NC eProcurement

Creating a Contract Workspace (IT)

This job aid is for a user that wishes to create a Contract Workspace in the NC eProcurement Contracts Tool **for an IT contract**. By default, the user who initiates the CW becomes the **'Project Owner'**. An IT contract is defined as a contract with a vendor that falls under the authority of the NC Department of Information Technology. A Contract Workspace (CW) is a container for all information and documents pertaining to a contract with a single vendor. If a contract includes multiple vendors, the Project Owner will create multiple CWs; one for each vendor.

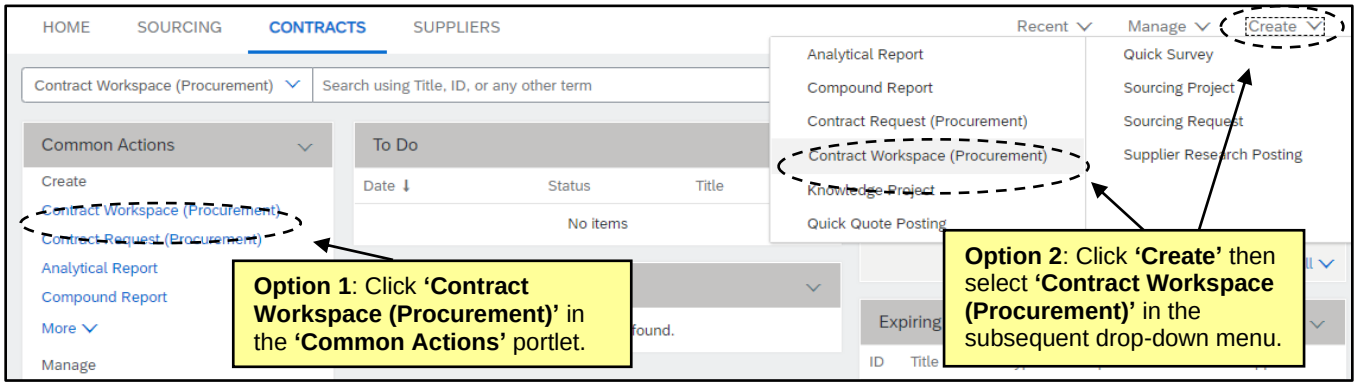
The basic process begins when the Project Owner logs in to the NC eProcurement Contracts Tool and clicks on the **'Contract Workspace (Procurement)'** link under the Create menu.

I. Initiate Contract Workspace and Enter Contract Attributes

1. There are two options for initiating a Contract Workspace for an IT contract:

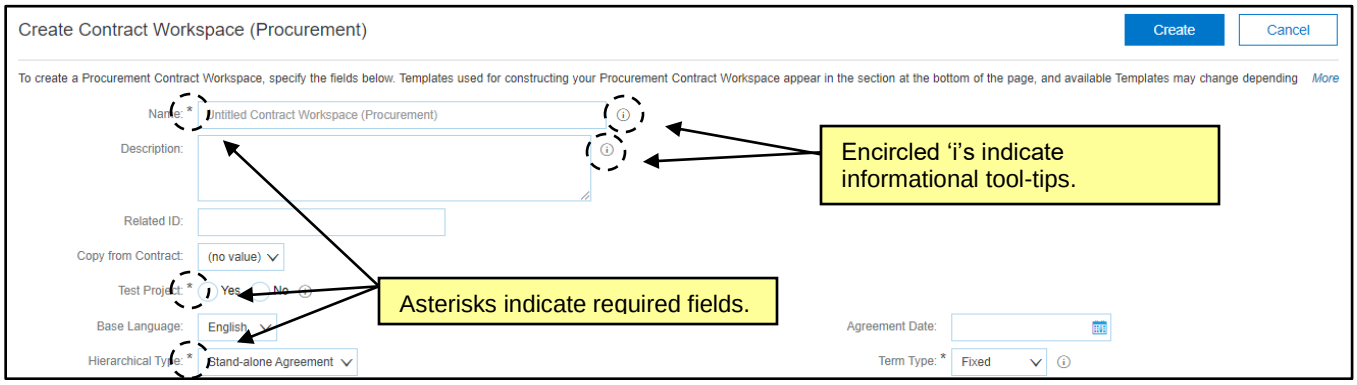
   a. In the **'Common Actions'** portlet on the left side of the screen, click the **'Contract Workspace (Procurement)'** link.

   b. In the upper right corner of the screen, click **'Create'** and select **'Contract Workspace (Procurement)'** in the subsequent drop-down menu.



2. The **'Create Contract Workspace (Procurement)'** page will display. Populate all relevant fields, including the required fields that are noted by an asterisk (*). Some fields are conditional, meaning that the information entered in these portions of the CW determine options later in the process.

   Note: There is an informational tool-tip icon (lowercase 'i' within a circle) next to some of the fields. To display further explanation for the associated field, left-click on the icon.



3. **Name***: Enter a title for the CW. This title must be a unique value. If the enter name has already been used, the system will alert the Project Owner with an error message.

4. **Description***: Describe the contract being loaded into the CW.

5. **Related ID**: A free-text field used to note IDs or other tracking numbers created outside of the system. If an agency has a Purchase Requisition (PR) number or other unique identifier, they can list it here. This would capture the data related to that identifier and provide for reporting purposes. Using the PR number could assist in reviewing data from NC eProcurement Buyer to understand what Purchase Orders have been issued to the vendor against the contract.

6. **Copy from Contract**: This field defaults to **'(no value)'**, but a Project Owner may initiate the process of copying a previously created CW from this drop-down field.

7. **Test Project***: Always select the radio button for **'No'** in this field. The system allows for the creation of test projects for practice or training purposes. However, if the **'Yes'** option is selected in error, it cannot be undone once the Project Owner clicks **'Create'** at the completion of this screen.

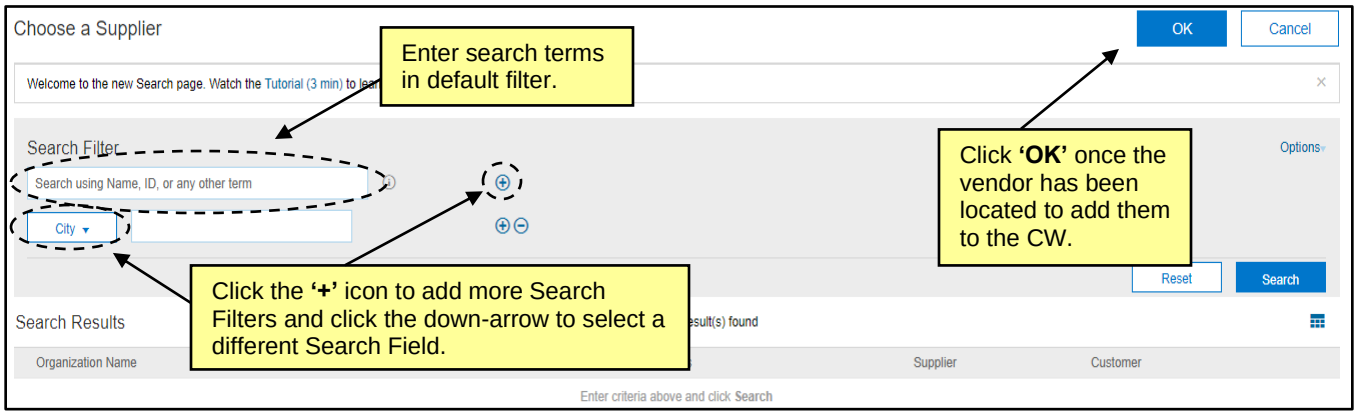
8. **Base Language**: This field defaults to **'English'**, which is the only option available.

9. **Hierarchical Type***: This field defaults to **'Stand-alone Agreement'**, which indicates an independent CW and should remain the selection. The other options are **'Master Agreement'**, which specifies that the CW is related to one or more sub agreement CWs, and **'Sub Agreement'**, which indicates the CW belongs to a master agreement.

10. **Supplier**: Select the vendor that was awarded the contract being loaded into the CW. Click the down-arrow at the right of the box and select **'Search more'** in the drop-down menu to access the **'Choose a Supplier'** page. Enter a vendor name, location, or any other term within the default search filter free-text field. Click on the **'+'** icon to add more search filters and click the down-arrow to select the specific field by which to filter if the desired field does not display automatically. Click **'OK'** when the correct vendor has been located to add them to the CW.

    Note: Only vendors with an active registration for NC eProcurement within the NC electronic Vendor Portal (eVP) will return in the search results. A CW can be created for a contract that has been negotiated with a vendor who is not active in eVP. However, the CW cannot be Published until that vendor has an active NC eProcurement registration within eVP and has been added to the CW.

