Contracts Workshop

Presented By:
UCF Office of the General Counsel

OPEN COBBLESTONE

- From https://contracts.aa.ucf.edu

OR

https://generalcounsel.ucf.edu/

Scroll to the Bottom of the Homepage: Locate the **Resources** section and select **Cobblestone**.

Log In Using Single Sign-On (SSO)
You will be automatically directed to the Cobblestone homepage upon authentication.

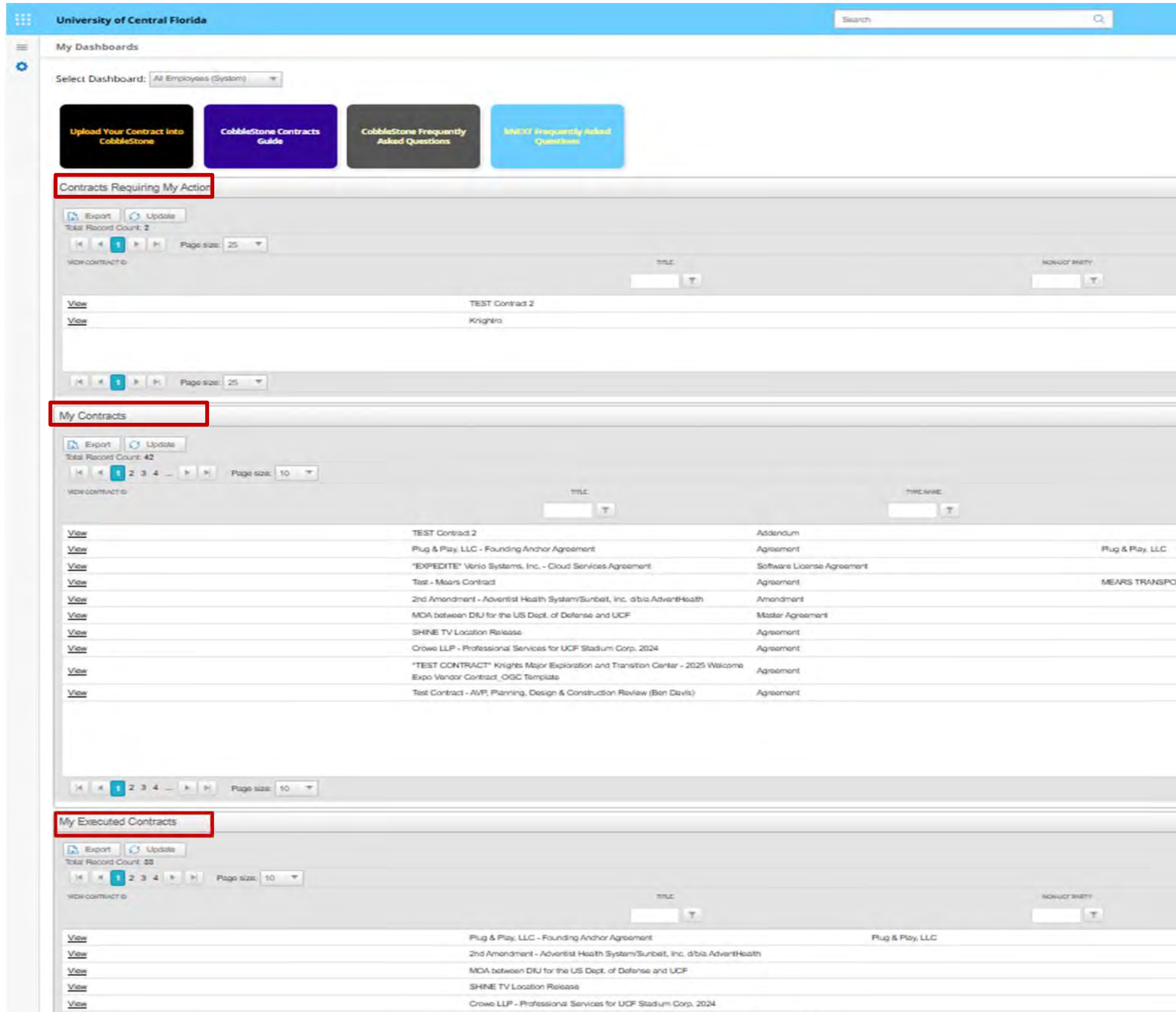
LOCATE AND SUBMIT CONTRACTS IN COBBLESTONE

MY DASHBOARDS

Contracts Requiring My Action

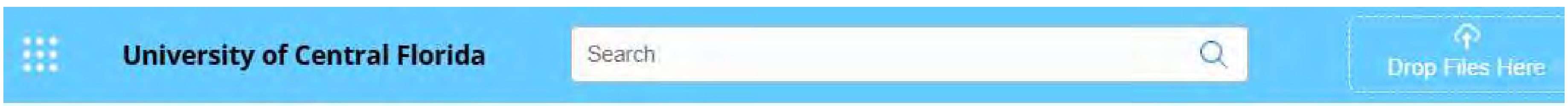
My Contracts

My Executed Contracts

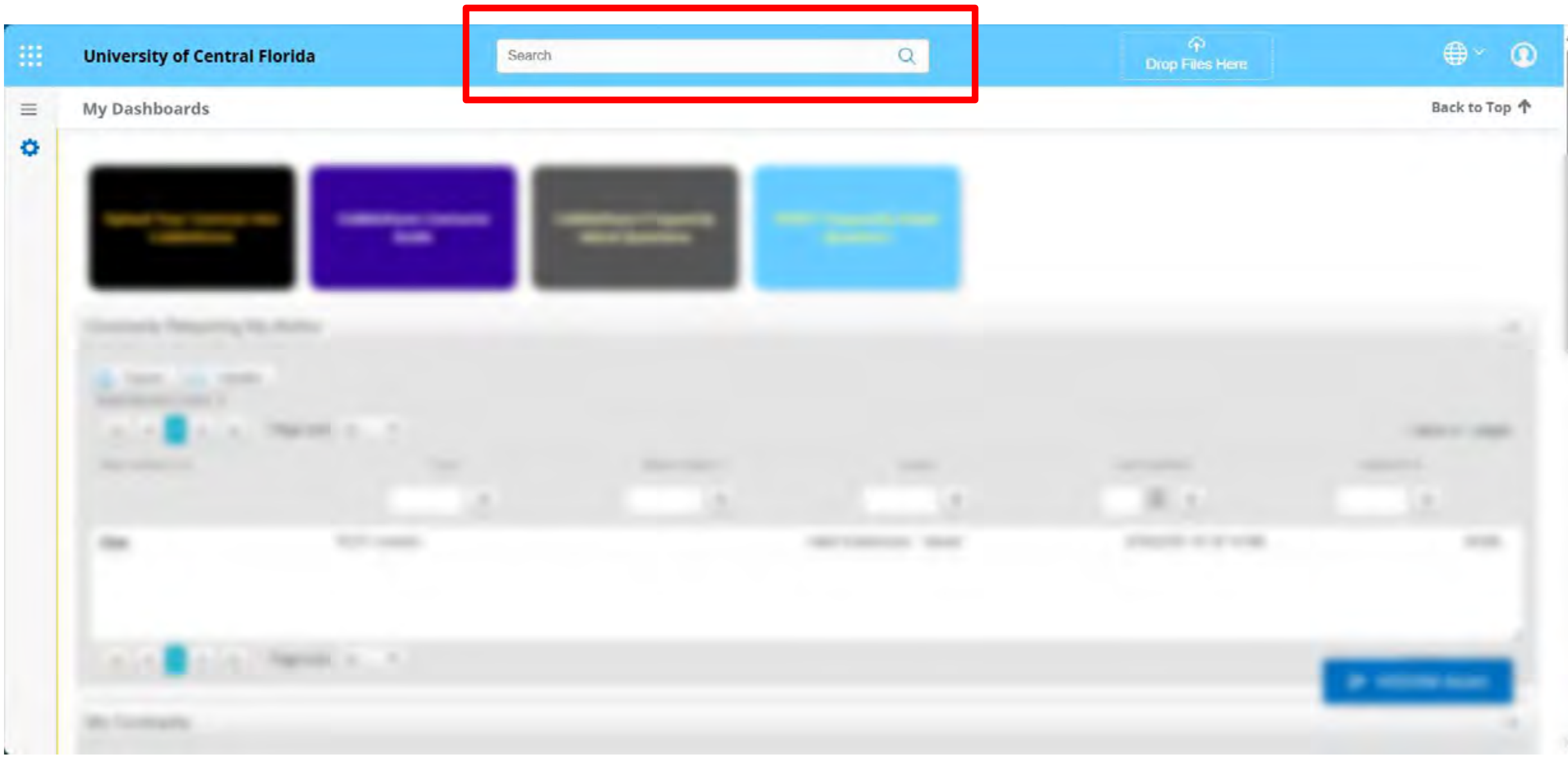


SEARCH CONTRACTS

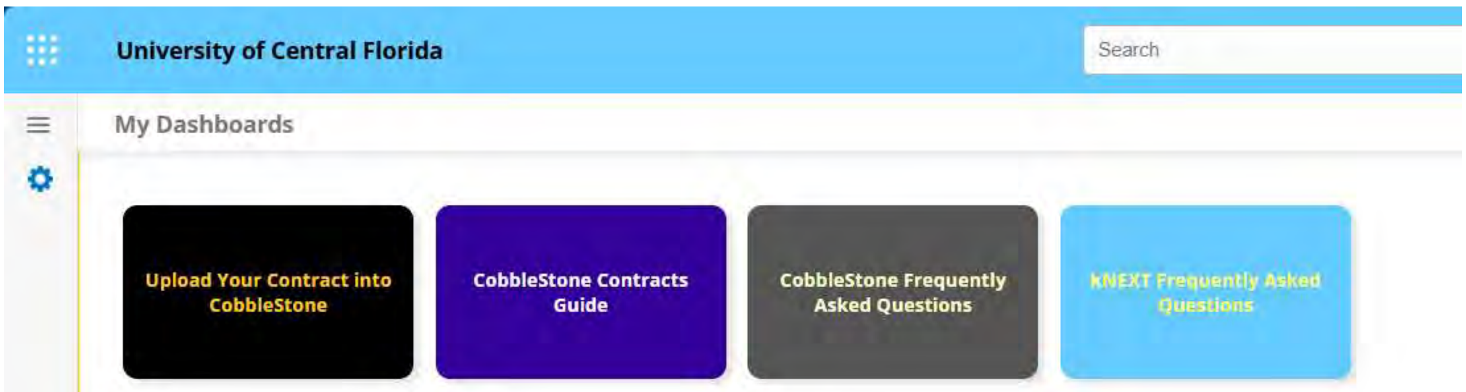
Search by Contract Title or Contract ID



SEARCH CONTRACTS



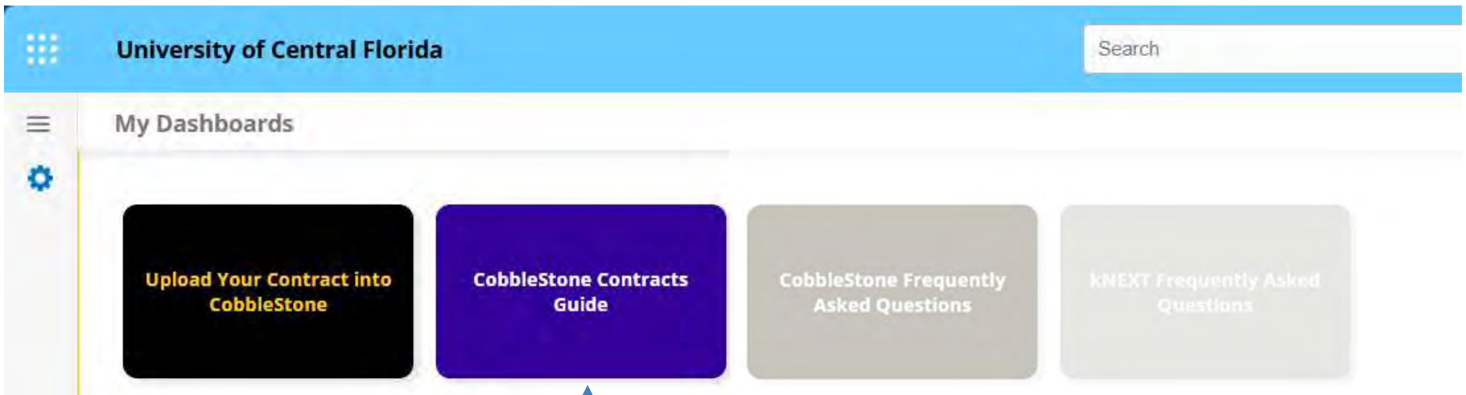
ACTION BUTTONS



ACTION BUTTONS

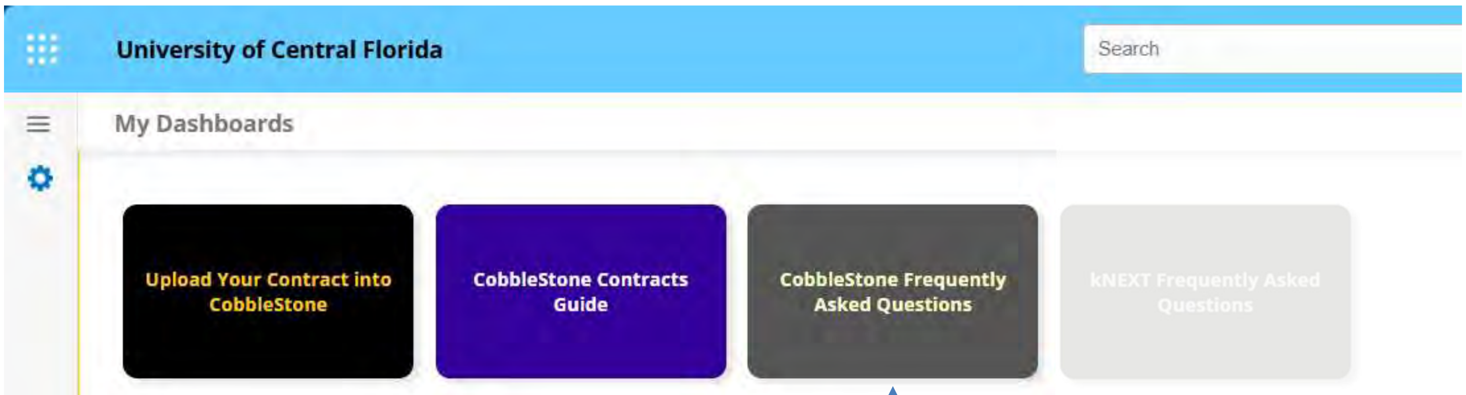
Enter new contracts

ACTION BUTTONS



Step-by-step guide for entering contracts

ACTION BUTTONS

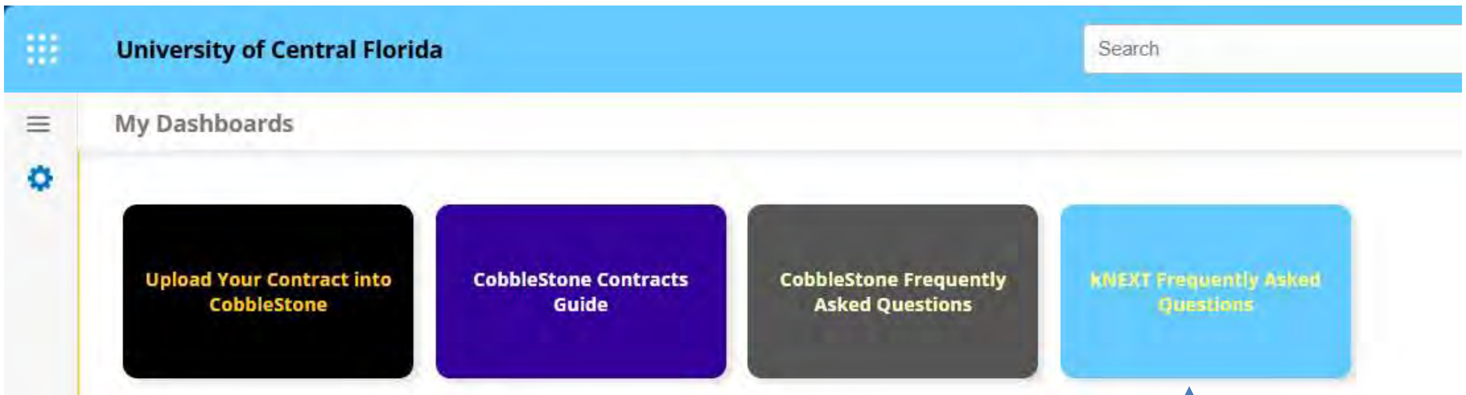


FAQs on Cobblestone review process

CobbleStone FAQ's

Question	Response
How do I reactivate my account after 60 days of not logging into Cobblestone?	Cobblestone automatically deactivates an account after 60 days of inactivity. To restore your account, please contact contracts@ucf.edu.
Are there any guidelines or policies I need to follow when submitting a contract request?	Please refer to the UCF's policies and procedures guidelines for contract submission and signature authority under policies.ucf.edu. • Contract review policy 2-102 • Signature Authority policy 2-107 Information can also be found under the General Counsel website at Contract Information and Procedure - UCF General Counsel
