Introducing: CobbleStone

The Contract Administrator's guide to CobbleStone Contract Management

In July 2014, UMW Procurement Services department introduced a new contract management system called CobbleStone. This system will assist in managing contracts for the University. This guide will present CobbleStone as a contract administration tool, as well as a refresher for some steps in the contract administration process.

In this handy guide you will find:

1. **Contract Administrator Designation Letter**
2. **Survey from the Procurement team**
3. **CobbleStone Public Portal: what is it and how do I use it?**
4. **Training for Contract Administrators**
5. **CobbleStone Alerts**
6. **Frequently Asked Questions**

1. Contract Administrator Designation Letter

So, you're the Contract Administrator (CA)? Great! We need to make it official! You will be sent a "Contract Administrator Designation Letter" from someone in Procurement Services. It will have the relevant contract details as well as outline your responsibilities as the CA. It will also have a link to the CA Training course that you **must** complete annually (more on this in Section 4 of this document). It is **very important** that you sign and return this form to Procurement Services as soon as you receive it! You don't want us to chase you down for it, do you?

A sample of this letter can be found at the end of this packet.
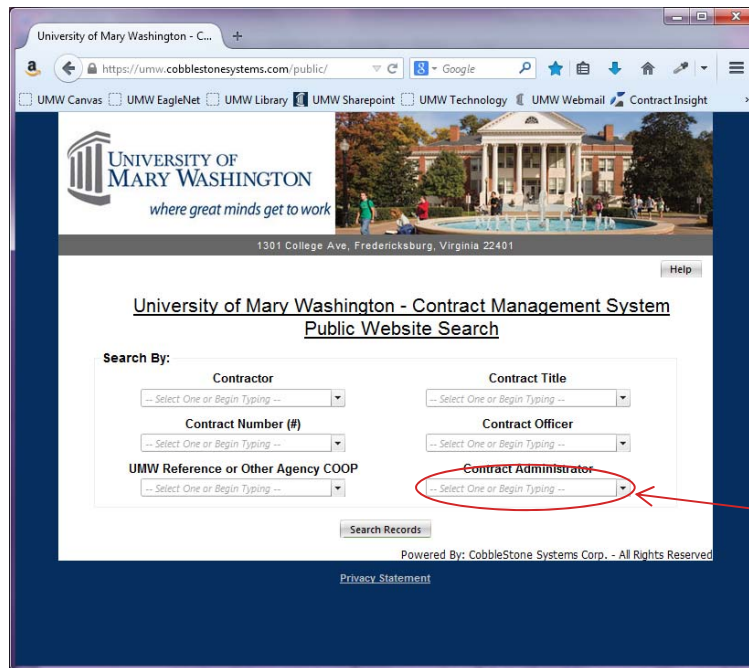
2. Sample Survey From Procurement Team

As a department, we'd like to know how we're doing. Once we're finished processing a solicitation for your department, we'll send you this link to our Customer Survey. We really value your feedback – it helps us know what we're doing right and what we can do better. When you receive the link, please take the time to fill it out. We really do appreciate it!

Survey can be found here: http://adminfinance.umw.edu/procurement/contracts-2/customer-survey

3. CobbleStone Public Portal: what is it and how do I use it?

One of the great things about CobbleStone is now all of our contracts are available to view on the public portal. To access the portal, go to https://umw.CobbleStonesystems.com/public/.

This screen will welcome you:

You can search for your contracts by typing in your name here.

As you can see, there are many different ways to search for contracts. You can start typing in the box or click the drop-down arrow and scroll through your options. To familiarize yourself with the functions of the different search fields, go to the portal and click on the "help" button in the top right-hand corner.

One great feature about the gateway is the "Contract Administrator" search field, type in your name and see all of the contracts for which you are designated the Contract Administrator.