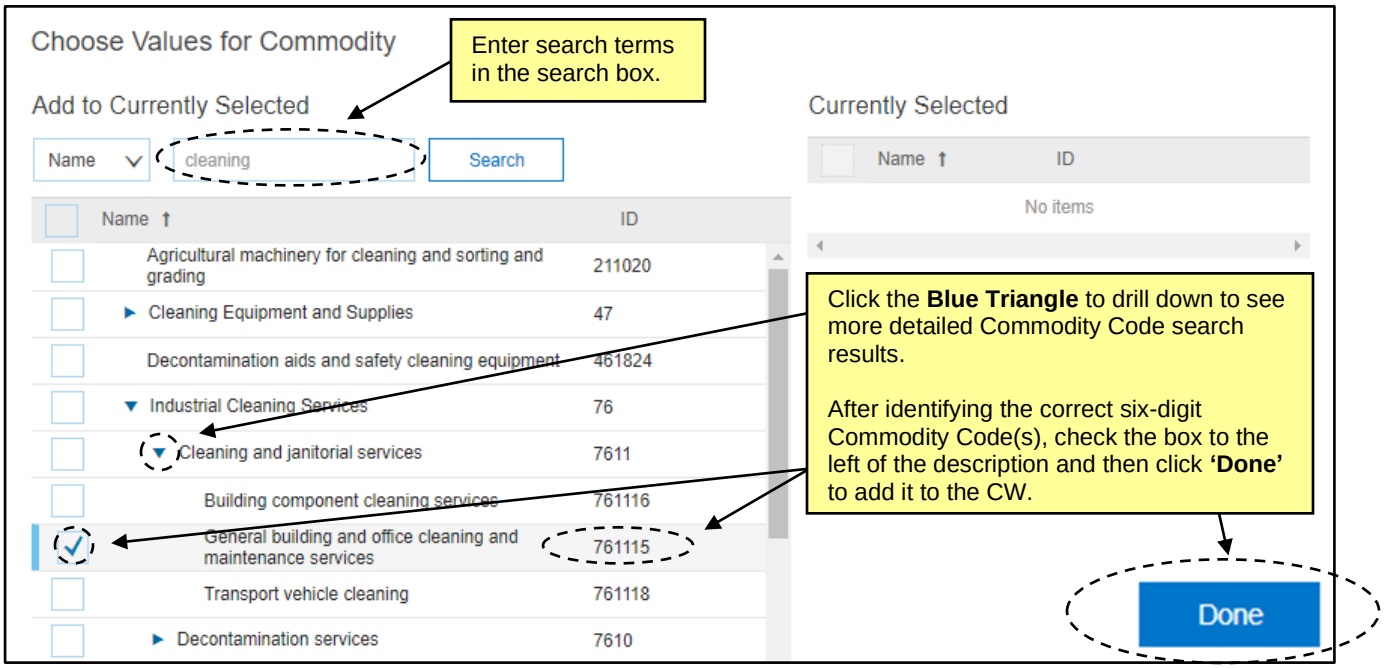
    Note: As a reminder, CWs are for one vendor only. If multiple vendors are on a contract, the Project Owner should create a CW for one of the vendors and then copy it to use as the basis for creating CWs for the other vendors.



11. **Contract Amount***: Enter the dollar value of the contract in U.S. Dollars (USD).

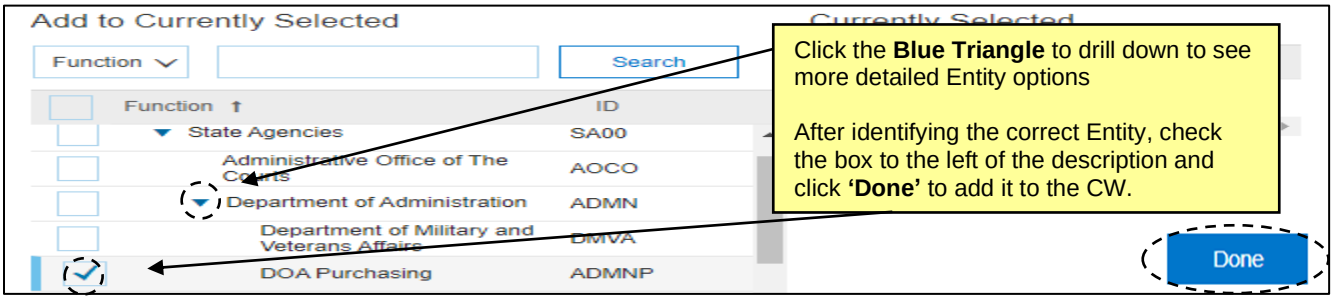
12. **Commodity***: Select the commodity code that best describes the nature of the contracted item(s). Click the down-arrow at the right of the box and select **'Search more'** in the drop-down menu to access the Commodity Code Search page. Project Owners may search by **'Name'** or **'ID'**. After identifying the correct commodity code, check the box next to it and click **'Done'** to add it to the CW. More than one commodity code can be selected per CW if the contract covers multiple items.

    Notes:
    - The commodity codes listed are part of the United Nations Standard Products and Services Code (UNSPSC) commodity code structure. Codes that begin with a '7', '8', or '9' correspond to Services.
    - UNSPSC codes are organized in groupings of two, four, and six digits, with six-digit codes providing the most detailed description of the item(s). To search for more specific commodity codes in the search results, click on the **Blue Triangle** next to the commodity code description to drill down further.
    - The NC eProcurement guide to selecting commodity codes can be found here: https://eprocurement.nc.gov/training/selecting-commodity-codes.
    - The UNSPSC code search website can also be a helpful resource: https://www.unspsc.org/search-code.



13. **Entity**: Select the entity entering into the contract. Click the down-arrow at the right of the box and select **'Search more'** in the drop-down menu to access the Entity Search page. Project Owners may search by **'Function'** (i.e., Entity name) or **'ID'**. For some entities with multiple levels, it will be necessary to drill down further by clicking on the **Blue Triangle** next to the Entity's name. Once the correct entity has been identified, check the box next to it and click **'Done'** to add it to the CW.

    Note: It is very important to select the correct **Entity**, as this selection directly impacts the Project Owner's options at the template level.



14. **Predecessor Project**: This field defaults to **'(no value)'**, but a Project Owner may link the current CW to a previous CW or Sourcing Project from this drop-down field.

15. **Contract Type***: This field defaults to **'No Choice'**, but it is required that the Project Owner selects the correct type of contract from the drop-down menu. Four choices are provided, although certain options are not applicable to the Project Owner creating the CW.

    a. **Statewide Term Contract**: Option for use by the Statewide IT Procurement Office or P&C when creating statewide term contracts.

    b. **Agency Specific Term Contract**: Option for use by any entity when creating an agency specific term contract. A "term contract" is a contract where a vendor agrees to provide goods and services at set prices, for an agreed Contract Term, and pursuant to specific terms and conditions. No set quantity is provided, but estimates are often given based on forecasted usage. It is also referred to as a "requirements contract" or "indefinite quantity contract".

    c. **IT Convenience Term Contract**: Option for use by the Statewide IT Procurement Office when creating mandatory Statewide IT Term Contracts.

    d. **Agency Contract**: Option for use by any entity when creating a standard contract with defined quantity, pricing, and duration.

    Note: It is very important to select the correct **Contract Type**, as this selection directly impacts the Project Owner's options at the template level.

16. **Solicitation Type**: This field defaults to **'No Choice',** but the Project Owner can select either **'Competition'** or **'Waiver of Competition'** from the drop-down menu should those options better describe the nature of the solicitation process for this contract.

17. **Statewide Contract ID**: This field only appears after the selection of either **'Statewide Term Contract'** or **'IT Convenience Term Contract'** in the **'Contract Type'** field. Click the down-arrow at the right of the box and select **'Search more'** in the drop-down menu to access the list of statewide contract IDs and select the one for which this contract is being loaded.

18. **Agency Contract ID**: This field only appears after the selection of either **'Agency Specific Term Contract'** or **'Agency Contract'** in the **'Contract Type'** field. This free-text field should be populated with the Contract ID the entity uses to label this contract.

