

# NC eProcurement

## Editing a Document

Within a Contract Workspace (CW), the **'Documents'** tab is a central storage location for all documents related to your contract. It houses the associated **'Solicitation Documents,'** the **'Contractual Services Agreement'** – which serves as the main contract document – and any modification documents. The instruction below is meant to guide users to modify the **'Contractual Services Agreement'** within the tool and review changes made to the contract.

### I. Accessing Documents

1. Log in to NC eProcurement Contracts and open the Contract Workspace whose documents require editing. Click on the **'Documents'** tab and note the folder structure as defined by the Template selected during the creation of the CW. Click on a **Blue Arrow** to drill down for more options. The document's **'Owner'** and **'Status'** are listed to the right of each item.

**Test Contract** ID CW7466  
 Contract Workspace (Procurement) Tasks: Incomplete Tasks: 0

Overview **Documents** Tasks Team Message Board History

**Test Contract** Show Details Actions

Name	Owner	Status
Solicitation Documents	Project Owner	
Contract Document	Project Owner	
<b>Contractual Services Agreement</b>	Project Owner	Draft
Document Templates	Project Owner	

2. To access the **'Contractual Services Agreement,'** click on the **Blue Arrow** to the left of **'Contract Document.'** Next, click the **Blue Arrow** to the right of the **MS Word** document titled **'Contractual Services Agreement'** to display the drop-down menu and select **'Download Draft.'**

**Test Contract** ID CW7568  
 Contract Workspace (Procurement) Tasks: Incomplete Tasks: 0

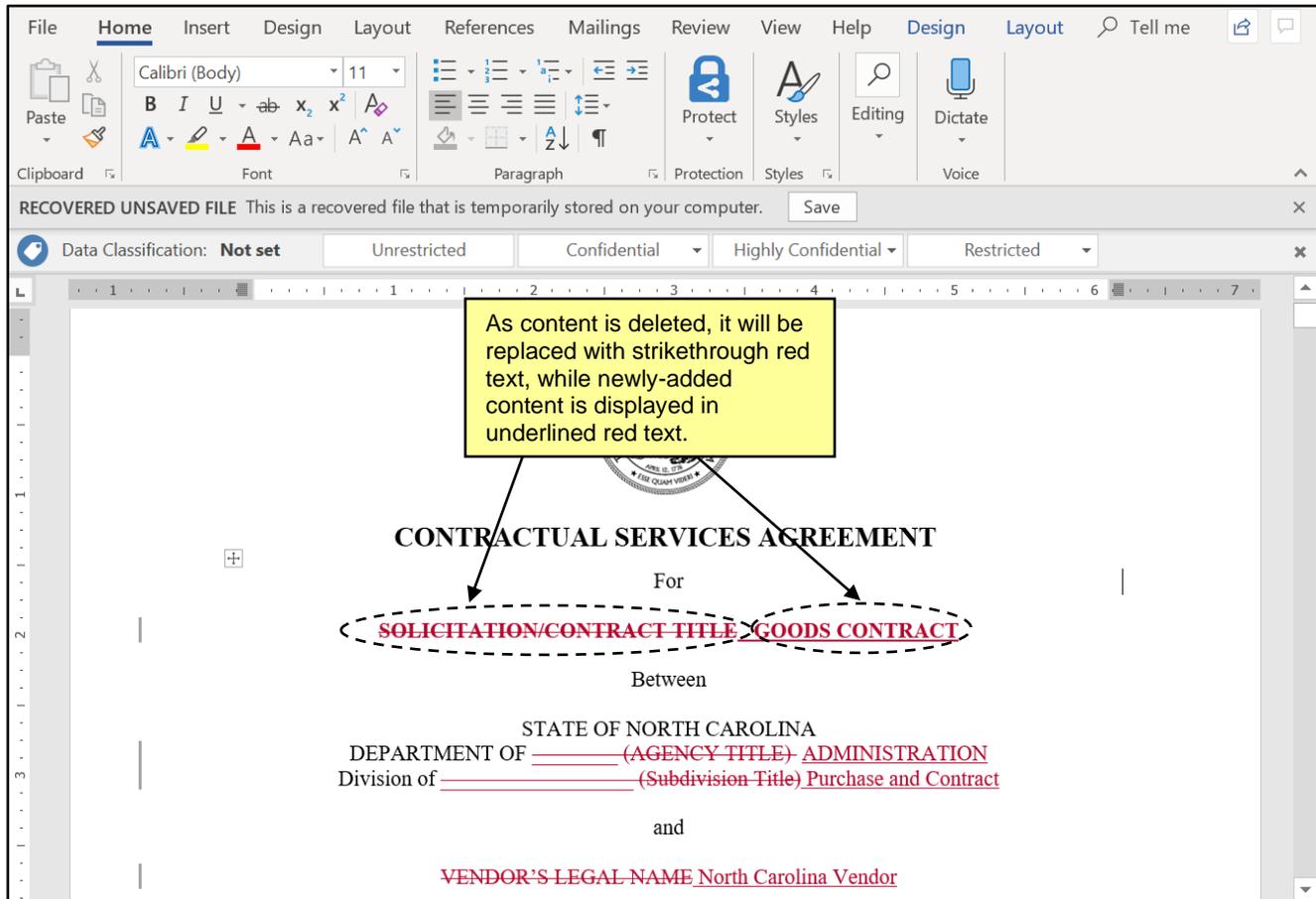
Overview Documents **Tasks** Team Message Board History

