



## Contracts

**State of Vermont**  
**Department of Finance & Management**  
**February - 2024**

## Revisions to Manual

### **February 2024**

- Updated for PeopleTools 8.60 upgrade

### **December 2022**

- Added a note to the Create Contract Change/Amendment section of the manual starting on page 41. If your agency/department uses a maximum line amount you must also update the maximum line amount(s) when you process a change order.

### **August 2019:**

- Added a note to step 29 on page 31 that the amount must be set to at least .01

### **March 2019:**

- Manual finalized

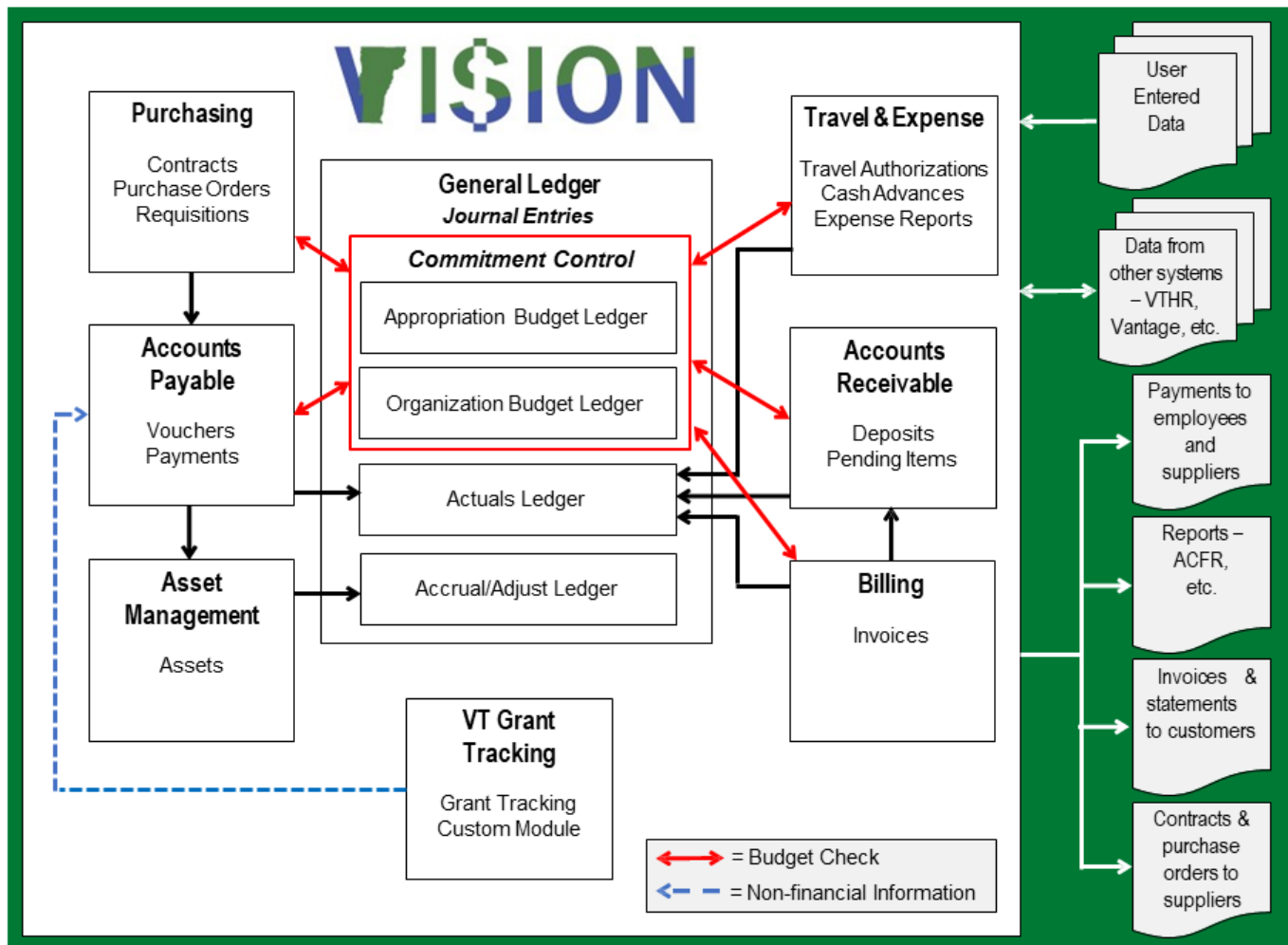
### **December 2018:**

- Manual written

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## Introduction to Contracts



### Overview of VISION financial system:

There are several documents which should be reviewed to understand contracting requirements. All are accessible on the Finance & Management website.

**VISION procedure #3** - <http://finance.vermont.gov/policies-and-procedures/vision-procedures>

**Operational Guidance OG#2** - <http://finance.vermont.gov/training-and-support/vision-job-aids-and-operational-guidance>

**Bulletin 3.5** - <http://aoa.vermont.gov/bulletins>

Bulletin #3.5 and VISION Procedure #3 require the use of purchase orders when making payment against all contracts if the payment is being made in VISION. Through VISION, a purchase order directly ties the expense to the available contract balance providing the greatest assurance that a contract will not be overspent, while also providing interested parties with real-time information regarding contract utilization. While a department may feel it's more efficient to track contract payments through a spreadsheet and not use purchase orders, there is no direct link or system control between a

department's spreadsheet and the processing of that payment in VISION...thus increasing the risk of overspending the contract.

A contract must be entered into the VISION system to comply with Bulletin 3.5 Standards. It is recommended that you visit the Agency of Administration's website and review Bulletin 3.5.

The Purpose and Policy from Bulletin 3.5 reads: "This Bulletin applies to the procurement of all goods and services and the required documentation of such procurements, regardless of dollar amount, for all agencies, as defined herein, of the State of Vermont government. This Bulletin provides guidelines for conducting procurements and contracting and establishes minimum benchmarks and protocols to ensure the solicitation and awarding of contracts for services are completed with sufficient competition. The State process is designed to: ensure fair and open competition; guard against favoritism, improvidence, extravagance, fraud and corruption; ensure the results meet Agency/department needs; provide for checks and balances and oversee Agency procurement activities; and protect the interest of the State and its taxpayers. Agencies and departments may develop individual processes and procedures applicable to their needs, in addition to the minimum stated requirements of this Bulletin."

**\*\*Agencies must enter the contract into the VISION financial system to obtain a contract number, regardless of the dollar amount.**

The only way to draw down on a contract is by entering a purchase order.

#### **Tracking Performance Contracts:**

Challenges for Change is a plan to make Vermont government and services more effective so that better results are delivered at lower cost to taxpayers. Challenges for Change was authorized by Act 68 (the Challenges Bill) of the 2009-2010 legislative session. See additional information in Bulletin 3.5, Performance Measures and Accountability. Bulletin 3.5 can be found at the following link: <http://aoa.vermont.gov/bulletins>.

As a result of the Challenges for Change initiative, a new page called "Performance Info" has been added to the contracts section of the Purchasing module. This page is a mandatory page that must be filled in and approved before new contracts added to the financial system can be approved. The performance info page provides a mechanism to track performance contracts and compliance with performance measures.

Contracts with a start date  $\geq$  7-1-10 are automatically designated as challenges for change contracts. The performance info page must be filled out and approved before the contract can be approved.

#### **General Procurement Information:**

In order to meet on-going reporting requirements pertaining to State contracting, additional contract data elements must be captured when entering contracts and contract amendments into VISION. These new elements include designating the "Process Used" to secure the agreement and the "Agreement Type". Although these elements are already required and captured when preparing Form AA- 14, additional "Agreement Types" have been added to reflect the changes with the reissue of Administrative Bulletin 3.5. Use of this General Procurement Information area begins July 1, 2016. The General Procurement Information Job Aid can be found on our Finance and Management website at <http://finance.vermont.gov/training-and-support/vision-job-aids-and-operational-guidance>.

**The VISION Contract Amendment process is as follows:**

- All Departments will create and maintain one contract without copying and creating new iterations.
- Contract Activities link – The comments fields behind the “Contract Activities” link **MUST** be used to identify all amendments. You **MUST** enter the contract amendment number from the AA-14 here. Entering information on this page will give you a quick view of all amendments.
- Add/Edit Comments link – Explanation for any amendments **MUST** also be entered on this page. This can be done easily with a cut and paste process. Entering information on this page allows all current and prior contract amendment information to be printed out and easily viewed (assuming “copy to supplier” is checked).

Departments are reminded that all documentation required by Bulletin 3.5 must be maintained off line and made available upon demand for audit purposes.

**\*\*\* Finance is the only Department that processes contract adjustments. \*\*\***

## Frequently Asked Questions (FAQs)

**I added a contract that I no longer need or was entered with incorrect information (i.e., wrong supplier). What do I do with it?**

You cannot delete the contract, instead you can close the contract and create a new one if necessary. If you no longer need to use the contract, navigate to Purchasing > Procurement Contracts, change the status to Closed, and save. We do not use the Cancel function in VISION.

**Why am I receiving an “Invalid Value” error message when I try to enter a PO against a valid contract?**

Typically, this happens because of a couple of different reasons. On the Contract Header page, check the begin and expire dates to confirm the contract is available for use. If the dates are valid, verify the contract is in Approved status. If the dates are fine and the contract is approved, contact VISION Support at [VISION.FinHelpdesk@vermont.gov](mailto:VISION.FinHelpdesk@vermont.gov) for assistance.

**Why aren't the PO Defaults I put in my Contract coming into my Purchase Order?**

PO Defaults set up on a Contract will only come into the Purchase Order if the PO is copied from the Contract. If you enter the Contract number on the Contract tab of your PO, the default information will not come forward.

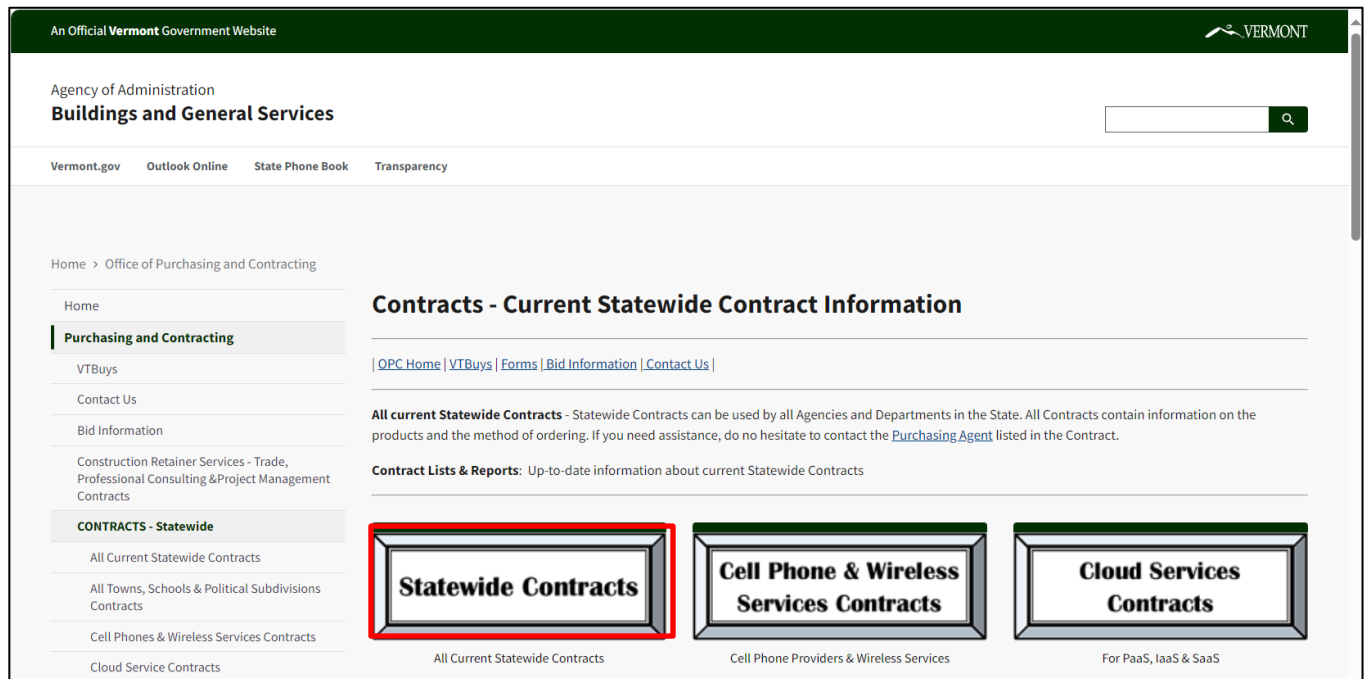
**What do I do if the remaining amount of my contract is incorrect due to the PO that I entered incorrectly?**

- If the PO has not been completed, then you will need to process a change order to the PO to properly update the remaining amount of the contract. For information on processing change orders, please refer to the Purchasing 102 manual located on the Finance and Management website at <http://finance.vermont.gov/training-and-support/vision-manuals>
- If the PO had been completed, then you will need to contact a member of Financial Operations to have a manual contract adjustment processed.

## Is there a State Contract for the item I need to purchase?

To determine if there is a State contract for a specific item you need to purchase, go to the Office of Purchasing and Contracting website located on the State of Vermont website under Dept. of Buildings and General Services.

**Navigation:** Go to the Purchasing and Contract website at <http://bgs.vermont.gov/purchasing-contracting/contract-info>



Click on [Statewide Contracts](#)

**NOTE:** Please note that when accessing Current Contracts from the Office of Purchasing & Contracting website at <http://www.bgs.vermont.gov/purchasing-contracting/contract-info/current> (including those for use by Town and Schools), these contracts are statewide use contracts and do not include individual agency-specific contracts issued by the Office of Purchasing & Contracting.



## Current Statewide Contracts

[| OPC Home](#) | [eProcurement - VTBuys](#) | [Forms](#) | [Bid Information](#) | [Contact Us](#) |

To view a Contract, click on the Contract number. If you need additional information, please contact the Purchasing Agent named within the Contract. Contact information by Purchasing Agent can be found [here](#).

TRL F) or Command+F (CMD F) on a Mac, to bring up the search box and it'll locate the text.

