NC eProcurement Contracts
Existing Contracts Bulk Load

Select users can load existing contracts in bulk into the system. Loading these existing contracts in mass is an easy way to create Contract Workspaces (CW) for all contracts that were negotiated outside of the system. After contracts have been uploaded, allowed users will be able to search and run reports on existing contracts.

Note: Only the user identified as the Contracts System Administrator is allowed to 'bulk load' contracts. The help desk can also be contacted for assistance on that matter.

I. Accessing Bulk Load Template

Access the Microsoft Excel worksheet titled **NC Offline Contract Migration Template**. This worksheet allows the user to enter information regarding the existing contracts to be bulk loaded.

II. Bulk Load Template Explanation

After downloading the NC Offline Contract Migration Template, complete the Microsoft Excel worksheet with details about the existing contracts. The NC Offline Contract Migration Template collects header field information from the contracts undergoing bulk load that will be input into NC eProcurement Contracts. The NC Offline Contract Migration Template is organized into sections within an Excel Workbook. Information within the **'Contracts,' 'ContractDocuments,'** and **'ContractTeams'** sheets should be completed.

   a. **Contracts**: Specifies all contracts that are to be bulk loaded into the system, as well as the contract field attributes for each contract.

   b. **ContractDocuments**: Specifies all documents that are to be loaded for each contract.

   c. **ContractTeams**: Specifies the team members or groups assigned to the particular contract.

The **'Contracts_Screenshot,' 'ContractDocuments_Screenshot,'** and **'ContractTeams Screenshot'** sheets are for reference purpose only and may provide information to assist in the completion of the necessary data.

   d. **Contracts_Screenshots**: **For Reference Only** Provides examples and screenshots to show how sample data from the Contracts tab would appear in Contract Management.

   e. **ContractDocuments_Screenshot**: **For Reference Only** Provides examples and screenshots to show how sample data from the ContractDocuments tab would appear in Contract Management.

   f. **ContractTeams_Screenshot**: **For Reference Only** Provides examples and screenshots to show how sample data from the ContractTeams tab would appear in Contract Management.

**'ImportProjectParameters'** sheet will be completed by the NC eProcurement Contracts system.

   g. **ImportProjectsParameters**: **NC eProcurement Contracts system to Complete** Specifies load parameters / file locations for the file load.

Note: General information regarding the various sections of the NC Offline Contract Migration Template also exists in the **'Instructions'** sheet of the Excel worksheet. However, the instructions provided in this job aid add specific instructions for the NC eProcurement Contracts system.
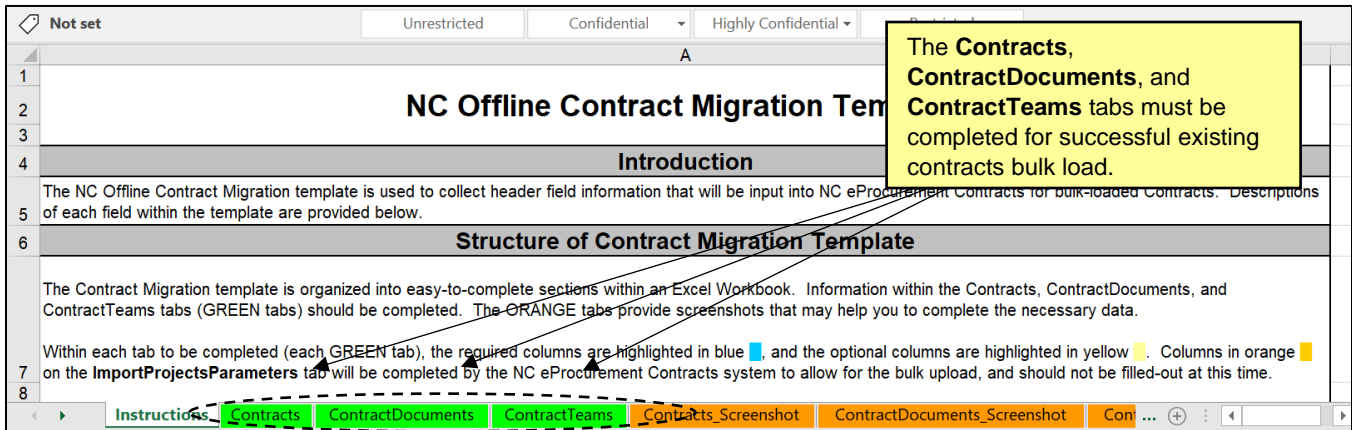
In the step-by-step instructions below, the required columns are highlighted in blue, and the optional columns are highlighted in yellow.