How do I submit a contract for initial review?	In Dashboard #1 - Contract Overview – field question "Submit contract?" (No to Save or Yes to Submit), please change the selection from "No" to "Yes." This will advance the contract to the next stage.
Can I make changes to my contract request after submission?	Yes, you can make changes to the record after submission if the contract is under requestor review, or if someone from the legal or kNext contracts team has requested supporting documentation or edits. Contracts cannot be changed once they are fully executed and signed.
How will I be notified when my contract request is approved or denied?	A notification via email from CobbleStone will be sent. Also check the status of your record on your CobbleStone dashboard.
What should I do if my contract request is denied?	If your contract request is denied, please go to the Notes/Comment section located at the bottom of the contract record. Reach out to the appropriate parties who reviewed the contract in CobbleStone and coordinate accordingly.
Can I track the status of my contract request in CobbleStone	Yes, if you are listed as the "Requestor", the contract status is on the dashboard called "Contracts Requiring My Action" under "Status"
How do I access previously submitted contract requests?	Previously submitted contract requests can be found on the user's dashboard page under "My Contracts." This is the last dashboard located at the bottom of the home screen. Contracts submitted by others can be searched for by utilizing the search bar at the top of the Cobblestone page.
How do I report technical issues with CobbleStone?	Technical issues should be reported to contracts@ucf.edu or call the General Counsel's office line at 407-823-2482.