**Webpage Error:** Let us know if you find a broken link/error on this webpage. Send us an [email](#). Thanks!

### Current Categories:

[Aerial Photography](#)

[Auction Services](#)

[Audio Visual Equipment & Accessories](#)

[Automotive, Tires & Parts](#)

[Beds & Bedding](#)

[Building & Plumbing Supplies](#)

[Cell Phones & Wireless Service](#)

[Clothing, Footwear & Uniforms](#)

[Cloud Solution Services](#)

[Communications](#)

[Computer Accessories & Peripherals](#)

[Hospital & Surgical Equipment \(See Medical and Lab Equipment\)](#)

[Industrial Equipment & Supplies](#)

[Interior Coverings](#)

[Information Technology Retainer Services](#)

[ITS75 Software & Services](#)

[Janitorial Supplies](#)

[Law Enforcement Equipment & Supplies](#)

[Lawn & Grounds Equipment](#)

[Mail & Small Package Delivery Services & Mailroom](#)

To search the page press "Control + F" or select a category

<b>Fire Fighting Pants &amp; Coats - Turn out Gear</b>				
<a href="#">47016</a>	Municipal Emergency Services Inc.	<a href="#">Matt Wilson</a>	800.560.8030	11/01/2024
<b>Police &amp; Security Uniforms, Equipment &amp; Gear</b>				
<a href="#">44513</a>	Galls LLC	<a href="#">David Adams</a>	859.787.0428	09/02/2024
<b>Rough Duty Uniforms</b>				
<a href="#">44330</a>	Ben's Uniforms Inc.	<a href="#">Kathy Brace</a>	978.388.0471	08/01/2024
<b>State Police Uniforms</b>				
<a href="#">42283</a>	Ben's Uniforms Inc.	<a href="#">Kathy Brace</a>	978.388.0471	07/08/2024
<b>Uniform Rental &amp; Cleaning</b>				
<a href="#">45048</a>	Unifirst Corporation	<a href="#">Philip Breen</a>	603.448.0011	12/31/2024
<b>Related Products:</b> <a href="#">Law Enforcement Equipment &amp; Supplies</a> , <a href="#">Safety &amp; Security Equipment &amp; Supplies</a>				

Click on the **contract number** to view a particular contract:

**State of Vermont**  
Buildings and General Services  
Office of Purchasing & Contracting  
109 State St  
Montpelier VT 05609-3001  
USA

## CONTRACT



Vendor ID 0000009824  
Ben's Uniforms Inc  
20 Main Street  
Amesbury MA 01913  
USA

Contract ID 0000000000000000000034114		Page 1 of 3
Contract Dates 06/15/2017 to 06/14/2019		Origin CPS
Description: CPS - STATE POLICE UNIFORMS		Contract Maximum \$999,999.99
Buyer Name LaRose Deborah L	Buyer Phone 828-4635	Contract Status Approved

Phone #: 978-388-0471

Line #	Item ID	Item Desc	UOM	Unit Price	Max Qty	Max Amt
1		VERMONT STATE POLICE DRESS BLOUSE PER ATTACHED SPECIFICATIONS. FECHHEIMER #VTSP - BLOUSE COAT	EA	495.00000	0.00	0.00
2		VERMONT STATE POLICE HONOR GUARD BLOUSE PER ATTACHED SPECIFICATIONS. FECHHEIMER #VTSP-HONOR GUARD BLOUSE	EA	595.00000	0.00	0.00
3		VERMONT STATE POLICE LONG SLEEVE MEN'S SHIRTS PER ATTACHED SPECIFICATIONS. FECHHEIMER #VTSP-LS	EA	114.00000	0.00	0.00
4		VERMONT STATE POLICE SHORT SLEEVE MEN'S SHIRTS PER ATTACHED SPECIFICATIONS. FECHHEIMER #VTSP-SS	EA	90.00000	0.00	0.00
5		VERMONT STATE POLICE SUMMER TROUSERS PER ATTACHED SPECIFICATIONS. FECHHEIMER #VTSP-ST	EA	100.00000	0.00	0.00
6		VERMONT STATE POLICE WINTER TROUSERS PER ATTACHED SPECIFICATIONS. FECHHEIMER #VTSP-WT	EA	115.00000	0.00	0.00
7		VERMONT STATE POLICE NECKTIE PER ATTACHED SPECIFICATIONS.	EA	8.00000	0.00	0.00
S. BROOME #45015/45035/45065						

Contract page opens displaying information regarding what items are on this contract.

**Is there a State Contract for the item I need to purchase? Is Complete**

## How to Find and Interpret a Contract

**WorkCenter navigation:** Purchasing WorkCenter > Links Pagelet > Contracts > Add/Update Contracts

**Navigator Menu navigation:** Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** button:

The screenshot shows the 'Contract Entry' page with the 'Find an Existing Value' section. At the top right is a button '+ Add a New Value'. Below the section title is a 'Search Criteria' dropdown and a instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two search history sections: 'Recent Searches' and 'Saved Searches', each with a dropdown menu and an edit icon. The main search area contains several fields with dropdown menus and text input boxes, each with a magnifying glass icon: '\*SetID' (set to '= STATE'), 'Contract ID' (set to 'begins with'), 'Contract Version' (set to '='), 'Origin' (set to 'begins with'), 'Version Status' (set to '='), 'Contract Style' (set to 'begins with'), 'Contract Process Option' (set to '='), 'Short Supplier Name' (set to 'begins with'), 'Supplier Name' (set to 'begins with'), 'Master Contract ID' (set to 'begins with'), and 'Description' (set to 'begins with'). Below these fields is a link 'Show fewer options'. At the bottom are two checkboxes: 'Case Sensitive' and 'Correct History'. At the very bottom are two buttons: 'Search' (highlighted with a red box) and 'Clear'.

SetID = **STATE** defaults in.

There are three ways to search for a contract:

1. **Contract ID** - If you know the contract number, enter the number in the Contract ID field and be sure to include the leading zeros. You can also click on the drop-down arrow, change “begins with” to “contains” and search by part of the number.
2. **Origin Code** - This is a good way to search for contracts belonging to your department. You can also search for Central Purchasing contracts by using their origin codes of CP and CPS however this may be a long list.
3. **Short Supplier Name** - Enter part or as much of the Supplier Name as you wish, click the magnifying glass to return a list of suppliers with a similar short name to select from, then click the **Search** button. Remember, sometimes putting in too many letters reduces your chance of success.

Once you have selected the contract and clicked **Search** the following page will display:

Contract		VT Performance Info				
<b>Contract Entry</b>						
<b>Contract</b>						
<b>Solid STATE</b> Contract ID: 00000000000000000000000000000000 *Status: Approved *Origin: CP		<b>Contract Version</b> Version: 1 Status: Current Approved Date: 05/01/2018				
Administrator/Buyer: LWORTMAN		Linda T Wortman				
<b>Header</b>						
Contract Style: Purchase Order Process Option: Purchase Order Supplier: CASELLA MA-001 Supplier ID: 0000299699 Begin Date: 05/01/2018 Expire Date: 04/30/2020  Renewal Date: Currency: USD CRRNT Primary Contact: Supplier Contract Ref: Description: CP-WASTE&RECYC ST.PARKS RG-4 Master Contract ID: Tax Exempt ID: <input type="checkbox"/> Tax Exempt		Edit Comments Contract Activities Primary Contact Info Contract Releases  Activity Log Document Status Thresholds & Notifications				
		<b>Casella Major Account Services, LLC</b>				
		<b>Amount Summary</b>				
		Maximum Amount: 30,000.00 USD Line Item Released Amount: 0.00 Category Released Amount: 0.00 Open Item Released Amount: 0.00 Total Released Amount: 0.00 Remaining Amount: 30,000.00 Remaining Percent: 100.00				
<b>Order Contract Options</b>						
<input type="checkbox"/> Allow Multicurrency PO <input checked="" type="checkbox"/> Corporate Contract <input type="checkbox"/> Lock Chartfields PO Defaults		<input type="checkbox"/> Allow Open item Reference <input type="checkbox"/> Adjust Supplier Pricing First <input type="checkbox"/> Price Can Be Changed on Order Add Open Item Price Adjustments				
		<input type="checkbox"/> Must Use Contract Rate Date <input checked="" type="checkbox"/> Auto Default *Dispatch Method: Print Price Adjustment Template				
		Rate Date: 04/18/2018 Dispatch				
<b>Contract Items</b>						
Catalog Search		Item Search				
Search for Contract Lines						
<b>TRASH REMOVAL / DISPOSAL SERV</b>						
Lines Personalize Find View All First 1 of 1 Last						
Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings ITT						
Line	Item	Description	UOM	Category	Included for Release	Status
1	EA	WASTE AND RECYCLING COLLECTION SERVICE	EA	91027	<input checked="" type="checkbox"/>	Active
View Category Hierarchy		Category Search				
<b>Contract Categories</b>						
Lines Personalize Find View All First 1 of 1 Last						
Details Pricing Options Release Amounts ITT						
Line	Category	Description	Status			
1			Active			

Save Return to Search Previous In List Next In List Notify Refresh Add Update/Display Correct History

- 1. The Contract ID number** displays on the top of the contract

The screenshot shows the 'Contract Entry' form in the VISION system. Numbered callouts point to the following fields:

- 2**: \*status (Approved)
- 3**: Process Option (Purchase Order)
- 4**: Supplier ID (00029969)
- 5**: Expire Date (04/30/2022)
- 6**: Maximum Amount (30,000.00 USD)
- 7**: Remaining Amount (30,000.00)

Other visible fields include Contract ID, Contract Version (1), Status (Current), Approved Date (05/01/2018), Administrator/Buyer (Linda T Wortman), Contract Style (Purchase Order), Supplier (CASELLA MA-001), Begin Date (05/01/2018), Renewal Date, Currency (USD), Primary Contact, Supplier Contract Ref, Description (CP-WASTE&RECYC STARKS RG-4), Master Contract ID, Tax Exempt ID, and Tax Exempt checkbox.

2. **The Contract must be in “approved” status in order to use the contract in a purchase order.** If the contract status is something other than approved and: **Origin code = CP or CPS** – contact the Purchasing Agent (828-2211) - to find the agent click on the Contract Thresholds link or look in the Current Contracts list, **Origin code = Your Dept** – contact the appropriate person in your department
3. **Contract Process Option** - The process option should be **Purchase Order** for the contract to be used in a purchase order and to be able to print the contract
4. **Supplier ID Number** - The Contract number and the Supplier ID number form a partnership. If you are creating a Purchase Order and do not have the correct Supplier ID number, you will not be able to bring in a line from that contract. The Supplier Address for the Contract will default from the Supplier record. There will be no ability in VISION to change the Supplier Address directly on a Contract
5. **Expiration Date** - The last date the contract is available to use. If the expiration date of the contract has already gone by, in order to use the contract, you will need to make the PO date prior to the expiration date of the contract. (This should only be done if the services were for the time period the contract was valid)
6. **Maximum Amount** - The maximum dollar amount of the contract
7. **Remaining Amount** - The maximum amount of the contract minus the total released amount. This tells you how much is left on the contract to spend

## Under Order Contract Options

**Order Contract Options**

☐ Allow Multicurrency PO **8**

☒ Corporate Contract **9**

☐ Allow Open Item Reference

☐ Adjust Supplier Pricing First

☐ Price Can Be Changed on Order

☐ Must Use Contract Rate Date Rate Date 04/18/2018

☒ Auto Default

☐ Lock Charfields

☐ PO Defaults

\*Dispatch Method Print

Price Adjustment Template

Dispatch

- 8. Allow Multicurrency PO** - This box defaults in as unchecked and cannot be changed. Currently the State of Vermont only processes transactions in US Dollars
- 9. Corporate Contract** - This box defaults in as checked. This allows all business units to potentially use this contract. All CP or CPS contracts should have this box selected. In addition, if your department has multiple PO Business units, you must leave this box selected. **To restrict use of the contract to your BU only, uncheck the Corporate Contract checkbox and click on PO Defaults to enter department-specific information**

Click the [Edit Comments](#) link (or [Add Comments](#) link, if there aren't any comments yet) to view comments about the contract:

Contract

VT Performance Info

Contract Entry

Contract

SetID STATE

Contract ID 000000000000000000000000036070

\*status Approved

\*Origin CP

Contract Version

Version 1

Status Current

Approved Date 05/01/2018

Administrator/Buyer LWORTMAN Linda T Wortman

Header

Contract Style Purchase Order

Process Option Purchase Order

Supplier CASELLA MA-001

Supplier ID 0000299699

Begin Date 05/01/2018

Expires Date 04/30/2020

Edit Comments

Contract Activities

Primary Contact Info

Contract Releases

Activity Log

Document Status

Thresholds & Notifications

Casella Major Account Services, LLC

The **Header Comments** page displays and is available to enter additional information about the contract:

**Contract Comments**

---

Contract Entry

### Header Comments

SetID	STATE	Contract ID	000000000000000000000036070	Version	1
-------	-------	-------------	-----------------------------	---------	---

☒ Retrieve Active Comments Only
 Retrieve

\*Sort Method Comment Time Stamp

\*Sort Sequence Ascending

Sort

**Comments**
Find | View All    First 1 of 1 Last

Use Standard Comments      Comment Status Active Inactivate +

1. Parties. This is a contract for services between the State of Vermont, Department of Buildings and General Services, Office of Purchasing and Contracting, on behalf of the Vermont Department of Forest, Parks, and Recreation (hereinafter called "State"), and Casella Major Accounts, LLC, with a principal place of business in Williston, Vermont, (hereinafter called "Contractor"). Contractor's form of business organization is LLC. It is Contractor's responsibility to contact the Vermont Department of Taxes to determine if by law Contractor is

☒ Send to Supplier    
 ☐ Show at Receipt    
 ☐ Copy to Purchase Order    
 ☐ Show at Voucher

**Associated Document**

Attachment	Attach	View	Delete	Email
From -> CNT STATE-000000000000000000000036070				

**OK**
Cancel
Refresh

Any Contract Amendments **MUST** be entered here as well as on the Contract Activities page.