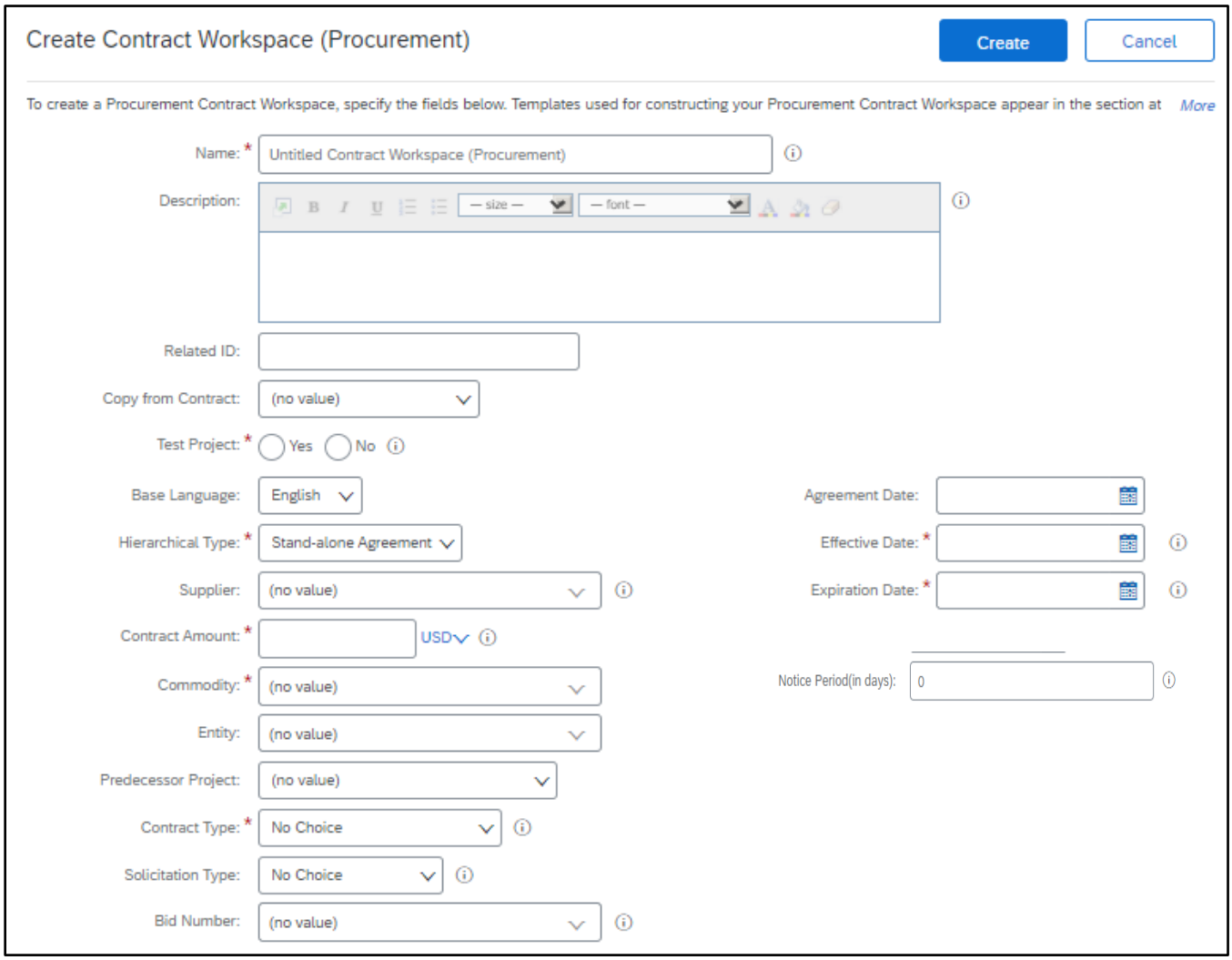
19. **Bid Number**: This field defaults to **'(no value)'**, but the Project Owner can choose to add the Interactive Purchasing System (IPS) Bid Number assigned to the official competitive bidding event should one have occurred. Click the down-arrow at the right of the box and select **'Search more'** in the drop-down menu to access the Bid Number Search page. Project Owners may search by **'Bid Number'** or **'Bid Description'**. Values will be added from IPS on a nightly basis.

20. **Agreement Date**: The date that the contract was awarded to the vendor. Use the date-picker or type the date in the correct format (MM/DD/YYYY). Selecting past dates is acceptable.

21. **Effective Date***: The date that the contract goes into effect. Use the date-picker or type the date in the correct format (MM/DD/YYYY). Selecting past dates is acceptable if the Project Owner is loading an already-existing contract. If this date is in the future when the CW is published, the status will be **'Pending'** until the date is reached and the status changes to **'Published'**.

22. **Expiration Date***: The date that the contract expires and is no longer valid. Use the date-picker or type the date in the correct format (MM/DD/YYYY). For contracts with a base contract period and one or more optional renewal periods, Project Owner should enter the end date of the base contract period so that any notices that the Project Owner requests be sent will be in advance of time needed to exercise the first renewal option.

23. **Notice Period (in days)**: Enter the number of days prior to the **Expiration Date** that the Project Owner wishes to begin receiving reminder email notifications about the contract's upcoming expiration. The suggested entry for this field is 120 days, but the Project Owner may choose any number of days. By default, the **Project Owner** receives the notifications, but other recipients may be added in the **'Notice Email Notification'** area within a different part of the CW.



II. Template Selection

After filling out the Contract Attributes fields, the Project Owner should navigate down the screen to the **'Select a template'** section. The Template options displayed are based upon the selection made in the **'Entity'** field. For IT contracts, the Project Owner should first select the **'Agency Contract Process'** template. The Project Owner will then be prompted to answer additional questions that are used to include/exclude different objects in the CW.

1. In the **'Select a template'** section of the **'Create Contract Workspace (Procurement)'** page, click the radio button next to the **'Agency Contract Process'**.

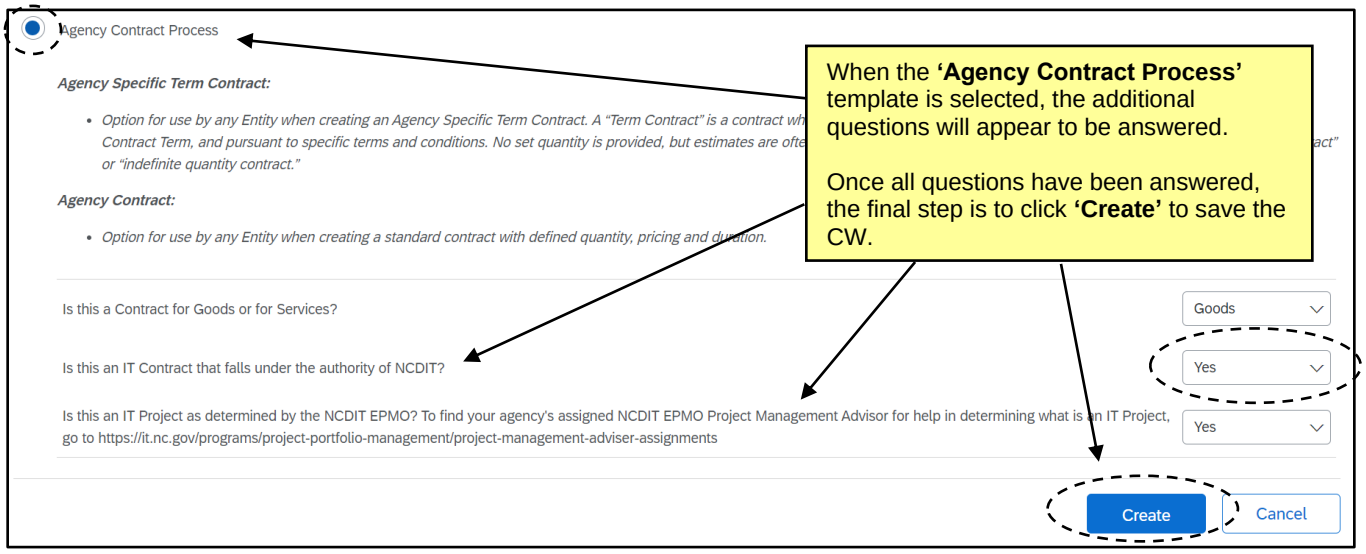
2. The Project Owner should then answer the three questions using the available drop-down menus.

    a. The first question is **'Is this a Contract for Good or for Services?'**. Select either **'Goods'** or **'Services'** from the drop-down depending on the nature of the contract.

    b. The second question is **'Is this an IT Contract that falls under the authority of NCDIT?'** and the two options in the drop-down are **'Yes'** or **'No'**. Since this job aid is for IT contracts that fall under the authority of NCDIT, the Project Owner should select **'Yes'** to the **'Is this an IT Contract that falls under the authority of NCDIT?'** template question. This adds the appropriate NCDIT approvers to the workflow for IT contract amendments, renewals, or termination letters.

    c. The third question is **'Is this an IT Project as determined by the NCDIT EPMO?'**, and the two options in the drop-down are **'Yes'** or **'No'**. Project Owner should work with their assigned NCDIT EPMO Project Management Advisor to help determine if the IT business need being addressed by the IT contract is deemed an IT Project that is required to follow the NCDIT IT Project Management Process. If so, the Project Owner should enter **'Yes'** to this question. This adds the NCDIT EPMO and OSBM approvers to the IT contract amendment approval workflow.

3. After selecting the Agency Contract Process template and answering all subsequent questions, click the blue **'Create'** button (at either the top or bottom of the screen). This action saves the CW in the system and assigns it a unique ID number beginning with "CW". The site will now take the Project Owner to the **Overview** screen where the Project Owner can begin managing the various aspects of the CW.



III. Overview of Tabs

After clicking **'Create'** on the **'Create Contract Workspace (Procurement)'** page, the CW is saved and the **Overview** tab is displayed. This screen contains information about the contract captured on the previous **'Create'** page. From this screen, Project Owners can access five other tabs for the management of the CW: **'Documents'**, **'Tasks'**, **'Team'**, **'Message Board'**, and **'History'**. At this point, the CW is in **'Draft'** status.

- **'Documents'** tab: Place to manage all contract related documents.
- **'Tasks'** tab: A recommended checklist of tasks to perform during various activities during the contract lifecycle as suggested by the Statewide IT Procurement Office.
- **'Team'** tab: Contains a list of individuals and groups considered as team members who can play various roles in the CW throughout the contract lifecycle.
- **'Message Board'** tab: An online discussion page where team members can hold conversations in the form of posted messages that can be organized in topics.
- **'History'** tab: A detailed record of all changes to information in the CW over time.