1. To begin, navigate to the 'Contracts' tab. Within the Contracts tab, populate all relevant fields, including seven required fields, as noted by an asterisk (*).

    a. **Owner***: This user will become the **'Project Owner'** of the Contract Workspace. The Owner field should be populated with the user's NCID username.

    b. **Title***: Specifies the title of the Contract Workspace. Each Contract Workspace must have a unique title.

       Note: The system will not allow special characters for the **'Title'** within the **'Contracts'** sheet. Letters, numbers, hyphens, and underscores are acceptable, but all other characters must be removed. Documents with special characters in the title need to be renamed.

    c. **ContractID***: Specifies the contract identification number. Each contract must have a unique Contract ID.

   d. **Description**: Used to input a description of the Contract Workspace.

    e. **Supplier**: Specifies the supplier associated with each Contract Workspace. Each supplier has a corresponding **'System ID'** number that should be entered in this field. To identify the appropriate **'System ID,'** search for the supplier in the NC eProcurement Contracts system.

       To search for **'System ID'** within the NC eProcurement Contracts system, navigate to the **'Contracts'** page. To the left of the search bar, click the arrow to view the drop-down menu, and select **'Suppliers and Customers.'** Enter the supplier name and select search.
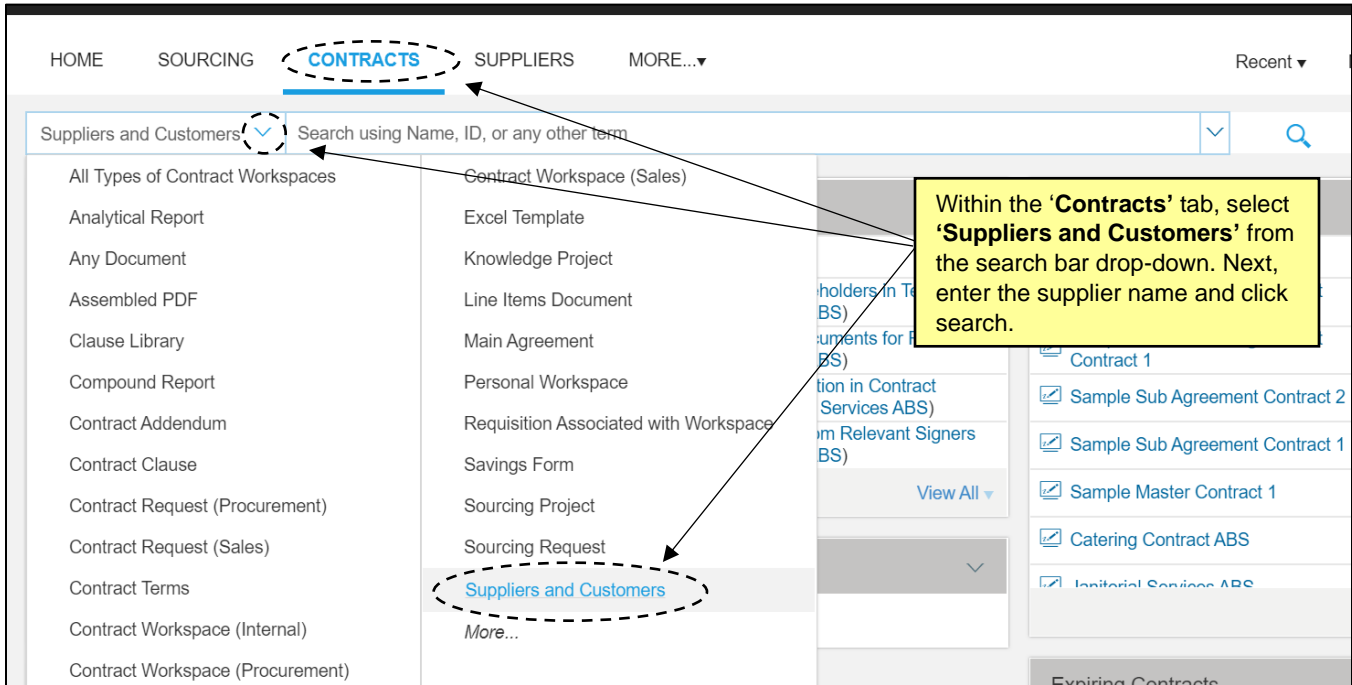
The search results appear, each with a corresponding **'System ID.'** Copy the appropriate ID into the **'Supplier'** field of the bulk upload template.