- 10. Send to Supplier** - Click on this box if you want comments to be seen on the printed version of the contract. If the comments are for internal use only, leave the check box unchecked
- 11. Copy to Purchase Order** - Select this box if you want comments to copy over to the PO
- 12.** Click **OK**
- 13.** Click the **Contract Activities** link to view additional information

Contract

VT Performance info

Contract Entry

Contract

SetID STATE

Contract ID 00000000000000000000000036070

\*status Approved

\*Origin CP

Contract Version

Version 1

Status Current

Approved Date 05/01/2018

Administrator/Buyer LWORTMAN

Linda T Wortman

Header

Contract style Purchase Order

Process Option Purchase Order

Supplier CASELLA MA-001

Supplier ID 0000299699

Begin Date 05/01/2018

Expire Date 04/30/2020

Casella Major Account Services, LLC

Edit Comments

Contract Activities

Primary Contact info

Contract Releases

Activity Log

Document Status

Thresholds & Notifications



The **Contract Activities** page displays:

Contract Activities

Contract Entry

Contract Activities

SetID STATE Contract ID 00000000000000000000036070 Version 1

Activities Personalize | Find | View All | First 1 of 1 Last

Version	*Due Date	Done	*Comments
1 1	11/15/2018	<input checked="" type="checkbox"/>	Amended for price change - 11/15/18. ET

OK Cancel Refresh

This is the page where **all contract activity**, such as approvals and amendments, **MUST** be recorded. **This information is required**. You should also include initials of the person who updated this information. For example:

"Approved on 3/31/12 with signatures. TJ"

"Amended 4/15/12 to add Section 3. TJ"

In the case of an amendment, provide a description of what was updated, and you **MUST** include the contract amendment number from the AA-14.

**14. Click OK**

Order Contract Options

☐ Allow Multicurrency PO
 ☐ Allow Open Item Reference
 ☐ Must Use Contract Rate Date

☒ Corporate Contract
 ☐ Adjust Supplier Pricing First
 ☒ Auto Default

☐ Lock Chartfields
 ☐ Price Can Be Changed on Order
 \*Dispatch Method Print

Rate Date 04/18/2018

Dispatch

PO Defaults

Add Open Item Price Adjustments

Price Adjustment Template

Contract Items

Catalog Search

Item Search

Search for Contract Lines

TRASH REMOVAL / DISPOSAL SERV

Lines

Personalize

Find

View All

First

1 of 1

Last

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		WASTE AND RECYCLING COLLECTION SERVICE	EA	91027					<input checked="" type="checkbox"/>	Active

View Category Hierarchy

Category Search

**15.** Click the **Line Details** icon to see additional contract information



The **Details for Line 1** page displays:

Details for Line 1

Contract ID 0000000000000000000038070

Version 1

Supplier CASELLA MA-001

Line 1

Item ID

WASTE AND RECYCLING COLLECTION

Line Details

Category 91027

Description

Category ID 00768

Status Active

Physical Nature Goods

Transaction Item Description:

WASTE AND RECYCLING COLLECTION SERVICE

Expand All

Collapse All

Item Information

Supplier's Catalog

Supplier Item ID

Manufacturer ID

Description

Manufacturer's Item ID

GTIN

Device Tracking

Release Amounts / Quantities

Minimum Line Amount

Maximum Line Amount

Total Line Released Amount

29,488,570

Minimum Line Quantity

Maximum Line Quantity

Total Line Released Quantity

2,948,657.00

Remaining Amount

USD

Remaining Quantity

0.0000 EA

Remaining Amount %

Remaining Quantity %

0.00

Pricing Information

☒ Use Contract Base Price
 ☐ Price Can Be Changed on Order

☐ Use Supp Price UOM Adjustments
 ☐ Use Supplier Price Shipto Adj

Price Date Due Date

Price Qty Line Quantity

Qty Type Current Order Quantity

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		Personalize	Find	View All	First	1 of 1	Last
Price Loc	UOM						
<input checked="" type="checkbox"/> MULTIPLE	EA				0.01000	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		Personalize	Find	View All	First	1 of 1	Last
Lead Time	Time Due	*Qty Sched	UOM				
30		1.0000	EA				

OK

Cancel

Refresh

This is the page that determines whether the “Price Can Be Changed on Order”. If this option is checked, you can change purchase order prices that default in from the contract.

This is also where the base price is entered. Any maximum or minimum line quantities are entered here. For example, if when the contract was negotiated it was determined that line 6 of the contract should only have \$60,000 spent against it, a maximum line amount of \$60,000 could be entered for the maximum line amount. This would only allow up to \$60,000 in purchase orders to go against line 6.

**16. Click OK**

Contract		VT Performance Info	
Agency/Dept:	CP Central Purchasing	Contract ID:	0000000000000000000036070
Vendor Name:	Casella Major Account Services, LLC	Supplier ID:	0000299699
Address: PO Box 1383			
City, State, Zip: Williston, VT 05495			
Start Date:	05/01/2018	Expire Date:	04/30/2020
Description:		CP-WASTE&RECYC ST.PARKS RG-4	
Maximum	\$30,000.000	C4C Contract:	<input checked="" type="checkbox"/>
Payable:		Approved:	<input checked="" type="checkbox"/>
<b>Financial Information</b>			
Does this agreement include performance measures tied to outcomes and/or funding? <input checked="" type="radio"/> Yes <input type="radio"/> No			
Estimated Funding Split:	G-Fund <input type="text"/> %	F-Fund <input type="text"/> %	S-Funds <input type="text"/> %
	GC-Fund <input type="text"/> %	Other <input type="text"/> %	
		\$30,000.00	
Total funding splits: 100 %		Explain: PURCHASING CONTRACT	
<b>General Procurement Information</b>			
Process used: Standard bid or RFP			
Agreement type: Other contracts for services			

Save

Return to Search

Notify

Refresh

Add

Update/Display

Correct History

Contract | VT Performance Info

All the information filled in above comes directly from the Contract page.

- This box will be checked and grayed out for **all** contracts entered with a start date  $\geq 7-1-10$ . This indicates that the contract is a challenges for change contract and will require the Financial Information section to be filled in
- If the contract has a start date  $\leq 6-30-10$  the box will not be checked and the Financial Information section will not need to be filled in
- If the contract has a start date  $\leq 6-30-10$  and it is determined that the contract is a challenges for change contract, the box can be checked and the Financial Information area would need to be filled in

- The question “Does this agreement include performance measures tied to outcomes and/or funding” must be answered by choosing “Yes” or “No”.
- Estimated Funding Split: A percentage must be entered for how the contract money will be spent. The total funding splits must equal 100%. These splits will automatically calculate the dollar amount based on the percentages entered per each fund.
- G-Fund = general fund
- F-Fund = federal fund
- S-Fund = special fund

- GC-Fund = global commitment fund
- Other (If “Other” is chosen, a text box will open, and a description of the funding source must be entered)

**Note:** For contracts that can be used throughout the state, such as Purchasing and Contract Administration contracts with an origin code of CP or CPS or master contracts such as those for Marketing and DII, if the funding source cannot be determined then use 100% “Other”. A suggested description of the funding source would be “Central Purchasing” or “Master”.

Approval box: This box must be checked if the C4C box is checked. Only users with security to approve a contract will be able to approve the Performance Info page. A contract that is a C4C contract must have the Performance Info page approved before the contract can be approved.

### General Procurement Information:

Based on information captured when preparing Form AA-14.

#### Drop Down Values

##### Process Used:

- Qualifications based selection
- Simplified bid
- Sole sourced
- Standard bid or RFP
- Statutory

##### Agreement Type:

- Architectural/Engineering
- Commodity
- Construction
- Data Usage and/or Data Sharing
- Financial Transaction
- Grant
- Information Technology
- Marketing
- Other Contracts for Services
- Privatization
- Professional Services
- Retired or Former Employee
- Zero Dollar (or No-Cost)

The General Procurement Information area is designed so that selecting values in the drop-down fields are required fields.

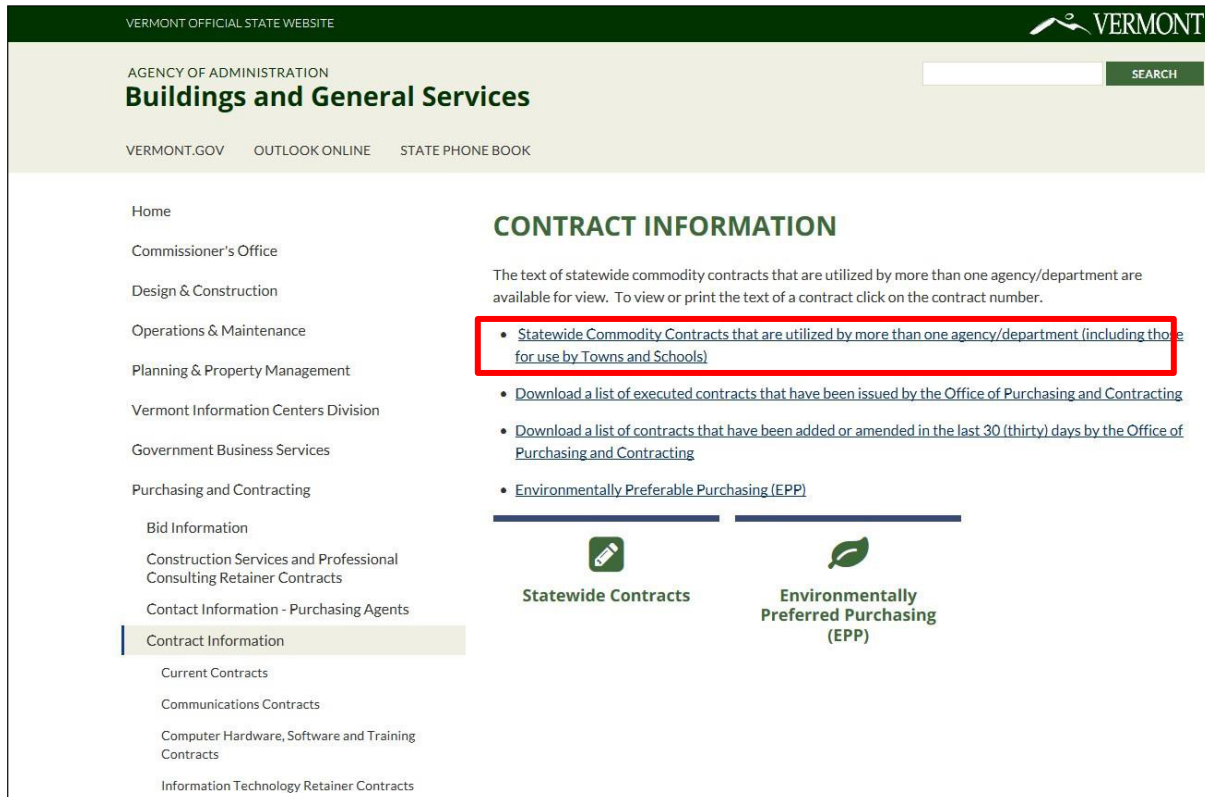
**New contracts:** If a new contract is entered into VISION, the drop-down values must be selected before the contract can be moved to “approved” status.

**Existing contracts:** If an existing contract, in an “approved” or “closed” status, is moved to “open” and then to “approved” status, the General Procurement information area needs to be complete. (I.e., if values do not exist, they need to be selected.) If an existing contract, whether “approved” or “open”, is moved to “closed” status the General Procurement information area will not need to be filled in.

### Finding and Interpreting a Contract is Complete

## How to Determine if a Commodity is on Contract

**Navigation:** Go to the Purchasing and Contract Administration website at <http://www.bgs.vermont.gov/purchasing-contracting/contract-info>.



1. Click on [Statewide Commodity Contracts that are utilized by more than one agency/department \(including those for use by Towns and Schools\)](#)

**NOTE:** Please note that when accessing Current Contracts from the Office of Purchasing & Contracting website at <http://www.bgs.vermont.gov/purchasing-contracting/contract-info/current> (including those for use by Town and Schools), these contracts are statewide use contracts and do not include individual agency-specific contracts issued by the Office of Purchasing & Contracting.

## CURRENT CONTRACTS

To see the text of a contract click on the contract number. If you need further information, send the purchasing agent an e-mail by clicking on their name. In order to view, navigate, download or print the contracts you will need the free.

[See the complete list of contracts where the purchasing card may be used as a method of payment](#)

To Search This Page Press "Control F"

[Audio Visual](#)

[Automotive](#)

[Beds and Bedding](#)

[Building Supplies](#)

[Clothing and Footwear](#)

[Communications](#)

[Computer Hardware, Software and Training](#)

[Custodial Supplies](#)

[Document Destruction Services](#)

[Electrical Equipment, Supplies and Service](#)

[Fasteners](#)

[Filters](#)

[Fire Protection Equipment and Supplies](#)

[Flags](#)

[Food](#)

[Fuel](#)

[Highway Materials and Equipment](#)

[Hospital and Surgical Equipment](#)

[Industrial Supplies](#)

[Interior Coverings](#)

[Laboratory and Field Equipment](#)

[Lawn and Grounds Equipment](#)

[Markers and Signs](#)

[Mail and Express Services](#)

[Medical](#)

[Newspaper Advertising](#)

[Office Furniture](#)

[Office Machines](#)

[Office Supplies](#)

[Paper and Plastic Products, Disposable](#)

[Paper, Envelopes and Forms](#)

[Police Equipment and Supplies](#)

[Printing](#)

[Safety Equipment and Services](#)

[Scrap Metal Removal](#)

[Translation Service](#)

[Training](#)

[Visual and Auditory Aids](#)

[Waste Hauling and Recycling](#)

[Welding Supplies](#)

2. To search the page press "Control + F" or select a category

### Building Supplies

- Lumber and Building Supplies
  - LaValley Building Supply Inc, Contract [34436](#)
  - Poulin Lumber, Contract [34441](#)
- Hardwood Plywood
  - Atlantic Plywood Corporation, Contract [36064](#)
- Plumbing and HVAC Supplies
  - Granite Group, Contract [30953](#)
  - F. W. Webb, Contract [31324](#)

3. Click on the contract number to view a particular contract

<b>Contract ID</b> 0000000000000000000000031324		Page 1 of 4
<b>Contract Dates</b> 04/01/2016 to 03/31/2019		<b>Origin</b> CPS
<b>Description</b> CPS-PLUMBING & HVAC SUPPLIES	<b>Contract Maximum</b> \$9,999,999.00	
<b>Buyer Name</b> Regina Rattan, Inc.	<b>Buyer Phone</b> 802/828-2217	<b>Contract Status</b> annrncrtd

Line #	ItemID	ItemDesc	UOM	Unit Price	Max Qty	Max Amt
1		PIPE AND FITTINGS (VALVES, ELBOWS, COUPLINGS, etc.) OF VARIOUS SIZES (APPROX. 1/4" TO 4") AND MATERIALS (COPPER, IRON, PLASTIC, etc.).	EA	0.01000	0.00	0.00
		30% OFF RETAIL				
2		WATER HANDLING PUMPS (CIRCULATOR, SUMP, etc.) INCLUDING MOTORS AND THEIR ASSOCIATED MAINTENANCE AND ACCESSORY PARTS (TEMP AND PRESSURE CONTROLS, GASKETS, COUPLINGS, etc.).	EA	0.01000	0.00	0.00
		35% OFF RETAIL				
3		BOILER AND FURNACE BURNERS FOR MULTIPLE FUELS AND THEIR ASSOCIATED MAINTENANCE AND ACCESSORY PARTS (FUEL PUMPS, FUEL VALVES, NOZZLES, IGNITER POINTS, etc.).	EA	0.01000	0.00	0.00
		20% OFF RETAIL				
4		AIR HANDLING FANS AND DAMPERS INCLUDING THEIR MOTORS AND ASSOCIATED MAINTENANCE AND ACCESSORY PARTS (TEMP AND PRESSURE CONTROLS, FILTERS, GASKETS, COUPLINGS, ACTUATORS, etc.).	EA	0.01000	0.00	0.00
		30% OFF RETAIL				
5		SYSTEM CONTROL DEVICES AND CONTROLLERS (SOLENOIDS, ZONE CONTROLS, THERMOSTATS, DIGITAL INTERFACES, etc.).	EA	0.01000	0.00	0.00

## How to Determine if a Commodity is on Contract is Complete

## Enter Services Contract

**WorkCenter navigation:** Purchasing WorkCenter > Links Pagelet > Contracts > Add/Update Contracts

**Navigator Menu navigation:** Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays:

The screenshot shows the 'Contract Entry' page. At the top left is the title 'Contract Entry'. Below it, on the left, is the text 'Add a New Value'. On the right is a button with a magnifying glass icon and the text 'Find an Existing Value'. The main form area contains four fields: 'SetID' with the value 'STATE' and a magnifying glass icon; '\*Contract ID' with the value 'NEXT'; 'Style ID' with the value 'PO' and a magnifying glass icon; and '\*Contract Process Option' with a dropdown menu showing 'Purchase Order'. Below these fields is a button labeled 'Add', which is highlighted with a red rectangle.