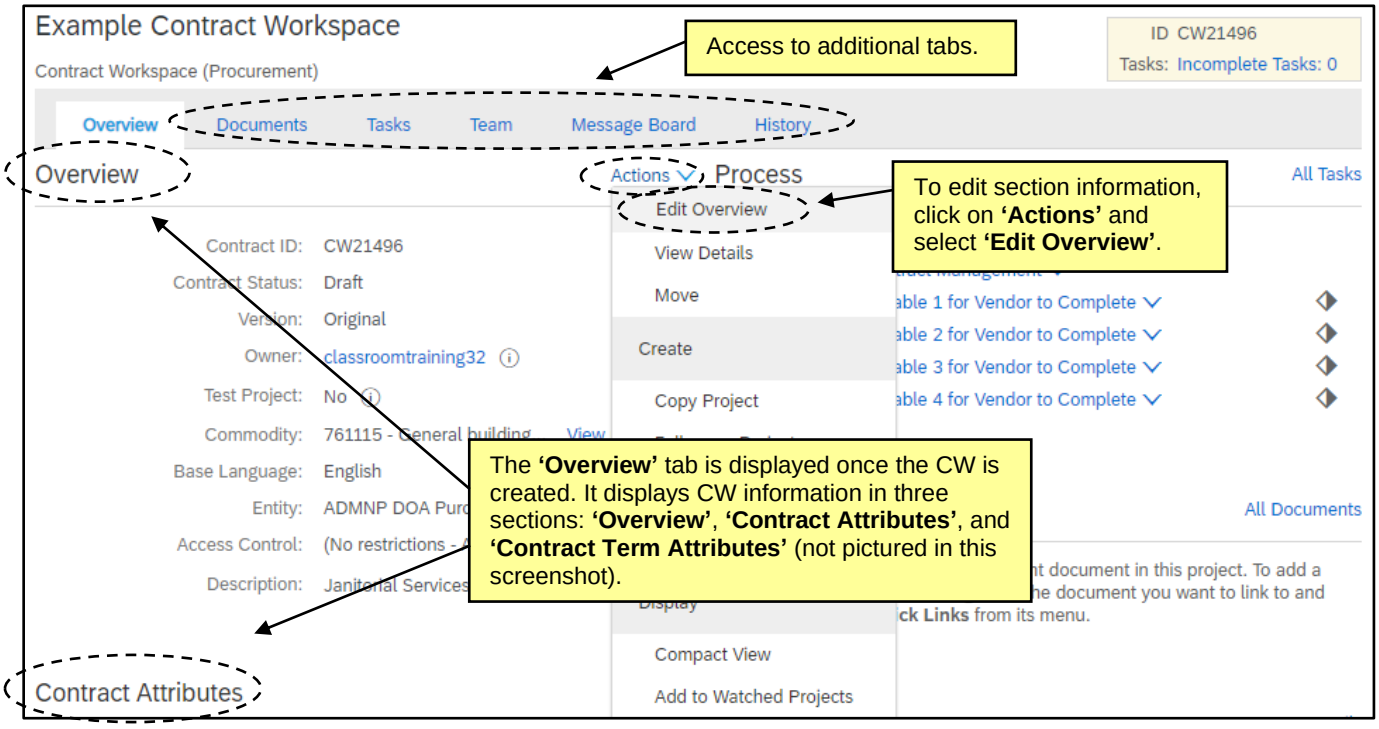
1. On the **'Overview'** tab, scroll down the screen to verify the accuracy of the information populated in the **'Overview'**, **'Contract Attributes'**, and **'Contract Term Attributes'** sections of the **Overview** screen.

    - **'Overview'** contains basic information including **'Contract ID'**, **'Entity'**, and **'Description'**.

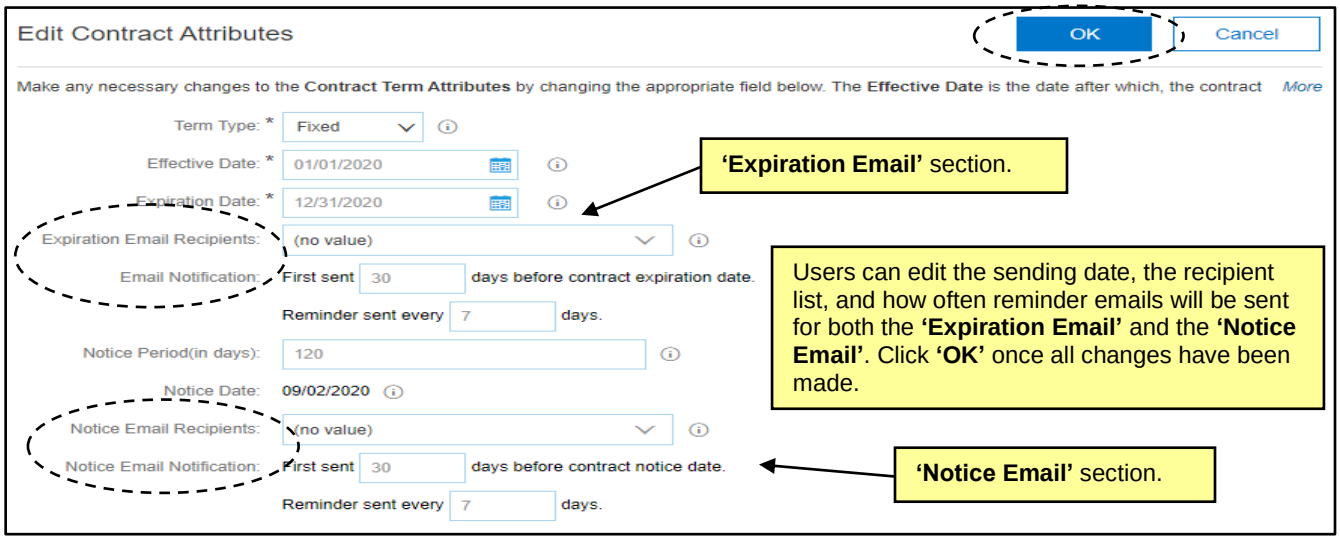
    - **'Contract Attributes'** contains information including **'Contract Amount'**, **'Supplier'**, and **'Contract Type'**.

    - **'Contract Term Attributes'** contains information including **'Effective Date'**, **'Expiration Date'**, and **'Notice Period (in days)'**.

2. To edit any of this information, click on **'Actions'** in the top-right of each section and select **'Edit'** from the drop-down.



Note: Contract expiration notifications can be controlled within the **'Contract Term Attributes'** section of the **'Overview'** screen. There are two different notification email options that serve the same function of reminding applicable users of contract expiration: **'Expiration Email'** and **'Notice Email'**. The **Project Owner** receives both emails by default, and other recipients can be included if desired. Project Owners can utilize both options if they wish to send notifications to different recipients using different schedules. The **'Expiration Email'** first sends 30 calendar days before the contract expiration date, and the **'Notice Email'** first sends 30 calendar days before the **'Notice Date'**, which is a specified number of days before the **'Expiration Date'** as entered in the **'Notice Period (in days)'** field. These dates, the notification recipients, and the frequency of reminder emails can be edited by clicking **'Actions'** next to **'Contract Term Attributes'** and selecting **'Edit Term Attributes'**. Once changes have been made, click **'OK'**.



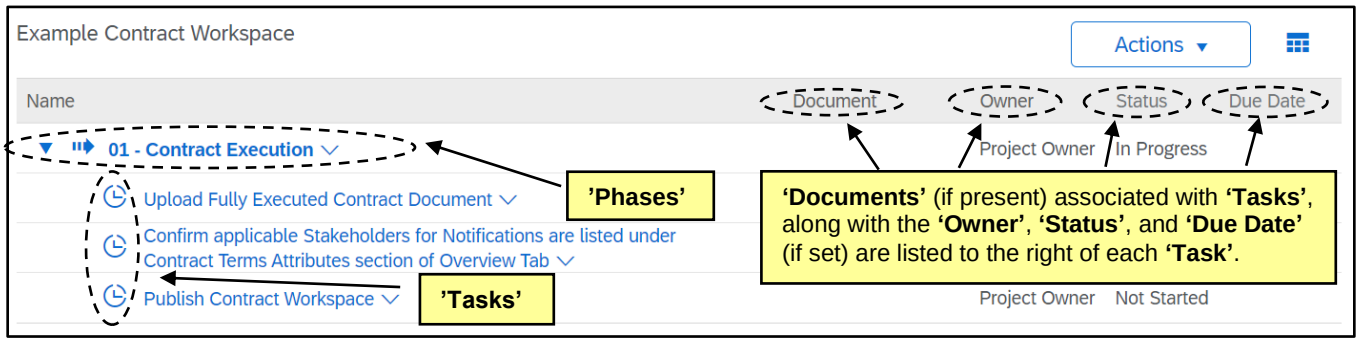
IV. Managing Phases and Tasks

The phases and tasks are located under the **'Tasks'** tab. The purpose of phases and tasks are to provide a road map for the Project Owner to navigate the contract lifecycle and to track the progress made throughout the CW. There are several types of **'Tasks'** in a CW:

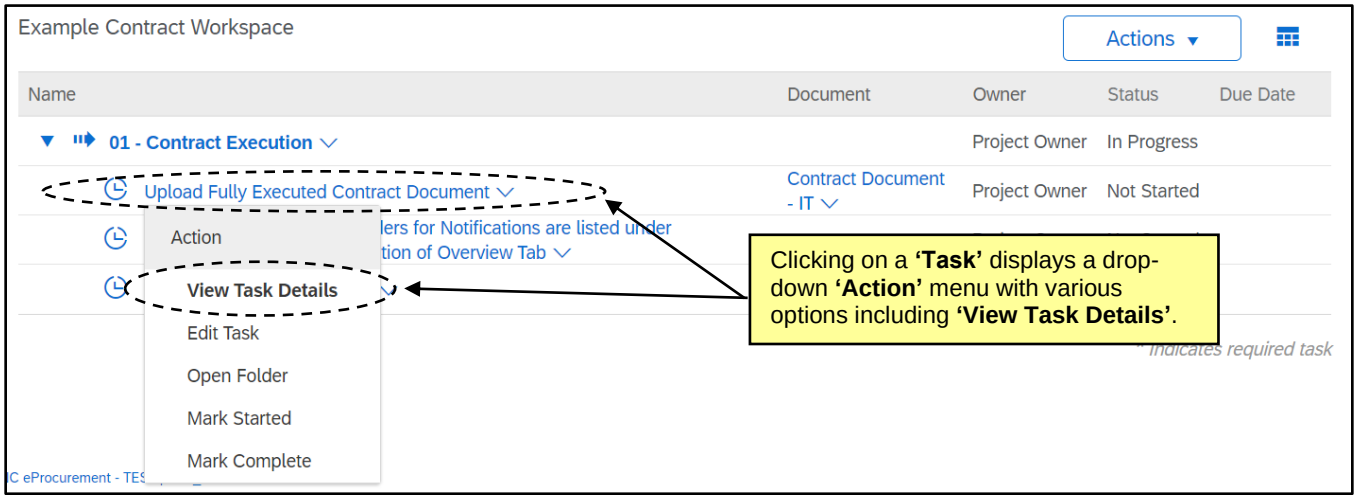
a. **To Do Task**: A simple task that tracks an action.

b. **Document Task**: Associated with a particular document or folder.

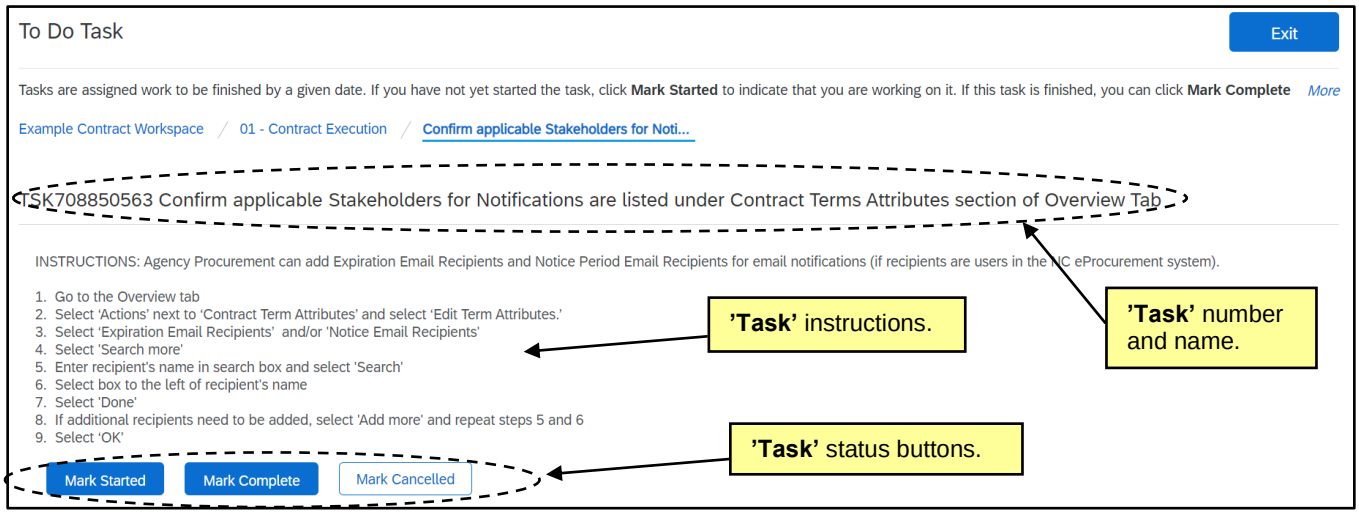
c. **Approval Task**: Requests approvers to approve or deny a contract-related document (e.g., amendment, renewal, termination letter) before it is finalized.



1. Click on a **'Task'** to display the **'Action'** menu for that **'Task'** and select **'View Task Details'**.



2. The **'Task'** detail page opens and displays the **'Task'** number, name, and type above a description of the Project Owner's expected action. Click **'Mark Started'** to indicate the **'Task'** has been initiated and **'Mark Complete'** once the activity has been completed. If the **'Task'** is not a **'To Do Task'**, the **'Mark Started'** button will not appear on the detail page but can be selected from the **'Action'** drop-down. **'Mark Started'** will change the **'Status'** to **'In Progress'**. **'Mark Complete'** will change the **'Status'** to **'Complete'** and put a blue checkmark next to that **'Task'** on the **'Tasks Tab',** so CW stakeholders know where the process stands.

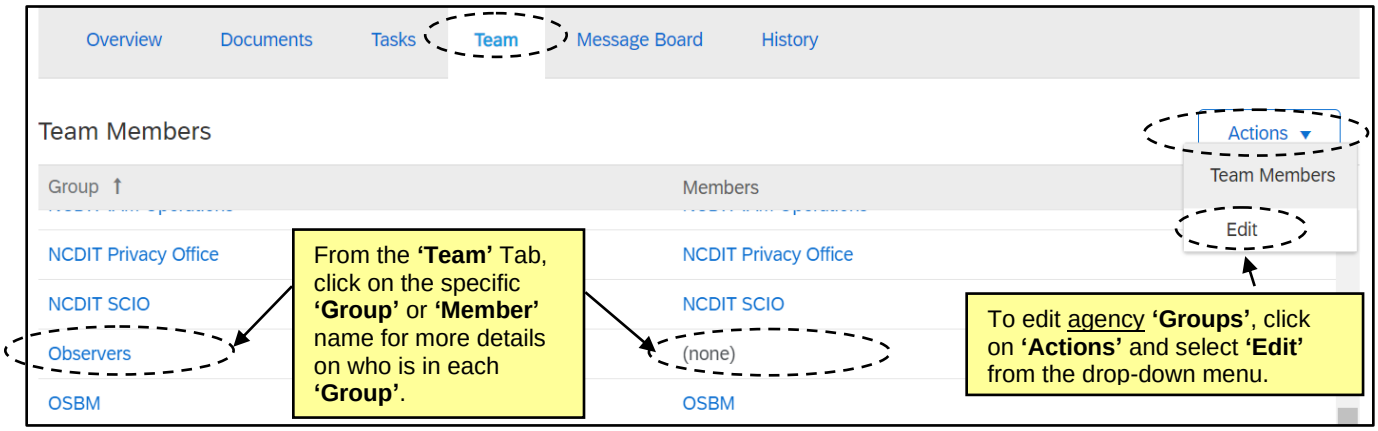


V. Managing Team Members

The **'Team'** tab lists the CW **'Groups'** and its **'Members'**. Each '**Group'** can have different roles that specify permissions for users in that group and the actions they can perform. **'Groups'** will populate by default based on the Attributes entered when creating the CW. It is possible to edit the non-NCDIT assigned **'Groups'** within each CW should the need arise.

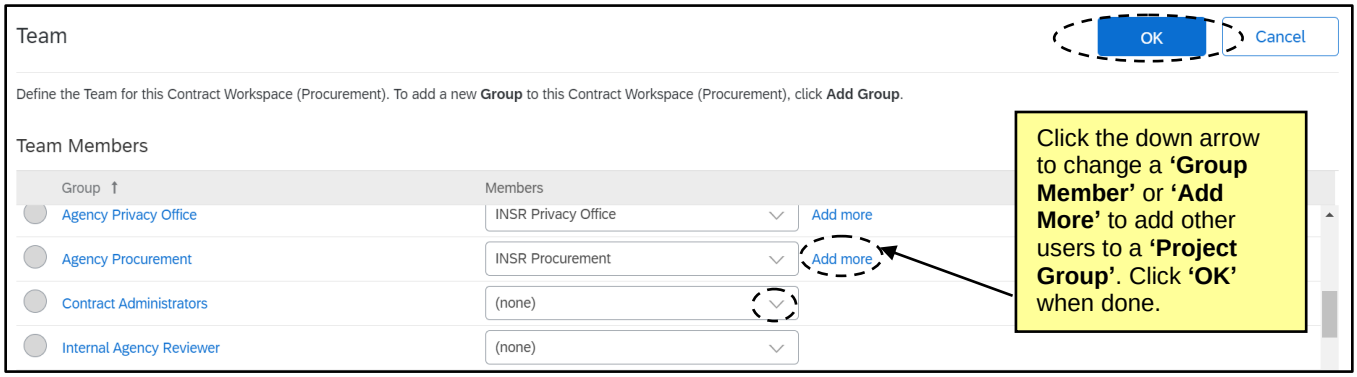
1. Navigate to the **'Team'** Tab and review the CW **'Groups'** and their **'Members'**. For more details on these, click on them to open a **'Details'** page. The pre-loaded **'Groups'** based on the CW template should be sufficient. If changes need to be made, click on **'Actions'** and select **'Edit'** from the dropdown.