The help desk can also be contacted for assistance on that matter.

f. **HierarchalType***: Specifies the hierarchal type of the contract. The selection for this field should always be StandAlone.

g. **Amount**: Specifies the amount of the contract in in US Dollars.

h. **Commodity**: Specifies the Commodity Code(s) for the contract. The Commodity Code can be entered using a UNSPSC code.

For UNSPSC commodities, enter the four or six-digit UNSPSC code in the following format unspsc: <xxxx> or<xxxxxx>. The UNSPSC codes may either be found by searching for the Commodity Code within the NC eProcurement Contracts system or by searching the United Nations Standard Products and Services Codes official website.

To search for a UNSPSC commodity code within the system, navigate to the **'Contracts'** tab within NC eProcurement Contracts system. Click **'Create'** and select **'Contract Workspace (Procurement).'** On the subsequent page, locate the **'Commodity'** field and click the drop-down arrow within the field. Select **'Search more'** from the drop-down menu. On the next page, search by name to identify the four- or six-digit UNSPSC commodity code.

Commodity: *	(no value) ⌄
Entity:	Building and Construction Machinery and Accessories 22
Predecessor Project:	Software 4323
	General building and office cleaning and maintenance services 761115
Contract Type: *	Building component cleaning services 7611
Solicitation Type:	Banquet and catering services 901016
	🔍 Search more
Bid Number:	

> From the **'Create Contract Workspace (Procurement)'** page, locate the **'Commodity'** field, click the drop-down arrow, and select **'Search more'** to identify the appropriate commodity code.

If multiple commodity codes are needed, brackets should be used in the following format: [unspsc:0100][unspsc:0110]

The help desk can also be contacted for assistance on that matter.

i. **Client**: Specifies the Entity that the contract applies to. The Entity ID can be found within the NC eProcurement Contracts system.

In NC eProcurement Contracts, the Entity ID can also be found by navigating to the **'Contracts'** page. Select 'Create' and choose **'Contract Workspace (Procurement).'** In the subsequent page, find the 'Entity' field and identify the appropriate entity from the drop-down menu.

	E	G	J	K	M
1	Supplier	HierarchicalType	Amount	Commodity	Client
2	364947	StandAlone	1000000	unspsc:761115	ADMN
3	380574	StandAlone	20000	unspsc:761115	ADMN
4	51272	StandAlone	20000	unspsc:761115	ADMN
5	341848	StandAlone	500000	unspsc:601212	ADMN
6	334483	StandAlone	5000000	unspsc:721512	ADMN
7					
8					

The help desk can also be contacted for assistance on that matter.

j. **ExpirationTermType***: Specifies the term type of the contract. The selection for this field should always be Fixed.

k. **AgreementDate**: Specifies the date that the contract was awarded to the supplier.