**Note:** In the Contract Process Option field, the value defaults as Purchase Order. Accept the default so that you can dispatch and print the contract. If you enter a contract and you selected an option other than “purchase order”, you will need to close the contract and create a new one to be able to dispatch/print.

1. Click **Add**



The **Contract** page displays:

The screenshot shows the 'Contract Entry' page with the following fields highlighted by red boxes:

- \*Origin** (with a search icon)
- Administrator/Buyer** (with a search icon)
- \*Supplier** (with a search icon)
- \*Supplier ID** (with a search icon)
- \*Begin Date** (with a calendar icon, showing 11/27/2018)
- Description** (with a search icon)
- Maximum Amount** (with a search icon, showing 0.00 USD)

Other visible fields include: SetID, STATE, Copy From Contract, Contract ID (NEXT), \*Status (Open), Contract Version (1), Status (Current), Approval Due Date, \*Contract Style (Purchase Order), Process Option (Purchase Order), \*Supplier ID, \*Begin Date, Expire Date, Renewal Date, Currency (USD), CRRNT, Primary Contact, Supplier Contract Ref, Master Contract ID, Tax Exempt ID, Tax Exempt, Order Contract Options, Allow Multicurrency PO, Corporate Contract, Lock Chartfields, PO Defaults, Allow Open Item Reference, Adjust Supplier Pricing First, Price Can Be Changed on Order, Add Open Item Price Adjustments, Must Use Contract Rate Date, Rate Date (11/27/2018), Auto Default, \*Dispatch Method (Print), Dispatch, 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, Personalize, Find, View All, First, 1 of 1, Last, View Category Hierarchy, Category Search, Contract Categories, Pricing Options, Release Amounts, Details, Line, Category, Description, Status, Active, Save, Notify, Refresh, Add, Update/Display, Correct History.

2. **Origin Code** - Enter an Origin Code
3. **Administrator/Buyer** - Enter the Administrator/Buyer
4. **Supplier ID** - Do not utilize the Supplier search link on this page, searching for the supplier number should be done using the following **Navigation**: Suppliers > Supplier Information> Add/Update > Supplier
5. **Begin Date & Expire Date** - Select the Begin and Expire dates for the contract



6. **Description** - If you want to see a description on reports that you run, you should enter a meaningful description here
7. **Maximum Amount** - You can select a maximum amount if desired

Contract VT Performance Info

Contract Entry

Contract

SetID STATE Copy From Contract

Contract ID NEXT

\*Status Open

\*Origin FM

Administrator/Buyer

Contract Version

Version 1 Status Current

Approval Due Date

Header

\*Contract Style Purchase Order

Process Option Purchase Order

\*Supplier

\*Supplier ID 0000084643

\*Begin Date 11/27/2018

Expire Date 12/31/2018

Renewal Date

Currency USD CRRNT

Primary Contact

Supplier Contract Ref

Description Oracle Tech Services

Master Contract ID

Tax Exempt ID

Tax Exempt

Add Comments

Contract Activities

Primary Contact Info

Contract Releases

Activity Log

Document Status

Thresholds & Notifications

Amount Summary

Maximum Amount 100000.00 USD

Line Item Released Amount 0.00

Category Released Amount 0.00

Open Item Released Amount 0.00

Total Released Amount 0.00

Order Contract Options

Allow Multicurrency PO

Corporate Contract

Lock Chartfields

PO Defaults

Allow Open Item Reference

Adjust Supplier Pricing First

Price Can Be Changed on Order

Add Open Item Price Adjustments

Must Use Contract Rate Date

Auto Default

\*Dispatch Method Print

Price Adjustment Template

Rate Date 11/27/2018

Dispatch

8. Click the **Add Comments** link

The **Contract Comments** window opens:

9. Enter all appropriate requirements and/or enter the Standard Comments

10. To enter Standard Comments, Click the **Use Standard Comments** link

The **Standard Comments** page displays:

11. **Comment Type** - Standard Comments for service contract have a **Comment Type = CS** or use the magnifying glass to select the appropriate comment type

12. **Comment ID** - Use the magnifying glass to select the Comment ID(s) you wish to include

13. Click **OK** - The comments will be copied into your contract and active for entry of specific information

You are returned to the **Contract Comments** page:

Contract Comments

Contract Entry

Header Comments

SetID STATE Contract ID NEXT Version 1

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate

1. Parties. This is a contract for services between the State of Vermont, \_\_\_\_\_ (hereinafter called "State"), and \_\_\_\_\_ (hereinafter called "Contractor"). Contractor's form of business organization is \_\_\_\_\_. It is Contractor's responsibility to contact the Vermont Department of Taxes to determine if, by law, Contractor is required to have a Vermont Department of Taxes Business Account Number.

2. Subject Matter. The subject matter of this contract is services generally on the subject of \_\_\_\_\_. Detailed services to be provided by Contractor are described in Attachment A.

☒ Send to Supplier ☐ Show at Receipt ☒ Copy to Purchase Order

☐ Show at Voucher

Associated Document

Attachment Attach View Delete Email

OK Cancel Refresh

14. Click on the **Send to Supplier** checkbox for comments to be seen on a printed copy of the Contract

15. Click on the **Copy to Purchase Order** checkbox for comments to be seen on a printed copy of the PO

16. If you need to add an Attachment to be included with the standard comments, click the **Attach** button

The **File Attachment** box opens, click on **Chose File** to find file attachment and click **Upload**

File Attachment

Choose File No file chosen

Upload Cancel

*If you have questions about which Standard Comments should be used, please contact BGS Purchasing and Contract Administration at 828-2211.*

17. Click **OK**

You are returned to the **Contract Entry** page:

18. Click the **Contract Activities** link to view additional information

The **Contract Activities** page displays:

This is the page where **all contract activity**, such as approvals and amendments, **MUST** be recorded. This information is required. You should also include initials of the person who updated this information.

Example(s): "Approved on 11/27/18 with signatures. ET" "Amended 12/01/18 to add Section 3. ET"

In the case of an amendment, provide a description of what was updated, and you **must** include the contract amendment number from the AA-14.

19. Click **OK** - Once the Maintain Contracts page returns, **uncheck** the Allow Multicurrency PO checkbox (SOV only processes transactions using US Dollars)

20. If you want to restrict use of the contract to your Business Unit only, uncheck the Corporate Contract checkbox and click on the PO Defaults link to enter dept specific information

21. Departments with contracts that serve multiple PO business units should leave Corporate Contract checked

22. Click the **PO Defaults** link

The **Contract Defaults by BU** page displays:

Contract Defaults by BU

Contract Entry

PO Defaults

SetID STATE Contract ID NEXT Version 1 Supplier ID 0000084643

Header Find | View All First 1 of 1 Last

\*Business Unit 01110 Copy from BU Defaults

Supp Loc MULTIPLE

Buyer ETEST

Origin

Currency USD CRRNT

Payment Terms ID NET30

Billing Location PFMMTP002

Tax Exempt

Tax Exempt ID:

Shipping Information

Ship To Ship To Address

Location

IN Unit

Freight Terms FOBDEST

Ship Via

Charge By Quantity

AM Business Unit

Capitalize

Profile ID

Cost Type

Ultimate Use Code

Where Performed

Distributions Personalize | Find | View All

Distributions

*GL Unit	Account	Fund	Dept	Program	Class	Project	Affiliate
01110							

Add Comments

OK Cancel Refresh

23. Enter all appropriate defaults and click **OK**

The **Maintain Contracts** page displays:

Lines Personalize | Find | View All First 1 of 1 Last

Details Order By Amount Item Information Default Schedule Release Amounts Release Quantities Line Groupings

Line	Item	Description	UOM	Category	Include for Release	Status
1		TECHNOLOGY	EA	03198		Active

View Category Hierarchy Category Search

24. **Description** - The description field for the services provided on all Personal Services contracts must be descriptive enough to ascertain the type of service being provided. Entering descriptions such as “Contractual Services”, “Third Party Services”, department name or acronym is NOT sufficient

25. **UOM (unit of measure)** - use the magnifying glass for look up

26. **Category** - use the magnifying glass for look up

27. Click on the **Line Details** icon to the left of the Item field

The **Details for Line 1** page displays:

**28.** Change the Physical Nature as appropriate for the contract and Click the **Expand All** link

**29.** Enter any appropriate **Min/Max Line Amount** information as well as Min/Max Line Qty information (this information is contract line specific and is optional)

**30.** Select the **Price Can Be Changed on Order** checkbox - if you want to be able to change the system calculated price on POs for this contract. If you do not select this option, the price field on the PO is unavailable to change

**Pricing Information**

☒ Use Contract Base Price  
☒ Price Can Be Changed on Order  
 Price Date: Due 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** Personalize | Find | View All | First 1 of 1 Last

	Price Loc	UOM	Base Price	Curr		
<input checked="" type="checkbox"/>	MULTIPLE	EA	.01	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** Personalize | Find | View All | First 1 of 1 Last

Lead Time	Time Due	*Qty Sched	UOM		
30		1,0000	EA	+	-

31. Enter a Base Price amount **Note: Base Price must be entered with dollar amount of .01 or greater** – If the price can be changed on order, the checkbox is marked for this line, it is the user's choice on the UOM Base Price Amount. If the "Price Can Be Changed on Order" checkbox is NOT marked, enter the per unit price
32. Click **OK**



You are brought back to the **Contract Entry** page, click on the **Performance Info** tab:

Contract **VT Performance Info**

Agency/Dept: FM Finance & Management Contract ID: NEXT  
Vendor Name: Supplier ID:  
Address:  
City, State, Zip: ,  
Start Date: 12/01/2018 Expire Date: Description: Oracle Tech Services  
Maximum Payable: \$0.000 **C4C Contract:** ☒ Approved: ☐

**Financial Information**

Does this agreement include performance measures tied to outcomes and/or funding? ☐ Yes ☐ No

Estimated Funding Split: % G-Fund % F-Fund % S-Funds % GC-Fund % Other %

Total funding splits: %

The Performance Info page must be filled in for all contracts that are challenges for change contracts (C4C). Contracts with a start date  $\geq 07/01/10$  are automatically designated as challenges for change contracts. Contracts with a start date  $\leq 06/30/10$  can be designated as challenges for change contract by clicking on the C4C box.