**Test Contract** Show Details Actions

Name	Owner	Status
Solicitation Documents	Project Owner	
Contract Document	Project Owner	
<b>Contractual Services Agreement</b>	Project Owner	Draft
Document Templates	Project Owner	

## II. Modifying a Document in MS Word

1. Open the downloaded document in **MS Word**.
2. Users will see a template for the **'Contractual Services Agreement'** and they should modify it as appropriate per the terms of the contract. Users should NOT modify any legal verbiage, but rather, simply fill in applicable information where the template has left a blank underline. Due to the default settings of **'Track Changes'** within the **MS Word** document, deleted content will appear in strikethrough red text, while added content will appear in underlined red text.

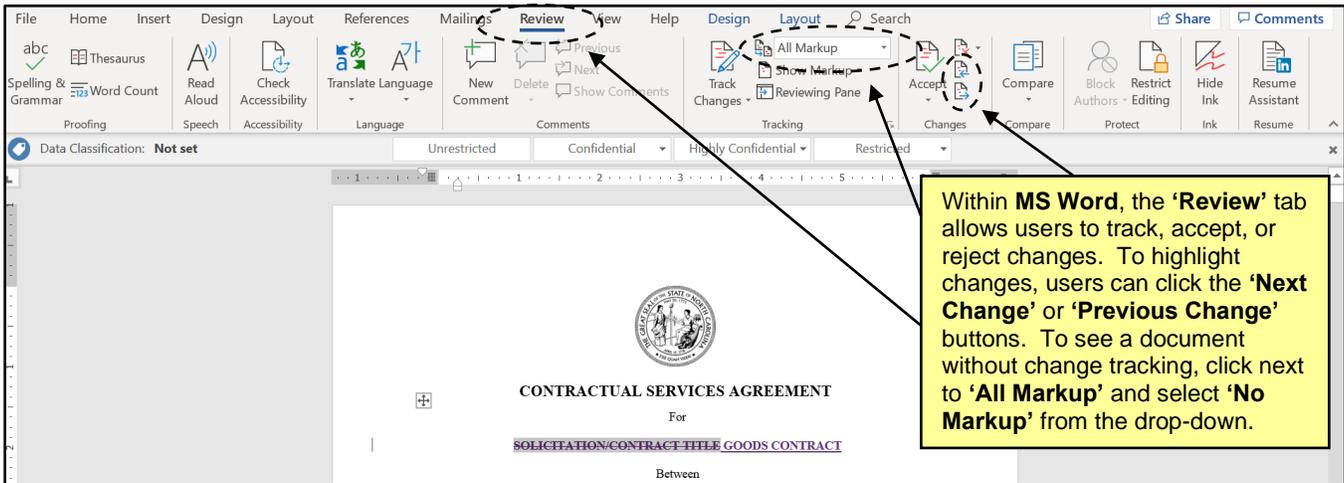


3. For users editing an already-modified document in a **'Reviewer'** role, it may be helpful to further utilize **'Track Changes.'** Click the tab at the top of the toolbar labeled **'Review.'** On the right-hand side of the tool bar, there is a column marked **'Changes'** at the bottom. From this view, users can review the changes (as indicated by the red text) one at a time using the icons with the blue arrow.