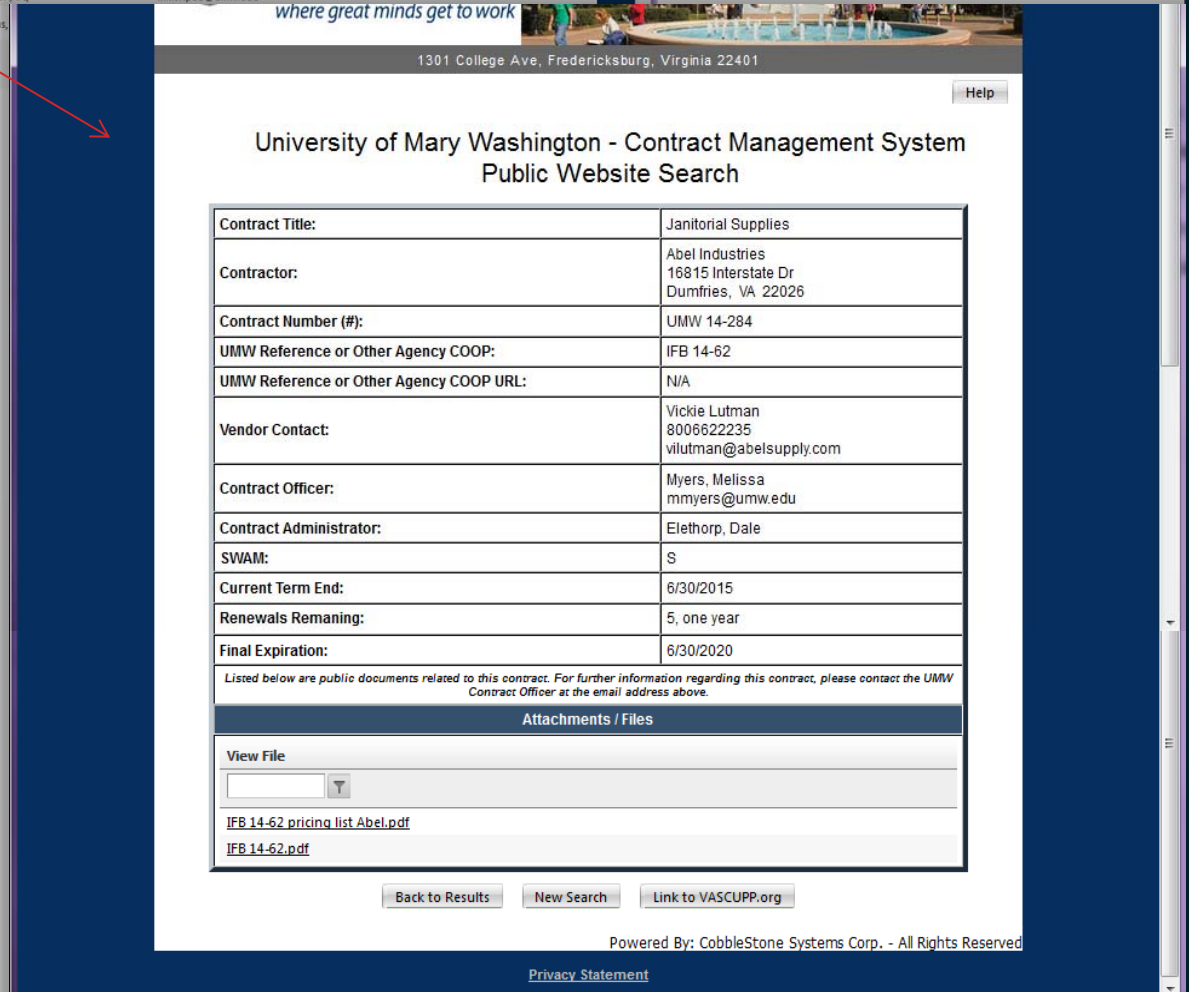Once you hit "search", the gateway will return the results in a table form:

Select "view" to access the desired contract. This will take you to a contract summary sheet with all relevant documents attached.

4. Training for Contract Administrators

The CA training consists of a 10-minute slide-show detailing the things you need to know for the successful administration of contracts, followed by a short quiz. In the training module, you can listen to the slide show, as well as view the notes for each slide. You can view it as many times as necessary, even after you complete the quiz. Again, it is important that you complete this training, and it is **required annually** for all Contract Administrators.

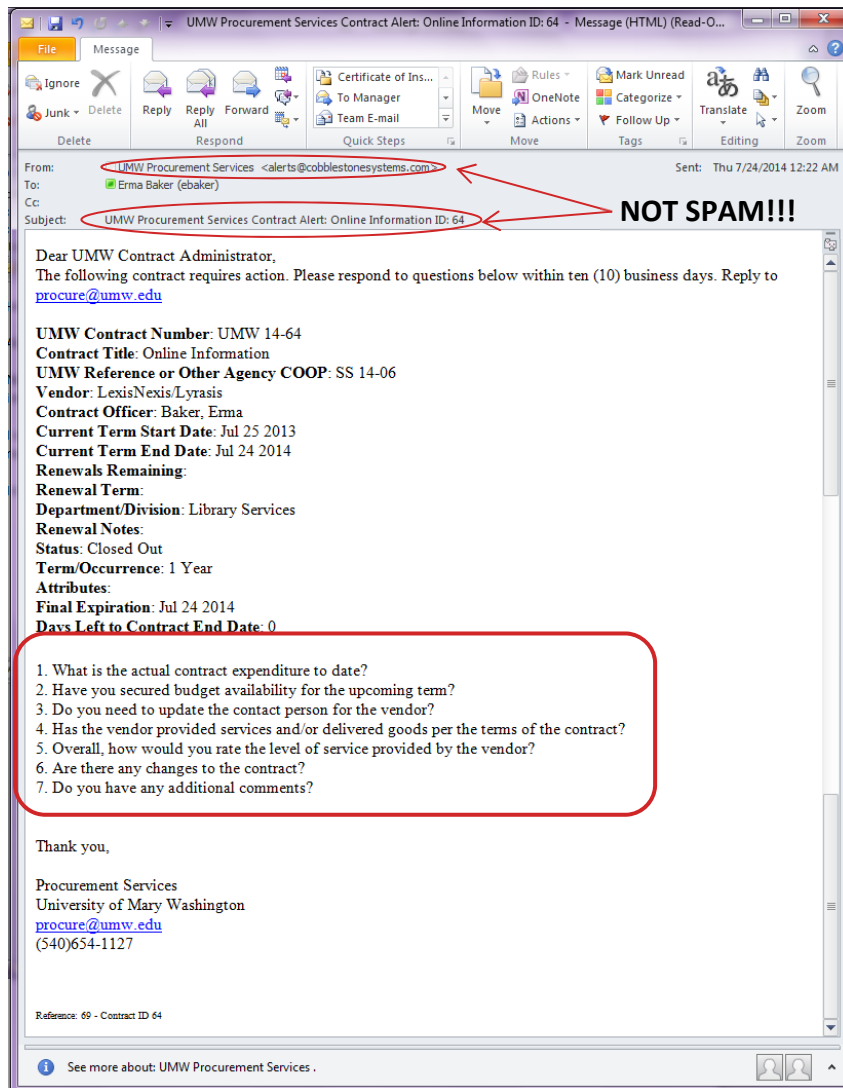For instructions on accessing the training, go here:

http://adminfinance.umw.edu/procurement/training/contract-administrator-training/

If you have any problems accessing the Knowledge Center, contact Pam Lowery at (540) 654-1357.

6. Frequently Asked Questions:

Do I really have to sign the Contract Administration Designation letter?
Yes!

Do I really have to take the CA training?
Yes!

I've taken the CA training already; do I have to do it again?
If you took it over a year ago, then yes! The CA training must be completed each calendar year.

I am still receiving the old renewal survey form. Why is that?
This is most likely because we entered your contract into CobbleStone after the alert would have gone out. Therefore, for some contracts we are still sending the link for the survey. Please complete it as instructed.

For the first question in the renewal form, how do I find the actual contract expenditure? Can you provide me this figure?
The buyer for your department should be able to access this information via Banner.

I can't seem to find my contract on the public portal? Why is that?
There could be several reasons why it isn't showing up. Contact us and we'll be happy to help you sort it out!

[SAMPLE] Designation and Responsibilities of Contract Administrator

TO: CONTRACT ADMINISTRATOR
FROM: CONTRACT OFFICER
                   Procurement Services
DATE: November 11, 2014

The contract referenced below has been awarded and services or performance may be commenced. You have been assigned as the contract administrator for this contract and are assigned the following responsibilities. Please review this information; sign and date this original letter, that you have read and understand your responsibilities as Contract Administrator, return it to the Purchasing Office within five days to complete the contract file. If you have any questions, please contact the Contract Officer indicated above.

ANNUAL CONTRACT ADMINISTRATOR TRAINING REQUIREMENT COMPLETED? YES ☐ NO ☐
https://covkc.virginia.gov/umw/Kview/CustomCodeBehind/Customization/Login/COV_Login.aspx

Signed: _____   Date: _____

        Contract Number: CONTRACT NUMBER
        Contractor: CONTRACTOR NAME
        Project: CONTRACT TITLE
        Period of Contract: MO/DAY/YR TO MO/DAY/YR
        Renewals: NUMBER AND TYPE OF RENEWALS IF ANY

View your contract on UMW Public Contracts Portal: http://umw.cobblestonesystems.com/public/

You, as contract administrator, are responsible for:

- Day to day coordination of the delivery of this service (or goods);
- Reviewing the Contractor Key and Badge Policy with the contractor and ensure the contractor fully understands this policy;
- Certifying receipt of services (or goods) billed were delivered in accordance with the contract terms and conditions;
- Obtaining and approving job estimates and verifying labor hours and classifications if required (time and material contracts);
- Prompt reporting of delivery failures or contractor performance problems to the Contract Officer;
- Completing and submitting periodic evaluations of contractor performance ;
- Initiating Complaint to State Vendor form if required;
- Assurance that the contract amount is not exceeded without proper authorization from Contract Officer;
- Assurance that the contract terms and conditions are not extended, increased, decreased, or modified in any way without action through the Contract Officer;
- Coordinating contract "start-up" activities with appropriate agency personnel (facilities management, security, IT, etc.);
- Recommending solutions to Contract Officer if performance problems or contract issues persist.;
- Capture of Small Business (SWaM) subcontracting reporting data if requested in the original bid/proposal.
  Note: Contract Administrator responsibility shall not be transferred except through the UMW Purchasing Department.

PLEASE KEEP A COPY OF THIS DOCUMENT FOR YOUR RECORDS.