l. **EffectiveDate**: Specifies the date the contract goes into effect.

m. **ExpirationDate***: Specifies the date the contract expires and is no longer valid.

n. **NoticePeriod**: Specifies the number of DAYS prior to the expiration date that the NC eProcurement Contracts system will notify team members of this contract's expiration.

o. **NoticeEmailRecipients**: Specifies the user who should receive the 'Notice Period' email notification. This field should be populated with the appropriate user's NCID username.

p. **ExpiringEmailRecipients**: Specifies the user who should receive the 'Expiration Period' email notification. This field should be populated with the appropriate user's NCID username.

q. **Related ID**: Specifies IDs or other tracking numbers created outside of the system.

r. **ContractStatus***: Contract Status should be Published if the contract is still Open or Closed if the contract is complete. You may also enter Expired if the Contract is Expired but not yet Closed.

Note: Load all existing Contract Workspaces in Published status to prevent manual publication.

	N	Q	R	S	T	U	V	W	X
1	ExpirationTermType	AgreementDate	EffectiveDate	ExpirationDate	NoticePeriod	NoticeEmailRecipients	ExpiringEmailRecipients	RelatedId	ContractStatus
2	Fixed	2/27/2009	3/27/2009	1/24/2021	180	testuser1	testuser2		Published
3	Fixed	2/28/2009	4/27/2009	1/25/2021	180	testuser1	testuser2		Published
4	Fixed	3/1/2009	4/27/2009	1/26/2021	180	testuser1	testuser2		Published
5	Fixed	3/2/2009	5/1/2009	1/27/2021	180	testuser1	testuser2		Published
6	Fixed	3/3/2009	5/1/2009	1/28/2021	180	testuser1	testuser2		Published
7									
8									

s. **cus_ContractType**: Specifies the type of contract being loaded in the system. Each Contract Type has a coded value. Enter the corresponding coded value for one of the following options: Term Contract Statewide, Term Contract Agency Specific, Term Contract IT Convenience, or Agency Contract.

Contract Type	Value
Term Contract Statewide	T
Term Contract Agency Specific	A
Term Contract IT Convenience	C
Agency Contract	Z

t. **cus_SolicitationType**: Specifies the solicitation type of the contract. Either leave this field blank, enter 'Competition,' or enter 'Waiver of Competition,' whichever is the most applicable.

u. **cus_StatewideContractID**: Specifies the Statewide Contract ID.

v. **cus_AgencyContractID**: Specifies the Agency Contract ID.

w. **cus_BidNumber**: Specifies the Bid Number.

	Z	AA	AB	AC	AD
1	cus_ContractType	cus_SolicitationType	cus_StatewideContractID	cus_AgencyContractID	cus_BidNumber
2	T	Competition	031A		200900043
3	T	Competition	045A		200900044
4	A	Competition	060A		200900046
5	Z	Waiver of Competition	065A		200900047
6	Z	Waiver of Competition	071A		200900048
7					
8					

Note: Multiple fields have been hidden from view in the NC Offline Contract Migration Template. These fields should not be completed.

2. Within the **ContractDocuments** tab, populate all relevant fields, including three required fields.

    a. **Workspace***: Specifies the Contract Workspace to add documents to. This field must be a valid Contract ID from the Contracts tab of this spreadsheet. If multiple documents are associated with the same contract, then each document should have the same Contract Workspace identifier.

    b. **File***: Path, or file location, for the document that is being loaded (e.g., Contract.doc).

    c. **Title***: Title of the document that will ultimately be displayed in the system. Note that the full filename must be provided, and that multiple documents may be included within a Contract Workspace.

    Note: The system will not allow special characters for the **'File'** and **'Title'** within the **'ContractDocuments'** tab. Letters, numbers, hyphens, and underscores are acceptable, but all other characters must be removed. Documents with special characters in the title need to be renamed.

    d. **Folder**: Specifies the folder location for the document. This field is only used if folders are being loaded into the Contract Workspaces (if blank, document will be placed in the root directory).

    e. **Owner**: Specifies the NCID username of the Owner of the Document.

    f. **Status**: Status should be Published for all documents.