ACTION BUTTONS

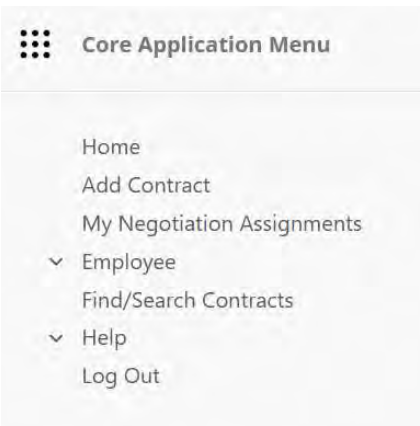


FAQs on procurement and suppliers

kNEXT FAQ's

Question	Response
What is a Procurement Contract?	A contract whereby the university, DSO, or other related entity is engaged in the acquisition of commodities, services, or licenses whether by rent, lease, installment, or outright purchase or a contract associated with, preliminary to, or necessary for such acquisitions.
Does a supplier need to be created prior to the submission of my procurement contract?	Yes. There have been several regulatory and compliance requirements directed by Florida Statute when contracting with non-government entities. The requirements are built into the supplier registration process and is the most effective way to ensure compliance.
Do I need to create a supplier if I do not need a purchase order?	All suppliers must be approved in Workday before any procurement contract is submitted for review in Cobblestone. This is required, regardless of payment type (i.e., expense card, procurement card, supplier invoice).
How do I create a supplier?	If the supplier is not listed in Cobblestone, please have the supplier complete registration through Workday's Prospective Supplier Portal or a Travel/Procurement Coordinator within a Finance Business Center can complete the *Create Supplier Request* task on the supplier's behalf. Once the supplier is approved, they will be selectable in Cobblestone and your procurement contract can be submitted.
Can goods and services be purchased with a PO?	Goods and services can be purchased on a university issued purchase order or with the use of an expense card (where applicable) without the need for a separate signed contract. A PO is a legally binding document between two parties that can potentially contain all the information needed to authorize a purchase. Utilizing UCF's PO rather than a supplier contract is UCF's preferred mechanism for purchasing goods and services as the UCF PO incorporates the university's standard terms and conditions and is the most efficient process for making a purchase. If a supplier submits a contract or similar document (quote, agreement, statement or work, proposal, etc.) for signature, ask if they will accept a purchase order or expense card (under $5,000) in lieu of a signed agreement.
What if the procurement contract is urgent?	Please contact kNEXT@ucf.edu for assistance in expediting the supplier approval process.

ADD NEW CONTRACT

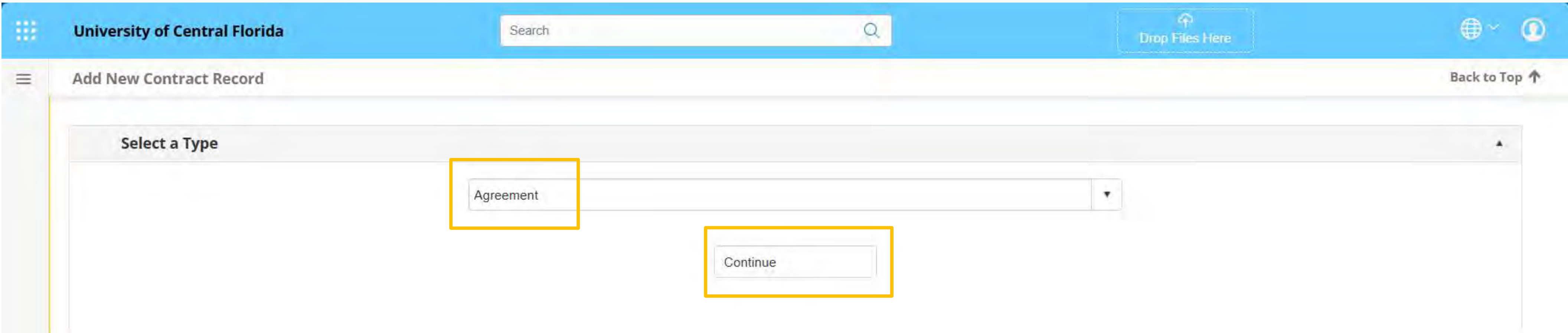


Waffle Icon + Add Contract

Add Contract button

AGREEMENT DEFAULT FOR CONTRACT TYPE

Select the type of **Agreement** and click **Continue**



PROCUREMENT AND SUPPLIER REGISTRATION

What is a procurement contract? A contract whereby the university, DSO, or other related entity is engaged in the acquisition of commodities, services, or licenses whether by rent, lease, installment, or outright purchase or a contract associated with, preliminary to, or necessary for such acquisitions.

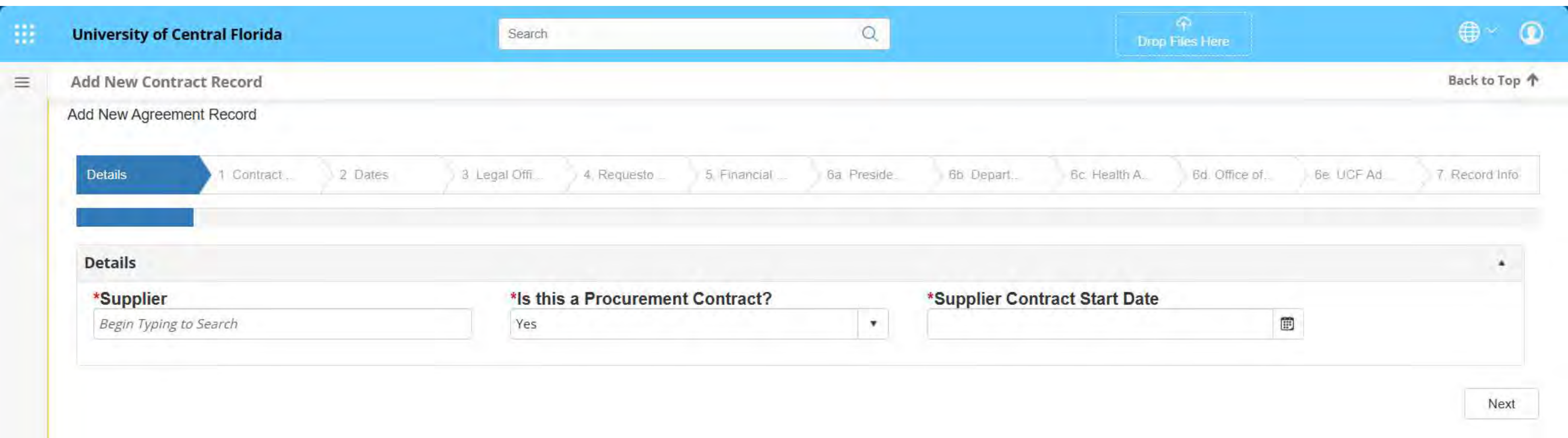
What if the procurement contract is urgent? Contact kNEXT@ucf.edu for assistance in expediting the supplier approval process.

Why is this necessary? There are regulatory and compliance requirements directed by Florida Statute when contracting with nongovernment entities.

The requirements are built into the supplier registration process and is the most effective way to ensure compliance.

DETAILS

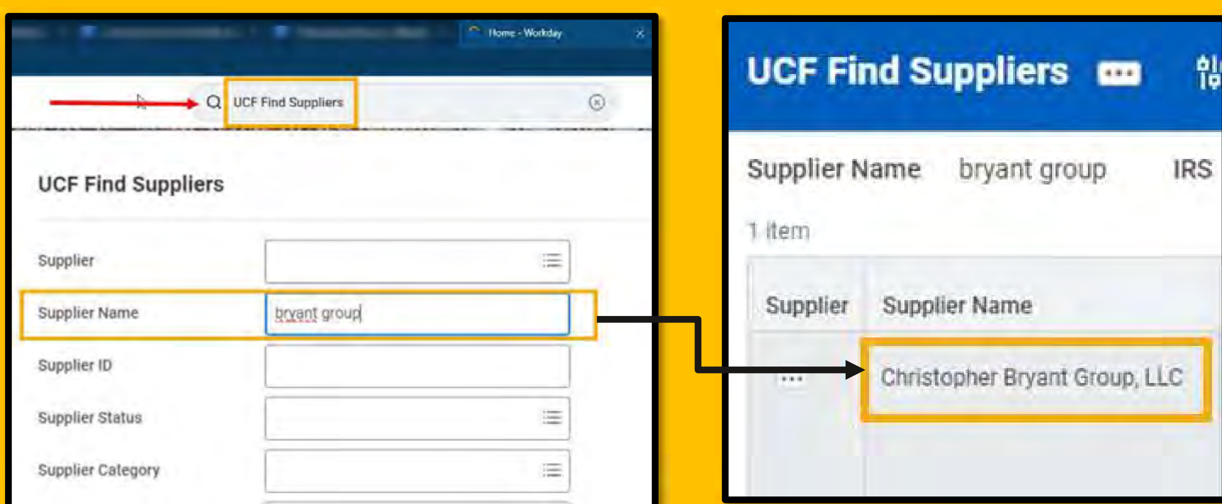
- Complete required fields (*)
- Name of UCF approved supplier appears when you begin typing.
- Enter Supplier Contract Start Date and **Next** to proceed.



