

Creating a Contract Workspace From a Sourcing Project

Introduction

After a Sourcing Event has ended and the solicitation has been awarded to the winning vendor(s), the Project Owner must create a Contract Workspace (CW) to manage the subsequent contract with the vendor(s) directly from the recently completed Sourcing Project.

Learning Objectives

At the end of this job aid, **you will be able to:**



Create a Follow-on Project from a Sourcing Project.



Navigate from a Contract Workspace to a linked Sourcing Project.



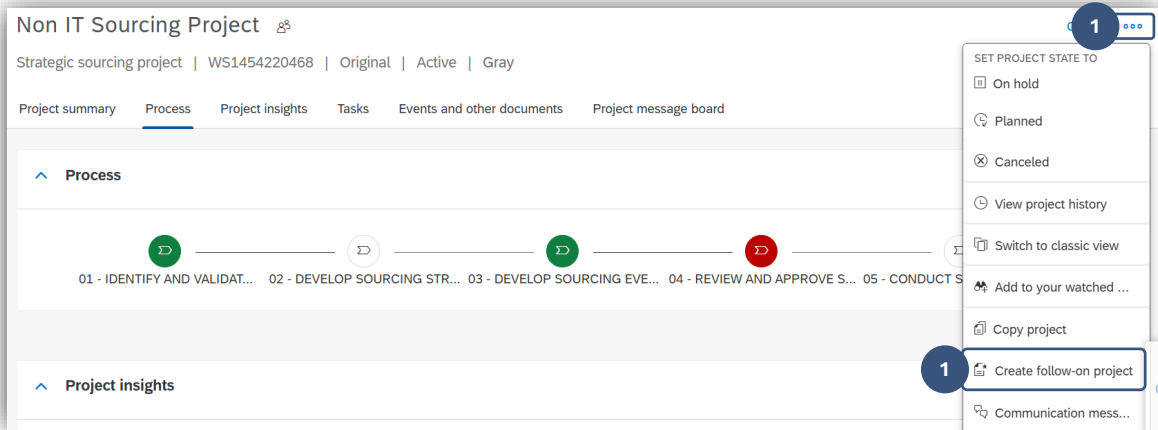
Create Additional Contract Workspaces when Awarding to Multiple Vendors.

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
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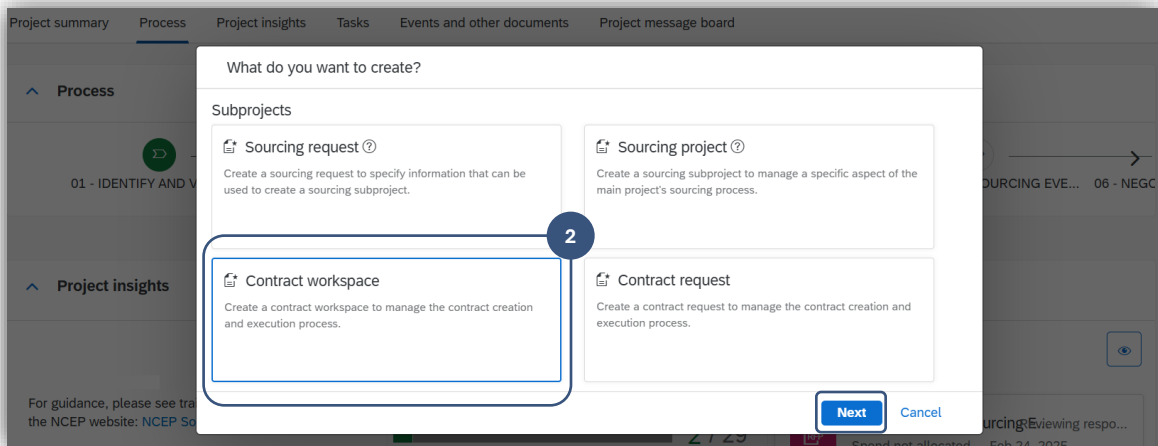
Creating a Contract Workspace From a Sourcing Project

Create a Follow-on Project to initiate a Contract Workspace

- 1 Navigate to the Sourcing Project. Click on the three dots in the upper right-hand corner of the screen and select **Create follow-on project** from the drop-down.