**Note: The Information above the Financial Information area is filled in from the Contract page**

33. The C4C (challenges for change) box is checked and grayed out as will be the default for all contracts entered with a start date  $\geq 07/01/10$
34. A "Yes" or "No" must be selected for the question of 'Does this agreement include performance measures tied to outcomes and/or funding?'
35. Estimated Funding Split: Enter the percentage in the appropriate area for what fund or funds the contract amount will be spent against. The Total funding splits will automatically calculate and must equal to 100%. If part or all the funding source falls under "Other", a description of the funding source must be entered in the text box that opens

**Note: For contracts that can be used throughout the state, such as Purchasing and Contract Administration contracts with an origin code of CP or CPS or master contracts such as those for Marketing and DII, if the funding source cannot be determined then use 100% "Other". A suggested description of the funding source to enter into the text box would be "Central Purchasing" or "Master"**



Contract		VT Performance Info	
Agency/Dept:	FM Finance & Management	Contract ID:	NEXT
Vendor Name:		Supplier ID:	
Address:			
City, State, Zip:			
Start Date:	12/01/2018	Expire Date:	
		Description:	Oracle Tech Services
Maximum Payable:	\$0.000	C4C Contract:	<input checked="" type="checkbox"/>
		Approved:	<input type="checkbox"/>
<b>Financial Information</b>			
Does this agreement include performance measures tied to outcomes and/or funding?			<input checked="" type="radio"/> Yes <input type="radio"/> No
Estimated Funding Split:	G-Fund <input type="text" value="50"/> %	F-Fund <input type="text" value=""/> %	S-Funds <input type="text" value=""/> %
		GC-Fund <input type="text" value=""/> %	Other <input type="text" value=""/> %
Total funding splits:		%	

**General Procurement Information section:**

General Procurement Information	
Process used:	Standard bid or RFP
Agreement type:	Information technology

**36.** The Process used field and the Agreement type field must be filled in based on information gathered from the AA-14 form

**37. Approved checkbox** -This box must be checked when all sections of the VT Performance Info page are complete. This page must be approved before the contract can be approved

**Note:** Only *VISION* users with the security to approve contracts can approve the performance info page

The following **message** appears if you are using a Master Contract for marketing services:

Message
Media buying payment terms reminder (23200,12)
The contractor shall be paid for media buying in two installments.
1. The Contractor shall bill the State ninety percent (90%) of media buying costs at the time of placement.
2. The Contractor shall bill the State the remaining ten percent (10%) at the end of the campaign.
<input type="button" value="OK"/>

**Note:** This message will also appear each time you click **Save**.

**38.** Click **OK**

**39.** Click back on the **Contract** tab

**40.** Click **Save**

A **Contract ID** number is assigned:

<b>Contract</b>		VT Performance Info	
Contract Entry			
<b>Contract</b>			
SetID STATE		<b>Contract Version</b>	
Contract ID 000000000000000000037314		Version 1	
*Status Open		Status Current	
*Origin FM		Approval Due Date	
Administrator/Buyer ETEST		Ella Test	
<b>Header</b>			
*Contract Style Purchase Order		Edit Comments	
Process Option Purchase Order		Contract Activities	
*Supplier CHERRYROAD-06		Primary Contact Info	
*Supplier ID 0000084643		Contract Releases	
*Begin Date 11/27/2018		Activity Log	
Expire Date 12/31/2018		Document Status	
Renewal Date		Thresholds & Notifications	
Currency USD		<b>Amount Summary</b>	
Primary Contact		Maximum Amount 100,000.00 USD	
Supplier Contract Ref		Line Item Released Amount 0.00	
Description Oracle Tech Services		Category Released Amount 0.00	
Master Contract ID		Open Item Released Amount 0.00	
Tax Exempt ID		Total Released Amount 0.00	
<input type="checkbox"/> Tax Exempt			
<b>Order Contract Options</b>			

- 41.** Follow the specific controls in place in your department for contract approval of both the performance info page and the contract page. A purchase order can be applied to the contract only if it is in Approved status

## Entering a Service Contract is Complete

## Define Contract Alert Notification Parameters for a Contract

**Possible situations when this function is used:** Individuals responsible for Contract Maintenance have the need to identify Contracts that are nearing renewal, expiration, approval or maximum amount. Contract Alert Notifications can provide directed email messages for contracts that are nearing renewal, expiration, approval or maximum amount.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Contracts > Add/Update Contracts

**Navigator Menu navigation:** Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** button:

The screenshot shows the 'Contract Entry' page with a 'Find an Existing Value' section. At the top right of this section is a button labeled '+ Add a New Value'. Below the title is a 'Search Criteria' section with a dropdown arrow and the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two search history sections: 'Recent Searches' and 'Saved Searches', each with a dropdown menu and an edit icon. The main search area contains several criteria, each with a dropdown menu and a text input field: '\*SetID' (dropdown), 'STATE' (text), 'Contract ID' (dropdown 'begins with'), 'Contract Version' (dropdown), 'Origin' (dropdown 'begins with'), 'Version Status' (dropdown), 'Contract Style' (dropdown 'begins with'), 'Contract Process Option' (dropdown), 'Short Supplier Name' (dropdown 'begins with'), 'Supplier Name' (dropdown 'begins with'), 'Master Contract ID' (dropdown 'begins with'), and 'Description' (dropdown 'begins with'). Below these fields are two checkboxes: 'Case Sensitive' and 'Correct History'. At the bottom are two buttons: 'Search' (highlighted with a red box) and 'Clear'.

1. **Contract ID** - Enter a Contract ID number
2. **Contract Process Option** - Should always be Purchase Order
3. **Origin** - Your depts. origin code - **You should at least enter your dept.'s origin code to keep the search results more manageable**
4. **Short Supplier Name** - Enter Short Supplier name if known
5. Click **Search**

The **Contract Entry** page displays:

Contract Entry

Contract

SetID STATE  
Contract ID 00000000000000000000000030250  
\*Status **Approved**  
\*Origin FM

Contract Version  
Version 1  
Status Current  
Approved Date 10/01/2015

Administrator/Buyer RMCCUEN2 McCuen,Raya

▼ Header ?

Contract Style Purchase Order  
Process Option Purchase Order  
Supplier VERMONT TR-002  
Supplier ID 0000327756 Vermont Transparency, Inc.  
Begin Date 10/01/2015  
Expire Date 07/31/2017

Add Comments  
Contract Activities  
Primary Contact Info  
Contract Releases

Activity Log  
Document Status  
**Thresholds & Notifications**  
View Changes  
Current Change Reason

6. Click the **Thresholds & Notifications** link

The **Thresholds & Notifications** page displays:

Thresholds & Notifications

☒ **Send Date/Amount Notification**

**Expand All** Collapse All

► Date Notification

► Maximum Amount Notification

▼ Notification Assignments Personalize | Find | View All | [A] [B] First 1-2 of 2 Last

	Notification Type	User ID	User Description	Email Address		
1	Maximum Arr ▼	KSYMONDS	Karen L Symonds	karen.symonds@vermont.gov	+	-
2	Expiration ▼	KSYMONDS	Karen L Symonds	karen.symonds@vermont.gov	+	-

▼ Amount Summary

Maximum Amount	12,000.00	USD
Total Line Released Amount	11,125.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	
Remaining Amount	875.00	
Remaining Percent	7.29	

OK Cancel

7. Click the **Send Date/Amount Notification** checkbox

8. Click the **Expand All** link

The **Date Notification** and **Maximum Amount Notification** sections expand:

Thresholds & Notifications

☒ Send Date/Amount Notification

[Expand All](#) [Collapse All](#)

**▼ Date Notification**

Notify User when contract is within specified days of Expire Date.

Expire Date 07/31/2017 **Notify Days Before Expires** 30

Expiration Notification Date 07/01/2017

Notify User when contract is within specified days of Renewal Date.

Renewal Date **Notify Days Before Renewal**

Renewal Notification Date

**▼ 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** 1,000.00 USD

Percent Less than Maximum 8.33

Notification Amount 11,000.00

**▼ Notification Assignments** [Personalize](#) | [Find](#) | [View All](#) | [Print](#) | [Export](#) First 1-2 of 2 Last

	Notification Type	User ID	User Description	Email Address		
1	Maximum Arr	KSYMONDS	Karen L Symonds	karen.symonds@vermont.gov	+	-
2	Expiration	KSYMONDS	Karen L Symonds	karen.symonds@vermont.gov	+	-

**▼ Amount Summary**

Maximum Amount	12,000.00	USD
Total Line Released Amount	11,125.00	
Total Category Released Amount	0.00	
Open Item Released Amount	0.00	
Remaining Amount	875.00	
Remaining Percent	7.29	

9. For a notification on Expiration Date, enter a value in the Notify Days Before Expires box. (Note that the Expire Date of the Contract is displayed in this box. This value entered represents the Number of Days prior to this Expiration Date that the notification should be generated)
10. For a notification on Renewal Date, enter a value in the Notify Days Before Renewal box. (Note that the Renewal Date of the Contract (if applicable) is displayed in this box. This value entered represents the Number of Days prior to this Renewal Date that the notification should be generated)
11. For a notification on Maximum Amount, enter a value in the Amount Less than Maximum box. (Note that the Maximum of the Contract is displayed in this box. This value entered represents the dollar amount less than this maximum amount that the notification should be generated. Also note that the Percent Less than Maximum is automatically calculated based on this dollar amount)

To select the specific users that should receive a notification, first identify the Notification Type in the Notification Assignments section. (Note that the various types of notification include: Approval Due Date, Expiration, Maximum Amount and Renewal.)

Thresholds & Notifications

Expand All

Collapse All

▼ Date Notification

Notify User when contract is within specified days of Expire Date.

Expire Date

07/31/2017

Notify Days Before Expires

30

Expiration Notification Date

07/01/2017

Notify User when contract is within specified days of Renewal Date.

Renewal Date

Notify Days Before Renewal

Renewal Notification Date

▼ 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

1,000.00

USD



Percent Less than Maximum

8.33

Notification Amount

11,000.00



▼ Notification Assignments

Personalize | Find | View All |  

First

1-2 of 2

Last

	Notification Type	User ID	User Description	Email Address	
1	Maximum Arr ▼	KSYMONDS 	Karen L Symonds	karen.symonds@vermont.gov	<div><div>+</div><div>-</div></div>
2	Expiration ▼	KSYMONDS 	Karen L Symonds	karen.symonds@vermont.gov	<div><div>+</div><div>-</div></div>

▼ Amount Summary

Maximum Amount

12,000.00

USD

Total Line Released Amount

11,125.00

Total Category Released Amount

0.00

Open Item Released Amount

0.00

---

Remaining Amount

875.00

Remaining Percent

7.29

OK

Cancel

Select the User ID for the Notification Type via the User ID lookup. After you select the user, you will see the User Description and Email Address are then displayed

- To specify an additional Notification Assignment, click the plus sign icon in the Notifications Assignments section, and then specify the Notifcation Type and User ID (Step 12). (Note that you can have multiple Notification Types for the same User ID, or multiple User IDs for the same Notification Type based on your specific needs for the Contract)

- Click **OK**

Contracts - February 2024

Page 38 of 73

You are returned to the **Contract Entry** page:

The screenshot shows the 'Contract Entry' page with several sections:

- Order Contract Options:** Includes checkboxes for 'Allow Multicurrency PO', 'Corporate Contract', 'Lock Chartfields', 'Allow Open Item Reference', 'Adjust Supplier Pricing First', 'Price Can Be Changed on Order', 'Must Use Contract Rate Date', 'Auto Default', and a 'Dispatch Method' dropdown set to 'Print'. A 'Dispatch' button is also present.
- Contract Items:** A table with columns: Line, Item, Description, UOM, Category, Include for Release, and Status. The first row shows Line 1, Item (icon), Description 'Database work on vendors & salaries for SPOTLIGHT', UOM 'EA', Category '00101', and Status 'Active'.
- Contract Categories:** A table with columns: Line, Category, Description, and Status. The first row shows Line 1, Category (empty), Description (empty), and Status 'Active'.
- Buttons:** At the bottom, there is a 'Save' button (highlighted with a red box), 'Return to Search', 'Notify', 'Refresh', 'Add', 'Update/Display', and 'Correct History'.

14. Click the **Save** button to save the **Contract**

A Reason Code page will appear to allow you select a Reason Code and enter Comments related to the changes made for the Contract Thresholds and Notification:

The 'Reason Code Page' dialog box contains the following information:

- SetID STATE Contract ID:** 0000000000000000000030250
- Reason Code:** CHANGE (with a magnifying glass icon highlighted by a red box)
- Comment:** Updated Contract Alert Notifications as per the request of Agency.
- Use Same Reason Code:** An unchecked checkbox.
- Buttons:** OK, Cancel, and Refresh.

15. Select a **Reason Code** by clicking the magnifying glass icon to display all eligible values



Look Up Reason Code

Help

SetID

STATE

Reason Type

Procurement Contract

Reason Code

begins with

Description

begins with

Look Up

Clear

Cancel

Basic Lookup

Search Results

View 100

First

1-6 of 6

Last

Reason Code	Description
CHANGE	Change Order
ERROR	Error
EXPIRE	Contract Expired
EXTENSION	Extension
RELEERROR	Release Error
STATUS	STATUS

**16.** To enter further description related to your change, you can enter comments in the Comment box

The **Contract** is now saved with the defined Contract Alert Notifications.

***Note – The contract alert process will run nightly to produce notification emails. You must have “Email User” checked under Workflow Attributes on your My System Profile page for contract notifications to be sent. If this is not checked, no notification will be sent. It is also important to “mark as worked” any contract notification that you have received on your worklist once it has been addressed. Additional notifications for the same contract will not be sent unless all previous notifications have been “marked as worked”.***



## Create Contract Change/Amendment

**Situations when this function is used:** To extend the expiration date of a contract, to increase the maximum amount of the contract, or to designate a contract as a challenge for change contract. This should only be done after all required signatures have been obtained for the contract amendment.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Contracts > Add/Update Contracts

**Navigator Menu navigation:** Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** button:

The screenshot shows the 'Contract Entry' page with a 'Find an Existing Value' section. At the top right of this section is a button labeled '+ Add a New Value'. Below the title is a 'Search Criteria' section with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two search history sections: 'Recent Searches' and 'Saved Searches', each with a dropdown menu and an edit icon. The main search criteria area contains several fields, each with a dropdown menu and a search icon: '\*SetID' (set to '='), 'Contract ID' (set to 'begins with'), 'Contract Version' (set to '='), 'Origin' (set to 'begins with'), 'Version Status' (set to '='), 'Contract Style' (set to 'begins with'), 'Contract Process Option' (set to '='), 'Short Supplier Name' (set to 'begins with'), 'Supplier Name' (set to 'begins with'), 'Master Contract ID' (set to 'begins with'), and 'Description' (set to 'begins with'). A link 'Show fewer options' is visible below the 'Description' field. At the bottom of the search criteria area are two checkboxes: 'Case Sensitive' and 'Correct History'. At the very bottom are two buttons: 'Search' (highlighted with a red box) and 'Clear'.

1. **Contract ID** - Enter the contract ID number
2. **Contract Process Option** - Should always be Purchase Order
3. **Origin** - Enter your depts. origin code
4. **Short Supplier Name** - Enter the short supplier name if known
5. Click **Search**

**Note:** You should at least enter your dept.'s origin code to keep the search results more manageable

The **Contract** page displays:

Contract

VT Performance Info

Contract Entry

Contract

SetID STATE

Contract ID 000000000000000000030250

\*Status Open

\*Origin FM

Administrator/Buyer RMCCUEN2

McCuen, Raya

Contract Version

Version 1

Status Current

Approved Date 10/01/2015

▼ Header ?

\*Contract Style Purchase Order

Process Option Purchase Order

\*Supplier VERMONT TR-00

\*Supplier ID 0000327756

\*Begin Date 10/01/2015

Supplier Search

Vermont Transparency, Inc.

Add Comments

Contract Activities

Primary Contact Info

Contract Releases

Activity Log

Document Status

Thresholds & Notifications

View Changes

Current Change Reason

**6.** Change the Status to **Open**, this will allow access to fields on the contract for updates

In this example, the new contract maximum amount has been increased by \$200,000 and the contract is now a “challenges for change” contract so the performance page must be filled out.