   Note: Not all **'Groups'** will prepopulate with members. The **'Project Owner'** group will always default to include the Project Owner who created the CW. Users in the **'Project Owner'** group are the only people who can edit the CW.

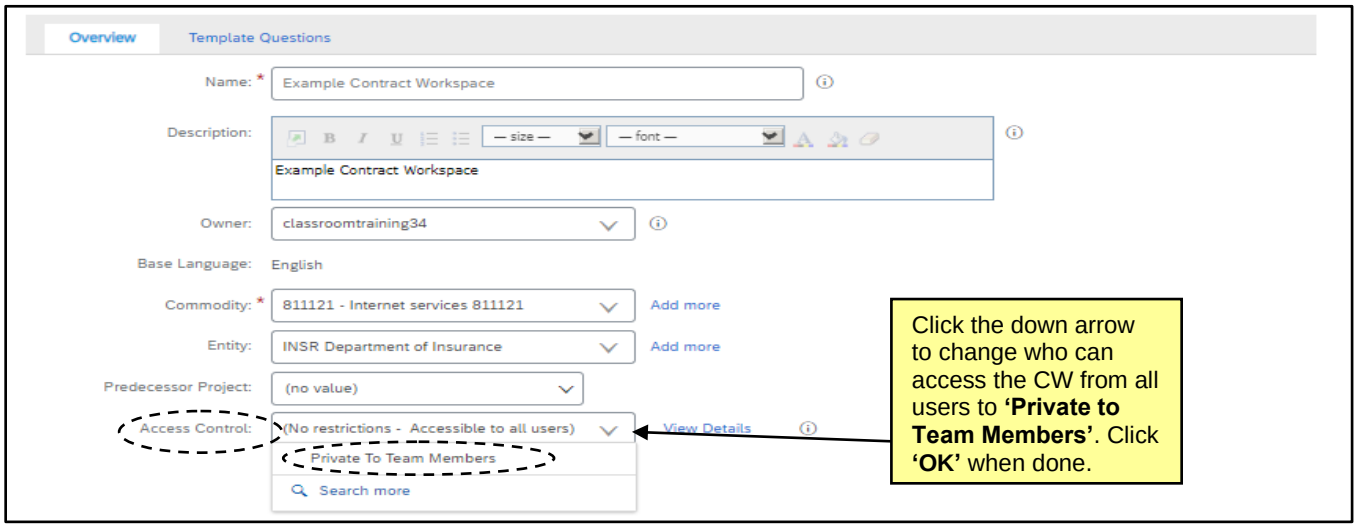


2. On the **'Team'** page, change a team member by clicking on the down arrow in the **'Members'** box or click on **'Add more'** to include other users. There is also an **'Add Group'** button that will allow for additional **'Groups'** to be added. When all changes have been made, click **'OK'.**

   Note: Any changes made to the **'Team'** tab within a CW only apply to that CW and not to other CWs also created by the same Project Owner.



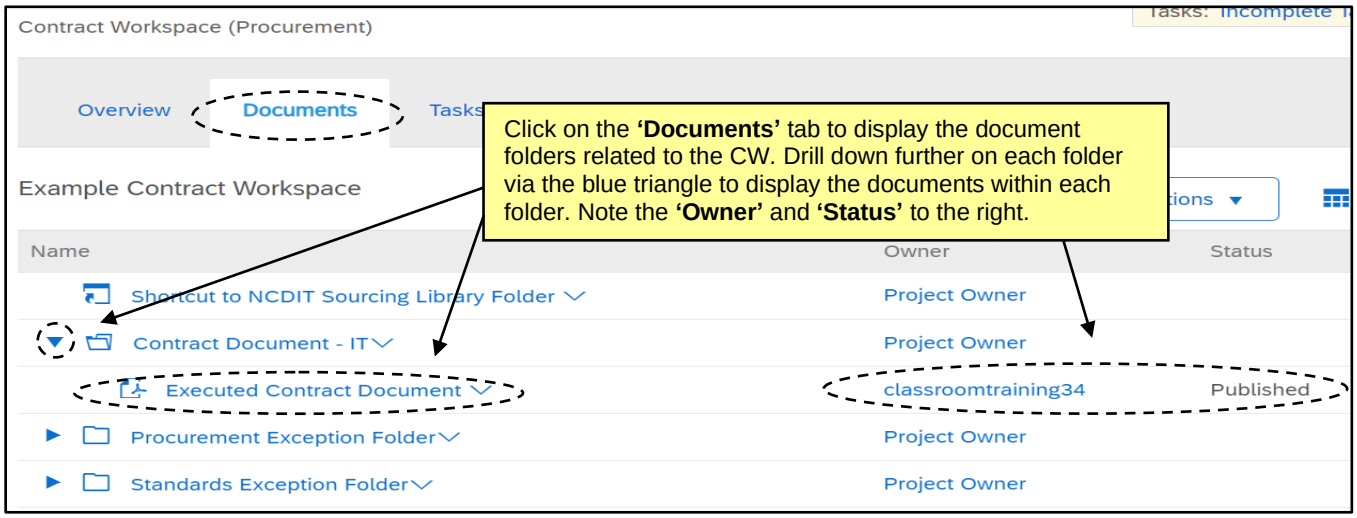
3. The default setting for a CW is to allow all NC eProcurement Contracts Tool users to see the CW. If the Project Owner wants to limit access to the CW to just users that are listed on the Team tab of the CW, then the Project Owner should go to the Overview tab, click on the **'Actions'** menu, and select **'Edit Overview'**. Under the **'Access Control'** field, the Project Owner can select the **'Private to Team Members'** option. Click **'OK'** when done.



VI. Managing Documents

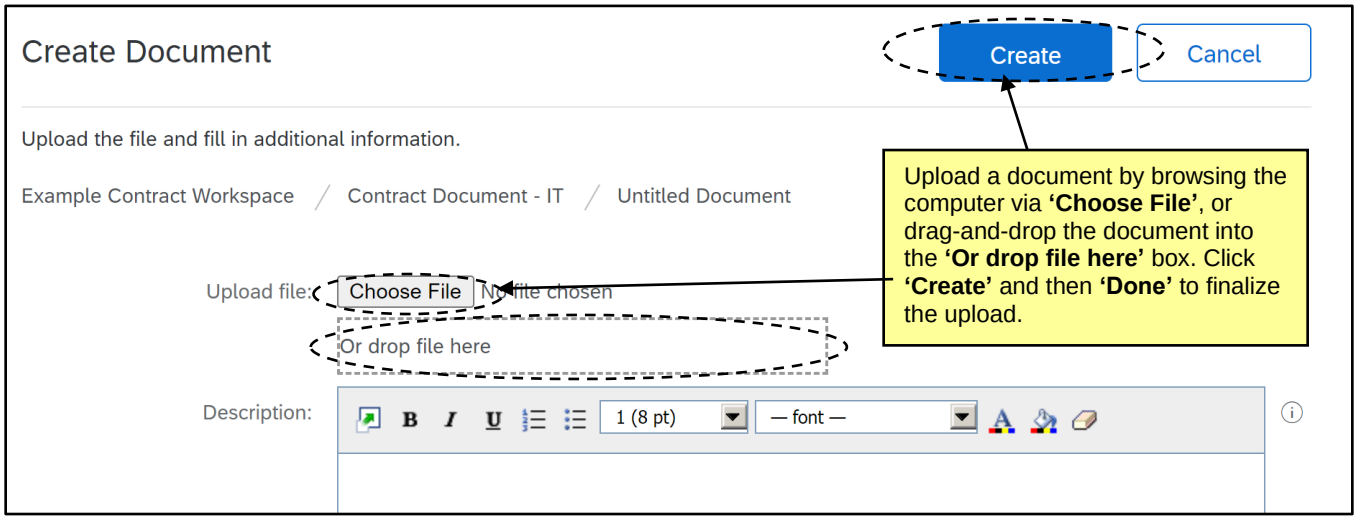
The **'Documents'** tab is a central storage location for all documents related to a contract. By default, it includes folders for **'Contract Document - IT'**, **'Procurement Exception Folder'**, **'Standards Exception Folder'**, **'Security Exception Folder'**, and **'Additional Documentation Folder'**. Users can upload applicable documents in these folders needed over the contract lifecycle to have all important contract-related documents to be in one place. Project Owners can upload new documents and replace existing documents. All documents are version controlled.

1. Click on the **'Documents'** tab and note the folder structure. Click on a blue triangle to the left of a folder to drill down for more options. The document's **'Owner'** and **'Status'** are listed to the right of each item. By default, the **'Contract Document – IT'** folder will be empty.