- 2 On the subsequent **Subprojects** popup window, select **Contract Workspace** then click **Next**.



- 3 The **Create a Contract Workspace (Procurement)** page will display, and the user will be prompted to populate the **Contract Attributes** fields, answer two questions, select the **Agency Contract Process** template, and click **Create**. For more information on these steps, please refer to the [Creating a Contract Workspace Guide \(Non-IT\)](#) or [Creating a Contract Workspace Guide \(IT\)](#) within the **Contracts** training module.

Creating a Contract Workspace From a Sourcing Project

4 The following fields will be pre-populated based on information entered in the Sourcing Project, although any of those valued can be edited along with the other blank fields:

- **Description**
- **Commodity**
- **Entity**
- **Predecessor Project**
- **Effective Date**

Create Contract Workspace (Procurement)

CreateCancel

To create a Procurement Contract Workspace, specify the fields below. Templates used for constructing your Procurement Contract Workspace appear in the section at the bottom of the page, and [More](#)

Name:^{*}Untitled Contract Workspace (Procurement)⁽ⁱ⁾

Description:

-- size --

Example Non IT Solicitation

⁽ⁱ⁾

Related ID:

Copy from Contract:(no value) ▾

Base Language:English ▾

Hierarchical Type:^{*}Stand-alone Agreement ▾

Supplier:(no value) ▾⁽ⁱ⁾

Contract Amount:^{*}

USD ▾⁽ⁱ⁾

Commodity:^{*}7611 - Cleaning and janitorial services 7...[Add more](#)

Entity:ADMNP DOA Purchasing[Add more](#)

Predecessor Project:Non IT Sourcing Project ▾

Contract Type:^{*}No Choice ▾⁽ⁱ⁾

Solicitation Type:

No Choice ▾⁽ⁱ⁾

Bid Number:(no value) ▾⁽ⁱ⁾

Agreement Date:

Effective Date:^{*}03/30/2025⁽ⁱ⁾

Expiration Date:^{*}⁽ⁱ⁾

5 Above the **Select a template** section, the user will be asked to answer **Yes** or **No** to two questions:

- **Copy all documents from the parent project?**
- **Copy all project groups from the parent project?**

The default answer to both questions is **No**, which is the recommended response. The user cannot choose to only bring certain documents over - it's all or none - and it is not advised to populate the Contract Workspace with all documents in the Sourcing Project.

Copy all documents from the parent project?

Copy all project groups from the parent project?

5

No

No

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which templates are available.

Creating a Contract Workspace

From a Sourcing Project

6 Select the **Agency Contract Process** template.

- A. Answer the two template questions based on the nature of the contract being created.
- B. Click **Create**.

Select a template

Select the template you want to use, and answer any questions related to it to create your project. How you set the fields in the section above might affect which templates are available.

Agency Contract Process

6

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."

Agency Contract:

Option for use by any Entity when creating a standard contract with defined quantity, pricing and duration.

Is this a Contract for Goods or for Services?

Please Select One

Is this an IT Contract that falls under the authority of NCDIT?

Please Select One

6A

Legacy Migration Template

Template to be used for Legacy Migration of Contracts

6B

Create

Cancel

7 The user will be taken to the **Overview** tab of the new Contract Workspace. From here they can follow the Tasks to manage the contracting process. To navigate back to the originating Sourcing Project, locate the **Process** section and click the link (the name of the Sourcing Project) under **Predecessor Project**.

