ID *Begin Date 07/01/2026 Expire Date 06/30/2029 Renewal Date 06/30/2027 Contract Version Version 1 Approval Due Date Status Current New Version Dispatch *Dispatch Method Print Edit Comments Contract Activities Primary Contact Info Contract Header Agreement Contract Releases Activity Log Document Status Thresholds & Notifications Price Adjustment Template Purchase Order BU Defaults Contract Reference

Step	Action
	The Thresholds & Notifications page displays in a pop-up window. 
2.	The Send Date/Amount Notification checkbox option must be selected for the notification functionality to work. 
3.	Click the Expand Section Date Notification icon (>). 

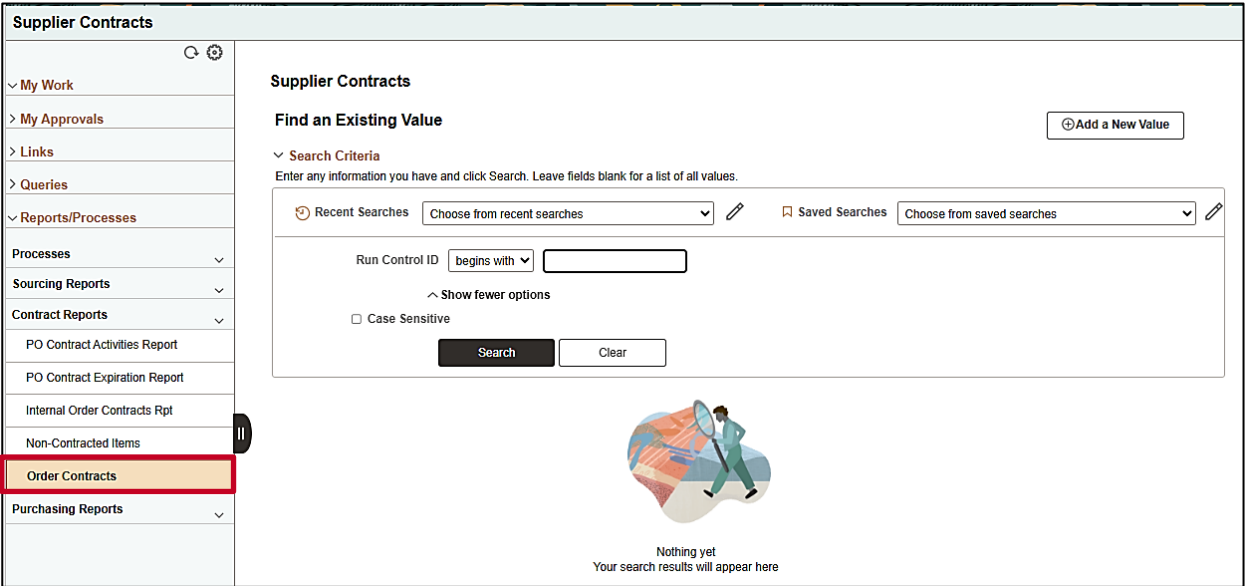
Step	Action
	The Date Notification section displays. ▼ Date Notification Notify user when contract is within specified days of Expire Date. Expire Date 06/30/2029  Expiration Notification Date 06/30/2029 Notify user when contract is within specified days of Renewal Date. Renewal Date 06/30/2027  Renewal Notification Date 06/30/2027 Notify user when New Contract or Draft is within specified days of Approval Due Date. Approval Due Date  Approval Notification Date Notify Days Before Expires Notify Days Before Renewal Notify Days Before Approval
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. Notify Days Before Expires 30
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. Notify Days Before Renewal 30
6.	Click the Expand Section Maximum Amount Notification icon (>). > Maximum Amount Notification
	The Maximum Amount Notification section displays. ▼ Maximum Amount Notification Notify user when the total contract released amount is either within the specified amount, or within the specified percentage, of the maximum contract amount. Amount Less than Maximum USD Percent Less than Maximum Notification Amount

Step	Action								
7.	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. Amount Less than Maximum 150,000.00 USD Percent Less than Maximum								
8.	Tab out of the completed field. 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. Amount Less than Maximum 150,000.00 USD Percent Less than Maximum 10 Notification Amount 1,350,000.00								
9.	In the Notification Assignments section, click the Notification Type dropdown button and select the appropriate option (Approval Due Date, Expiration, Maximum Amount, or Renewal). Notification Assignments <table><thead><tr><th></th><th>Notification Type</th><th>User ID</th><th>User Description</th></tr></thead><tbody><tr><td>1</td><td>Expiration</td><td> </td><td></td></tr></tbody></table>		Notification Type	User ID	User Description	1	Expiration		
	Notification Type	User ID	User Description						
1	Expiration								
10.	Enter the User ID of the Cardinal user to be notified in the User ID field. User ID								
	A new notification line must be created for each new notification type and for each user receiving the notification.								

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.

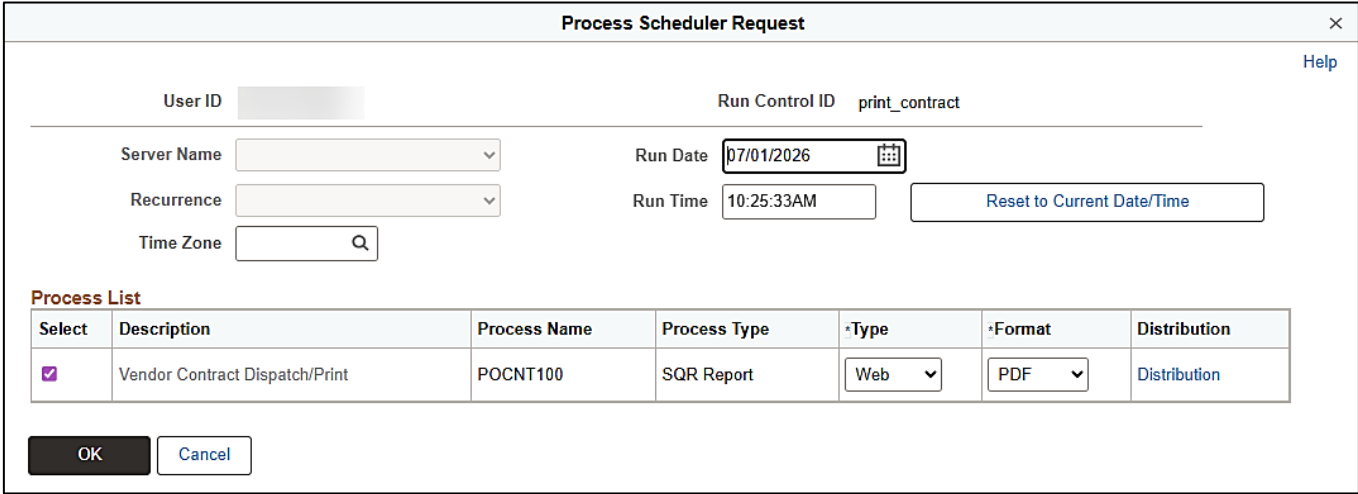
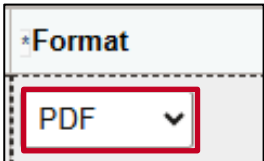
Step	Action
1.	Navigate to the Supplier Contracts page by clicking the Procurement WorkCenter tile. 
	For information about WorkCenters, see the Job Aid titled Overview of the Cardinal Financials WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation in 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



Procurement Job Aid

PR348 Entering and Maintaining Procurement Contracts (VDOT Only)

Step	Action
4.	Click the applicable Run Control ID. print_contract English >
The Supplier Contracts run control page displays. Run Control ID print_contract Report Manager Process Monitor Run Language English Report Request Parameters SetID STATE Q Business Unit Q Contract ID From 0000000000000000000050628 Q To 0000000000000000000050628 Q Supplier ID Q Miscellaneous Options ☐ Print Duplicate Number Of Copies 1 Sort By Sort by Line Number ▼ Statuses to Include ☒ Approved ☒ Open ☒ Held ☒ Canceled ☒ Completed Dispatch Methods to Include ☒ Print ☒ FAX ☒ E-Mail ☒ Phone Save Return to Search Previous in List Next in List Notify Add Update/Display	
5.	Enter “STATE” in the SetID field. SetID STATE Q
6.	Enter “50100” in the Business Unit field. Business Unit 50100 Q
7.	Enter the appropriate Contract ID in the Contract ID From and To fields. Contract ID From 0000000000000000000053308 Q To 0000000000000000000053308 Q

Step	Action
8.	Click the Run button. 
The Process Scheduler Request page displays in a pop-up window. 	
9.	Click the Format dropdown button and select “PDF”. 
10.	Click the OK button. 