	A	B	C	D	E	F
1	ContractId	File	Title	Folder	Owner	Status
2	LC1	Sample Contract Document 1.doc	Sample Contract Document 1		testuser1	Published
3	LC2	Sample Contract Document 2.doc	Sample Contract Document 2		testuser1	Published
4	LC3	Sample Contract Document 3.doc	Sample Contract Document 3		testuser1	Published
5	LC4	Sample Contract Document 4.doc	Sample Contract Document 4		testuser1	Published
6	LC5	Sample Contract Document 5.doc	Sample Contract Document 5		testuser1	Published
7						

3. Within the **ContractTeams** tab, populate all relevant fields, including three required fields.

    a. **Workspace***: Specifies the Contract Workspace to add documents to. Enter a valid Contract ID from the Contracts tab of this spreadsheet. If multiple documents are associated with the same contract, then each document should have the same Contract Workspace identifier.

    b. **ProjectGroup***: Specifies the group that will have access to the Contract Workspace. The Project Owner group receives e-mail notifications on expiring contracts. Each Contract Workspace should have a Project Owner. Other groups may be added as well.

    c. **Member***: Specifies which users or groups are assigned to the Project Group. Member must be a valid NCID username from the NC eProcurement Contracts system.

	A	B	C
1	Workspac	ProjectGroup	Member
2	LC1	Project Owner	testuser2
3	LC2	Project Owner	testuser2
4	LC3	Project Owner	testuser2
5	LC4	Project Owner	testuser2
6	LC5	Project Owner	testuser2
7			

Note: Review the information in each of the column headers to ensure data entered is correct and complete, as any errors will cause the system to fail the bulk upload.

Note: Only bulk load existing contract data for contracts that are not already in the NC eProcurement Contracts system. Do not attempt to use the bulk load for mass editing. Verify data before loading to prevent unnecessary updates.

III. How to Load Contracts

1. Once the NC Offline Contract Migration Template has been completed, CSV files need to be created for each sheet within the Excel workbook. There are four CSV files that specify all contract data that is to be bulk loaded into the system. Three CSV files contain existing contract data, and one contains information the system needs to perform the bulk load.

   a. **Contracts.csv**: Specifies the contract filed attributes for all contracts that are to be bulk loaded into NC eProcurement Contracts system.

   b. **ContractDocuments.csv**: Specifies all contract documents that are to be bulk loaded into NC eProcurement Contracts system. This file is optional, as the user can load an existing contract that does not contain any documents.

   c. **ContractTeams.csv**: Specifies users that are linked to each contract. This file is optional, as the user can load an existing contract that does not contain any team members other than the owner. The team can also be adopted from the template used during the bulk load.

   d. **ImportProjectParameters.csv**: This file is the directory of the other three CSV files and does not need to be edited by the user.

Note: Start loading contracts in very small batches (1-3 contracts) to ensure all information was correctly entered before proceeding with a larger batch.

Note: Do not exceed 1,000 Contract Workspaces per folder. If the documents and data exceed this amount, split up the documents and information on the CSV files into separate files.

