

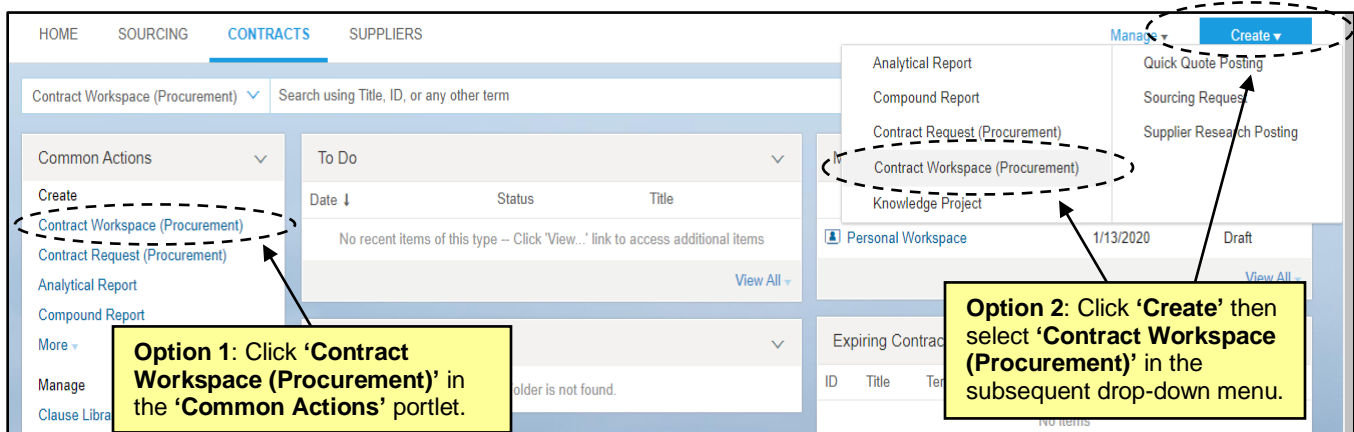
NC eProcurement

Advanced Contract Workspace

A Contract Workspace (CW) is a container for all information and documents pertaining to a contract with a single vendor. The basic process begins when the user clicks on a ‘**Contract Workspace (Procurement)**’ link. By default, the user who initiates the CW becomes the ‘**Project Owner.**’ Once a CW has been initiated, the user populates the Contract Attributes fields, which directs the user to select a Template. This Template guides the remainder of the user’s steps in the contract creation and management process based on the organization’s Contract Lifecycle. If a contract includes multiple vendors, the user will create multiple CWs; one for each vendor.

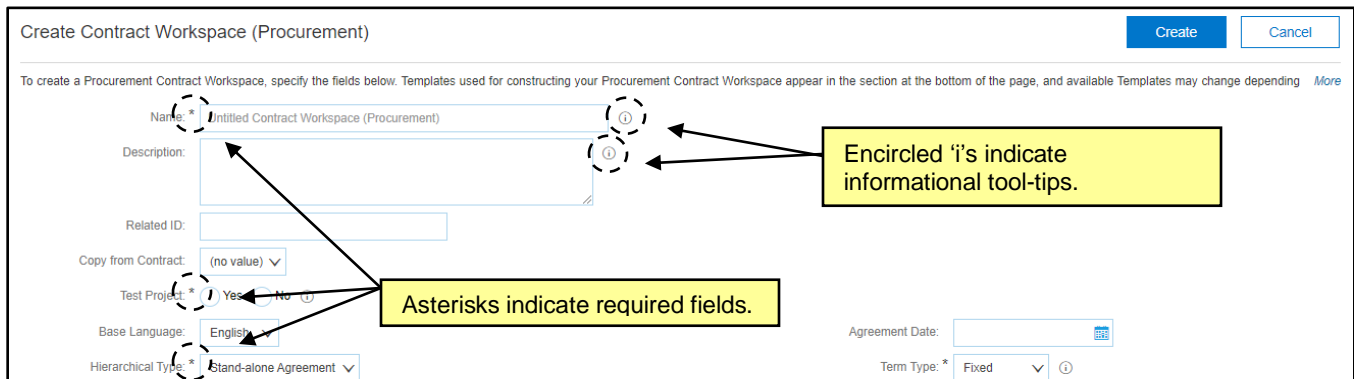
I. Initiate Contract Workspace and Enter Contract Attributes

1. There are two options for initiating a Contract Workspace:
 - 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 the blue ‘**Create**’ button and select ‘**Contract Workspace (Procurement)**’ in the subsequent drop-down menu.