Procurement Job Aid

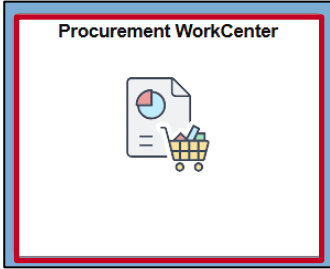
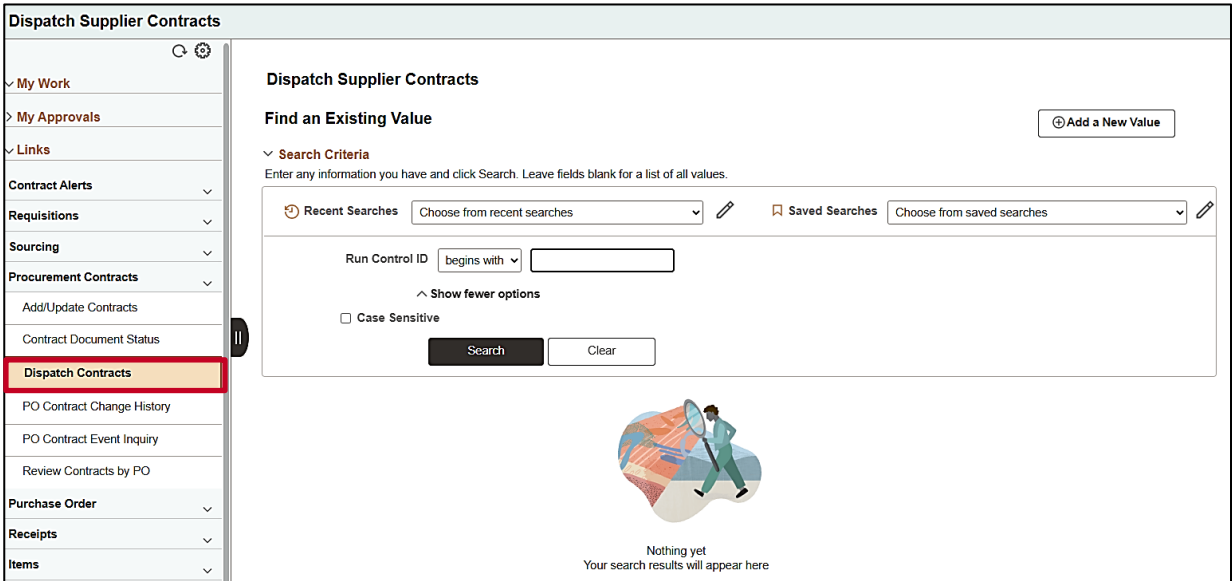
PR348 Entering and Maintaining Procurement Contracts (VDOT Only)

Step	Action
	The Supplier Contracts page redispays. Run Control ID <code>print_contract</code> Language English ▼ Report Manager Process Monitor Run Report Request Parameters SetID STATE 🔍 Business Unit 50100 🔍 Contract ID From 00000000000000000000000053308 🔍 To 00000000000000000000000053308 🔍 Supplier ID 🔍 Miscellaneous Options ☐ Print Duplicate Number Of Copies 1 Sort By Sort by Line Number ▼ Statuses to Include ☒ Approved ☒ Open ☒ Held ☒ Canceled ☒ Completed Dispatch Methods to Include ☒ Print ☒ FAX ☒ E-Mail ☒ Phone Save Return to Search Previous in List Next in List Notify Add Update/Display
11.	Click the Report Manager link. Report Manager Process Monitor Run

Step	Action														
	The Report Manager page displays, with the Contract's PDF listed. List Explorer Administration Archives View Reports For Folder Instance to Refresh Name Created On Last 1 Days Reports 1-1 of 1 View All <table border="1"> <thead> <tr> <th></th> <th>Report</th> <th>Report Description</th> <th>Folder Name</th> <th>Completion Date/Time</th> <th>Report ID</th> <th>Process Instance</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>POCNT100</td> <td>VENDOR CONTRACT DISPATCH/PRINT</td> <td>General</td> <td>07/01/26 10:31AM</td> <td>114579639</td> <td>25558629</td> </tr> </tbody> </table> Go back to Supplier Contracts Save List Explorer Administration Archives		Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance	1	POCNT100	VENDOR CONTRACT DISPATCH/PRINT	General	07/01/26 10:31AM	114579639	25558629
	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance									
1	POCNT100	VENDOR CONTRACT DISPATCH/PRINT	General	07/01/26 10:31AM	114579639	25558629									
	The printed contract includes an unauthorized signature block. Final = The price is final after adjustments Hard = Apply adjustments regardless of other adjustments Skip = Skip adjustments if any other adjustments have been applied Unauthorized														

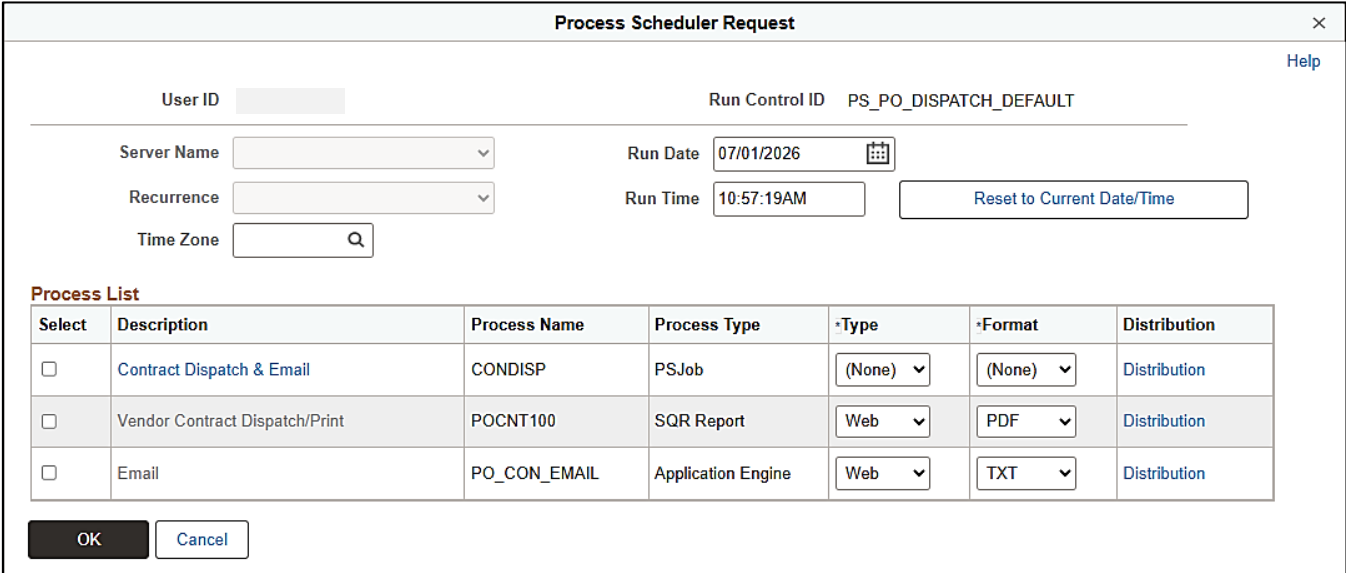
Dispatching a Contract for Signature

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. Dispatch Supplier Contracts Find an Existing Value ⊕ Add a New Value Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Run Control ID begins with ^ Show fewer options ☐ Case Sensitive Search Clear

Step	Action
4.	Click the applicable Run Control ID. PS_PO_DISPATCH_DEFAULT > The Dispatch Supplier Contracts run control page displays. Run Control ID PS_PO_DISPATCH_DEFAULT Language English Specified Language Recipient's Language Report Manager Process Monitor Run Process Request Parameters SetID Business Unit 50100 Contract ID Supplier ID Fax Cover Page Dispatch Methods to Include ☒ Print ☒ FAX ☒ E-Mail ☒ Phone Miscellaneous Options ☐ Test Dispatch ☐ Print Duplicate ☐ Print Copy Save Return to Search Previous in List Next in List Notify Add Update/Display

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. 



Procurement Job Aid

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Step	Action
	The Dispatch Supplier Contracts run control page redispays. Run Control ID PS_PO_DISPATCH_DEFAULT Language English Report Manager Process Monitor Run Specified Language Recipient's Language Process Instance:25558630 Process Request Parameters SetID STATE Business Unit 50100 Contract ID 0000000000000000000053308 Supplier ID Fax Cover Page Dispatch Methods to Include ☒ Print ☒ FAX ☒ E-Mail ☒ Phone Miscellaneous Options ☐ Test Dispatch ☐ Print Duplicate ☐ Print Copy Save Return to Search Previous in List Next in List Notify Add Update/Display

Step

Action

The **Report Manager** page displays, with the dispatched Contract’s PDF listed.

List

Explorer

Administration

Archives

View Reports For

Folder

Instance

to

Refresh

Name

Created On

Last

1

Days

Reports

1-2 of 2

View All

	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	POCNT100	VENDOR CONTRACT DISPATCH/PRINT	General	07/01/26 11:02AM	114579640	25558630
2	POCNT100	VENDOR CONTRACT DISPATCH/PRINT	General	07/01/26 10:31AM	114579639	25558629

Go back to Dispatch Supplier Contracts

Save

List

Explorer

Administration

Archives

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

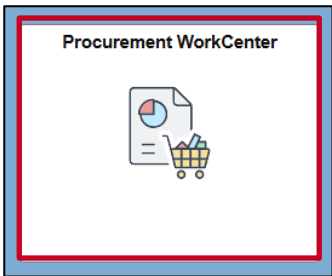
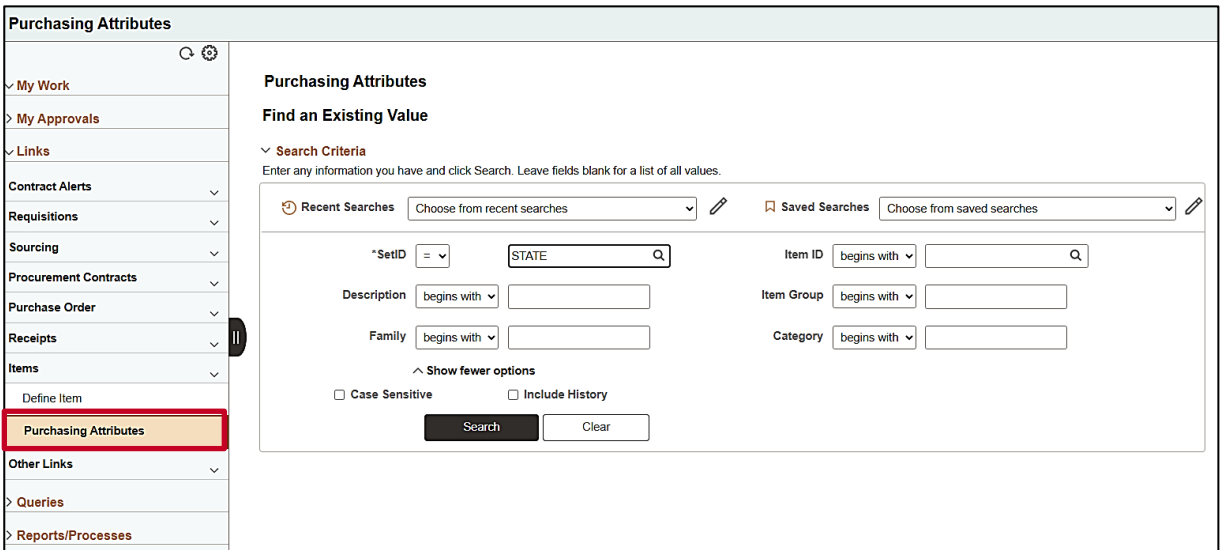
Final = The price is final after adjustments
Hard = Apply adjustments regardless of other adjustments
Skip = Skip adjustments if any other adjustments have been applied