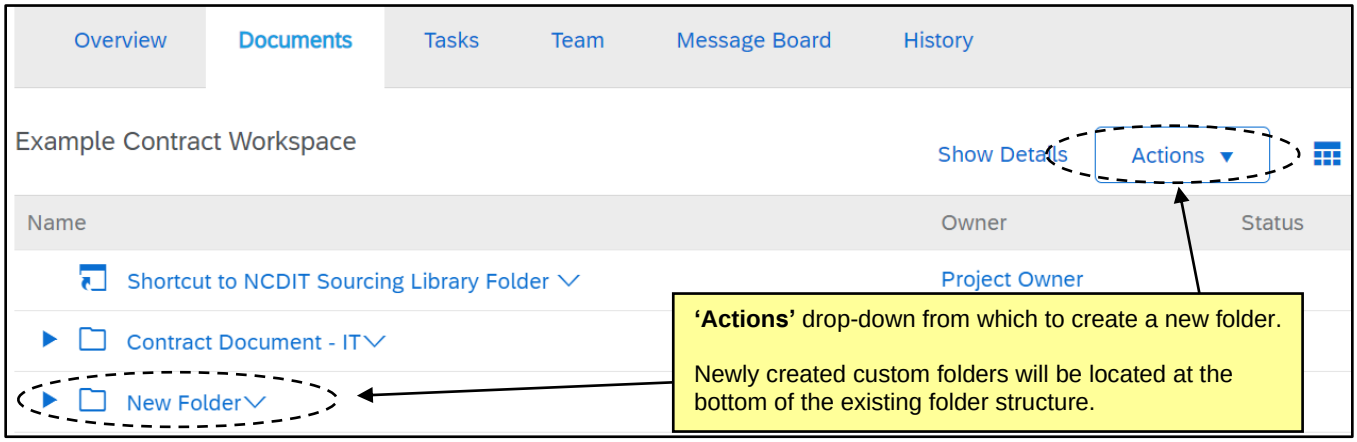
2. Project Owner should upload the fully executed contract document(s) into the **'Contract Document – IT'** folder. Click the down-arrow to the right of **'Contract Document – IT'** and select **'Document'** beneath **'Upload'** in the drop-down menu. If the CW is being set up for an IT contract that has been in place, Project Owner should also upload any fully executed amendments or renewals for the IT contract to the '**Contract Document – IT'** folder.

3. On the **'Create Document'** page, click **'Choose File'** to browse the computer to select the file to upload, or drag-and-drop the file into the **'Or drop file here'** box. Click **'Create'** and then **'Done'** on the subsequent screen to finish uploading the file. This process works for uploading any document to the CW.



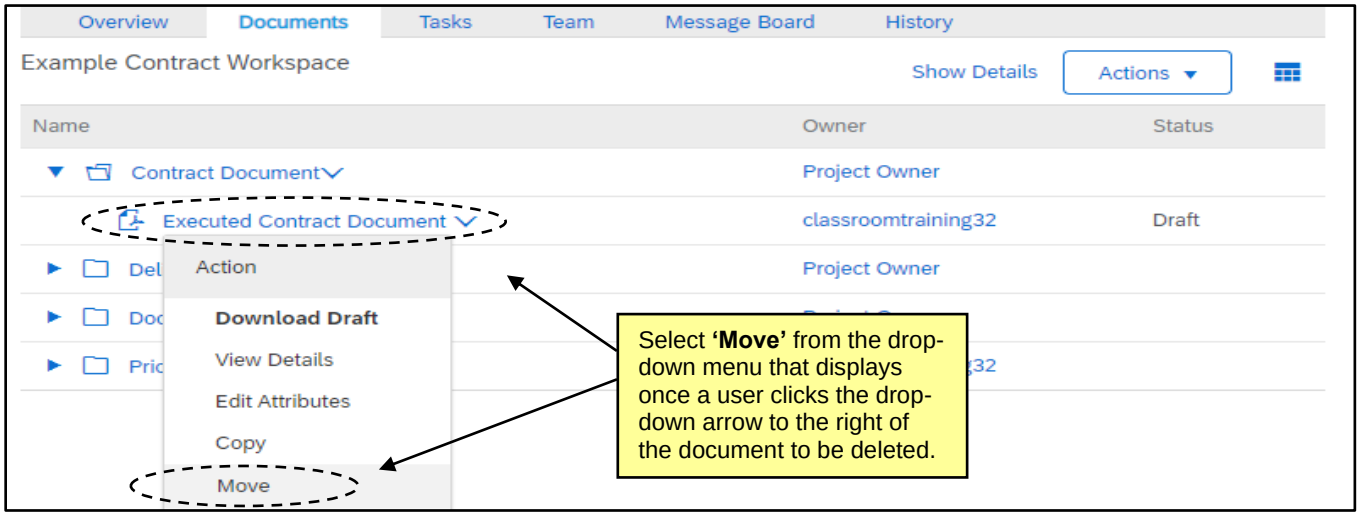
4. Any other documents or pertinent files can be added to the '**Documents'** tab should that be necessary. Project Owners can customize this tab by adding their own folders. **'Click'** the **'Actions'** drop-down in the top-right of the **'Documents'** tab and select **'Folder'** from the menu beneath **'Create'**.

5. On the **'Create New Folder'** screen, give the folder a name and click **'Create'**. The new folder will display at the bottom of the folder structure. Project Owners can create as many customized folders as necessary, and documents within these folders can be managed the same way documents are managed within the default template folders.

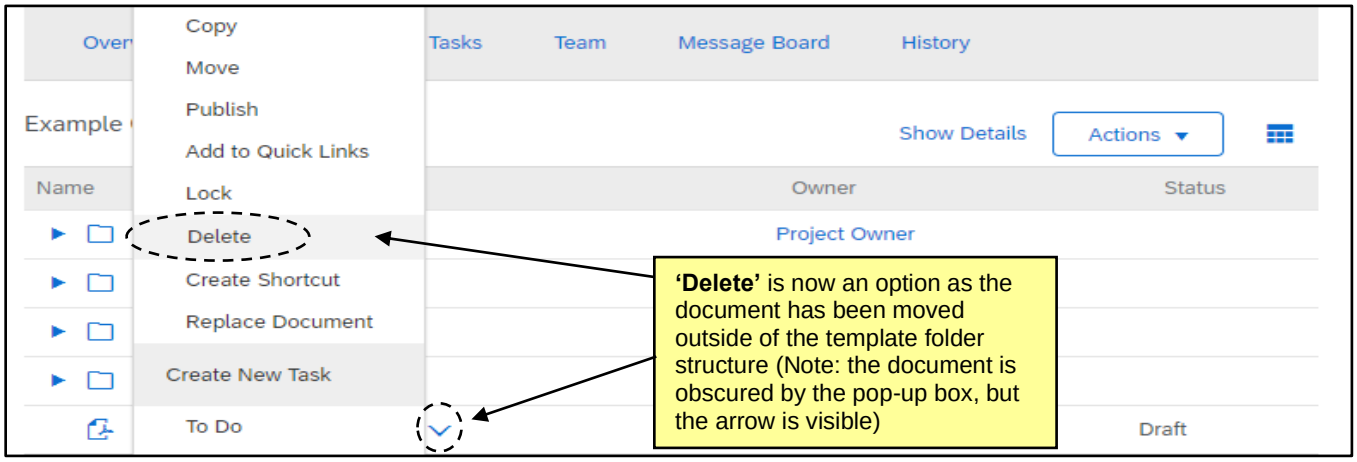


6. Project Owners can delete documents if necessary, but cannot do so for documents existing in any of the template folders (e.g., **'Contract Document - IT'**). This is to protect against a Project Owner from accidentally deleting an important contractual document. To delete a document in one of these folders, the Project Owner must first move the document to be deleted out of the protected folder.

7. Click the drop-down arrow to the right of the document to be deleted. Select **'Move'** from the drop-down menu beneath **'Action'**.



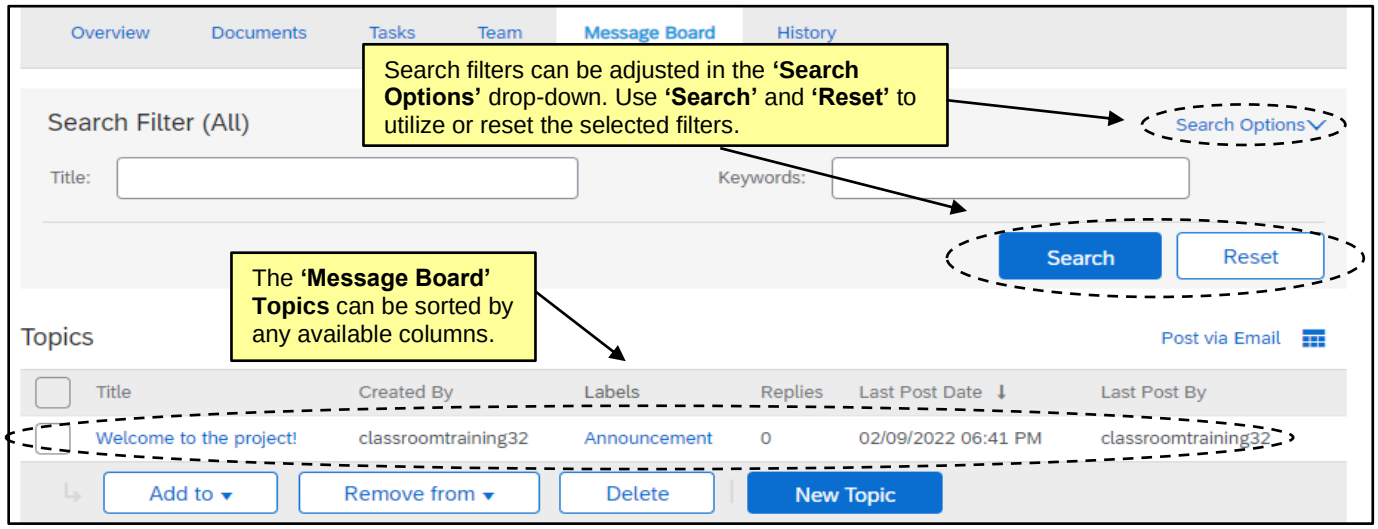
8. Select the radio button next to any destination folder that is not a default template folder and click **'OK'**. The document will be moved to this new location. The Project Owner can now click the drop-down arrow to the right of that document, and select **'Delete'**.