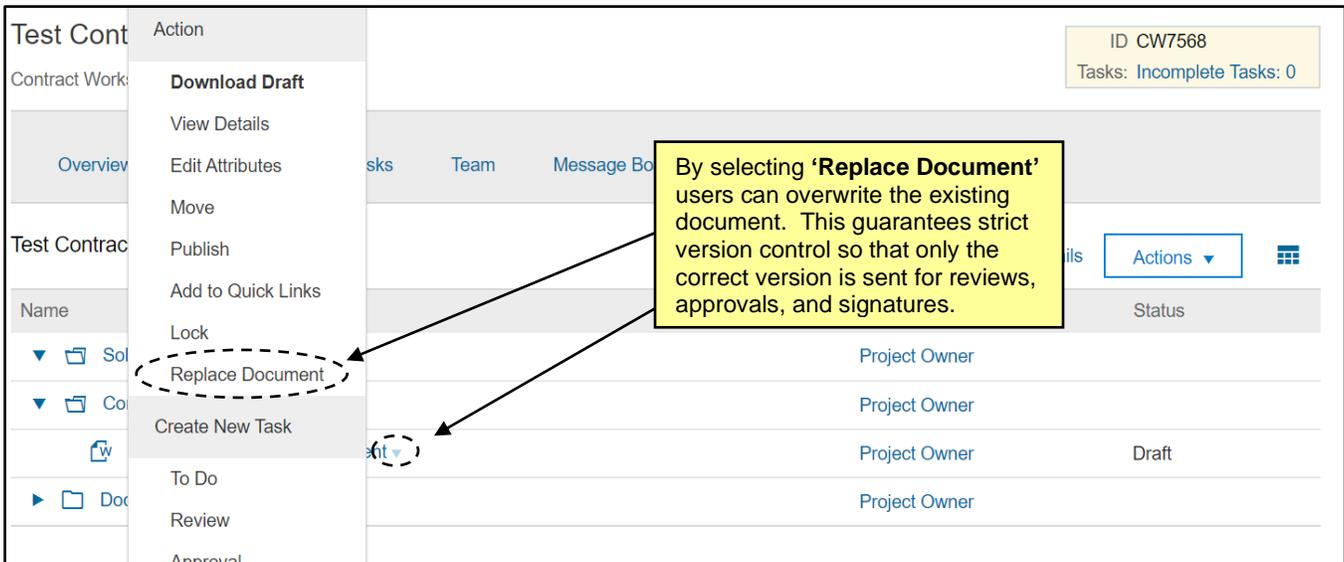
For each change, if the reviewer believes the change to be appropriate, they can accept the change by selecting the **'Accept'** button and choosing to approve that specific change. If desired, a reviewer can review the entire document and then select **'Accept All changes.'** After accepting a change, the strikethrough and colored text that indicates a change will disappear. To see the document without the red text, click the drop-down next to **'All Markup'** and select **'No Markup'** instead.

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- Following all necessary edits and additions to the 'Contractual Services Agreement' file, save the file to the computer for upload to the Contract Workspace. To begin the upload, click the blue arrow to the right of 'Contractual Services Agreement' and select 'Replace Document.'



When replacing the document with the modified version, users may drag and drop the file from their computer or select the file directly by clicking the 'Choose File' button. If desired, a user can also enter a description of the edits they've made to the document in the **Description** box.

To finalize the upload, click the 'Replace' button. The **Document Details** page will display. Users will see the 'Outline View,' which breaks the document down clause by clause, and note two other tabs for the 'Overview' and 'Version History.'

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HOME CONTRACTS PROCUREMENT CATALOG MORE... Recent Manage Create

### Replace Document

Choose a document to replace the Original Document and enter a Description to explain why the document is being replaced. You can replace the Original Document by uploading a new one from an external source, or by replacing it with a document from a project. A New Version of the document will be created. To replace the Original Document with the New Document, click Replace.

Original Document: Contractual Services Agreement.docx

Description:

New Document:  Upload

No file chosen

Contractual Services Agreement.docx

Replace original document with a document from a project

Users can add a description of changes made to the document. To replace the document, users can select the file directly, or drag-and-drop from their computer directly into the drop box, and then hit 'Replace.'

### III. Modifying a Document in Outline View (Clause Library)

- To edit a document within 'Outline View,' bring up the Document Details page by clicking on the 'View Details' option from a document and navigate to the 'Outline View' tab. This view allows users to quickly grasp all changes to the template. The 'Outline View' tab shows each individual clause of the contract. A 'Type' of 'Template' indicates the structure of that clause is original, while a 'Type' of 'Nonstandard' and indicates a modification has been made.