Authorized Signature

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



Step	Action
	The Purchasing Attributes Find an Existing Value page displays. Purchasing Attributes Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches ▼ Saved Searches Choose from saved searches ▼ *SetID = ▼ STATE Q Item ID begins with ▼ Q Description begins with ▼ Item Group begins with ▼ Family begins with ▼ Category begins with ▼ ^ Show fewer options ☐ Case Sensitive ☐ Include History Search Clear
3.	Enter the applicable value in the SetID field. *SetID = ▼ STATE Q
4.	Enter the Item ID of the Item to add a new Supplier relationship to in the Item ID field. Item ID begins with ▼ 7503532050 Q
5.	Click the Search button. Search Clear



Procurement Job Aid

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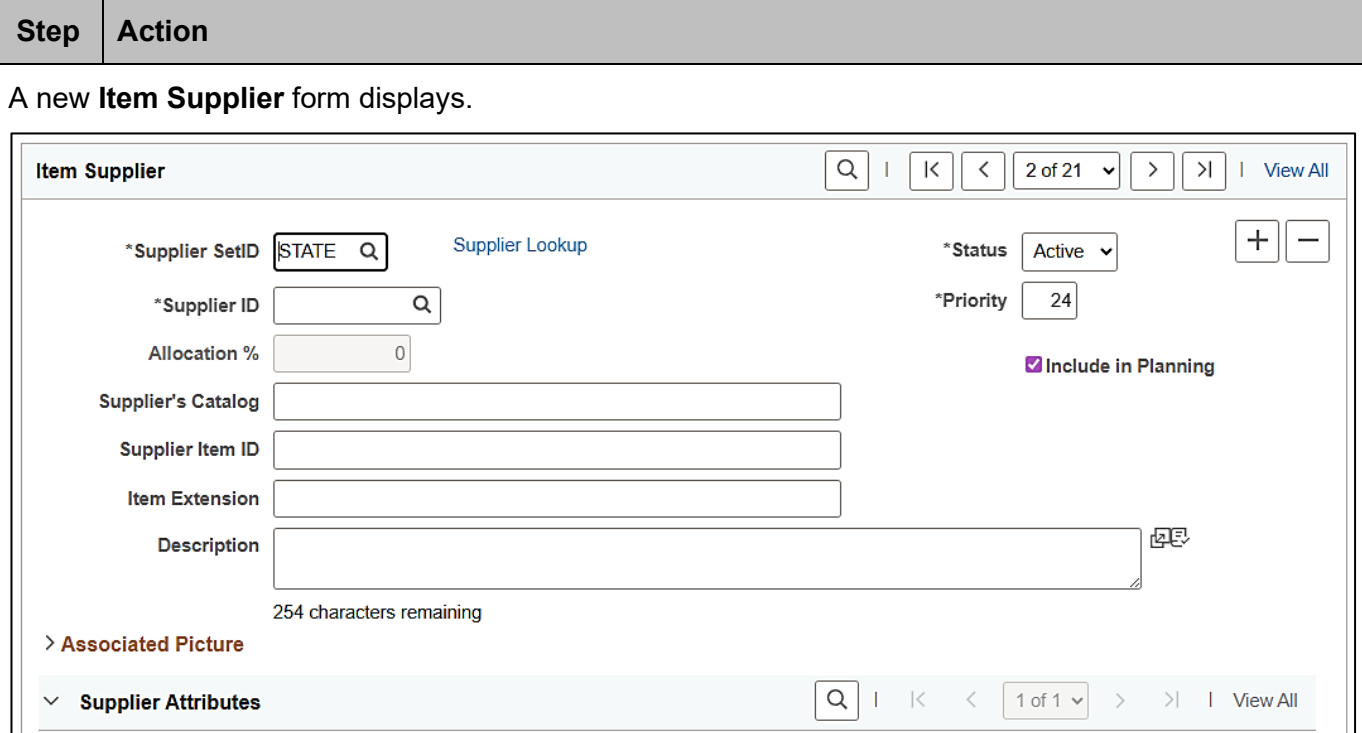
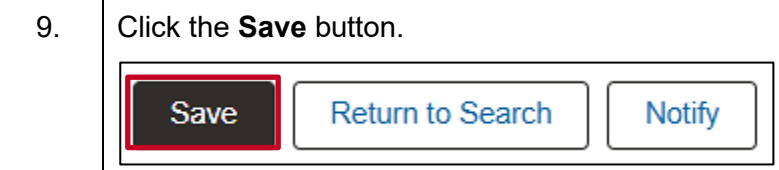
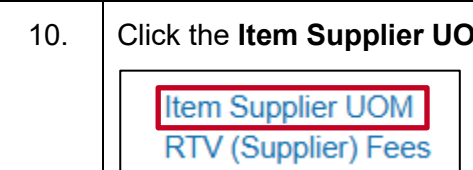
Step	Action				
	The Purchasing Attributes page displays. Purchasing Attributes SetID STATE Item ID 7503532050 Standard Unit of Measure LTN Description NO. 8, LIGHT WEIGHT, STONE PO Available Date 01/01/1900 Item Description NO. 8, LIGHT WEIGHT, STONE NO. 8, LIG Unavailable ☐ Use as Substitute Item Only Category 7503532 Standard Price 91.25000 LTN Model Asset Profile ID Last PO Price 91.25000 Ultimate Use Code Currency USD Dollar Physical Nature Goods Lead Time Days Primary Buyer Long Description STONE NO. 8, LIGHT WEIGHT, STONE 222 characters remaining Associated Picture File Name File Extension Chartfields < > 1-1 of 1 > > View All <table><thead><tr><th>Account</th><th>Task</th></tr></thead><tbody><tr><td>5012550</td><td></td></tr></tbody></table> Item Specifications VAT Default Packing Details VAT Service Treatment Setup Save Return to Search Notify Update/Display Include History Purchasing Attributes Purchasing Controls Item Supplier	Account	Task	5012550	
Account	Task				
5012550					
6.	Click the Item Supplier tab Purchasing <u>A</u>tttributes Purchasing <u>C</u>ontrols Item Supplier				

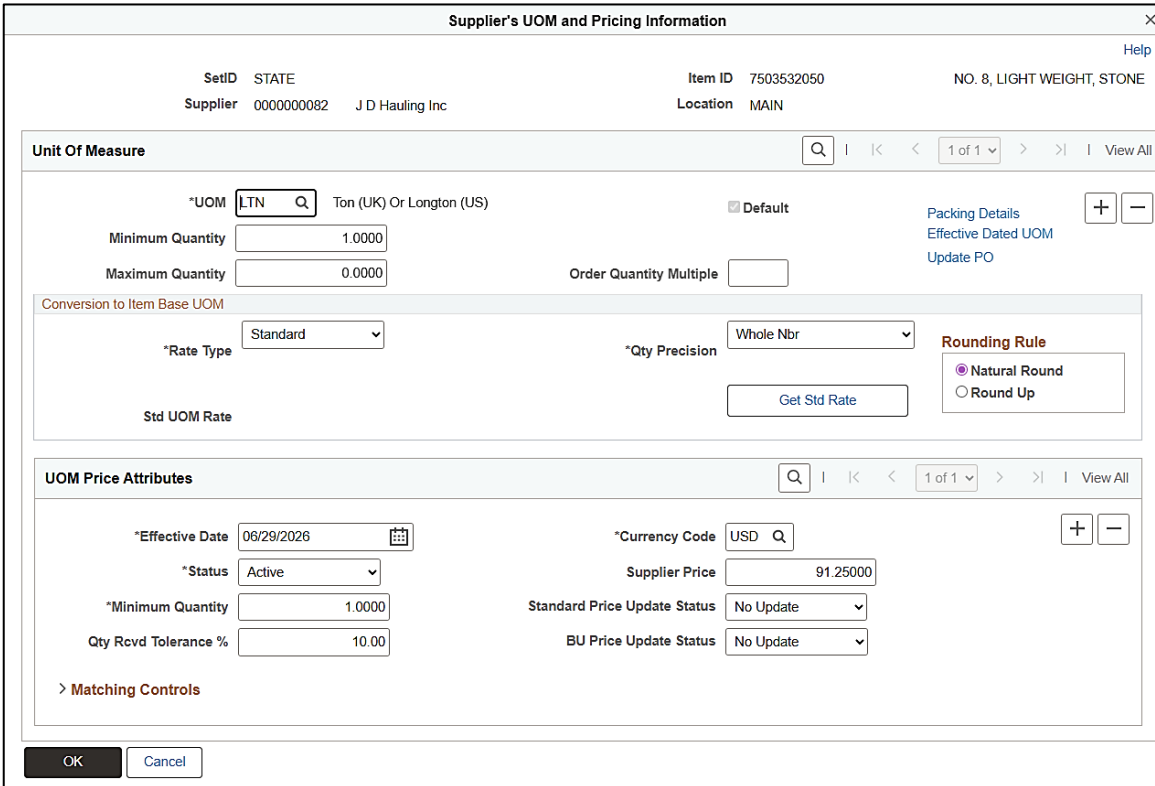
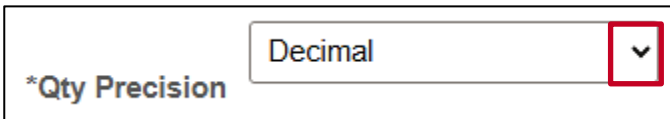
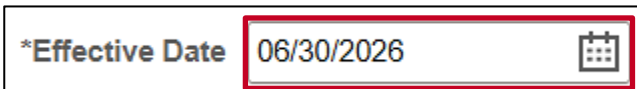