2. To create a CSV file for the **'Contracts'** sheet, right click **'Contracts'** from the selection ribbon, and select **'Move or Copy**.**'** From the subsequent window, click the drop-down arrow under the **'To book'** field and select **'(new book).'** Check the box next to **'Create a copy.'** Click **'OK.'**
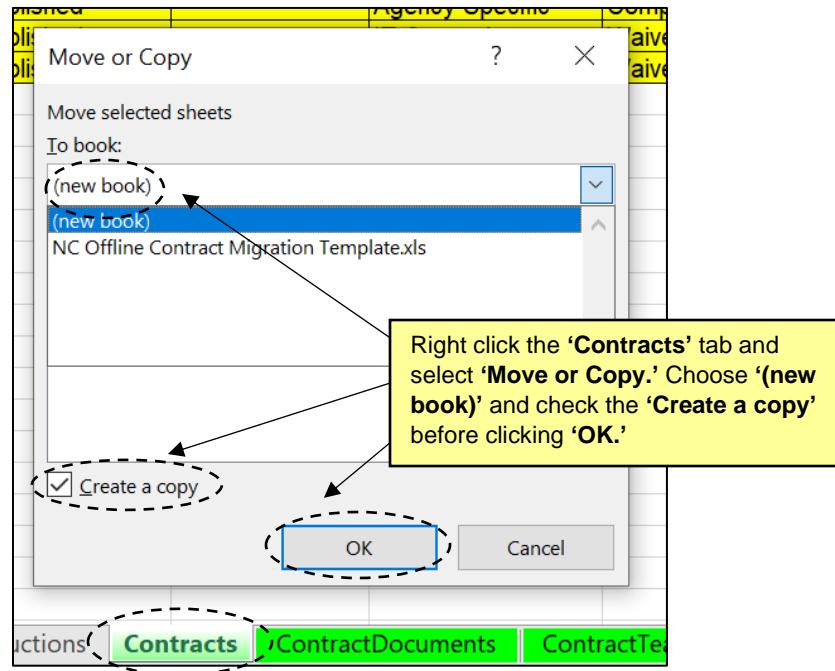
3. This will create a new Excel workbook comprised of only the **'Contracts'** sheet. To save this workbook, click **'File'** and then click **'Save As.'** Choose a location to save the document and enter the name **'Contracts'** into the field **'Enter file name here.'** In the following file type field, click the drop-down arrow and select **'CSV UTF-8 (Comma delimited) (*.csv)'** or any of the other options ending with (*.csv) to save the document as a CSV file.
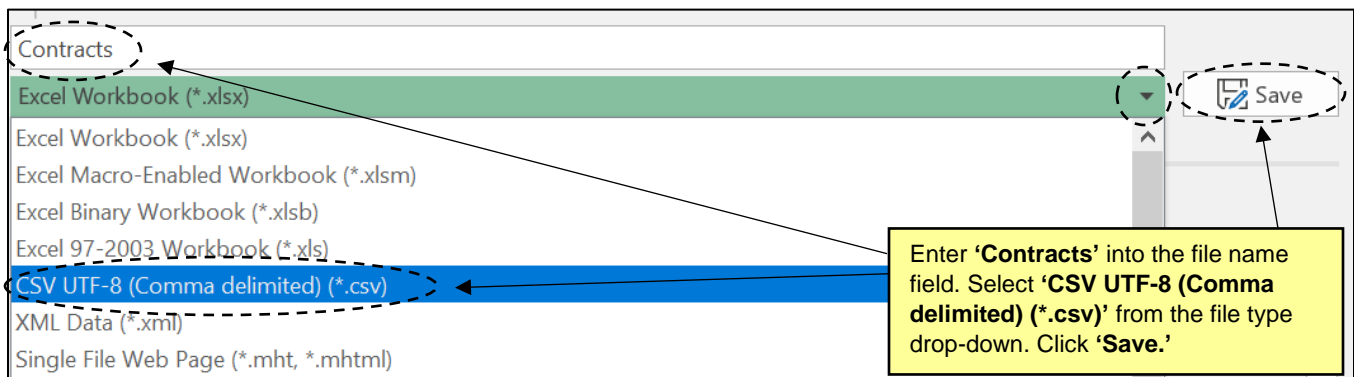

4. Repeat steps two and three to create the CSV files for the **'ContractsDocument,' 'ContractTeams,'** and **'ImportProjectParameters'** sheets.

5. Create a ZIP file containing the CSV files and all the documents to be loaded into the system. The documents should include files such as the main agreement, addenda, and any supporting documents for each CW. Documents can be any format (Word, Excel, PDF, etc.).