[illegible]

7. Click on the **Contract Activities** link

The **Contract Activities** page displays:



Contract Activities

Contract Entry

Contract Activities

SetID STATE Contract ID 000000000000000000000000030250 Version 1

Activities Personalize | Find | View All | First 1 of 1 Last

Version	*Due Date	Done	*Comments
1 1	10/08/2015	<input checked="" type="checkbox"/>	Approved on 3/31/16 with signatures. KS

OK Cancel Refresh

This is the page where **all contract activity**, such as approvals and amendments, **MUST** be recorded. This information is required. You should also include initials of the person who updated this information. For example: "Approved on 3/31/16 with signatures. KS" "Amendment #1 on 4/15/16 to increase maximum amount by \$200,000 from \$537,881.00 to \$737,881.00. KS"

In the case of an amendment, provide a description of what was updated, and you **must** include the contract amendment number from the AA-14.



Contract Activities

Contract Entry

Contract Activities

SetID STATE Contract ID 000000000000000000000000030250 Version 1

Activities Personalize | Find | View All | First 1 of 1 Last

Version	*Due Date	Done	*Comments
1 1	10/08/2015	<input checked="" type="checkbox"/>	Approved on 3/31/16 with signatures. KS

OK Cancel Refresh

- To insert a row click the plus sign + at the end of the row

A new **Activities** line opens:

**Contract Activities**

Contract Entry

**Contract Activities**

SetID STATE Contract ID 00000000000000000000000030250 Version 1

Version	*Due Date	Done	*Comments
1 1	10/08/2015	<input checked="" type="checkbox"/>	Approved on 3/31/16 with signatures. KS
2 1	10/08/2018	<input checked="" type="checkbox"/>	Amendment on 10/8/18 to increase value by \$200,000. KS

OK Cancel Refresh

9. Enter the current date in the **Due Date** field, check the **Done** box, enter all comments related to this amendment

10. Click **OK**

The **Contract** page displays:

**Contract**

Contract Entry

**Contract**

SetID STATE Contract ID 00000000000000000000000030250 Contract Version 1 Status Current

\*Status Open \*Origin FM Approved Date 10/01/2015

Administrator/Buyer RMCCUEN2 McCuen, Raya

**Header**

\*Contract Style Purchase Order Add Comments Activity Log

Process Option Purchase Order Contract Activities Document Status

\*Supplier VERMONT TR-002 Supplier Search Primary Contact Info

\*Supplier ID 0000327756 Vermont Transparency, Inc. Contract Releases View Changes

\*Begin Date 10/01/2015

Expire Date 07/31/2017

Renewal Date

Currency USD CRRNT

Primary Contact

Supplier Contract Ref

Description SPOTLIGHT

Master Contract ID

Tax Exempt ID

☐ Tax Exempt

**Amount Summary**

Maximum Amount	15,000.00	USD
Line Item Released Amount	11,125.00	
Category Released Amount	0.00	
Open Item Released Amount	0.00	
Total Released Amount	11,125.00	
Remaining Amount	3,875.00	
Remaining Percent	25.83	

11. Click on the **Add Comments** link

The **Contract Comments** page displays:

Contract Comments

Help

Contract Entry

Header Comments

SetID STATE Contract ID 000000000000000000000000030250 Version 1

☒ Retrieve Active Comments Only

Retrieve

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending Sort

Comments Find View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate +

☐ Send to Supplier ☐ Show at Receipt ☐ Copy to Purchase Order  
☐ Show at Voucher

Associated Document

Attachment Attach View Delete Email

From -> CNT STATE-000000000000000000000000030250

OK Cancel Refresh

**12.** In the Comments line click **View All** (if available). If there are multiple comments, all comments will appear on the page

Contract Comments

Contract Entry

### Header Comments

SetID STATE Contract ID 000000000000000000000000030250 Version 1

☒ Retrieve Active Comments Only Retrieve

\*Sort Method Comment Time Stamp \*Sort Sequence Ascending Sort

Comments Find | View All First 1 of 1 Last

Use Standard Comments Comment Status Active Inactivate +

☐ Send to Supplier ☐ Show at Receipt ☐ Copy to Purchase Order

☐ Show at Voucher

**Associated Document**

Attachment Attach View Delete ☐ Email

From -> CNT STATE-000000000000000000000000030250

OK Cancel Refresh

13. Place your cursor in the last comment text box and click on the plus sign + on the right side of the screen. This will insert a row for you to add the comments about the amendment. In this example there is no need to insert a row as the current row is blank. These comments can either be typed in again or copied from the Contract Activities link and pasted in the new row
14. Click on **Send to Supplier** if the comments should be displayed on the contract when it prints.
15. Click **OK**

You will be returned to the **Contract** page:

Contract

VT Performance Info

Contract Entry

Contract

SetID STATE

Contract ID 0000000000000000000030250

\*Status Open

\*Origin FM

Administrator/Buyer RMCCUEN2

McCuen,Raya

Contract Version

Version 1

Status Current

Approved Date 10/01/2015

Header

\*Contract Style Purchase Order

Process Option Purchase Order

\*Supplier VERMONT TR-00

\*Supplier ID 0000327756

\*Begin Date 10/01/2015

Expire Date 07/31/2017

Renewal Date

Currency USD

CRRNT

Primary Contact

Supplier Contract Ref

Description SPOTLIGHT

Master Contract ID

Tax Exempt ID

Tax Exempt

Supplier Search

Vermont Transparency, Inc.

Add Comments

Contract Activities

Primary Contact Info

Contract Releases

Activity Log

Document Status

Thresholds & Notifications

View Changes

Current Change Reason

Amount Summary

Maximum Amount

200,000.00

USD

Line Item Released Amount

11,125.00

Category Released Amount

0.00

Open Item Released Amount

0.00

Total Released Amount

11,125.00

Remaining Amount

188,875.00

Remaining Percent

94.44



**16. Change the Maximum Amount from \$15,000.00 to \$215,000.00. Note: If you have set a maximum line amount you must also update that:**

ems

th

Item Search

Search for Contract Lines

Personalize | Find | View All |   First  1

Order By Amount


Item Information

Default Schedule

Release Amounts

Release Quantities

Line Groupings



Item	Description	Minimum Line Amount	Maximum Line Amount	Total Line Released Amount	Remaining Amount	Curr	Remaining
	OPG Guardianship Evaluations		80,000.00	79,229.78	\$770.22	USD	

**17.** Click on the **Performance Info** tab








**Reason Code Page** Help

Enter a reason code and comment for making changes that are being tracked.

**SetID** STATE      **Contract ID** 0000000000000000000030250

**Reason Code** CHANGE 

**Comment** Updated Contract Alert Notifications as per the request of Agency.  

☐ Use Same Reason Code

**OK** **Cancel** **Refresh**

19. Select a **Reason Code** by clicking the magnifying glass icon to display all eligible values

**Look Up Reason Code** Help

**SetID**      **STATE**



**Reason Type**      **Procurement Contract**

**Reason Code** begins with

**Description** begins with

**Look Up** **Clear** **Cancel** **Basic Lookup**

**Search Results**

View 100 First  1-6 of 6  Last

Reason Code	Description
CHANGE	Change Order
ERROR	Error
EXPIRE	Contract Expired
EXTENSION	Extension
RELEERROR	Release Error
STATUS	STATUS

20. Click on the appropriate reason code. (Note that after you select the Reason Code, the Comment box will display a default value)





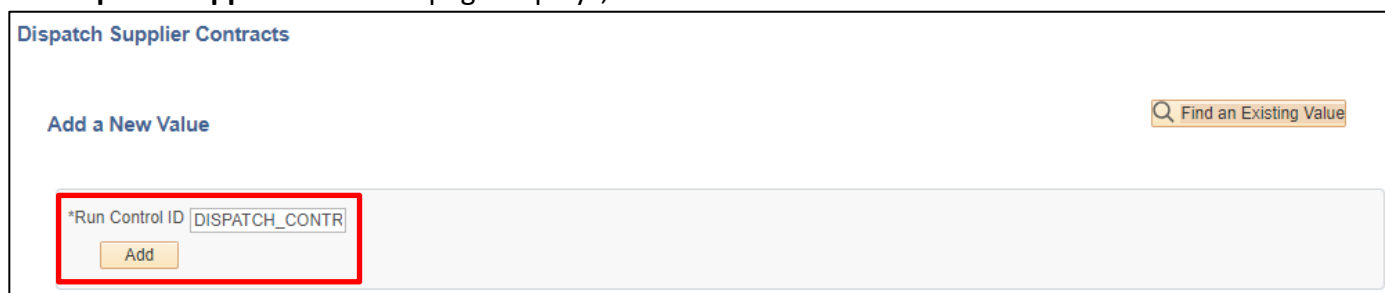
## Print/Dispatch Contract

A Contract can be dispatched (printed) using the “Dispatch Contracts” selection from the menu after the contract has been approved and saved. General contracts cannot be printed/dispatched.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Contracts > Dispatch Contracts

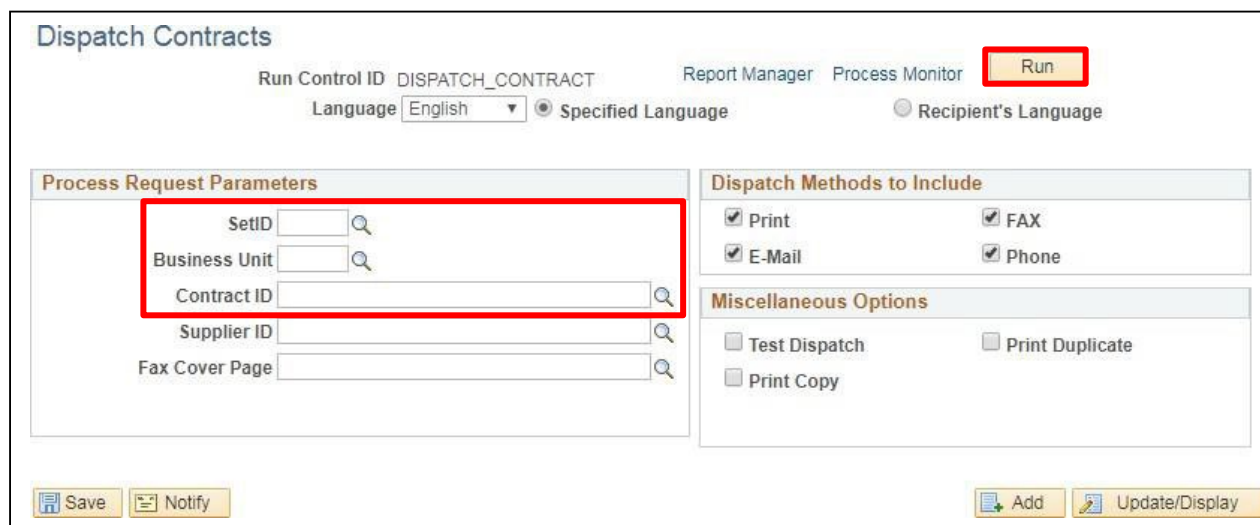
**Navigator Menu navigation:** Procurement Contracts > Dispatch Contracts

The **Dispatch Supplier Contracts** page displays, click on the **Add a New Value** tab:



1. **Run Control ID** - Enter a new run control ID, ex: DISPATCH\_CONTRACT
2. Click **Add**

The **Dispatch Contracts** page displays:



3. **Set ID** - Enter STATE
4. **Business Unit** - For CPS users only - To print a CP or CPS contract, enter “PURCH” for the business unit. If this is a CP or CPS contract and you want to print it but don’t have the PURCH option, then leave the business blank. The contract will print, and the only difference will be the State of Vermont address in the left-hand corner will not appear. If this contract originates from your Department, enter your Business Unit
5. **Contract ID** - Enter Contract ID #
6. Click **Run**

The **Process Scheduler Request** page displays:

Process Scheduler Request

User ID DBROCHU Run Control ID DISPATCH\_CONTRACT

Server Name  Run Date

Recurrence  Run Time

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Contract Dispatch & Email	CONDISP	PSJob	(None) ▾	(None) ▾	Distribution
<input checked="" type="checkbox"/>	Vendor Contract Dispatch/Print	POCNT100	SQR Report	Web ▾	PDF ▾	Distribution
<input type="checkbox"/>	Email	PO_CON_EMAIL	Application Engine	Web ▾	TXT ▾	Distribution

7. Select the **checkbox** next to Vendor Contract Dispatch/Print (POCNT100)
8. Click **OK**

The **Dispatch Contracts** page displays:

### Dispatch Contracts

Run Control ID DISPATCH\_CONTRACT **Report Manager** Process Monitor

Language  ☒ Specified Language ☐ Recipient's Language

Process Instance: 9196627

Process Request Parameters	Dispatch Methods to Include
SetID <input type="text" value="STATE"/> <input type="button" value="Q"/>	<input checked="" type="checkbox"/> Print <input checked="" type="checkbox"/> FAX
Business Unit <input type="text" value="PURCH"/> <input type="button" value="Q"/>	<input checked="" type="checkbox"/> E-Mail <input checked="" type="checkbox"/> Phone
Contract ID <input type="text" value="0000000000000000000014580"/> <input type="button" value="Q"/>	<b>Miscellaneous Options</b>
Supplier ID <input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/> Test Dispatch <input type="checkbox"/> Print Duplicate
Fax Cover Page <input type="text"/> <input type="button" value="Q"/>	<input type="checkbox"/> Print Copy

9. Click the **Report Manager** link

List

Explorer

Administration

Archives

View Reports For

User ID

EHOEFEL

Type

Last

1

Days

Refresh

Status

Folder

Instance

to

Report List

<<

<

1-17 of 17

>

>>

View All

Select	Report ID	Prcls Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514028	12437162	Vendor Contract Dispatch/Print	01/18/2024 1:56:35PM	Acrobat (*.pdf)	Posted	Details

A new browser window will open displaying the contract:

<b>State of Vermont</b> Buildings and General Services Office of Purchasing & Contracting 109 State St Montpelier VT 05609-3001 USA	<h1 style="margin: 0;">CONTRACT</h1>																									
<p><b>Supplier    0000018606</b></p> <p><b>Center for Technology Commercialization</b></p> <p><b>134 Flanders Rd Ste 225</b></p> <p><b>Westborough MA 01581</b></p> <p><b>USA</b></p>																										
<p><b>Phone #:</b></p>																										
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2"><b>Contract ID</b></td> <td align="right"><b>Page</b></td> </tr> <tr> <td colspan="2">00000000000000000000000014580</td> <td align="right">1 of 4</td> </tr> <tr> <td><b>Contract Dates</b></td> <td><b>Origin</b></td> <td></td> </tr> <tr> <td>02/02/2009 to 02/02/2010</td> <td>CPS</td> <td></td> </tr> <tr> <td><b>Description:</b></td> <td colspan="2"><b>Contract Maximum</b></td> </tr> <tr> <td>CPS-EDSS</td> <td colspan="2">\$14,811.50</td> </tr> <tr> <td><b>Buyer Name</b></td> <td><b>Buyer Phone</b></td> <td><b>Contract Status</b></td> </tr> <tr> <td>Smith, Steven D</td> <td>828-4681</td> <td>Closed</td> </tr> </table>			<b>Contract ID</b>		<b>Page</b>	00000000000000000000000014580		1 of 4	<b>Contract Dates</b>	<b>Origin</b>		02/02/2009 to 02/02/2010	CPS		<b>Description:</b>	<b>Contract Maximum</b>		CPS-EDSS	\$14,811.50		<b>Buyer Name</b>	<b>Buyer Phone</b>	<b>Contract Status</b>	Smith, Steven D	828-4681	Closed
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00000000000000000000000014580		1 of 4																								
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Smith, Steven D	828-4681	Closed																								
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th align="left">Line #</th> <th align="left">Item ID</th> <th align="left">Item Desc</th> <th align="left">UOM</th> <th align="right">Unit Price</th> <th align="right">Max Qty</th> <th align="right">Max Amt</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>EDSS - ENVIRONMENTAL DESIGN FOR SAFETY &amp; SECURITY</td> <td>EA</td> <td align="right">14,811.50000</td> <td align="right">0.00</td> <td align="right">0.00</td> </tr> </tbody> </table>			Line #	Item ID	Item Desc	UOM	Unit Price	Max Qty	Max Amt	1		EDSS - ENVIRONMENTAL DESIGN FOR SAFETY & SECURITY	EA	14,811.50000	0.00	0.00										
Line #	Item ID	Item Desc	UOM	Unit Price	Max Qty	Max Amt																				
1		EDSS - ENVIRONMENTAL DESIGN FOR SAFETY & SECURITY	EA	14,811.50000	0.00	0.00																				
<p><b>CONTRACTORS' RESPONSIBILITIES:</b></p> <ol style="list-style-type: none"> <li>RESEARCH THE SPECIFIC NEEDS OF THE STATE OF VERMONT DEPARTMENT OF BUILDINGS AND GENERAL SERVICES, SECURITY DIVISION.</li> <li>WORK WITH THE VERMONT DEPARTMENT OF HOMELAND SECURITY AND THEIR LIST OF CRITICAL INFRASTRUCTURE.</li> </ol>																										



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## Close a Contract

**Situations when this function is used:** The contract period has expired, and all related purchase orders are in complete status. Follow specific controls in place in your department for closing contracts.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Contracts > Add/Update Contracts

**Navigation Menu navigation:** Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** button:

The screenshot shows the 'Contract Entry' page. At the top, there is a 'Find an Existing Value' button and an 'Add a New Value' button. Below these is a 'Search Criteria' section with a prompt: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria section includes two dropdown menus for 'Recent Searches' and 'Saved Searches', both set to 'Choose from recent searches' and 'Choose from saved searches' respectively. Below these are several search fields: '\*SetID' (dropdown), 'Contract ID' (dropdown with 'begins with' and text input '000000000000000014319'), 'Contract Version' (dropdown), 'Origin' (dropdown with 'begins with' and text input), 'Version Status' (dropdown), 'Contract Style' (dropdown with 'begins with' and text input), 'Contract Process Option' (dropdown), 'Short Supplier Name' (dropdown with 'begins with' and text input), 'Supplier Name' (dropdown with 'begins with' and text input), 'Master Contract ID' (dropdown with 'begins with' and text input), and 'Description' (dropdown with 'begins with' and text input). There are also checkboxes for 'Case Sensitive' and 'Correct History'. At the bottom, there are 'Search' and 'Clear' buttons. The 'Search' button is highlighted with a red box.

1. **Contract ID** - Enter the contract ID number
2. **Contract Process Option** - Should always be Purchase Order
3. **Origin** - Enter your depts. origin code
4. **Short Supplier Name** - Enter the short supplier name if known

**Note:** You should at least enter your dept.'s origin code to keep the search results more manageable

5. Click **Search**

The **Contract** page is displayed:

[illegible]

6. Click on the **Contract Activities** link

The **Contract Activities** page displays:

[illegible]

7. Click on **+** to add a comment line



A new line opens:

Contract Activities

Contract Entry

Contract Activities

SetID STATE Contract ID 0000000000000000000014319 Version 1

Activities Personalize | Find | View All | First 1-3 of 3 Last

Version	*Due Date	Done	*Comments
1 1	04/03/2017	<input checked="" type="checkbox"/>	Expired contract closed via script, see FP 3085
2 1	11/21/2008	<input checked="" type="checkbox"/>	Entered Contract 11-21-08. KSymonds.
3 1	11/29/2018	<input checked="" type="checkbox"/>	Contract no longer needed. Closing. ETest

OK Cancel Refresh

8. Enter current date in **Due Date** and add a comment describing why the contract is being closed

9. Click **OK**

**Special Note: The contract will not be available to close if any of the associated purchase orders are not in Completed status. To determine which purchase orders are not in Completed status, refer to the instructions for Contract Document Status Inquiry.**

You are returned to the **Contract Entry** page:

Contract VT Performance Info

Contract Entry

Contract

SetID STATE Contract ID 0000000000000000000014319 Contract Version Version 1 Status Current

\*Status Closed \*Origin FM Approved Date 11/21/2008

Administrator/Buyer KPEARSON Kim A Pearsons

Header

Contract Style Purchase Order Add Comments Activity Log

Process Option Purchase Order Contract Activities Document Status

Supplier TRANSAMERI-005 Primary Contact Info Thresholds & Notifications

Supplier ID 0000281185 TransAmerica Training Management Inc Contract Releases

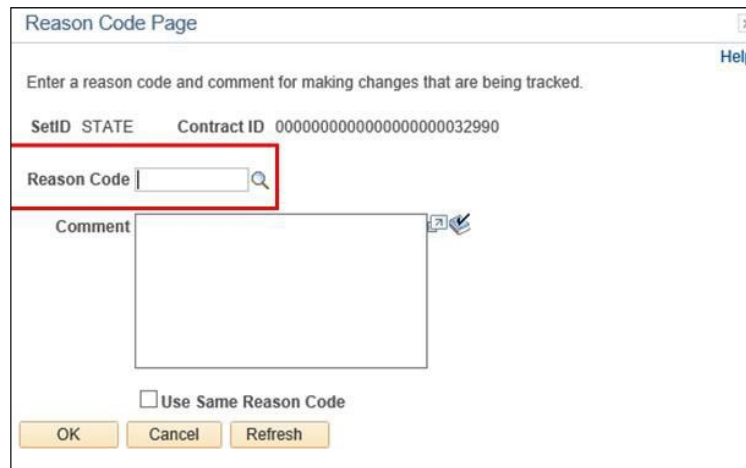
Begin Date 11/21/2008

Expire Date 10/31/2009

10. Using the drop-down list, change the Status to **Closed**

11. At the bottom of the Contract Entry page, click **Save**

A **Reason Code** page will display prompting you to record a reason for the closure:



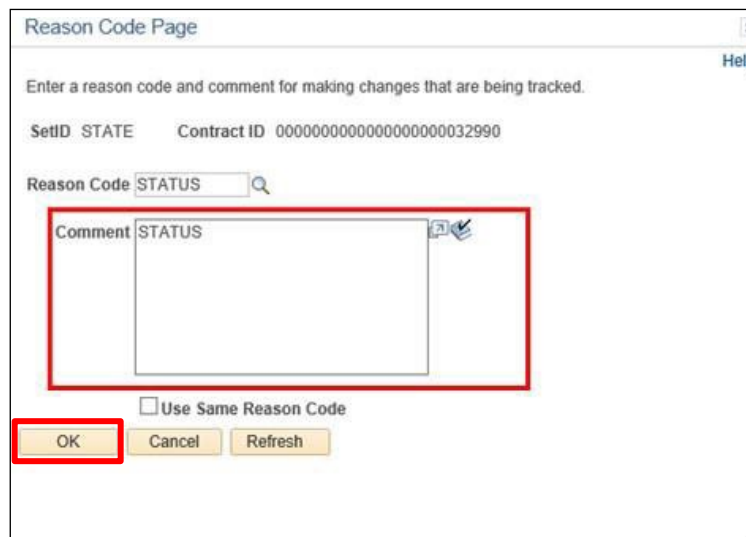
The 'Reason Code Page' dialog box contains the following elements:

- Header: Reason Code Page
- Help button: Help
- Instruction: Enter a reason code and comment for making changes that are being tracked.
- Fields: SetID, STATE, Contract ID (000000000000000000000000032990)
- Reason Code input field with a search icon (highlighted with a red box)
- Comment text area with a search icon
- Checkbox: ☐ Use Same Reason Code
- Buttons: OK, Cancel, Refresh

12. Select the appropriate **Reason Code** from the following values:

Reason Code	Description
CHANGE	Change Order
ERROR	Error
EXPIRE	Contract Expired
EXTENSION	Extension
RELEERROR	Release Error
STATUS	STATUS

Once you have selected the Reason Code, default descriptive text will appear in the **Comment** box that you can update accordingly:



The 'Reason Code Page' dialog box is shown with the following updates:

- Reason Code input field: STATUS (highlighted with a red box)
- Comment text area: STATUS (highlighted with a red box)
- OK button: Highlighted with a red box

13. Click **OK** to return to the **Contract Entry** page

### Close a Contract is Complete

## Contract Document Status Inquiry

**Situations when this function is used:** Determining what Purchase Orders have been entered against a Contract, the document date, what status the purchase orders are in, and the amount released against the Contract.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Contracts > Contract Document Status

**Navigator Menu navigation:** Procurement Contracts > Add/Update Contracts

The **Contract Status Inquiry** page displays:

**Contract Document Status Inq**

**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 begins with STATE  
Contract ID begins with 000000000000000018353  
[Show fewer options](#)

**Search** Clear

1. **SetID** - STATE
2. **Contract ID** - Enter contract ID # (be sure to include the leading zeros)
3. Click **Search**

The **Document Status** page displays:

**Document Status**

SetID STATE Contract 0000000000000000000018353  
Document Date 10/01/2010 Status Closed  
Currency USD Document Type Contract  
Buyer Patry,John B Released Amount 81,795.50  
Short Supplier Name ATWOODGAR-001

Requisitions Procurement Contracts Purchase Orders(50) Receipts Returns Vouchers Payments

1 to 2 of 50

Show All

**Associated Document** Personalize Find View All First 1-2 of 2 Last

Documents	Related Info	Actions	Business Unit	Document Type	DOC ID	Status	Document Date	Supplier ID	Location
▼ Actions	02150	Purchase Order	0000004235	Compl	11/03/2010	0000082775	MULTIPLE		
▼ Actions	02150	Purchase Order	0000004278	Compl	12/09/2010	0000082775	MULTIPLE		

[Return to Search](#)

4. Click on any active link to view additional information for those specific links

**Contract Document Status Inquiry is Complete**

## Inquire on Purchase Orders Against a Contract

**Situations when this function is used:** You need to know what Purchase Orders have been issued drawing down this contract.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Contracts > Review Contract Purchase Orders

**Navigator Menu navigation:** Procurement Contracts > Review Contract Information > Review Contracts by PO

The **Review Contracts by PO** page displays:

**Review Contracts by PO**

\*SetID

\*Contract ID   BGS - BOILER WATER SERVICES

Version

Item ID

Category Code

Contract Line

Category Line Number

**Search Options**

☒ PO with Contract

☐ PO without Contract

**List of Purchase Orders** [Personalize](#) | [Find](#) | [View All](#) |   First 1 of 1 Last

	Version	Business Unit	Purchase Order	Line	Line Status	Up-To-Date Quantity	Up-To-Date Amount	Item ID	More Information
<input type="checkbox"/>									

1. Enter your **Contract ID** number (in this example use #8355 with the leading zeros), when you tab out of the field the check boxes in the upper right become active. Click the **PO with Contract** check box, once you click the check box the Search button becomes active
2. Click **Search** - search results appear beneath **List of Purchase Orders**

### 3. Scroll down the page

- By selecting the **check box** next to a specific PO, the **Inquire** and **Activity Summary** links at the bottom of the page become active allowing you to drill back further for additional information.

## Contracts - February 2024

5. Clicking the **Inquire** link will open a new window displaying the Purchase Order Inquiry page:

Purchase Order Inquiry

**Purchase Order**

Business Unit 01181 PO Status Compl  
PO ID 0000005005 Budget Status Valid

**Header**

PO Date 04/25/2006 Doc Tol Status Valid  
Supplier Name JOHNSONDIV-001 Backorder Status Not Backordered  
Supplier ID 0000011256 Supplier Details Receipt Status Received  
Buyer BWATSON ☐ Hold From Further Processing  
PO Reference BGS - BOILER WATER SERVICES

**Amount Summary**

Header Details Merchandise 253.75  
All RTV Freight/Tax/Misc. 0.00  
Matching Header Comments Total 253.75 USD  
Document Status Encumbrance Balance 0.00 USD  
▼ Actions

**Lines** Personalize | Find | View All | First 1 of 1 Last

Line	Item ID	Item Description	Category	PO Qty	UOM	Merchandise Amount	Status
1		Provide water treatment servic	00101	25375.0000	EA	253.75 USD	Closed

[Return to Search](#) [Notify](#) [Related Links](#)

6. Clicking on the **Activity Summary** link will open a new window displaying the **Activity Summary** page

**Activity Summary**

Business Unit 01181 PO Status Compl  
Purchase Order 0000005005 Supplier JohnsonDiversey Inc  
Supplier Location MULTIPLE

Merchandise Amount 253.75 USD  
Merchandise Receipt 0.00 USD  
Merchandise Returned 0.00 USD  
Merchandise Invoice 253.75 USD  
Merchandise Matched 253.75 USD

**Lines** Personalize | Find | View All | First 1 of 1 Last

[Details](#) [Receipt](#) [Invoice](#) [Matched](#) [RTV](#) [PDF](#)

Line	Item	Item Description	UOM	Manufacturer ID	Mfg Itm ID
1		Provide water treatment servic	EA		

[Return to Search](#) [Notify](#)

**Inquiring on Purchase Orders against a Contract is Complete**

## Contracts by Origin Code Report

**Situations when this function is used:** A report of all Approved, Open, or Closed contracts for your department.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Processes pagelet > Procurement Contracts > VT Contracts by Origin

**Navigator Menu navigation:** Procurement Contracts > Reports > VT Contracts by Origin

The **VT Contracts by Origin** page displays, click on the **Add a New Value** button:



The screenshot shows the 'VT Contracts by Origin' page. At the top left, the title 'VT Contracts by Origin' is displayed. Below it, there is a section with two buttons: 'Add a New Value' on the left and 'Find an Existing Value' on the right. Below these buttons is a form area. In the form area, there is a label '\*Run Control ID' followed by a text input field containing 'VT\_CONTRACTS\_'. Below the input field, there is a button labeled 'Add', which is highlighted with a red rectangular box.