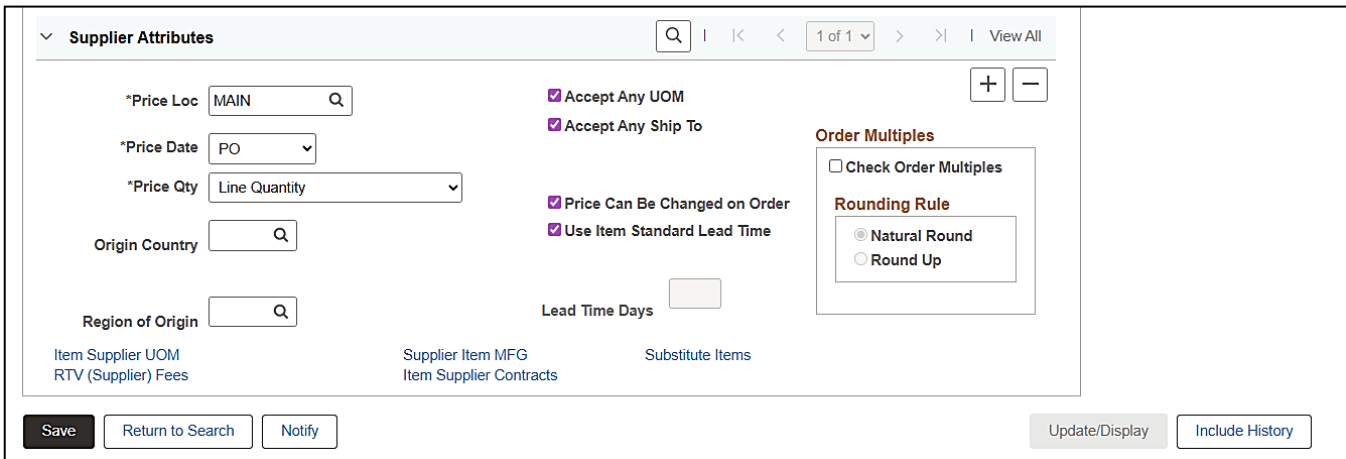
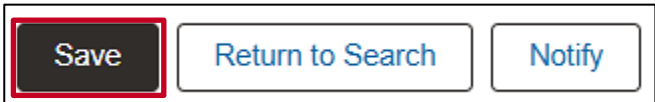
Procurement Job Aid

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Step	Action																
	The Item Supplier tab displays. Purchasing AttributesPurchasing ControlsItem Supplier SetID STATEItem ID 7503532050Standard Unit of Measure LTNDescription NO. 8, LIGHT WEIGHT, STONE ▼ Supplier Priorities 1-1 of 20View All <table><thead><tr><th>Supp SetID</th><th>Supplier ID</th><th>Supplier Name</th><th>*Priority Loc</th><th>Location Description</th><th>Status</th><th>*Priority</th><th>Alloc Pct</th></tr></thead><tbody><tr><td>STATE</td><td>0000006051</td><td></td><td>MAIN</td><td>Main Location</td><td>A</td><td>1</td><td>0</td></tr></tbody></table> Item Supplier1 of 20View All *Supplier SetID STATESupplier Lookup *Supplier ID 0000006051Solite LLC Allocation % 0 *Status Active *Priority 1 Include in Planning Supplier's Catalog Supplier Item ID Item Extension Description254 characters remaining > Associated Picture ▼ Supplier Attributes1 of 1View All *Price Loc MAIN *Price Date PO *Price Qty Line Quantity Origin Country Region of Origin Item Supplier UOMRTV (Supplier) Fees Supplier Item MFGItem Supplier Contracts Substitute Items Lead Time Days Order Multiples Check Order Multiples Rounding Rule Natural RoundRound Up Accept Any UOM Accept Any Ship To Price Can Be Changed on Order Use Item Standard Lead Time SaveReturn to SearchNotifyUpdate/DisplayInclude History	Supp SetID	Supplier ID	Supplier Name	*Priority Loc	Location Description	Status	*Priority	Alloc Pct	STATE	0000006051		MAIN	Main Location	A	1	0
Supp SetID	Supplier ID	Supplier Name	*Priority Loc	Location Description	Status	*Priority	Alloc Pct										
STATE	0000006051		MAIN	Main Location	A	1	0										
7.	Click the Add a New Row (+) icon in the Item Supplier list. Item Supplier1 of 20View All *Supplier SetID STATESupplier Lookup *Supplier ID 0000006051Solite LLC *Status Active *Priority 1																

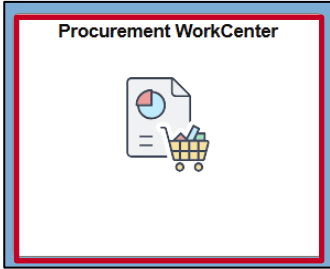
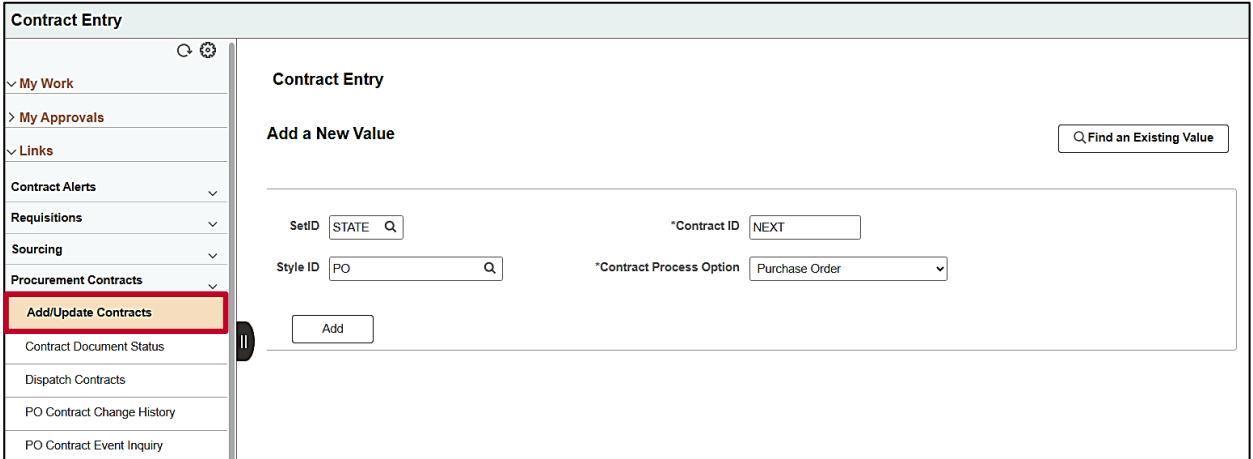
Step	Action
	A new Item Supplier form displays. 
8.	Enter the applicable Supplier ID in the Supplier ID field, and leave other default values. 
9.	Click the Save button. 
10.	Click the Item Supplier UOM link in the Supplier Attributes section. 

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. 	
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.

Step	Action
1.	Navigate to the Contract Entry 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 > Add/Update Contracts Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Contract Entry page using the following navigation path: NavBar > Menu > Procurement Contracts > Add/Update Contracts