LOCATING UCF APPROVED SUPPLIER

If Supplier name does not automatically appear in Cobblestone, search for supplier in Workday

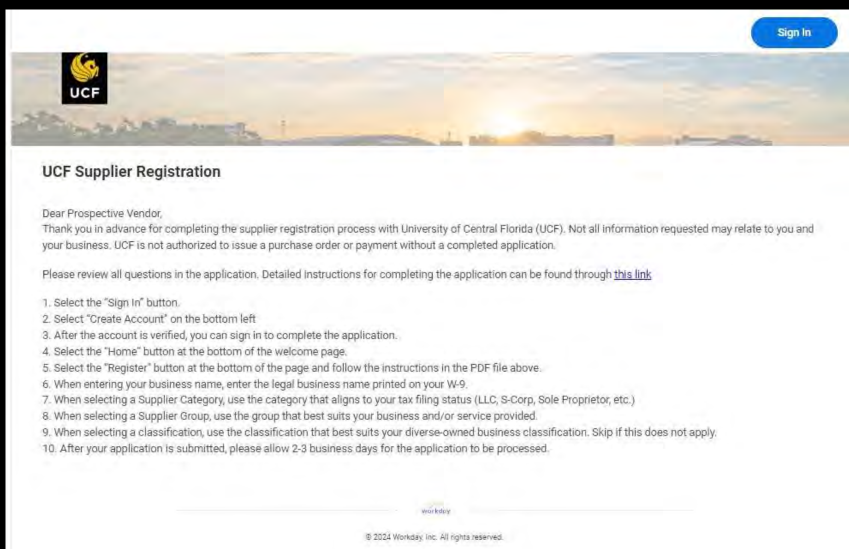
- In WD, search **UCF Find Suppliers**
- Search for them using the **Supplier Name** field
- If Supplier does not appear in WD or Cobblestone, reach out to kNEXT@ucf.edu to expedite the registration process



In this example, "*Bryant group*" was not found in Cobblestone because the supplier was listed as "*Christoper Bryant Group*" in Workday.

NEW SUPPLIER REGISTRATION

New suppliers must register with the **UCF Supplier Registration Link** to become an approved UCF vendor


Sign In

UCF

UCF Supplier Registration

Dear Prospective Vendor,
Thank you in advance for completing the supplier registration process with University of Central Florida (UCF). Not all information requested may relate to you and your business. UCF is not authorized to issue a purchase order or payment without a completed application.

Please review all questions in the application. Detailed instructions for completing the application can be found through this link

1. Select the "Sign In" button.
2. Select "Create Account" on the bottom left
3. After the account is verified, you can sign in to complete the application.
4. Select the "Home" button at the bottom of the welcome page.
5. Select the "Register" button at the bottom of the page and follow the instructions in the PDF file above.
6. When entering your business name, enter the legal business name printed on your W-9.
7. When selecting a Supplier Category, use the category that aligns to your tax filing status (LLC, S-Corp, Sole Proprietor, etc.)
8. When selecting a Supplier Group, use the group that best suits your business and/or service provided.
9. When selecting a classification, use the classification that best suits your diverse-owned business classification. Skip if this does not apply.
10. After your application is submitted, please allow 2-3 business days for the application to be processed.

workday

SAMPLE EMAIL TEMPLATE

Dear Prospective Vendor,

We are pleased to be doing business with you. As a new vendor, we kindly ask that you register with UCF by completing the new supplier registration. UCF is not authorized to issue any payments without a completed registration.

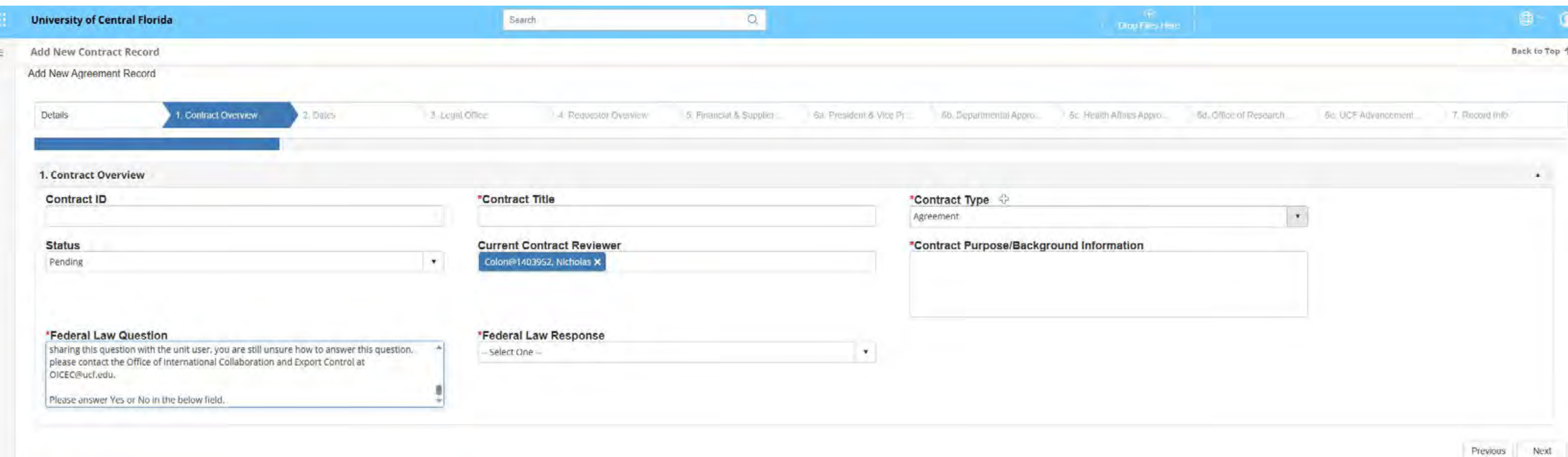
Please click on the link below and follow the instructions carefully. It is important that you **attach your W-9**.

We appreciate your cooperation.

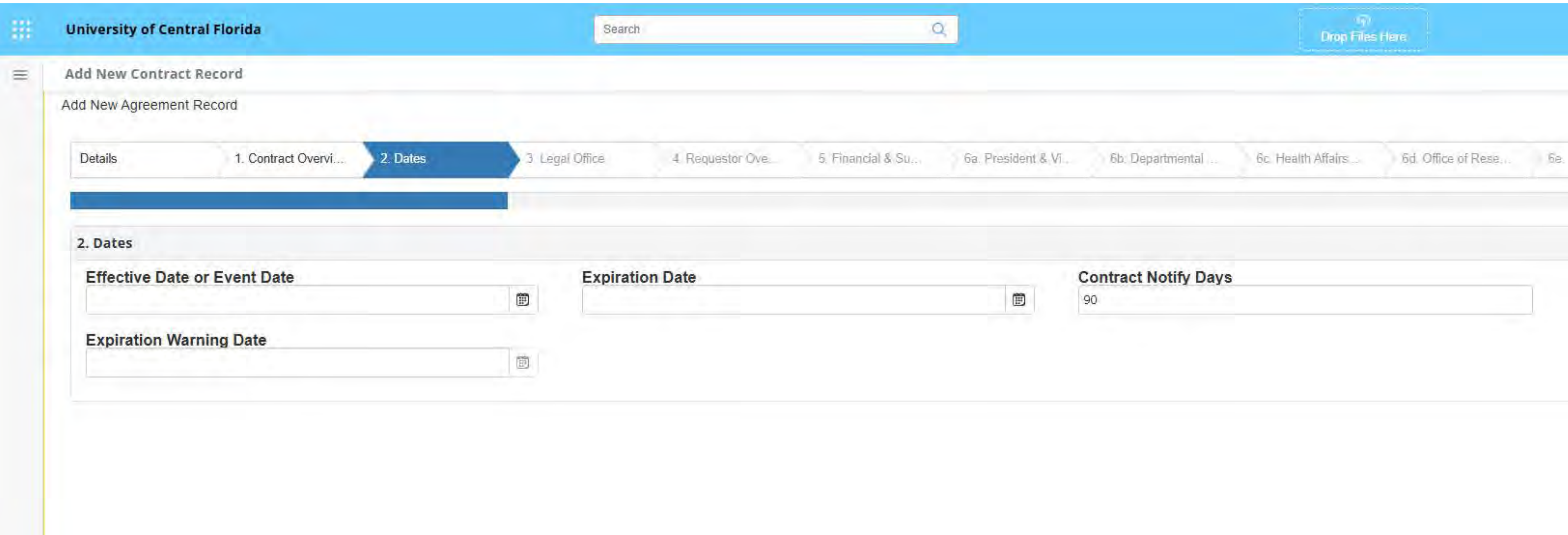
Please click here to register:
https://wd1.myworkdaysite.com/supplier/ucf/supplier_registration

1. CONTRACT OVERVIEW

- Complete required fields (*)
- Contract Title: Include supplier/vendor name and other unique identifiers
- Contract Purpose: Can include notes to Legal and/or KNEXT – *Reason for contract, vendor registration is in process, event dates are soon*
- *Answer the Federal Law Question from the Office of International Collaboration and Export Control. You can email them with any questions at OICEC@ucf.edu.*