2. The ‘**Contract Attributes**’ page will display. Populate all relevant fields including the nine required fields, as 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, including the selection of Templates.

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.



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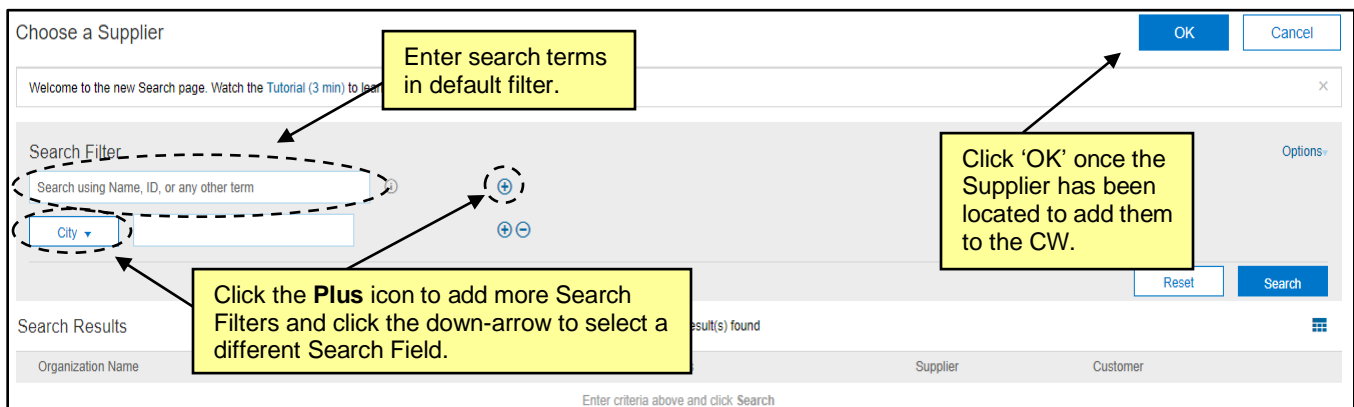
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- Name*:** Enter a title for the CW. This title must be a unique value, and if it has already been used, the system will alert the user with an error message.
- Description*:** Describe the contract being created or loaded.
- Related ID:** A free-text field used to note IDs or other tracking numbers created outside of the system.
- Copy from Contract:** This field defaults to **'(no value),'** but a user may initiate the process of copying a previously-created CW from this drop-down field. A subsequent training document covers this process in more detail.
- 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, but if the **'Yes'** option is selected in error, it cannot be undone once the user clicks **'Create'** at the completion of this screen.
- Base Language:** This field defaults to **'English,'** the only option available.
- Hierarchical Type*:** This field defaults to **'Stand-alone Agreement,'** and although there are two other options in the drop-down menu, do not change from the default.
- Supplier:** Select the Supplier 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 Supplier Search page. On the Supplier Search page, enter a Supplier Name, Location, or any other term within the default Search Filter free-text field. Click on the **Plus** 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 Supplier has been located to add them to the CW.

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

Note: As a reminder, CW's are for one supplier only. If multiple suppliers are on a contract, the user should create a CW for one of the vendors and then copy it to use as the basis of the CWs for the other vendors.



- Contract Amount:** Enter the exact or estimated dollar value of the contract in USD. This is not a required field, so it can be left blank or a dollar value of \$0 can be entered.

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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. Users may search by **'Name'** or **'ID.'** After identifying the correct 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.

Note: 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.

Note: 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.

Note: The NC eProcurement guide to selecting commodity codes can be found here: <https://eprocurement.nc.gov/training/selecting-commodity-codes>.