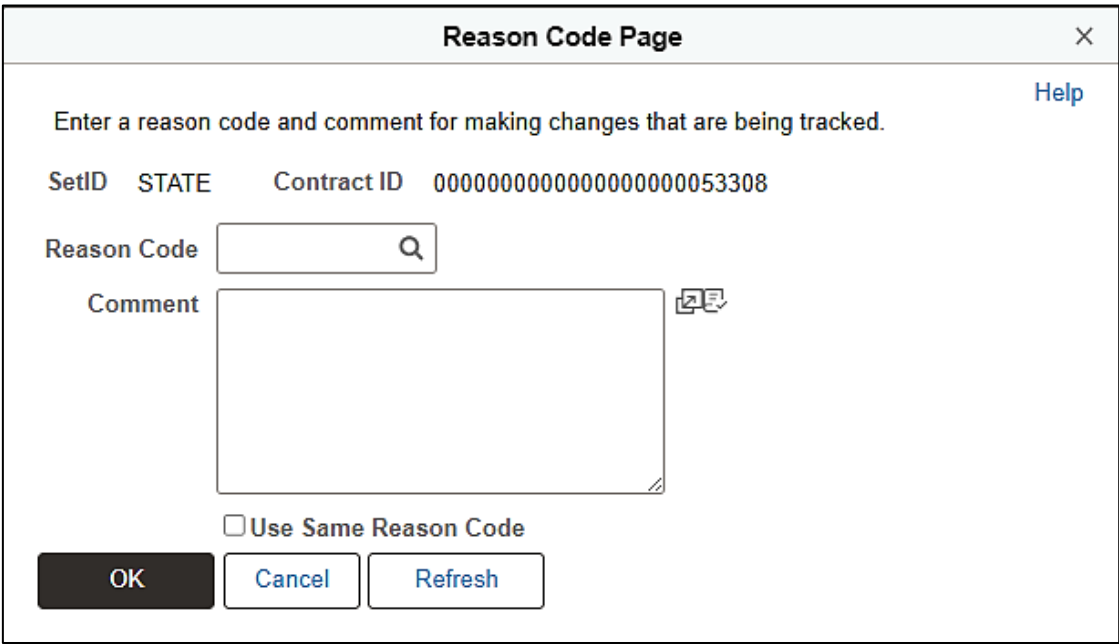


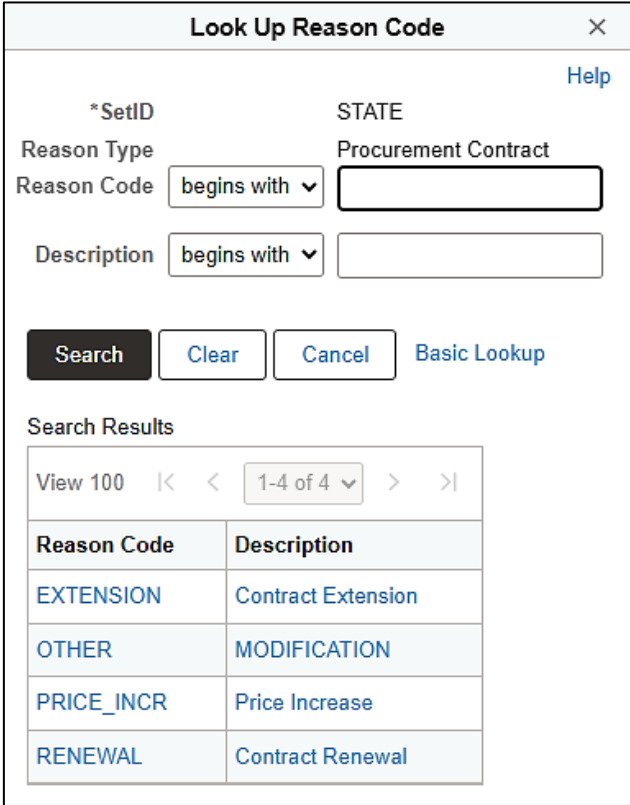
Procurement Job Aid

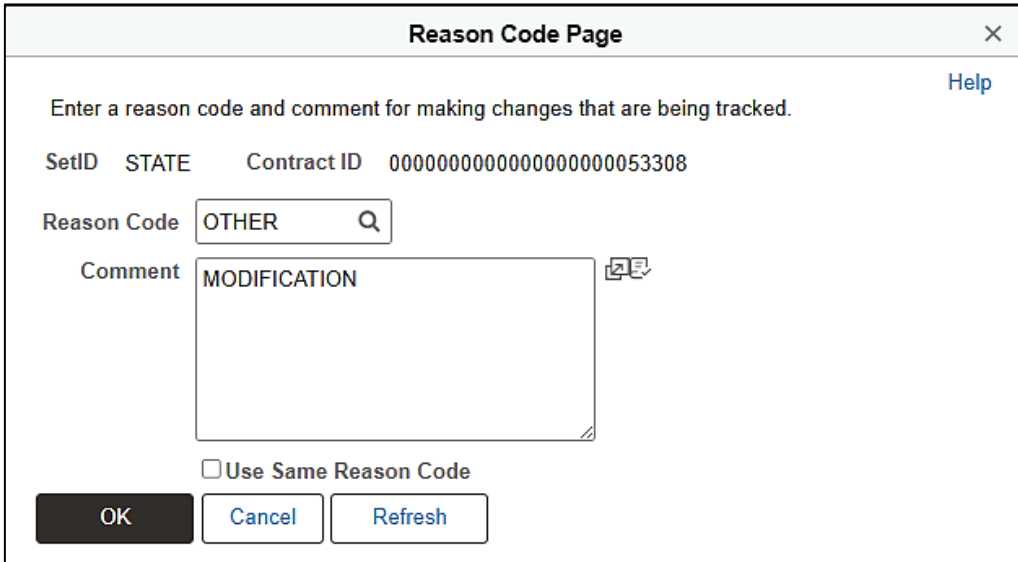
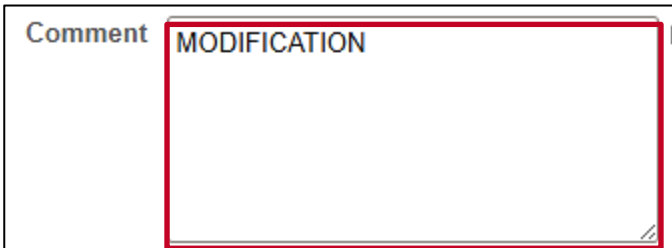
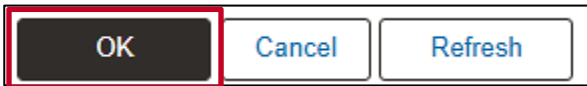
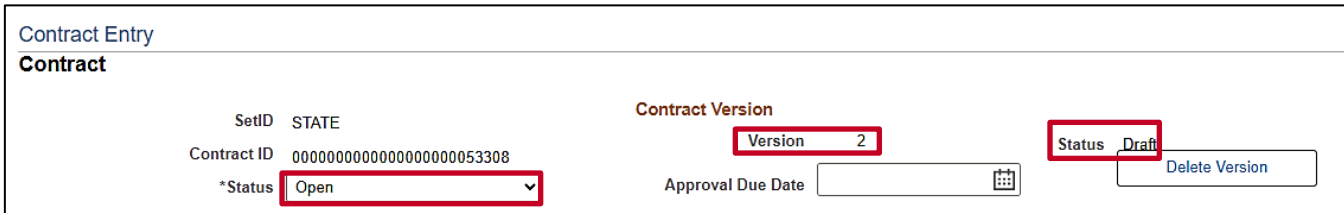
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Step	Action
	The Contract Entry Add a New Value page displays. Contract Entry Add a New Value Find an Existing Value SetID STATE *Contract ID NEXT Style ID PO *Contract Process Option Purchase Order Add
3.	Click the Find an Existing Value button. Find an Existing Value
	The Contract Entry Find an Existing Value page displays. Contract Entry Find an Existing Value Add a New Value Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches *SetID = STATE Contract ID begins with Contract Version = Version Status = Contract Style begins with Contract Process Option = Short Supplier Name begins with Supplier Name begins with Master Contract ID begins with Description begins with Show fewer options Case Sensitive Search Clear
4.	Enter the applicable Contract ID in the Contract ID field. Contract ID begins with 00000000000000000005



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. <table border="1"> <thead> <tr> <th>Reason Code</th><th>Description</th></tr> </thead> <tbody> <tr> <td>EXTENSION</td><td>Contract Extension</td></tr> <tr> <td>OTHER</td><td>MODIFICATION</td></tr> <tr> <td>PRICE_INCR</td><td>Price Increase</td></tr> <tr> <td>RENEWAL</td><td>Contract Renewal</td></tr> </tbody> </table>	Reason Code	Description	EXTENSION	Contract Extension	OTHER	MODIFICATION	PRICE_INCR	Price Increase	RENEWAL	Contract Renewal
Reason Code	Description										
EXTENSION	Contract Extension										
OTHER	MODIFICATION										
PRICE_INCR	Price Increase										
RENEWAL	Contract Renewal										

Step	Action
	The Reason Code page redispays.  The screenshot shows the 'Reason Code Page' window. It contains a 'Help' link, a description 'Enter a reason code and comment for making changes that are being tracked.', and fields for 'SetID', 'STATE', and 'Contract ID' (000000000000000000053308). The 'Reason Code' dropdown is set to 'OTHER' and the 'Comment' text area contains 'MODIFICATION'. There is a checkbox for 'Use Same Reason Code' and buttons for 'OK', 'Cancel', and 'Refresh'.
10.	Enter what the change entails in the Comment field.  The screenshot shows the 'Comment' text area with the word 'MODIFICATION' entered. The text area is highlighted with a red border.
11.	Click the OK button.  The screenshot shows the 'OK', 'Cancel', and 'Refresh' buttons. The 'OK' button is highlighted with a red border.
	The Contract Entry Contract page redispays. 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".  The screenshot shows the 'Contract Entry Contract' page. It displays 'SetID', 'STATE', 'Contract ID' (000000000000000000053308), and '*Status' (Open). The 'Contract Version' section shows 'Version' 2 and 'Status' Draft. There is an 'Approval Due Date' field and a 'Delete Version' button.

Step	Action
	Contract Version numbers increment by 1. Version 2 The Delete Version button is enabled. Status Draft Delete Version
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

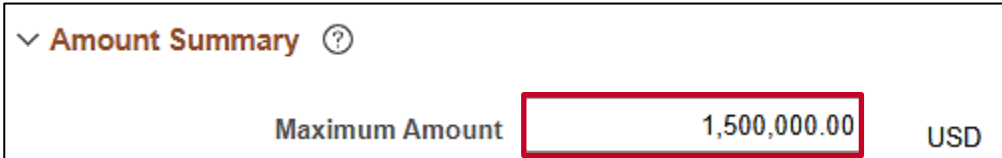
Approving and Saving a Contract Version

Step	Action
13.	Once all modifications are complete, click the Status dropdown button and select "Approved". *Status Approved v A message displays stating: "This action will make the Draft version become the Current version when you Save." This action will make the Draft version become the Current version when you Save (10400,591) If you leave the status as Approved and then hit Save, the Current version will become a History version and this Draft version will become the Current version. OK
14.	Click the OK button. OK

Step	Action
	The Contract Entry Contract page redisplay. Contract Entry Contract SetID STATE Contract ID 0000000000000000000053308 *Status Approved Contract Version Version 2 Approval Due Date Status Draft New Version
15.	Click the Save button. Save Return to Search Notify Refresh
	The Reason Code page displays in a pop-up window. Reason Code Page Enter a reason code and comment for making changes that are being tracked. SetID STATE Contract ID 0000000000000000000053308 Reason Code Comment Use Same Reason Code OK Cancel Refresh
16.	Select the applicable reason code in the Reason Code field. Reason Code OTHER
17.	Click the OK button. OK Cancel Refresh

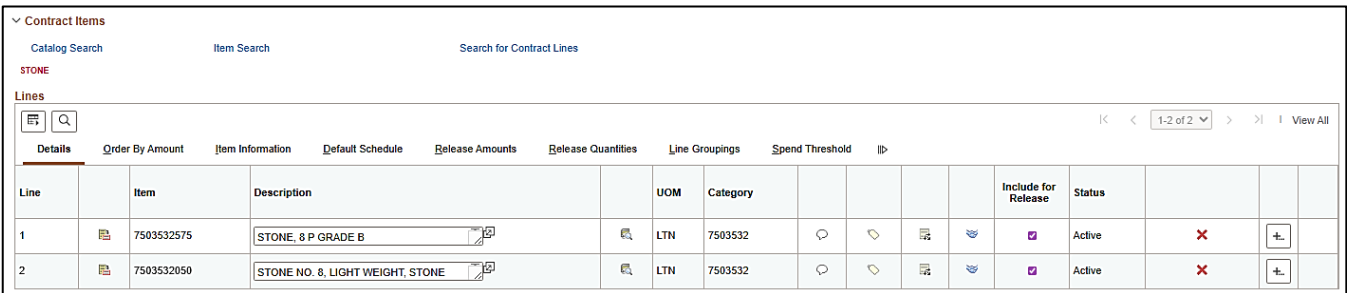
Updating a Contract's Maximum Amount

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.