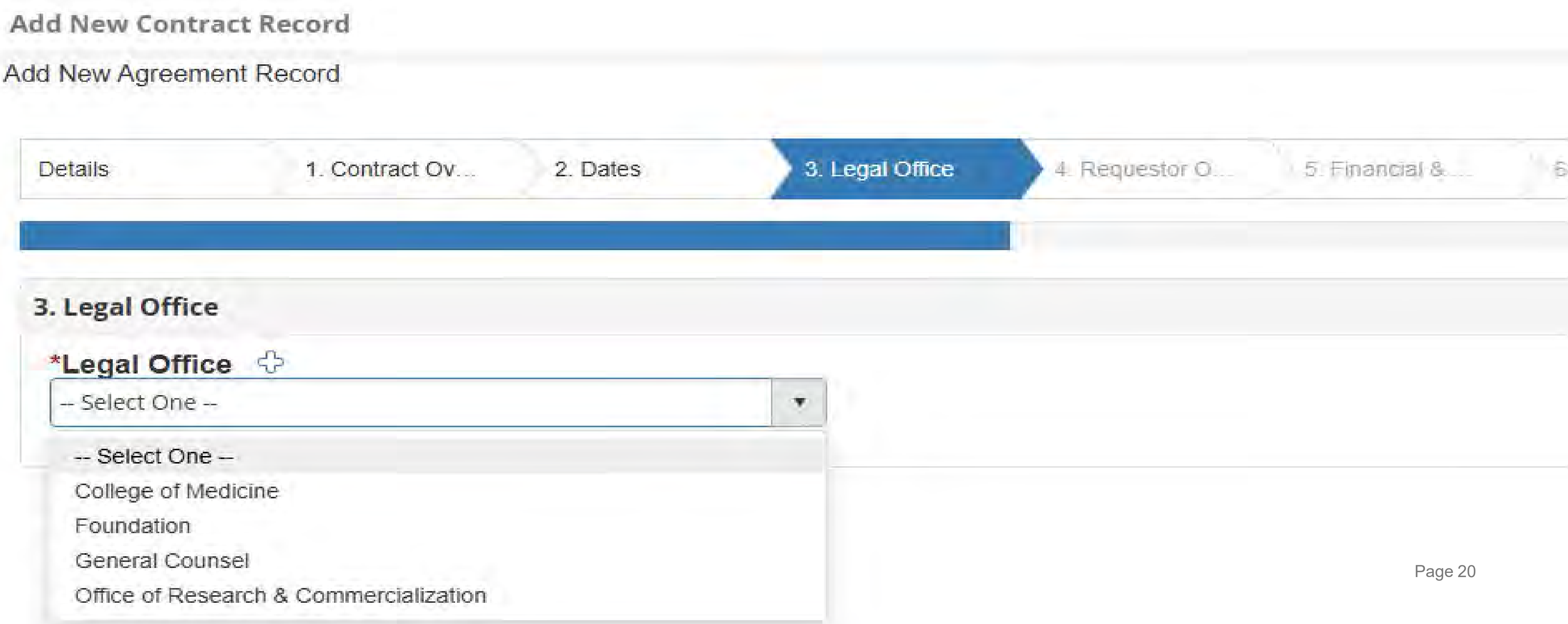


2. DATES


University of Central Florida
Search
Drop Files Here
Add New Contract Record
Add New Agreement Record
Details
1. Contract Overvi...
2. Dates
3. Legal Office
4. Requestor Ove...
5. Financial & Su...
6a. President & Vi...
6b. Departmental ...
6c. Health Affairs ...
6d. Office of Rese...
2. Dates
Effective Date or Event Date
Expiration Date
Contract Notify Days
90
Expiration Warning Date

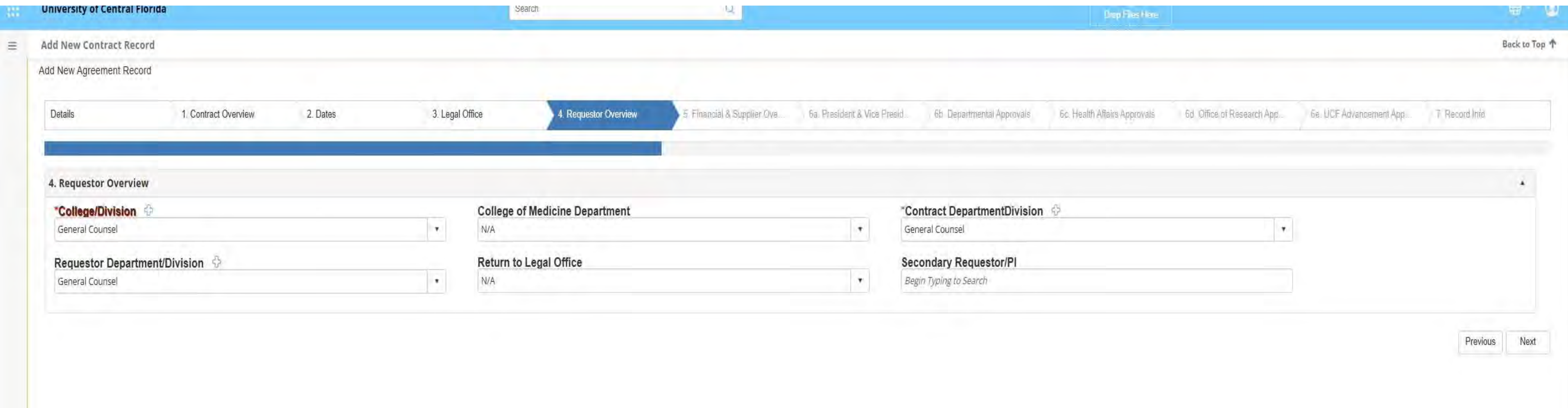
3. LEGAL OFFICE

Select the appropriate
Legal Office



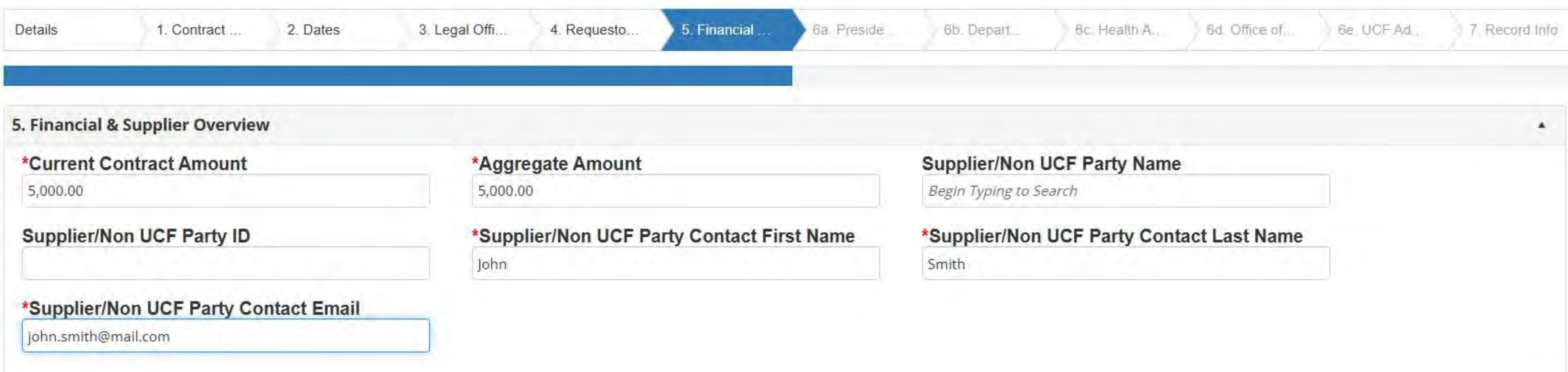
4. REQUESTOR OVERVIEW

- College/Division: choose your college or division
- Contract Department/Division: **Choose your Department**



5. FINANCIAL & SUPPLIER OVERVIEW

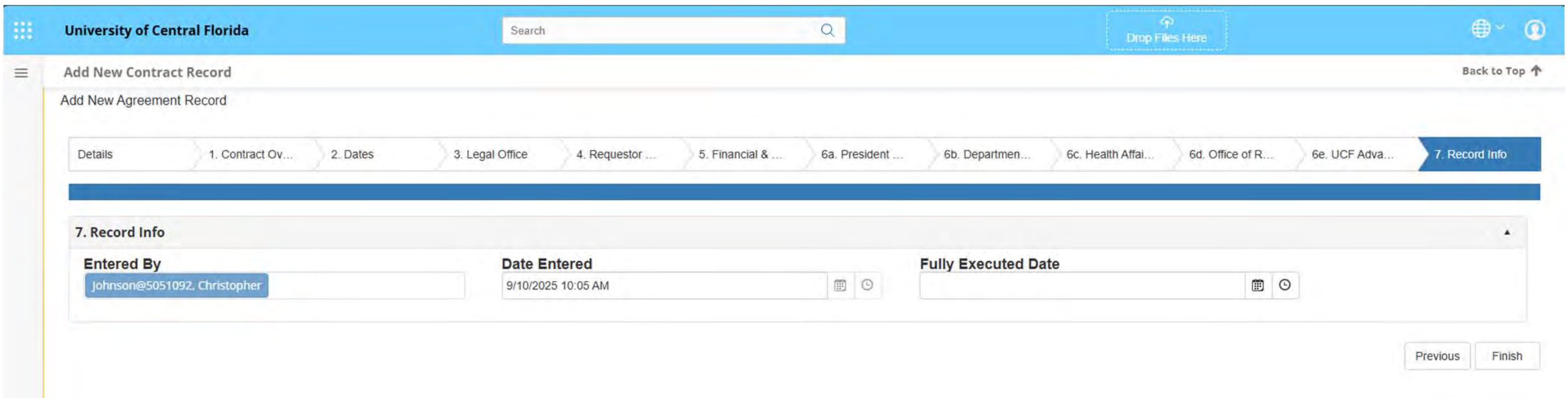
- Add contract amounts and all other required fields (*)
- Supplier contact info will be used by Legal and kNEXT to solicit signatures
  - Confirm person listed in **Supplier/Non-UCF Party Contact** is the signer