VII. Using the Message Board

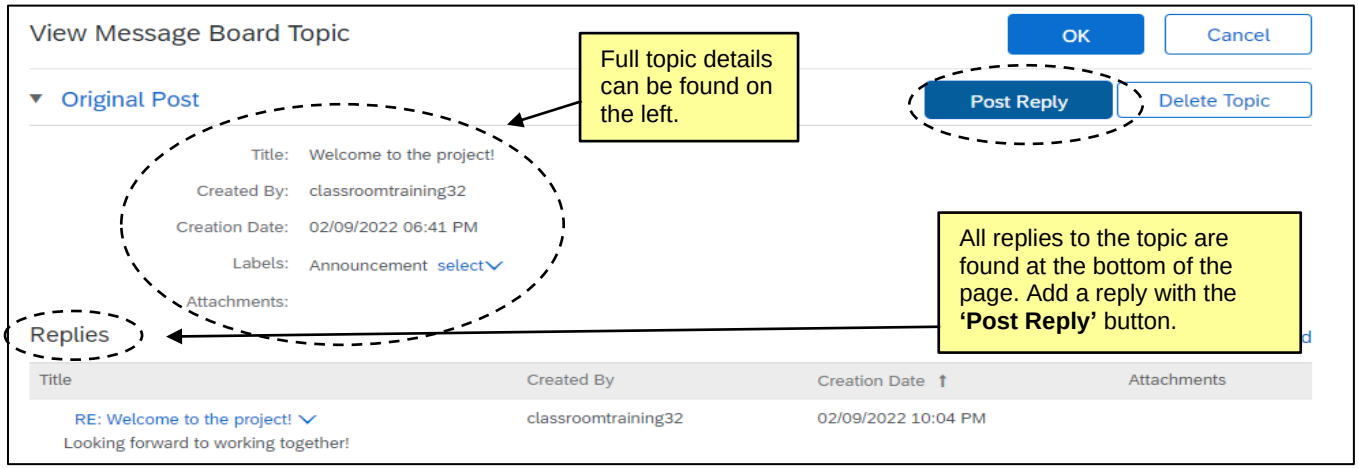
The **'Message Board'** allows members of the CW to communicate with one another.

1. Click on the **'Message Board'** tab at the top of the page.
2. Scroll down to see all **Topics** for the CW.
   a. Messages can be sorted by their fields: **Title**, **Created By**, **Labels**, **Replies**, **Last Post Date**, and **Last Post By**.
3. Use the **Search Filter** at the top of the tab to search by **'Title'** or **'Keywords'** to find specific messages.
   b. Additional search fields can be added to the **Search Filter** section using the **'Search Options'** drop-down menu on the right side. Search options can be shown or hidden from this drop-down.



4. To see the contents of a message and any posted replies, click the **'Title'** of the message.

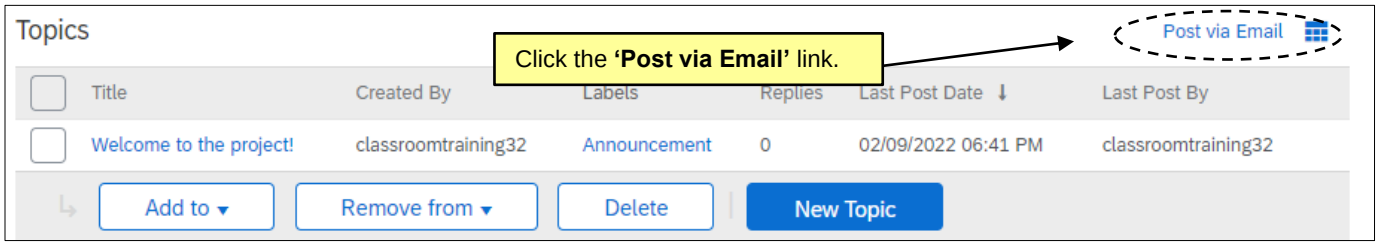
   a. From this screen, all listed replies and attachments will appear.
   b. Click **'OK'** when finished reviewing the message, or **'Cancel'** to exit without saving changes.
   c. The **'Post Reply'** button can be used to post a reply to the **Topic**.
   d. If the Project Owner created the **Topic**, the **'Delete Topic'** button will appear in the upper right, allowing the Project Owner to remove the **Topic** from the CW.



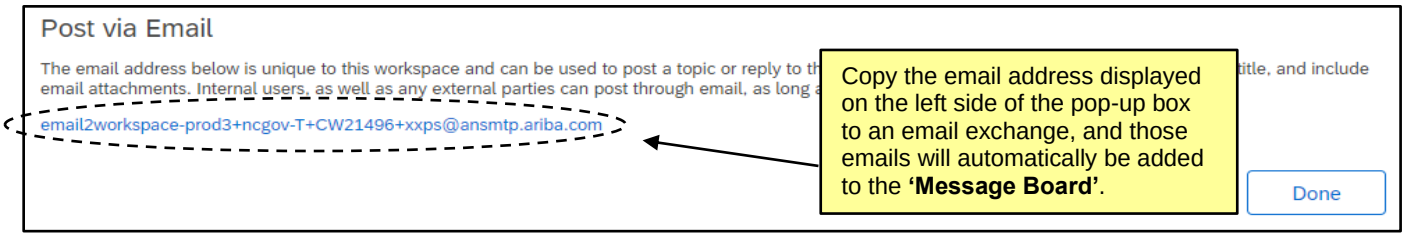
VIII. Tracking Emails in the Message Board

Emails exchanged outside of the CW can also be added to the Message Board.

1. Click the **'Post via Email'** link beneath the **'Search'** button.



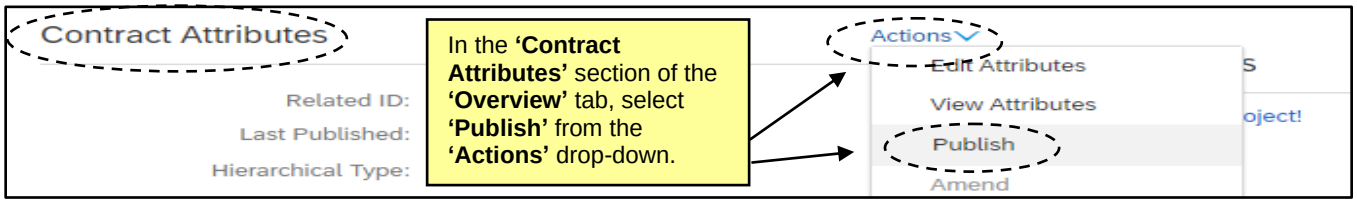
2. A pop-up box will display with a unique email address for this CW. Copying that email address in any future email exchanges or in a reply to an existing email chain will add those messages, along with any attachments, to the '**Message Board'** with the subject of the email becoming the **'Title'** of the **Topic.**



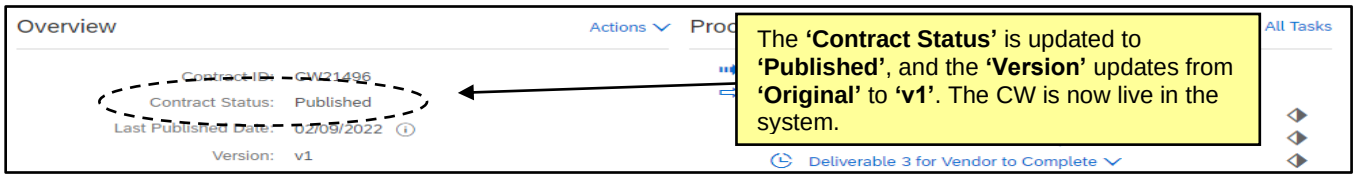
IX. Publishing a Contract Workspace

The final step in creating a CW is to **'Publish'** it. This freezes the current version of the CW so no further editing is possible unless an **'Amendment'** is initiated.

1. From the **'Overview'** tab, scroll down to the **'Contract Attributes'** section and select **'Publish'** from the **'Actions'** drop-down.



2. The **'Contract Status'** updates accordingly from **'Draft'** to **'Published'** if the contract is currently effective, or to **'Pending'** if the **'Effective Date'** is in the future. In the case of a **'Pending'** CW, the **'Contract Status'** will automatically update to **'Published'** when the **'Effective Date'** is reached. At this point the CW is live, reportable, and **'Expiration Notifications'** will now generate based on the expected schedule.



X. Closing a Contract Workspace

When a contract has fully expired or been terminated, the Project Owner should mark the CW as closed under the **'Contract Attributes'** section of the **'Overview'** tab.

1. From the **'Overview'** tab, scroll down to the **'Contract Attributes'** section and select **'Close'** from the **'Actions'** drop-down. This will change the **'Contract Status'** to **'Closed'**.