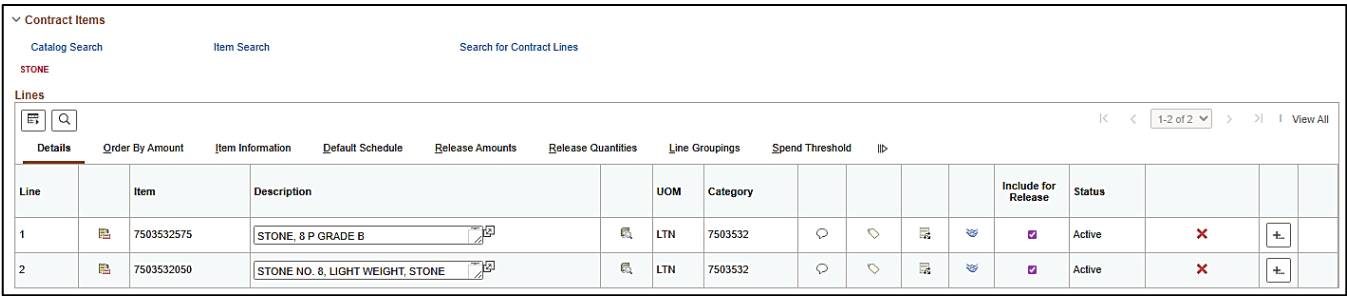
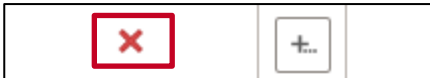
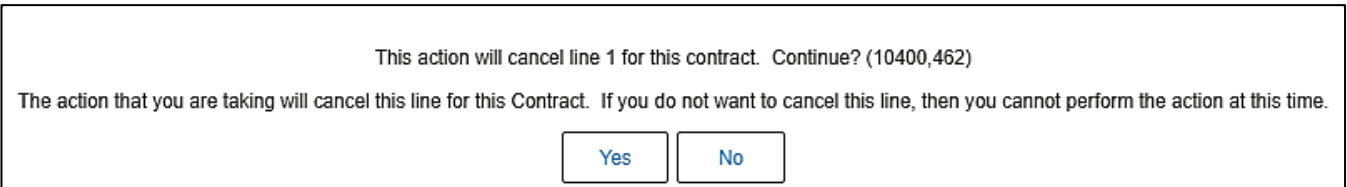
Step	Action
Add Contract lines on the Contract Entry Contract page, in the Contract Items Lines section. 	
1.	Click the Add multiple new rows (+) icon at the end of the line. 
2.	Enter the specific item information, price, description, etc.

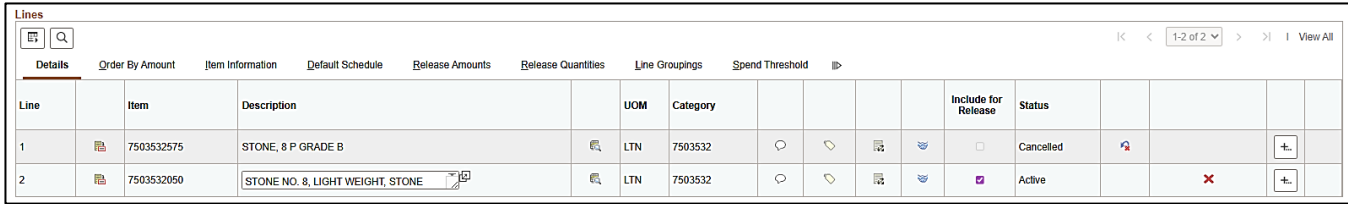
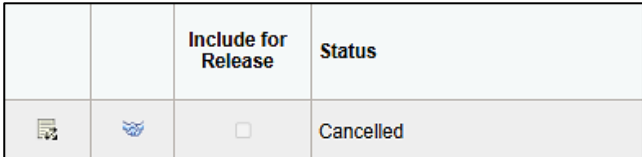
Step	Action
3.	Approve and Save the Draft Version by following Steps 13-17 in the Adding a Contract Version section of this Job Aid.

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. 

Step	Action
	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”. 
	Click the Reactivate Line icon and the line returns to its active state as if nothing ever happened. 
3.	Approve and Save the Draft Version by following Steps 13-17 in the Adding a Contract Version section of this Job Aid.
	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. 



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.

Step	Action						
1.	On the Contract Entry Contract page, Contract Lines section, Details tab, click the Price Adjustments icon next to the line to be updated. <table><tr><td>STONE NO. 8, LIGHT WEIGHT, STONE</td><td></td><td>LTN</td><td>7503532</td><td></td><td></td></tr></table>	STONE NO. 8, LIGHT WEIGHT, STONE		LTN	7503532		
STONE NO. 8, LIGHT WEIGHT, STONE		LTN	7503532				

The **Price Adjustments for Item Line XX** page displays.

Contract Price Adjustments

[Contract Entry](#)

Price Adjustments for Item Line 2

SetID STATE Contract ID 00000000000000000053308 Version 6 Line: 2 **STONE NO. 8, LIGHT WEIGHT, STC**

Price Adjustments  | < > 1 of 1 View All

*Effective Date: 06/30/2026 *Status: Active *Calculation Method: Sum All Adjustments + -

Price Rule  | < > 1 of 1 View All

Criteria
Sequence: 1
Supp Loc: 

Method
☐ General Adjustment
☐ Match Shipto
Ship To: 
☐ Match UOM
UOM: 

Restrictions
☐ Hard Price
☐ Ignore If Other Adjustments
☐ Stop Price Calculation Here

Adjustment Detail
  1-1 of 1 View All

*Method	Percentage	Adjusted Price
Percentage		91.25000

OK Cancel Refresh

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. *Effective Date: 06/30/2026  *Status: Active  *Calculation Method: Sum All Adjustments  
3.	Enter the date for the price adjustment to start in the Effective Date field. Future effective-dated pricing may be used. *Effective Date: 09/01/2026 
4.	Ensure the Status field is set to "Active". *Status: Active 
5.	In the Price Rule Section , the Sequence field defaults to "1". Criteria Sequence: 1 Supp Loc: 
6.	Click the Supp Loc dropdown button and select "MAIN", in most cases. Supp Loc: MAIN 
	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.

</

Step	Action								
8.	In the Adjustment Detail section, click the Method dropdown button and select either "Amount" or "Percentage". <table><tr><td>*Method</td><td>Amount</td></tr><tr><td>Amount ▼</td><td></td></tr></table> The adjacent field will change to either Amount or Percentage based on the Method selected. <table><tr><td>*Method</td><td>Amount</td></tr><tr><td>Amount ▼</td><td></td></tr></table>	*Method	Amount	Amount ▼		*Method	Amount	Amount ▼	
*Method	Amount								
Amount ▼									
*Method	Amount								
Amount ▼									
9.	In the Amount or Percentage field, enter the Amount or Percentage of the change. <table><tr><td>*Method</td><td>Amount</td><td>Adjusted Price</td></tr><tr><td>Amount ▼</td><td>2.50</td><td>91.25000</td></tr></table>	*Method	Amount	Adjusted Price	Amount ▼	2.50	91.25000		
*Method	Amount	Adjusted Price							
Amount ▼	2.50	91.25000							
	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. <table><tr><td>Amount</td><td>Adjusted Price</td></tr><tr><td>2.50000</td><td>93.75000</td></tr></table>	Amount	Adjusted Price	2.50000	93.75000				
Amount	Adjusted Price								
2.50000	93.75000								
11.	Click the OK button. <table><tr><td>OK</td><td>Cancel</td><td>Refresh</td></tr></table>	OK	Cancel	Refresh					
OK	Cancel	Refresh							



Procurement Job Aid

PR348 Entering and Maintaining Procurement Contracts (VDOT Only)

Step

Action

The **Contract Entry Contract** page redisplay.

Contract Items

Catalog Search

Item Search

Search for Contract Lines

STONE

Lines

Details

Order By Amount

Item Information

Default Schedule

Release Amounts

Release Quantities

Line Groupings

Spend Threshold

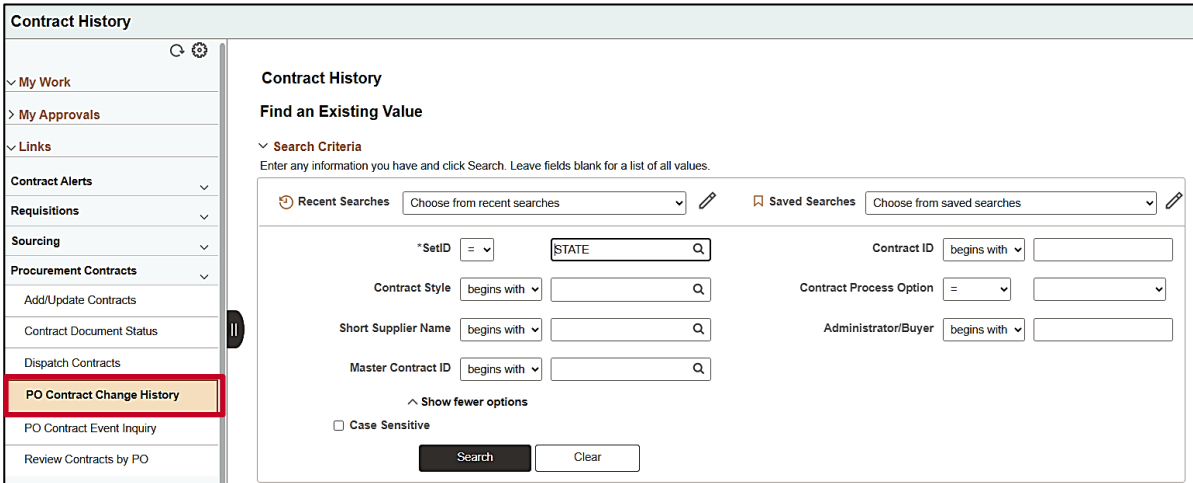
Line		Item	Description		UOM	Category						Include for Release	Status
1		7503532575	STONE, 8 P GRADE B		LTN	7503532							Cancelled
2		7503532050	STONE NO. 8, LIGHT WEIGHT, STONE		LTN	7503532							Active