6. To create the ZIP file, select **'New item'** and choose **'Compressed (zipped) Folder.'**

To create the ZIP file, select **'New Item,'** and choose **'Compressed (zipped) Folder.'**
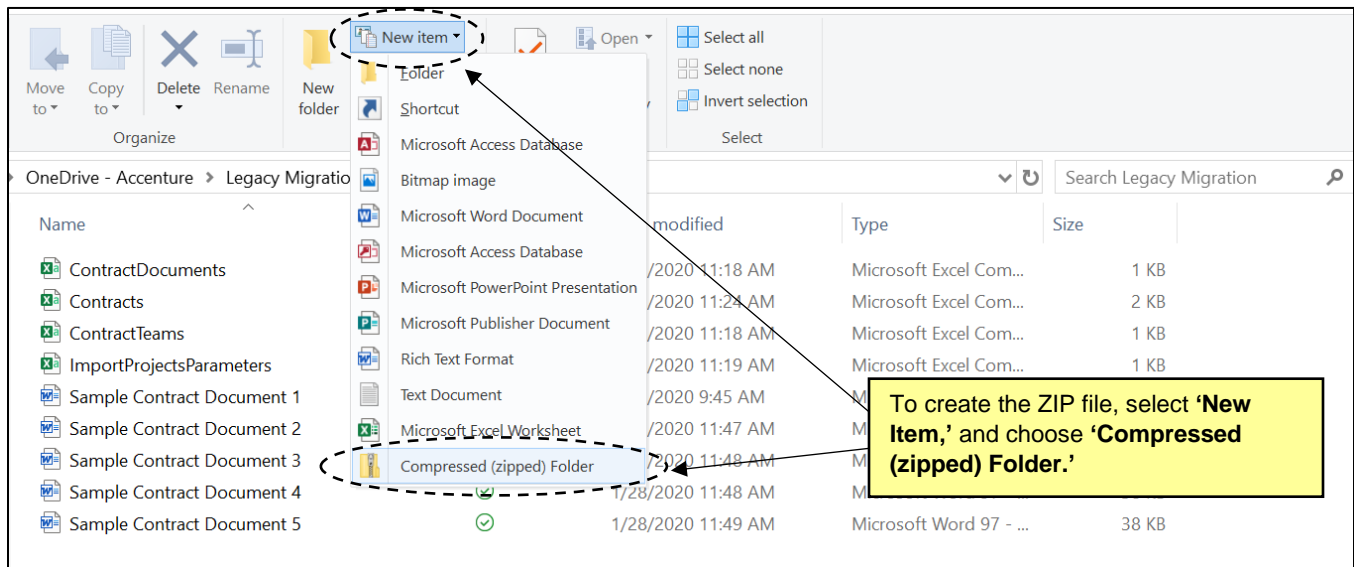
7. Name the new ZIP file. Select Contracts.csv , ContractDocuments.csv , ContractsTeams.csv , ImportProjectParameters.csv , and any contract documents referenced in the ContractDocuments file and drag them into the newly created ZIP file.

   Note: The ZIP file cannot exceed 100 MB. If the documents and data exceed this amount, split up the documents and information on the CSV files into separate files.

8. After creating the ZIP file, the System Administrator must send the information to the help desk. The help desk will perform a load of the files in NC eProcurement Contracts and communicate any errors in need for correction before the finalization of the bulk load.

9. In order to send the ZIP file to the help desk, the System Administrator should save the file to Sharepoint and then share this secure link with the help desk.

   Note: Because the bulk load ZIP files contain numerous files with sensitive information, the System Administrator should not send the raw file over email and must save the file to Sharepoint.

   Note: The NC eProcurement Contracts system cannot access files via OneDrive, so the System Administrator must save the ZIP file to Sharepoint to share the files with the help desk.

10. Following a successful bulk upload, all contract attributes of existing contracts will be searchable and reportable in the database. Users will receive automated email reminders regarding contract expirations and other events.