Note: The UNSPSC code search website can also be a helpful resource: <https://www.unspsc.org/search-code>.

Choose Values for Commodity

Add to Currently Selected

Name ▾ cleaning Search

<input type="checkbox"/>	Name ↑	ID
<input type="checkbox"/>	Agricultural machinery for cleaning and sorting and grading	211020
<input type="checkbox"/>	▶ Cleaning Equipment and Supplies	47
<input type="checkbox"/>	Decontamination aids and safety cleaning equipment	461824
<input type="checkbox"/>	▼ Industrial Cleaning Services	76
<input type="checkbox"/>	▶ Cleaning and janitorial services	7611
<input type="checkbox"/>	Building component cleaning services	761116
<input checked="" type="checkbox"/>	General building and office cleaning and maintenance services	761115
<input type="checkbox"/>	Transport vehicle cleaning	761118
<input type="checkbox"/>	▶ Decontamination services	7610

Currently Selected

Name ↑ ID

No items

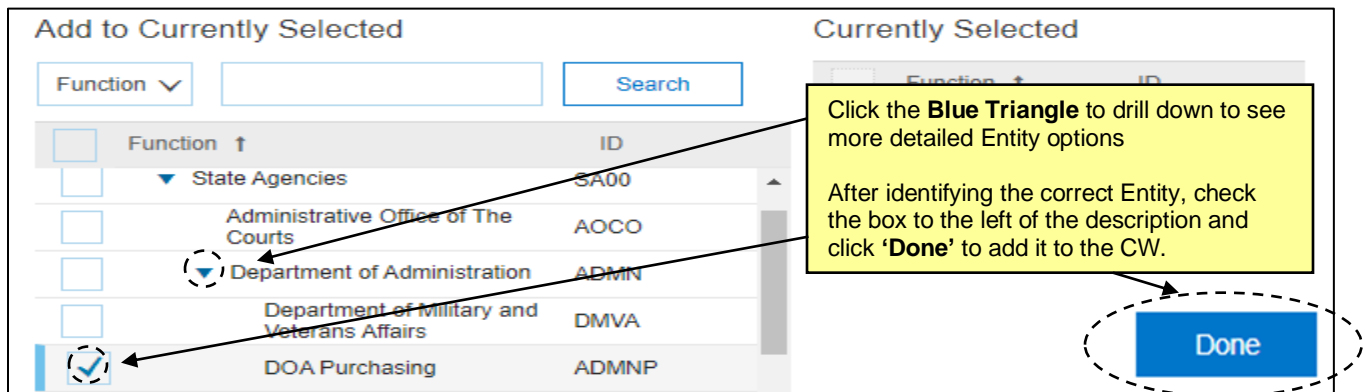
Click the **Blue Triangle** to drill down to see more detailed Commodity Code search results.

After identifying the correct six-digit Commodity Code(s), check the box to the left of the description and then click **'Done'** to add it to the CW.

Done

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. Users may search by **'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 user's options at the Template level.



14. **Predecessor Project:** This field defaults to **'(no value),'** but a user may link the current CW to a completed CW from this drop-down field.
15. **Contract Type*:** This field defaults to **'No Choice,'** but it is required that the user selects the correct type of contract from the drop-down menu. Four choices are provided, although certain options are not applicable to the user creating the CW.
 - a. **Term Contract Statewide:** Option for use by the Division of Purchase & Contract ONLY when creating Statewide Term Contracts to cover a specific period of time.
 - b. **Term Contract Agency Specific:** Option for use by any Entity when creating a contract intended to cover a specific period of time.
 - c. **Term Contract IT Convenience:** Option for use by the Department of Information Technology ONLY when creating Statewide IT Term Contracts to cover a specific period of time.
 - d. **Agency Contract:** Option for use by any Entity when creating a spot-buy (nonrecurring) contract.