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. 
	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. 
	Users can also access the Contract History page using the following navigation path: NavBar > Menu > Procurement Contracts > Add/Update Contracts > Contract Change History



Procurement Job Aid

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Step	Action
3.	Enter the applicable Contract ID in the Contract ID field. Contract ID begins with ▼ 00000000000000000005
4.	Click the Search button. Search Clear
The Contract History page displays, with the Contract Header tab displayed by default. Contract HeaderContract LineContract CategoryHeader AgreementLine AgreementCategory Agreement SetIDSTATEContract ID000000000000000000053308 Check the records you wish to view, and optionally, select a field on that record. ☒ Contract Header Changed Field Q ☒ PO Defaults Changed Field Q ☒ Price Adjustments Changed Field Q ☒ Thresholds and Notifications Changed Field Q ☒ Related Contracts Changed Field Q ☒ Supplier Locations Changed Field Q ☒ Contract Control Changed Field Q ▼ Search and Filter Criteria Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results. Modified By Q Reason Code Q From Date 📅 To Date 📅 Version From Q Version To Q Search Clear Expand All Collapse All	
5.	Click the Search button. Search

☒ Contract Control

Changed Field

Q

▼ Search and Filter Criteria

Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results.

Modified By

Q

Reason Code

Q

From Date

To Date

Version From

Q

Version To

Q

Search

Clear

Expand All

Collapse All



Procurement Job Aid

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Step	Action																																																
	The Contract Header section displays all changes to the overall Contract. Search Clear Expand All Collapse All ▼ Contract Header << < 1-10 of 41 > >> View All <table border="1"><thead><tr><th>Version</th><th>Sequence</th><th>Change Type</th><th>Description</th><th>Value</th><th>Modified By</th><th>Last Changed</th><th>Reason</th></tr></thead><tbody><tr><td>5</td><td>10</td><td>Change</td><td>Change Order Source</td><td>ONL</td><td></td><td>06/30/26 5:17:50PM</td><td>OTHER</td></tr><tr><td>5</td><td>10</td><td>Change</td><td>Contract Version</td><td>6</td><td></td><td>06/30/26 5:17:50PM</td><td>OTHER</td></tr><tr><td>5</td><td>9</td><td>Change</td><td>Change Order Source</td><td>ONL</td><td></td><td>06/30/26 4:55:50PM</td><td>OTHER</td></tr><tr><td>5</td><td>9</td><td>Change</td><td>Contract Status</td><td>A</td><td></td><td>06/30/26 4:55:50PM</td><td>OTHER</td></tr><tr><td>4</td><td>8</td><td>Change</td><td>Change Order Source</td><td>ONL</td><td></td><td>06/30/26 4:55:16PM</td><td>OTHER</td></tr></tbody></table>	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
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																																										



Procurement Job Aid

PR348 Entering and Maintaining Procurement Contracts (VDOT Only)

Step	Action
	The Contract Line tab displays. Contract HeaderContract LineContract CategoryHeader AgreementLine AgreementCategory Agreement SetIDSTATEContract ID000000000000000000053308 Check the records you wish to view, and optionally, select a field on that record. ☒ Contract Line ☒ Unit of Measure ☒ Distribution Details ☒ Price Adjustments Changed Field Changed Field Changed Field Changed Field Search and Filter Criteria Enter any additional search or filter information you have. Leave fields blank for all the results. Then hit search to view the results. Modified By Reason Code From Date Version From Line From To Date Version To Line To Contract Lines Filter Item ID Description Supplier's Catalog Manufacturer ID Category Supplier Item ID Mfg Itm ID UPN ID Search Clear Expand All Collapse All Contract Line
	Click the Search button. Search



Procurement Job Aid

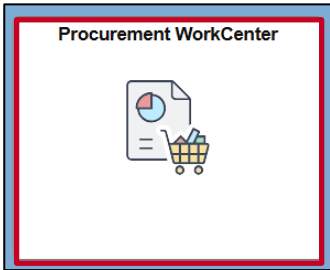
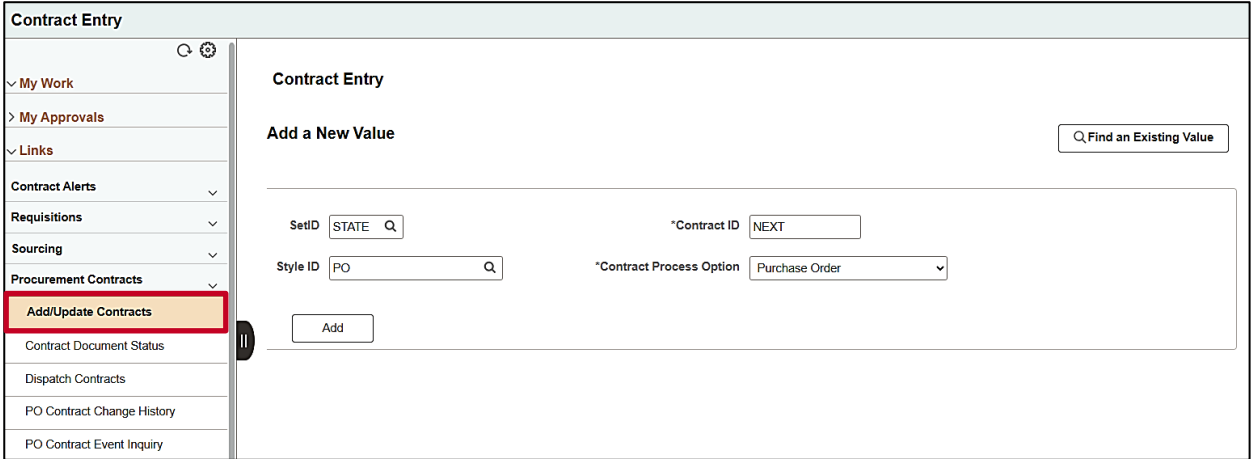
PR348 Entering and Maintaining Procurement Contracts (VDOT Only)

Step	Action																																																															
	The Contract Line section displays all changes to the Contract lines. Search Clear Expand All Collapse All ▼ Contract Line List Search << < 1-10 of 50 > >> View All Changes Line Detail ID <table border="1"><thead><tr><th>Version</th><th>Line</th><th>Sequence</th><th>Change Type</th><th>Description</th><th>Value</th><th>Modified By</th><th>Last Changed</th><th>Reason</th></tr></thead><tbody><tr><td>5</td><td>1</td><td>3</td><td>Change</td><td>Change Order Source</td><td>ONL</td><td></td><td>06/30/2026 4:55:50PM</td><td>OTHER</td></tr><tr><td>5</td><td>1</td><td>3</td><td>Change</td><td>Line Status</td><td>C</td><td></td><td>06/30/2026 4:55:50PM</td><td>OTHER</td></tr><tr><td>4</td><td>1</td><td>2</td><td>Change</td><td>Change Order Source</td><td>ONL</td><td></td><td>06/30/2026 4:54:07PM</td><td>OTHER</td></tr><tr><td>4</td><td>1</td><td>2</td><td>Change</td><td>Line Status</td><td>O</td><td></td><td>06/30/2026 4:54:07PM</td><td>OTHER</td></tr><tr><td>4</td><td>1</td><td>1</td><td>Change</td><td>Change Order Source</td><td>ONL</td><td></td><td>06/30/2026 4:53:21PM</td><td>OTHER</td></tr><tr><td>4</td><td>1</td><td>1</td><td>Change</td><td>Line Status</td><td>C</td><td></td><td>06/30/2026 4:53:21PM</td><td>OTHER</td></tr></tbody></table>	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
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.

Step	Action
1.	Navigate to the Contract Entry 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 > Add/Update Contracts Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the Contract Entry page using the following navigation path: NavBar > Menu > Procurement Contracts > Add/Update Contracts



Procurement Job Aid

PR348 Entering and Maintaining Procurement Contracts (VDOT Only)

Step	Action
	The Contract Entry Add a New Value page displays. Contract Entry Add a New Value Find an Existing Value SetID STATE *Contract ID NEXT Style ID PO *Contract Process Option Purchase Order Add
3.	Click the Find an Existing Value button. Find an Existing Value
	The Contract Entry Find an Existing Value page displays. Contract Entry Find an Existing Value + Add a New Value Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches *SetID STATE Contract ID begins with Contract Version Version Status Contract Style begins with Contract Process Option Short Supplier Name begins with Supplier Name begins with Master Contract ID begins with Description begins with Show fewer options ☐ Case Sensitive Search Clear
4.	Enter the applicable Contract ID in the Contract ID field. Contract ID begins with 00000000000000000005



Step	Action
5.	Click the Search button.

