

# Step-by-Step Instructions

## CobbleStone Contract Management System

***Please refer to the GGC Contract Process Flowchart for steps in the contract process prior to uploading to CobbleStone.***

- Log-in to the Cobblestone system. You can login using your GGC login credentials here: <https://ggc.cobblestone.software/Core/>. The home screen when you login is your dashboard.
- If you need access to CobbleStone or help at any time, please email [contracts@ggc.edu](mailto:contracts@ggc.edu).

### **SUBMITTING A NEW CONTRACT**

- Click the “Submit New Contract” tile on your dashboard or select “Submit New Contract” from the dropdown under “Contracts” at the top of the webpage.
- Choose type of contract and hit continue.
- Check the dropdown list under “Vendor/Agreement with” to see if vendor is already in the system. If they are not, you can add vendor/company by doing the following:
  - Hit the plus sign next to “Vendor/Agreement with”.
  - Enter company name and any details you have.
  - Choose yes under “Active”.
  - Hit save & continue.
- **Details:** All fields with an \* are required
  - Vendor/Agreement with: Enter the name of whoever the agreement is with.
  - Contract Type: This will automatically be populated from the first screen.
  - Contract Title: Enter the title of the contract – often listed at the top of the document.
  - Department/Business Unit: This will automatically be populated for you.
  - Employee: This will automatically be populated for you.
  - Contract Purpose: Enter a short explanation of the purpose of the contract. Your description should help approvers in the process to get an idea of what this contract is for.
  - Status: This will say legal review to begin with and will update as your contract moves through the approval process.
  - Term/Occurrence: Select the appropriate term (1 Year, 3 Year, 5 Year, Multiple Dates, Short term, Single Date). All monetary contracts should be a term of 1 year or less, unless specific exceptions are met.
  - Renewal Notes: Most monetary agreements can be renewed up to 4 times after the original contract is put in place. In this section, you can count down how many renewals you have remaining (ex: 3 renewals remaining).

- Foundation Building: If your contract involves a foundation property choose which one from the dropdown or choose N/A if this does not apply.
- Technology or Software: Choose yes if your contract is for technology or software and no if not. If you are questioning what to answer, ask yourself whether this contract should be reviewed by the IT Department. If it should, select yes.
- **Dates:**
  - Effective Date: List the date that the contract will begin. This date can be updated later, if necessary.
  - Expiration Date: List the date the contract will expire.
  - Contract Notify Days: Enter how many days before the Expiration Date you want to receive a notification to remind you that the contract is set to expire. This section will be defaulted to 90 days, but you may change this information to a longer timeframe if you wish. Please note: this box will not appear for speaker, performance, and facility-use contract types.
  - Expiration Warning Date: Do not enter anything here. This information automatically populates on the next screen. Please note: this box will not appear for speaker, performance, and facility-use contract types.
- **Financial/Budgetary:**
  - Contract Amount: Enter the amount GGC is either expending or receiving for the contract. Put zero if non-monetary.
  - Budget Fiscal Year: Enter the proper fiscal year.
  - Department ID (Budget Account No): Enter the budget account the cost will-be-spent from. If this doesn't apply to your contract, leave blank.
- **Record Info:**
  - You do not need to enter anything here.
- Hit save and continue. This will create the contract record.
- On the next screen scroll down to the "Files/Attachments" section and upload your contract. An alert will be listed at the top of the page as a reminder to attach the necessary documents. **\*It's important to remember to attach your contract to the record so the review/approval process isn't delayed\***

## **AFTER YOU SUBMIT A NEW CONTRACT**

- **Checking the status of your contract:** After you upload your contract, CobbleStone automatically routes the contract for review and signature by the appropriate parties. You can check the status of your contract at any time by going to your dashboard and reviewing the "Contracts in Progress" box. You may need to scroll over until you can view the "Status Name". You can also check the status by viewing the contract record and reviewing "Status" under Contract Details.

- **Notification of GGC signature:** You will receive an email alert after your contract is signed by the appropriate GGC individual. An example of this alert is attached to these instructions.
  - If the contract has not been signed by the other party, obtain the counter-signature and then upload the fully executed contract to the contract record in CobbleStone. After you have uploaded the fully executed contract, approve your final task.
  - If the contract has already been signed by the other party, approve your final task.
- After you have approved your final task, the contract status will update automatically to “Active”. **\*There must be a fully executed copy of the contract in CobbleStone before a contract can be updated to active\***
- **Completing a task:**
  - You can view your active tasks at any time by scrolling down on your dashboard to the “My Tasks” box.
  - To complete a task, you can either go to the contract record and scroll down to “Tasks, E-mails, Workflow, Alerts” and select “Approve” (or “Reject” if accurate) or you can select “Approve” directly on the email alert you receive.
- **Active contracts/Searching contracts:**
  - All of your active contracts are listed on your dashboard in the “My Active Contracts” box.
  - If you need to search for a contract, select “Find/Search Contracts” from the dropdown under “Contracts” at the top of the webpage. You can then select what you want to search by (ex: Select “Vendor/Agreement with” to search by the vendor the contract is with).

#### **Notes:**

- **Do not choose facility-use as your contract type.**
- **Please logout of the system once you have completed the submission of your contract. We have concurrent licenses and only a certain number of people can be in the system at one time.**
- **If you need a GGC template, click the green “GGC Templates” tile on your dashboard. This will take you to a list of templates where you can download fillable PDF forms.**

**Below is an example of the email alert you will receive after your contract has been signed.**

A new contract is ready for review. Please see task alert below:

**Task Name:** New Contract Signed

**Employee Assigned To:** Smith, Jane

**End/Due Date:** Jan 31 2020

**Notify Days:** 15

**Details:** The contract below has been signed internally. Please review and send to the counter-party for signature, if required. After all parties have signed, upload the executed contract and "Approve" the task.

**Notes:**

**Amount:** 250.00

**Contract ID:** 50

**Task ID:** 011

**Days Left to Task End Date:** 15

**Contract Details Record Information:**

**Contract Title:** Vendor Agreement

**Vendor / Agreement with:** Cobblestone Systems

**Employee:** Smith, Jane

**Effective Date:** Jul 06 2020

**Expiration Date:** Jul 10 2020

**Annual Review Date:**

**Department/Business Unit:** Student Affairs

**Contract Purpose:** Fun events for students

**Status:** Awaiting Counter Signature

**Renewal Notes:**

**Term/Occurrence:** Multiple Dates

**Contract ID:** 50

**Updated By:**

[Approve](#)

[Reject](#)

To view this event visit:

<https://ggc.cobblestone.software/core/default.aspx?navto=TaskDetails.aspx?ID=194>

(This link allows you to view the task page.)

To view this event's contract record visit:

<https://ggc.cobblestone.software/core/default.aspx?navto=ContractDetails.aspx?ID=78>

(This link allows you to view the complete contract record including all attachments.)

Record's Files & Attachments		
File Name	File Type	Date Uploaded
Signed vendor agreement	.pdf	1/16/2020
Vendor agreement	.pdf	12/11/2019

(These will be links to the documents attached to your contract record.)

Please log in and review this alert.

<https://ggc.cobblestone.software/Core/>

**Note: If your contract has already been signed by the counter-party, approve the task and your contract will update to active status. If your contract hasn't been signed by the counter-party, obtain the counter-signature and then upload the fully executed contract to your contract record. After you have uploaded the fully executed contract, approve the task and the contract status will update to active.**