6a. – 6e. – LEAVE BLANK and CLICK “Next”

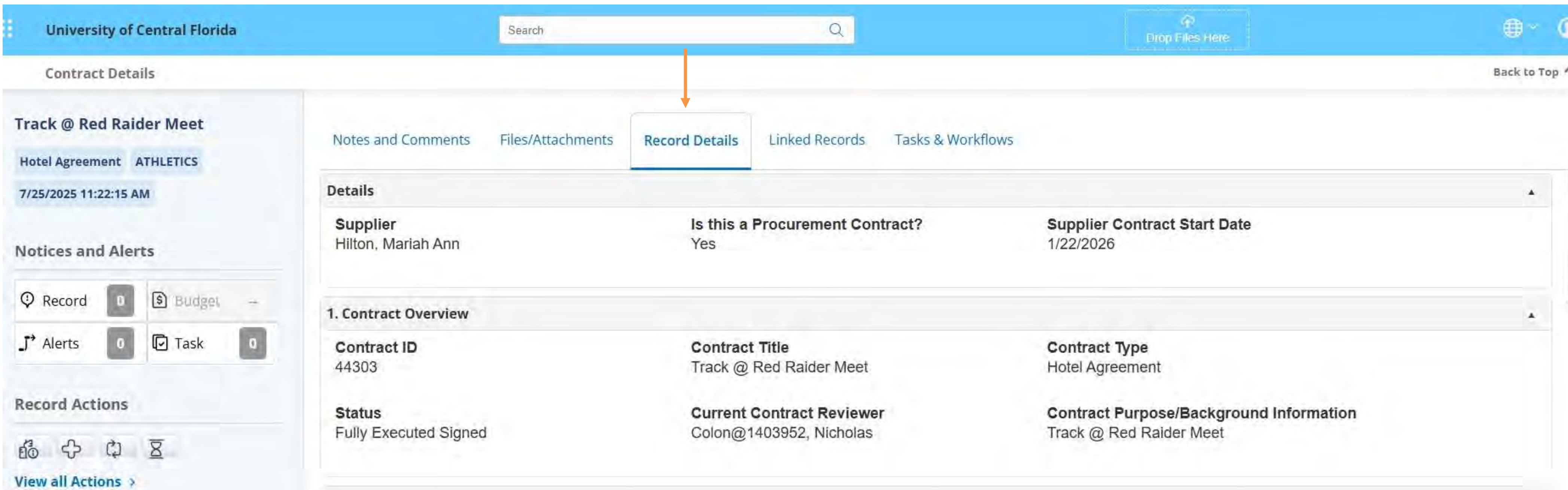
7. RECORD INFO

Record info – Auto populates. Confirm it's correct and click **Finish** to review record



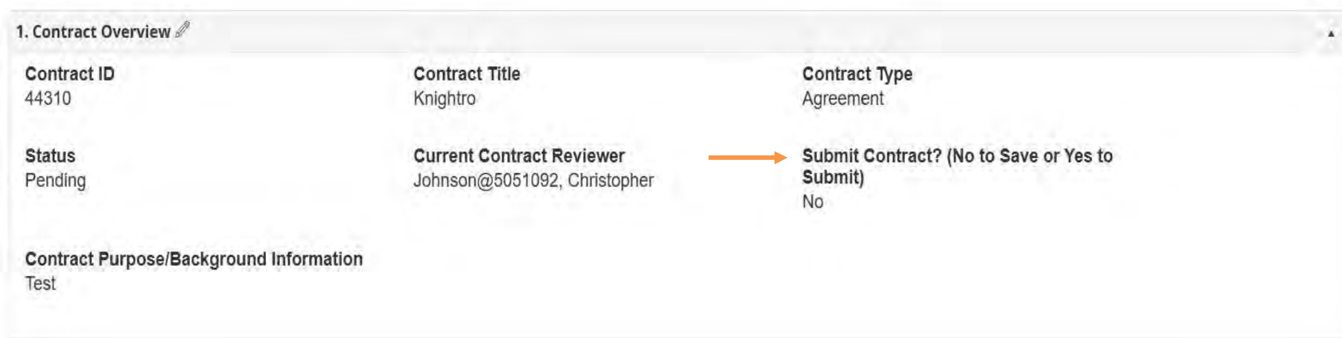
CONTRACT OVERVIEW

Contract can be viewed by opening it from My Dashboards (clicking **View)** and the **Record Details** tab.



CONTRACT STATUS: PENDING

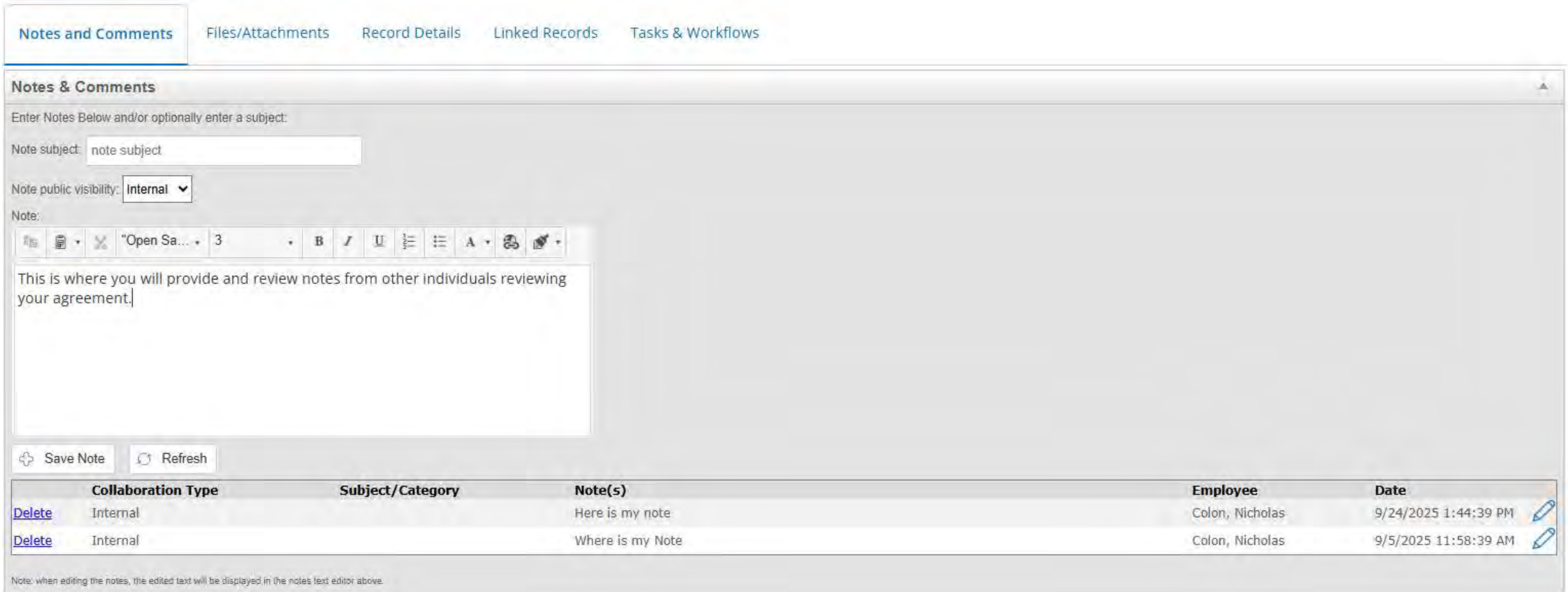
- Contract ID is found in **Section 1. Contract Overview**
- Status is **Pending** because **Submit Contract?** is “No”
- Contract is saved but not submitted for legal review.