Contract Entry

Contract

SetID

STATE

Contract ID

000000000000000000053309

*Status

Approved

Contract Version

Version

2

Approved Date

07/01/2026

Status

Current

New Version

Administrator/Buyer

Header

Contract Style

Purchase Order

Process Option

Purchase Order

Supplier

J D HAULIN-001

Supplier ID

0000000082

J D Hauling Inc

Primary Contact

Supplier Contract Ref

Description

Master Contract ID

Begin Date

07/01/2026

Expire Date

06/30/2030

Renewal Date

07/01/2028

Control Type

☐ Tax Exempt

☒ Auto Default

☐ Lock Chartfields

Tax Exempt ID

Dispatch

*Dispatch Method

Print

Add Comments

Contract Activities

Primary Contact Info

Contract Header Agreement

Contract Releases

Activity Log

Document Status

Thresholds & Notifications

Price Adjustment Template

View Changes

Current Change Reason

Purchase Order BU Defaults

Contract Reference

☒ Corporate Contract

Currency

USD

Rate Date

07/01/2026

CRRNT

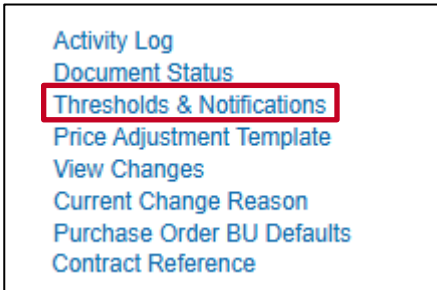
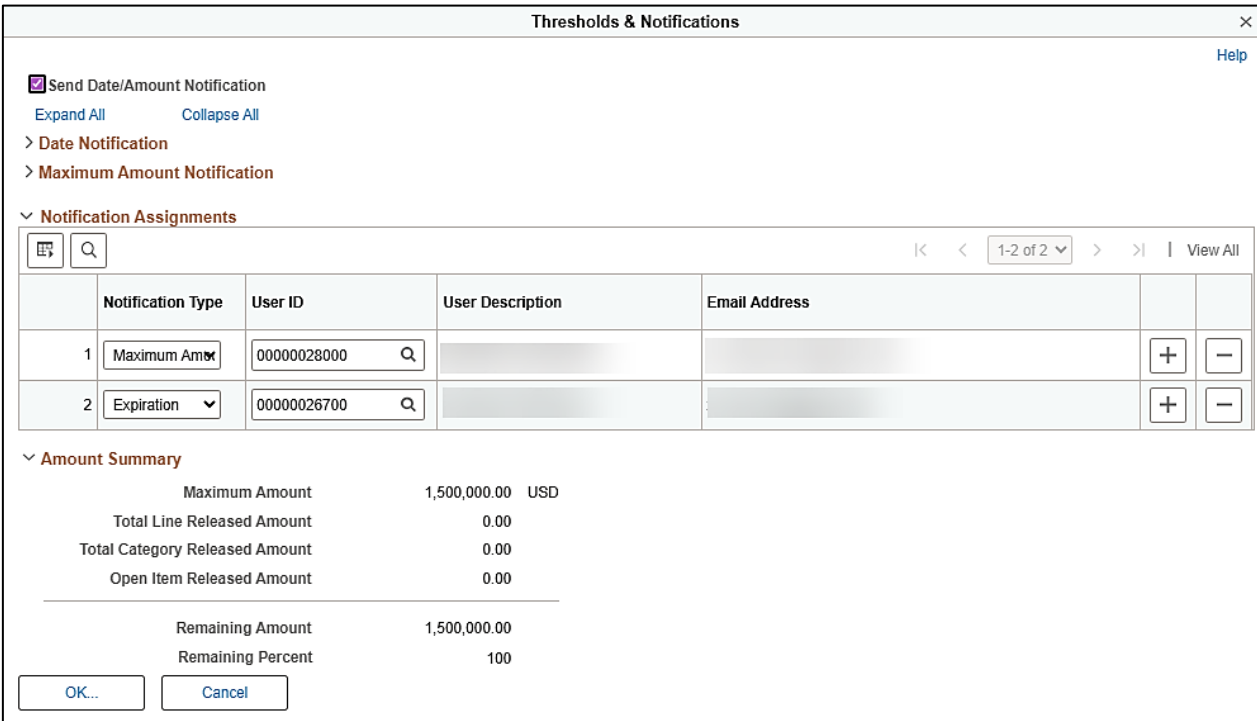
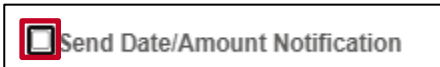
☐ Must Use Contract Rate Date

☒ Allow Multicurrency PO

*Status Canceled 

This action will cancel the entire contract. Continue? (10400,463)

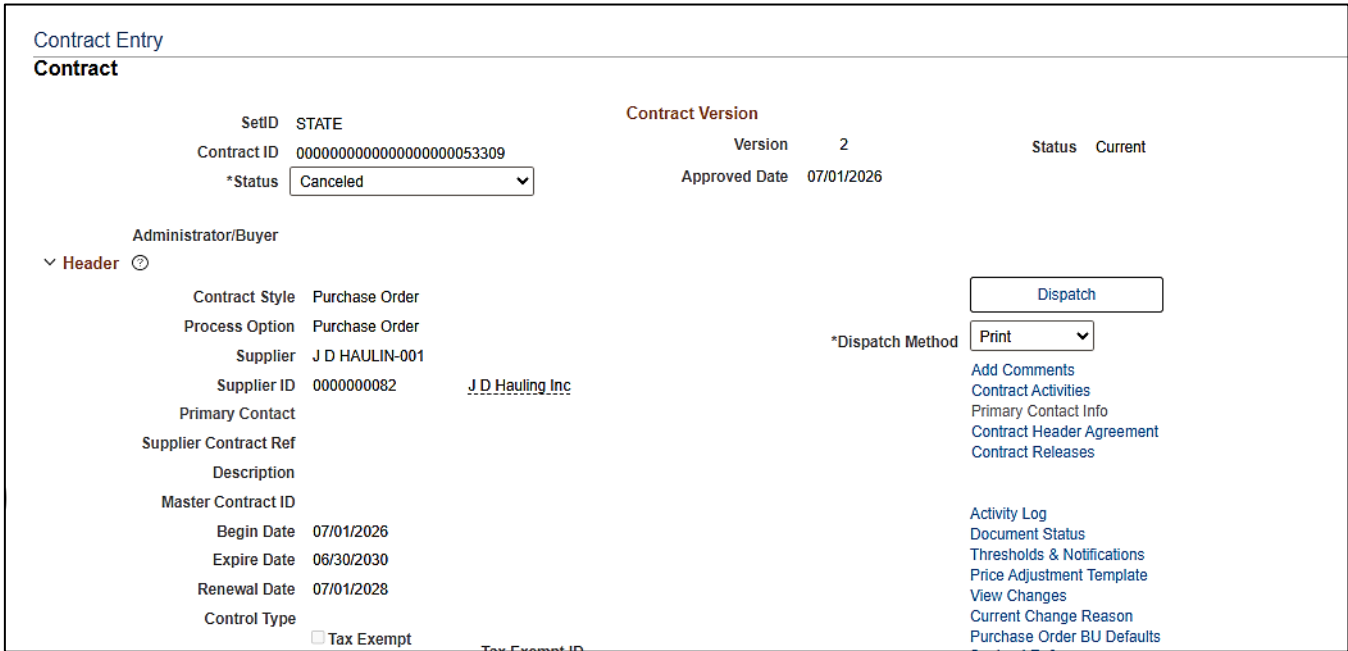
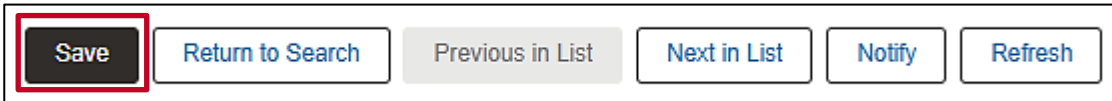
The action that you are taking will cancel the entire Contract. If you do not want to cancel the contract, then you cannot perform the action at this time.

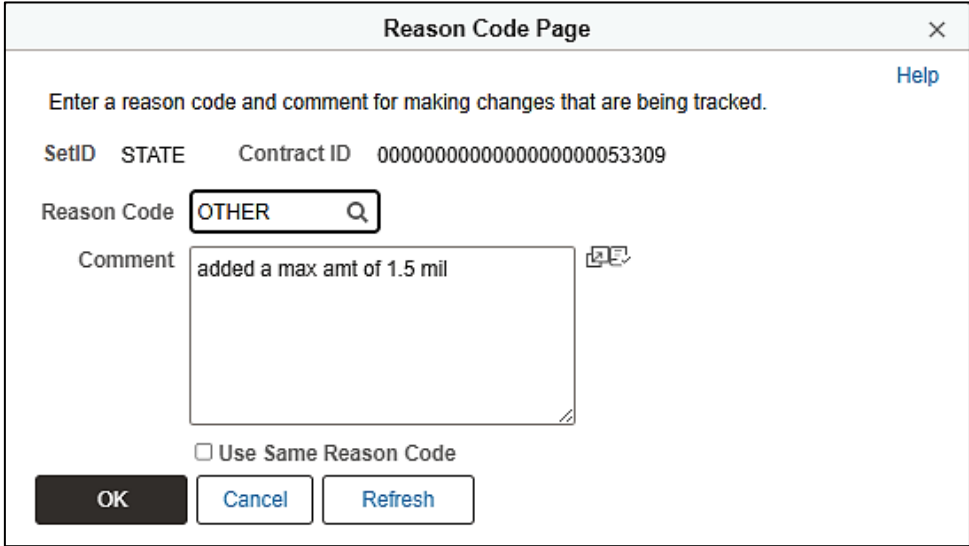
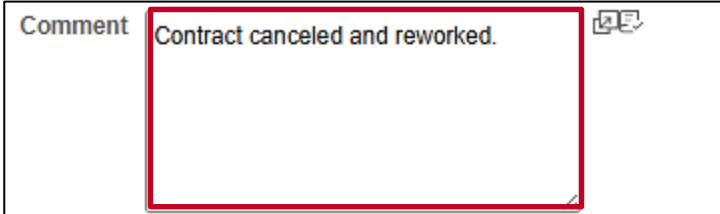
Step	Action
	Click the OK button. 
7.	Click the Thresholds & Notifications link. 
The Thresholds & Notifications page displays. 	
8.	Unselect the Send Date/Amount Notification checkbox option. This will stop future notifications. 



Procurement Job Aid

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Step	Action
9.	Click the OK button. 
The Contract Entry Contract page redispays 	
10.	Scroll down and click the Save button. 

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