Example Follow-on Contract Workspace

ID CW37900

Tasks: Incomplete Tasks: 0

Contract Workspace (Procurement)

Overview

Documents

Tasks

Team

Message Board

History

Overview

Actions

Process

All Tasks

Contract ID: CW37900

Contract Status: Draft

Version: Original

Owner: GuidedSourcing04

Commodity: 321310 - Electronic compo..., 851015 - Healthcare cente... View more

Base Language: English

Entity: ADMNP DOA Purchasing

Access Control: (No restrictions - Accessible to all users)

Description: Pricing for Medical Services

Parent Project: Example Non-IT Sourcing Project

Phase 1 - Contract Creation and Execution

Phase 2 - Contract Management

Deliverable 1 for Vendor to Complete

Deliverable 2 for Vendor to Complete

Deliverable 3 for Vendor to Complete

Deliverable 4 for Vendor to Complete

Predecessor Project

Example Non-IT Sourcing Project

7

Quick Links

All Documents

A Quick Link is a path to an important document in this project. To add a Quick Link to this area, navigate to the document you want to link to and choose **Add to Quick Links** from its menu.

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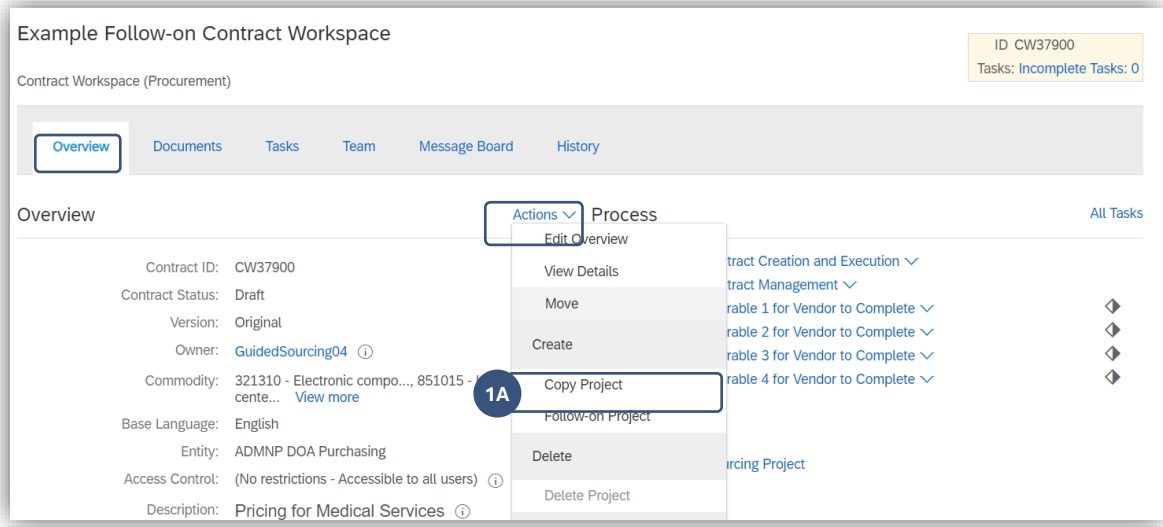
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Creating a Contract Workspace From a Sourcing Project

Create Additional Contract Workspaces when Awarding to Multiple Vendors

1 Contract Workspaces are for single vendors only. If a Sourcing Event was awarded to multiple vendors, the user will need to create separate yet similar Contract Workspaces for each awarded vendor. The best way to do this is not to create multiple **Follow-on Projects** from the Sourcing Project, but rather, create a **Copy** of the first Contract Workspace created and change the value in the **Supplier** field before loading any vendor-specific documents.

A. From the **Overview** tab of the **Follow-on** Contract Workspace, click the **Actions** link in the **Overview** section and select **Copy Project**.



2 The **Create Contract Workspace (Procurement)** page will display as described in **Step 3** of the first section of this document, and the user should proceed to populate the **Contract Attributes** fields, answer two questions, select the **Agency Contract Process** template, and click **Create**, before managing the remainder of the contracting process for that vendor.