ATTACH DOCUMENTS AND NOTES

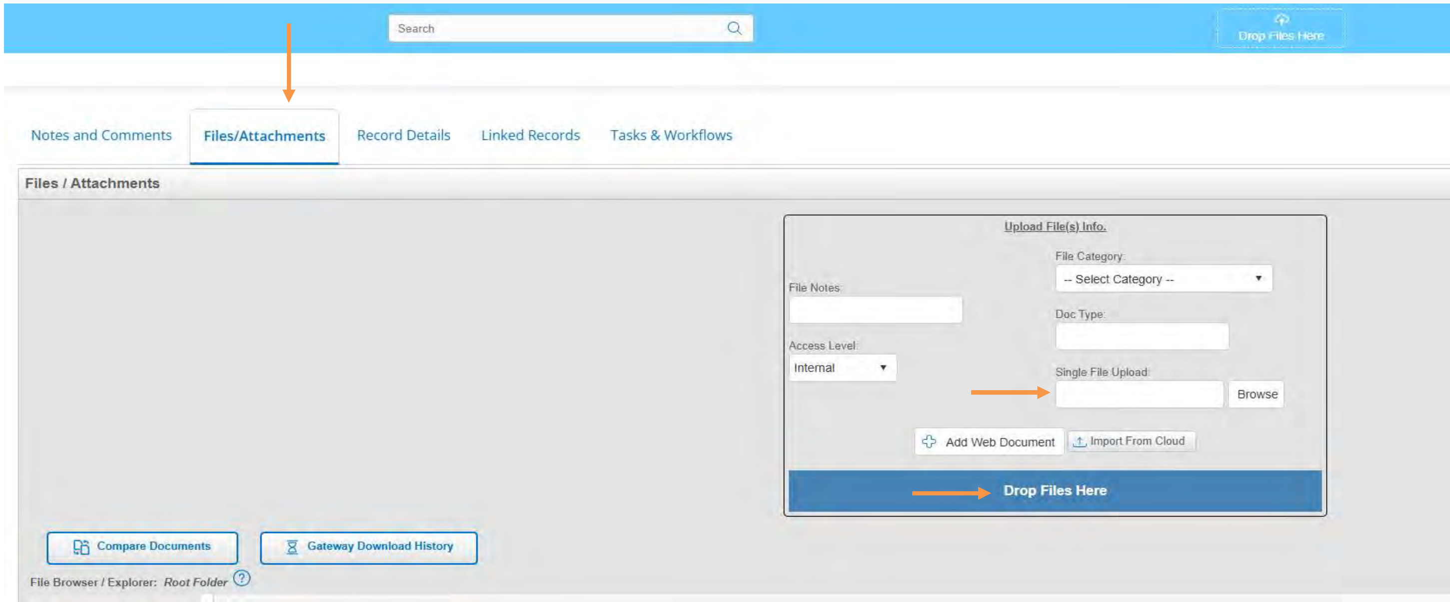
NOTES AND COMMENTS TAB

- Click hyperlink from email
- From Dashboard, open agreement from **Contracts Requiring My Action**
- Provide and view notes from the Legal Office or kNEXT and other offices in the **Notes & Comments** tab



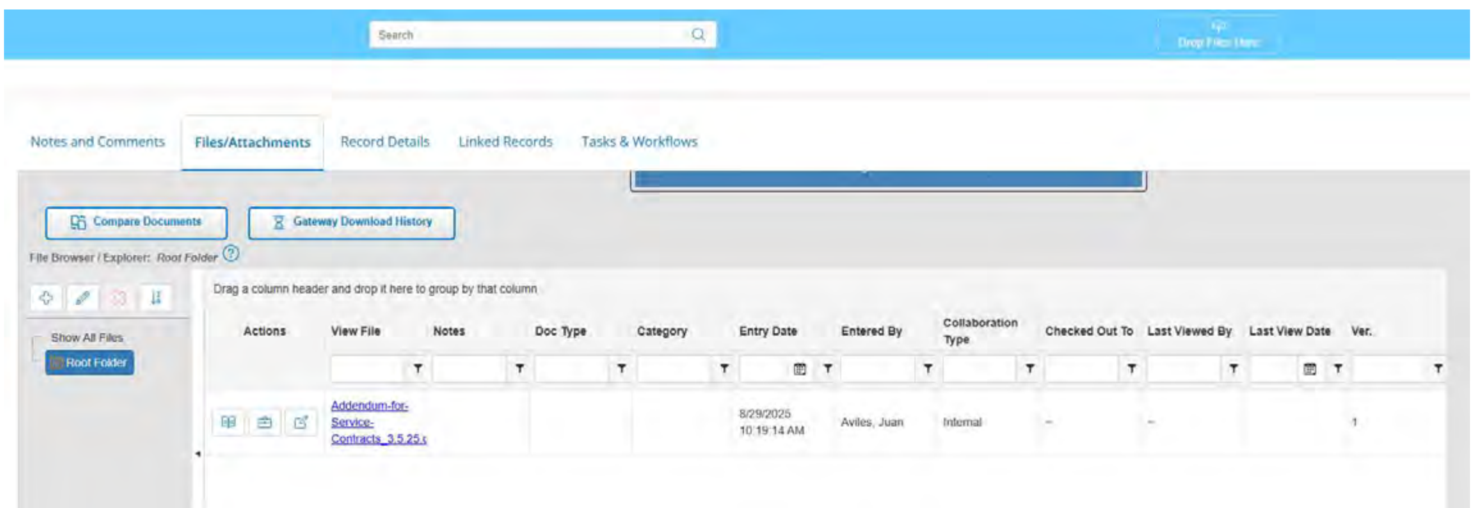
ATTACH SUPPORTING DOCUMENTATION

- Select **File/Attachments** tab
- Drag and drop files over the blue section or use the “Single File Upload” browse button



LOCATE ATTACHMENT

- Attachment appears in **File Browser** section
  - Click blue hyperlink to open file and ensure correct document was entered

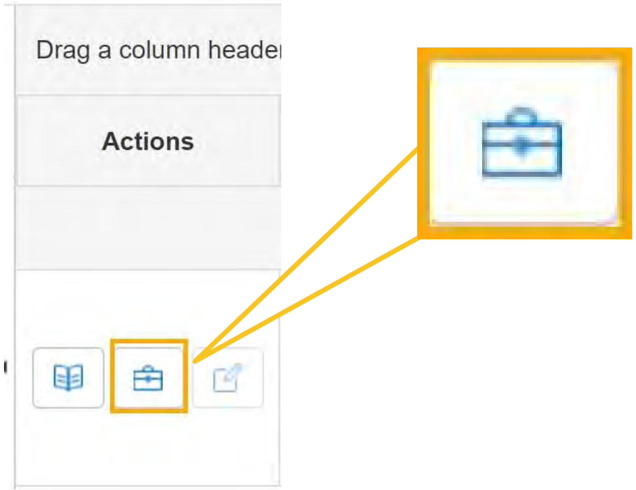


Add a Note to your Attachment

Document Toolbox Icon

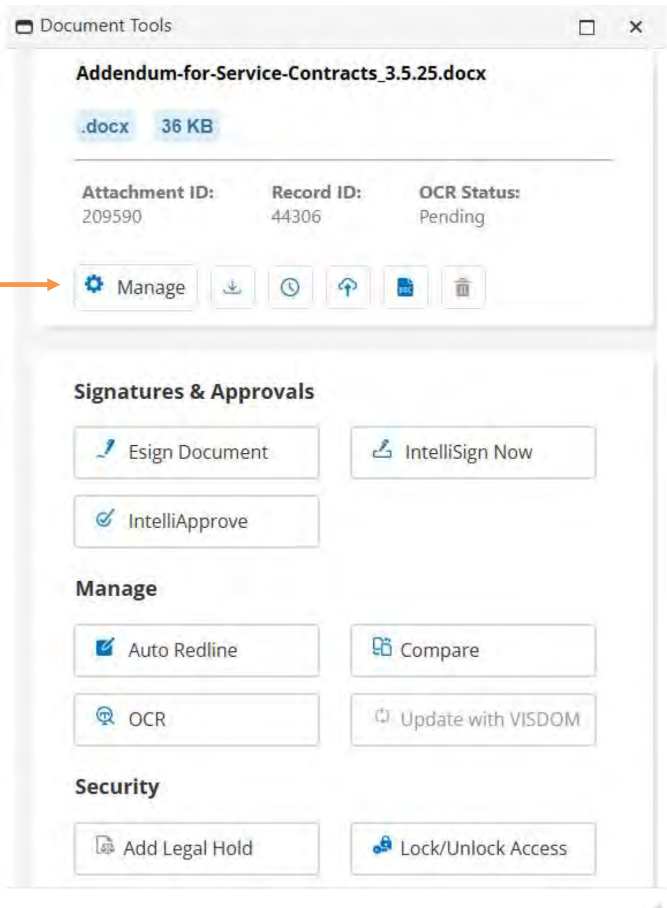
Add notes here requesting a change to the file/attachment--

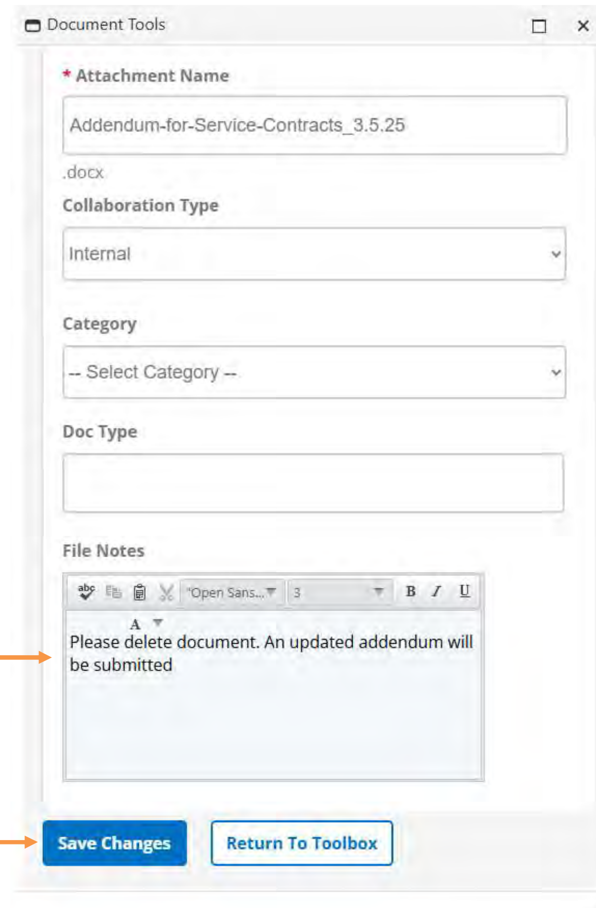
- *“adding for your review”,*
- *"please delete”,*
- *“attention to a specific document/page…”)*