1. **Run Control ID** - Enter a run control ID. If you already have a Run Control ID click the **Find an Existing Value** tab, enter the Run Control ID or a portion of it and click **Search**

***\*Run Controls are operator specific – it is important to remember you should not cross modules with your run controls – doing so may cause the run control to become corrupt.***

2. Click **Add**



The **Run Control** page displays:

Vtpor001

Run Control ID VT\_CONTRACTS\_BY\_ORIGIN Report Manager Process Monitor **Run**

Language English

**Report Request Parameters**

Origin: FM (Optional)

Supplier ID: (Optional)

Contract Status: Approved (Optional)

Primary Buyer: (Optional)

Save Notify Add Update/Display

3. **Origin Code** - Enter your dept origin code or, enter CP or CPS to view Central Purchasing Contracts
4. **Supplier ID** - Enter a supplier ID if you are searching for a specific supplier contract
5. **Contract Status** - Choose a value from the drop-down menu to help keep the report size manageable
6. **Primary Buyer** - Enter a primary buyer if you want to view contracts for a specific Primary Buyer
7. Click **Run**

The **Process Scheduler Request** window opens:

Process Scheduler Request

User ID DBROCHU Run Control ID VT\_CONTRACTS\_BY\_ORIGIN

Server Name Run Date 11/29/2018

Recurrence Run Time 12:54:32PM Reset to Current Date/Time

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Contracts by Origin Report	VTPOR001	SQR Report	Web	PDF	Distribution

OK Cancel

8. Click **OK**



You are brought back to the **Run Control** page:

Vtpor001

Run Control ID: VT\_CONTRACTS\_BY\_ORIGIN **Report Manager** Process Monitor Run

Language: English

**Report Request Parameters**

Origin: FM (Optional)

Supplier ID: (Optional)

Contract Status: Approved (Optional)

Primary Buyer: (Optional)

Save Notify Add Update/Display

9. Click the **Report Manager** link

The **Report Manager** page displays, click on the **Administration** tab:

List Explorer **Administration** Archives

**View Reports For**

User ID: EHOEFEL Type: Last 1 Days Refresh

Status: Folder: Instance: to:

**Report List**


Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514029	12437163	<b>Contracts by Origin Report</b>	01/18/2024 2:17:43PM	Acrobat (*.pdf)	Posted	Details

10. Click **Refresh** until the Status = **Posted**

11. Click the **Contracts by Origin Report** link in the Description column

A new browser window will open displaying the report:

State of Vermont										
Report ID: VTFOR001.SQR		List of Contracts by Origin Code (Departments)						Date: 29-NOV-2018		
Origin: FM		Finance & Management						12:55:38.000000_PM		
Contract Id	Contract Description	Vendor Id	Vendor Name	Contract Status	Buyer Id	Contract Begin Date	Contract Expire Date	Contract Max Amount	Amt Relsd on Contract	
000020987	Tech Support for	0000012725	CGI Technolog	Approv	CTOUCHET	11/09/11	01/13/22	3,499,646.00	3,129,269.00	
000034219	Consulting - VISI	0000362548	Sierra-Cedar,	Approv	CTOUCHET	06/26/17	04/30/19	4,959,293.00	1,146,682.00	
000036267	PO-101	0000362548	Sierra-Cedar,	Approv	KSYMONDS	01/01/18	09/03/18	1,000.00	0.00	
000036271	cpntact for po-25	0000084643	CherryRoad Te	Approv	KSYMONDS	08/25/18	08/25/19	25,000.00	2,400.00	
Records Printed: 4										
VTFOR001.SQR Contracts by Origin Code Report Run Sucessfully										

12. You can print this report using the printer icon  in the tool bar

**VT Contracts by Origin Report is Complete**

## Contract Expiration Report

**Situations when this function is used:** Periodically the Contract Expiration Report should be run as part of managing your department contracts. The report will show what contracts have expired or are due to expire by the date you enter.

**WorkCenter navigation:** Purchasing WorkCenter > Reports/Processes pagelet > Procurement Contracts > Vt Contracts to Expire

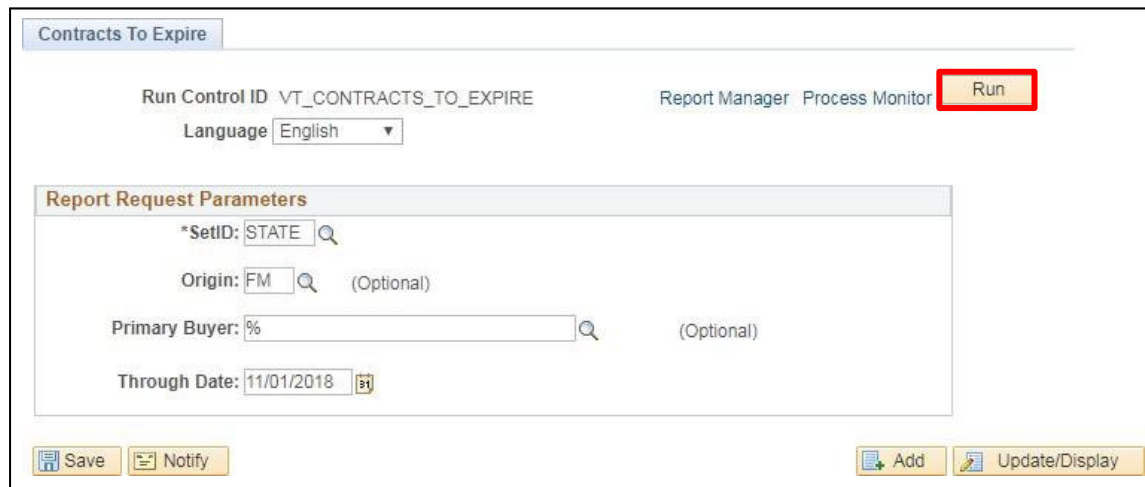
**Navigator Menu navigation:** Procurement Contracts > Reports > VT Contracts to Expire

The VT Contracts to Expire page displays, click on the **Add a New Value** button:



1. **Run Control ID** - Enter a Run Control ID
2. Click **Add**

The **Contracts To Expire** page displays:



3. **SetID** - STATE, do not change the default
4. **Origin Code** - This report should always be run using your department Origin code (example: FM, DPS, FPR, etc. Running this report using your origin code will help keep the report size manageable)
5. **Primary Buyer** - Enter if you have this information, keep in mind if you enter a primary buyer the report results will be only for that primary buyer and not for all buyers. Entering a % will return data for all buyers
6. **Through Date** - Example: 11/01/2018, this will also help keep the results manageable
7. Click **Run**

The **Process Scheduler** page displays:

The screenshot shows the 'Process Scheduler Request' dialog box. At the top, it displays 'User ID DBROCHU' and 'Run Control ID VT\_CONTRACTS\_TO\_EXPIRE'. Below this are fields for 'Server Name', 'Run Date' (12/01/2018), 'Recurrence', 'Run Time' (8:36:14AM), and 'Time Zone'. A 'Reset to Current Date/Time' button is next to the Run Time field. The 'Process List' section contains a table with one entry: VT\_RPTPO005, VT\_RPTPO005, Application Engine. The '\*Type' dropdown is set to 'Web' and the '\*Format' dropdown is set to 'PDF'. At the bottom, there are 'OK' and 'Cancel' buttons.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	VT_RPTPO005	VT_RPTPO005	Application Engine	Web	PDF	Distribution

8. Ensure the **\*Type = Web** and the **\*Format = PDF**

9. Click **OK**

You are brought back to the **Run Control** page:

The screenshot shows the 'Contracts To Expire' Run Control page. It displays 'Run Control ID VT\_CONTRACTS\_TO\_EXPIRE' and 'Language English'. There are links for 'Report Manager', 'Process Monitor', and a 'Run' button. Below this is the 'Report Request Parameters' section with fields for '\*SetID: STATE', 'Origin: FM', 'Primary Buyer: %', and 'Through Date: 12/01/2018'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

10. Click on the **Report Manager** link

The **Report Manager** page displays, click on the **Administration** tab:

List Explorer **Administration** Archives

**View Reports For**

User ID: EHOEFEL Type: [v] Last: [v] 1 Days: [v] **Refresh**

Status: [v] Folder: [v] Instance: [v] to: [v]

**Report List**


[Grid Icon] [Search Icon] 1-17 of 17 > > | View All

Select	Report ID	Pres Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	5514031	12437164	<b>VTRPTPO0005 - VT Contracts to Expire.pdf</b>	01/18/2024 2:23:55PM	Acrobat (*.pdf)	Posted	<a href="#">Details</a>

11. Click the **Refresh** button until the **Status = Posted**

12. Click on the **VT Contracts to Expire Report.pdf** link in the Description column

A new browser window will open displaying the report:



State of Vermont

Contracts Due To Expire


Report Definition: VTRPTPO005

Page: 1 of 1

Run Date: 12/1/2018

Run Time: 08:37:23 AM

Origin	Buyer	Expire Dt	Contract Number	Contract Descr	Supplier	Name	Max Amt	Released Amt
FM	RMCCUEN2	2017-07-31	000000000000000000030250	SPOTLIGHT	0000327756	Vermont Transparency, Inc.	12,000.00	11,125.00

13. You can print this report using the printer icon  in the tool bar.

**Contracts to Expire Report is Complete**

## Review Contract Change History

**Possible situations when this function is used:** Auditing and tracking of changes to contracts require the need to review changes made to a Contract. VISION Contract change tracking provides an audit trail of key contract transactional information that identifies who made what change and when the change was made.

**WorkCenter navigation:** Purchasing WorkCenter > Links pagelet > Contracts > Add/Update Contracts

**Navigator Menu navigation:** Procurement Contracts > Add/Update Contracts

The **Contract Entry** page displays, click on the **Find an Existing Value** button:

The screenshot shows the 'Contract Entry' page with a 'Find an Existing Value' section. At the top right of this section is a button labeled '+ Add a New Value'. Below the title is a 'Search Criteria' section with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two dropdown menus for 'Recent Searches' and 'Saved Searches', both labeled 'Choose from recent searches' and 'Choose from saved searches' respectively. Below these are several search criteria fields, each with a dropdown menu and a search icon: '\*SetID' (dropdown), 'STATE' (text), 'Contract ID' (dropdown with 'begins with' selected, text '000000000000000030250'), 'Contract Version' (dropdown), 'Origin' (dropdown with 'begins with' selected), 'Version Status' (dropdown), 'Contract Style' (dropdown with 'begins with' selected), 'Contract Process Option' (dropdown), 'Short Supplier Name' (dropdown with 'begins with' selected), 'Supplier Name' (dropdown with 'begins with' selected), 'Master Contract ID' (dropdown with 'begins with' selected), and 'Description' (dropdown with 'begins with' selected). Below the fields are two checkboxes: 'Case Sensitive' and 'Correct History'. At the bottom are two buttons: 'Search' (highlighted with a red box) and 'Clear'.

1. **Contract ID** - Enter a Contract ID number
2. **Contract Process Option** - Should always be Purchase Order)
3. **Origin** - Your depts. origin code - **You should at least enter your dept.'s origin code to keep the search results more manageable**
4. **Short Supplier Name** - Enter Short Supplier name if known
5. Click **Search**

The **Contract Entry** page displays:

Contract

VT Performance Info

Contract Entry

Contract

SetID STATE

Contract ID 0000000000000000000030250

\*Status Approved

\*Origin FM

Contract Version

Version 1

Status Current

Approved Date 10/01/2015

Administrator/Buyer RMCCUEN2

McCuen,Raya

Header

Contract Style Purchase Order

Process Option Purchase Order

Supplier VERMONT TR-002

Supplier ID 0000327756

Begin Date 10/01/2015

Expire Date 07/31/2017

Add Comments

Contract Activities

Primary Contact Info

Contract Releases

Activity Log

Document Status

Thresholds & Notifications

View Changes

Current Change Reason

Vermont Transparency, Inc.

6. Click the **View Changes** link

The **Contract Change History** page displays in a new window:

SetID STATE

Contract ID 0000000000000000000030250

Check the records you wish to view, and optionally, select a field on that record.

☒ Contract Header

☒ PO Defaults

☒ Price Adjustments

☒ Thresholds and Notifications

☒ Related Contracts

☒ Supplier Locations

Changed Field

Changed Field

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

To Date

Version To

Search



Clear

Expand All

Collapse All

7. You can refine search criteria by populating fields in the Search and Filter Criteria section. Examples of search criteria you may want to refine include Modified By, and From/To Dates
8. Click [Search](#)

The search results populate:

▼ Contract Header				Personalize   Find   View All     First 1-10 of 21 Last			
Version	Sequence	Change Type	Description	Value	Modified By	Last Changed	Reason
1	1	Change	Change Order Source	ONL	JKENNERK	10/01/18 9:50:10AM	CHANGE
1	1	Change	Notify Days Before Expires	30	JKENNERK	10/01/18 9:50:10AM	CHANGE
1	1	Change	Amount Less than Maximum	1000	JKENNERK	10/01/18 9:50:10AM	CHANGE
1	0	Original	Maximum Amount	12000	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Buyer	RMCCUEN2	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Change Order Source	ONL	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Contract Beginning Date	10/01/2015	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Corporate Contract	Y	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Expire Date	07/31/2017	JKENNERK	10/01/18 8:54:08AM	CHANGE
1	0	Original	Send Date/Amount Notification	Y	JKENNERK	10/01/18 8:54:08AM	CHANGE

**Note - You can repeat these steps for each of the tabs on the Contract Change History page.**

**Review Contract Change History is Complete**



## Reports & Queries

Reports and Queries for Contracts can be found in the [Contracts Reporting Manual](#).