Document Contractual Services Agreement Done

Listed below are the details of this Document, including Tasks associated with it. You can Edit the overview, Copy or Move the More

Test Contract / Contract Document / Contractual Services Agreement

Overview Outline View Version History

Clause Type: All

Clause	Type	Comments	Action
<p>▼ CONTRACTUAL SERVICES AGREEMENT ▼</p> <p>Mistake! WHEREAS, this AGREEMENT is entered into by and between an agency of the State of North Carolina, AGENCY (hereinafter called the "State") and VENDOR (hereinafter called the "Vendor"), under the terms and conditions herein as of the date of award (the "Effective Date"), below and is the result of Request for Proposal [RFP DATE, REFERENCE NUMBER.] and any further addenda or negotiation between the parties.</p>	Nonstandard		Actions ▼
<p>WHEREAS, this AGREEMENT is made under and shall be governed and construed in accordance with the laws of the State of North Carolina, without regard to its conflict of laws rules, and within which State all matters, relating to its validity, construction, interpretation and enforcement shall be determined.</p>	Template		Actions ▼

Any clause that is modified in the 'Contractual Services Agreement' triggers a 'Nonstandard' indicator within 'Outline View.' Notice the mistake in the first clause.

Unchanged clauses are labeled with a 'Type' of 'Template.'

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2. Users may click the **'Actions'** button to the right of each clause to display a drop-down menu. The options presented are:

- a. **Substitute:** Replace this clause with a pre-written clause from the Clause Library.
- b. **Promote to Section:** Make this clause a separate section of the contract.
- c. **View Versions:** See all previous versions of this clause.
- d. **Delete:** Delete this clause.

**Note:** Even if deleted, the **'Outline View'** will show that a clause was intentionally deleted from the template.

3. When substituting a clause, users will access the **Clause Library** page that enables them to choose from pre-written legal clauses. Clauses within the **Clause Library** are broken down in a similar structure to that of the **'Contractual Services Agreement'** (Preface, Background, Contract Administration, Remedies, Other, NC General Terms and Conditions, Acceptance and Authorization, and Attachments). Users can substitute one clause with another, as well as add a comment explaining the substitution.

Substitute Clause

Choose a substitute clause by selecting the button to the left of it and clicking **OK**. The clause you choose replaces the previous clause. You can [More](#)

Clause Comment: New Clause

- (OLD) State of North Carolina General Terms and Conditions
- Goods and Services Agreement
- Preface
- Background and Purpose
- Contract Administration
- Remedies

Use the drop-down arrows to open clause categories and choose an individual clause to replace the previously selected clause. Users may also add a comment to explain the substitution.

OK Cancel

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- After choosing the new clause from the **Clause Library** and clicking **'OK,'** the **'Outline View'** will show that the clause is an Ad Hoc addition from the library as opposed to a **'Template'** clause.

The screenshot shows the 'Contractual Services Agreement' document in 'Outline View'. A yellow callout box points to the 'Type' column of the clause list, stating: "Substituted clauses appear in the 'Outline View' as 'Ad Hoc (Library)' under the 'Type' Column." The clause list shows two entries: one with the type 'Ad Hoc (Library)' and another with the type 'Template'.

- Users can also add a new Section to the Contract or directly add a single Clause in the **'Outline View'** by clicking on the **'Actions'** arrow above the clause list and selecting **'Add New Section'** or **'Add Clause(s).'**

The screenshot shows the 'Contractual Services Agreement' document in 'Outline View'. A yellow callout box points to the 'Actions' dropdown menu above the clause list, stating: "Clicking the document-level 'Actions' button displays a dropdown providing the option to 'Add New Section' or 'Add Clause(s).'" The dropdown menu is open, showing options such as 'Add New Section' and 'Add Clause(s)'.

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- 6. A new Section of the contract requires a name, an owner, and description, and the section will be added at the end of the document. Single ad hoc clauses are also added to the end of the document.

The screenshot displays a document structure with the following sections:

- ATTACHMENTS: ▾
- Vendor Proposal ▾
- Pricing ▾
- Personnel ▾
- Test Section ▾ (circled with a dashed line)

The Test Section contains the following text:

All manufactured items and/or fabricated assemblies subject to operation under pressure, operation by connection to an electric source, or operation involving a connection to a manufactured, natural, or LP gas source shall be constructed and approved in a manner acceptable to the appropriate state inspector which customarily requires the label or re-examination listing or identification marking of the appropriate safety standard organization; such as the American Society of Mechanical Engineers for pressure vessels; the Underwriters Laboratories and /or National Electrical Manufacturers' Association for electrically operated assemblies; or the American Gas Association for gas operated assemblies, where such approvals of listings have been established for the type of device offered and furnished. A list of acceptable marks is available on the Division of Purchase and Contract website at:

Ad Hoc (Library) (circled with a dashed line)

Actions ▾

A yellow callout box with the text "Added sections and clauses are placed at the end of the document." has arrows pointing to the Test Section and the Ad Hoc (Library) clause.

**Note:** Although possible to edit a document through 'Outline View,' it is highly-advised that all document edits be made in **MS Word** instead.