Add a Note to your Attachment

Click **Manage** and type message in **File Notes** and **Save Changes**

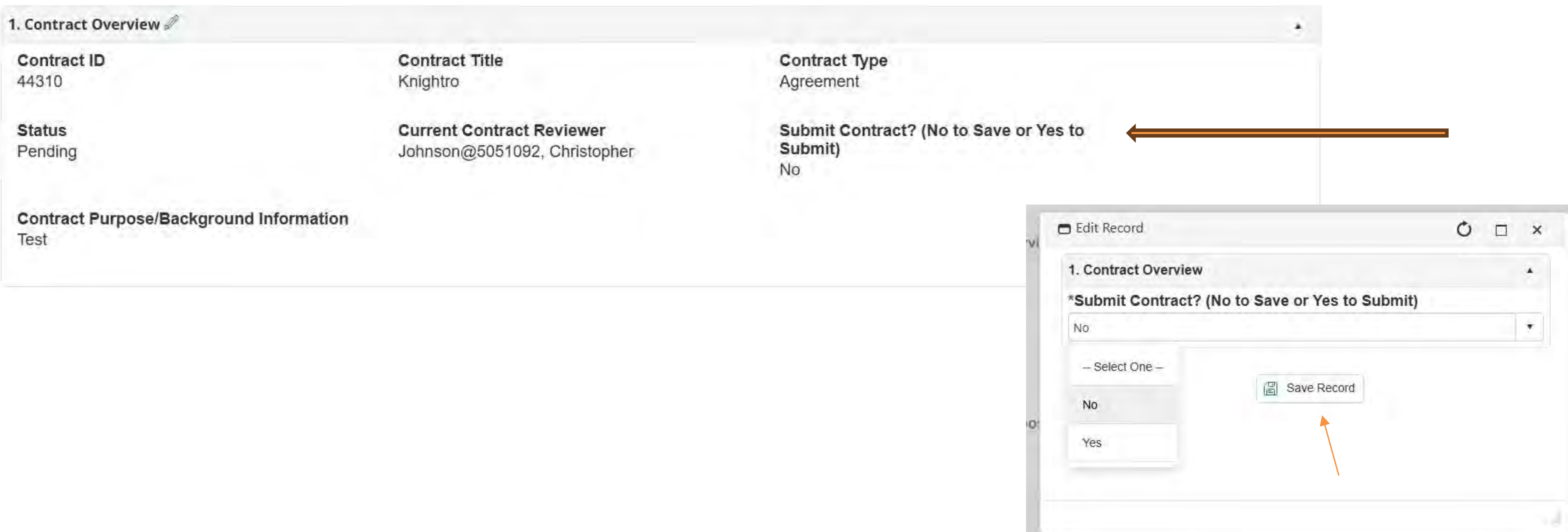




FINALIZING CONTRACT SUBMISSION

SUBMIT CONTRACT

- When you’re ready to submit the contract, go to **Section 1 – Contract Overview** under **Record Details** tab
- Click blue pencil icon - change **Submit Contract?** From “No” to ”Yes” and **Save Record**



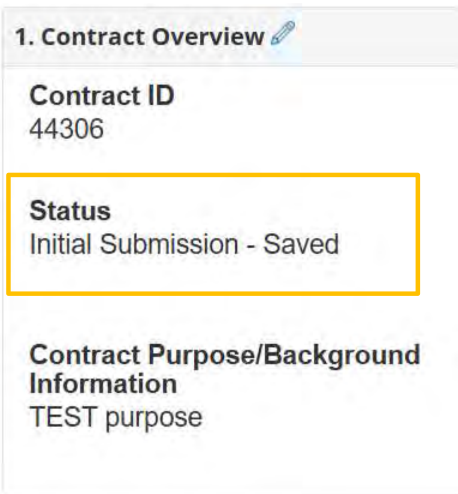
CONFIRM CONTRACT STATUS

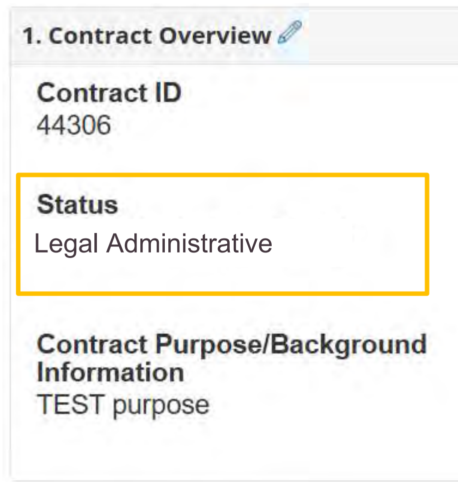
In **Section 1: Contract Overview**, Status changes from "Initial Submission – Saved" to "Legal Administrative"

Submit Contract is "Yes" indicating agreement has been sent to the appropriate Legal Office

SUBMISSION REMINDER

Remember, agreements will not go to Legal until **Submit Contract** status in Section 1 is changed to “Yes”





AUTOMATED EMAILS & NOTES

EMAIL TYPES

- Initial Submission - Saved
- Contract Submitted Successfully
- **Requestor Contract Review Needed** *
- Legal Office Submits Contract to Authorized Signer(s)
- Fully Executed Contract

* *only Cobblestone email requiring Requestor action*

COBBLESTONE software

Task: Requestor Contract Review Needed

The following contract had a status change.

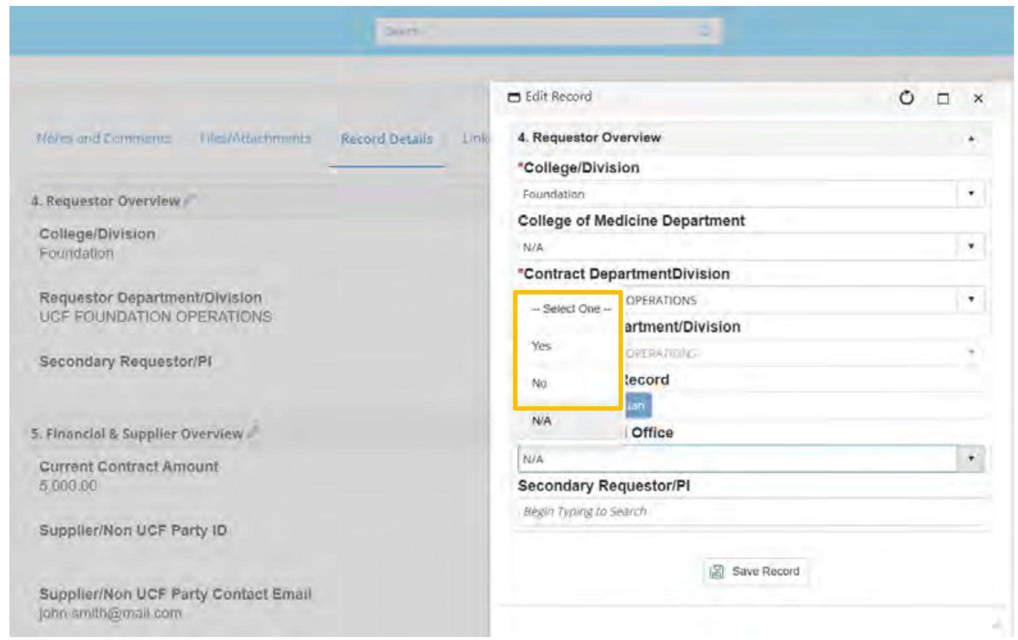
To view contract status or make changes to a contract, please log in to UCF's Contract Management System, https://ucf.cobblestonesystems.com/core.

Note: Contracts with pending actions assigned to you will appear in the section labeled Contracts Requiring My Action. You may also view the status of all of your submitted contracts in the right hand side of the window in the section labeled My Contracts.**Days Left to Task End Date**: 0

Contract Details Record Information:
Contract Title: Mears Contract - CECS Trip to Dr. Phillips
Legal Office: General Counsel
Contract Type: Agreement
Supplier/Non UCF Party Name: MEARS TRANSPORTATION GROUP
Effective Date: Sep 15 2025
Expiration Warning Date: Jun 17 2025
Expiration Date: Sep 15 2025
Requestor Department/Division: General Counsel
Status: Authorized Signer Review
Contract ID: 44573

IF FURTHER ACTION NEEDED - RETURN CONTRACT TO LEGAL

- In **Section 4. Requestor Overview**, hover over **Return to Legal Office** and click on pencil icon
- Change **Return to Legal Office** from “N/A” to “Yes”



FULLY EXECUTED CONTRACT

- This email indicates agreement has been fully signed
- Click the hyperlink to access the fully signed contract

COBBLESTONE software

Task: Fully Executed Date

The following contract had a status change.

To view contract status or make changes to a contract, please log in to UCF's Contract Management System, https://ucf.cobblestonesystems.com/core.

Note: Contracts with pending actions assigned to you will appear in the section labeled Contracts Requiring My Action. You may also view the status of all of your submitted contracts in the right hand side of the window in the section labeled My Contracts. **Days Left to Task End Date**: 0

Contract Details Record Information:
Contract Title: Mears Contract - CECS Trip to Dr. Phillips
Legal Office: General Counsel
Contract Type: Agreement
Supplier/Non UCF Party Name: MEARS TRANSPORTATION GROUP
Effective Date: Sep 15 2025
Expiration Warning Date: Jun 17 2025
Expiration Date: Sep 15 2025
Requestor Department/Division: General Counsel
Status: Fully Executed Signed
Contract ID: 44573

To view this event's contract record visit:
Contract Details