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

16. **Solicitation Type:** This field defaults to **'No Choice,'** but the user can select either **'Competition'** or **'Waiver of Competition'** from the drop-down menu should those options better describe the nature of the bidding process for this contract.
17. **Statewide Contract ID:** This field only appears after the selection of either **'Term Contract Statewide'** or **'Term Contract IT Convenience'** 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 **'Term Contract Agency Specific'** 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 user can choose to add the Bid Number IPS 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. Users may search by **'Bid Number'** or **'Bid Description.'** Values will be added from IPS on a nightly basis.

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20. **Agreement Date:** The date that the contract was awarded to the Supplier. Use the date-picker or type the date in the correct format (MM/DD/YYYY). Selecting past dates is acceptable.
21. **Term Type*:** This field defaults to **'Fixed,'** and although two other options are available in the drop-down menu, always leave this field populated with **'Fixed.'**
22. **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 user 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.'**
23. **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).
24. **Notice Period(in days):** Enter the number of days prior to the **Expiration Date** that the user wishes to begin receiving reminder email notifications about the contract's upcoming expiration. The suggested entry for this field is 120 days, but the user 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.

Create Contract Workspace (Procurement)

Create
Cancel

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

<p>Name: * <input style="width: 90%;" type="text" value="Untitled Contract Workspace (Procurement)"/> ⓘ</p> <p>Description: <div style="border: 1px solid #ccc; height: 40px; width: 90%;"></div> ⓘ</p> <p>Related ID: <input style="width: 50%;" type="text"/></p> <p>Copy from Contract: (no value) ▾</p> <p>Test Project: * <input type="radio"/> Yes <input type="radio"/> No ⓘ</p> <p>Base Language: English ▾</p> <p>Hierarchical Type: * Stand-alone Agreement ▾</p> <p>Supplier: (no value) ▾ ⓘ</p> <p>Contract Amount: <input style="width: 50%;" type="text"/> USD* ⓘ</p> <p>Commodity: * (no value) ▾</p> <p>Departments: (no value) ▾</p> <p>Predecessor Project: (no value) ▾</p> <p>Contract Type: No Choice ▾ ⓘ</p> <p>Solicitation Type: No Choice ▾ ⓘ</p> <p>Bid Number: (no value) ▾ ⓘ</p>	<p>Agreement Date: <input style="width: 80%;" type="text"/> ⓘ</p> <p>Term Type: * Fixed ▾ ⓘ</p> <p>Effective Date: * <input style="width: 80%;" type="text"/> ⓘ</p> <p>Expiration Date: * <input style="width: 80%;" type="text"/> ⓘ</p>
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II. Template Selection

After filling out the Contract Attributes fields, the user should navigate down the screen to the **'Select a template'** section. The Template options displayed are based upon the selections made in the **'Entity'** and **'Contract Type'** fields. Once the user selects the correct Template, they will be prompted to answer additional questions that are used to include/exclude different objects in the Contract Workspace (CW).

1. In the **'Select a template'** section of the CW Attributes page, click the radio button next to the appropriate Template for the contract being created. The possible options include **'Statewide Term Contract Process,' 'Statewide IT Procurement Process,'** and **'Agency Contract Process.'**
2. The selection of the **'Statewide Term Contract Process'** prompts the user to answer **'Is this contract for Goods or for Services?'** in a drop-down menu. If the answer is **'Consulting Services'** or **'General Services,'** an additional question will display: **'Will Contract Terms for Buying be enforced for this Contract?'** At this time, select **'No,'** as **'Contract Terms'** in this context refers to a feature of the software not yet implemented in the system.

Statewide Term Contract Process

Statewide Term Contract:

- A Term Contract for all agencies, unless exempted by statute, rule, or special term and condition specific to this bid.
- A contract awarded by P&C as a result of a P&C strategic sourcing event, cooperative agreement or any other procurement method.

Is this a Contract for Goods or for Services? Goods

When the **'Statewide Term Contract Process'** Template is selected and the answer to the question is **'Goods,'** there are no further questions.

3. The selection of the **'Statewide IT Procurement Process'** option prompts the user to answer: **'Is this contract for Goods or for Services?'** in a drop-down menu. If the answer is **'Services,'** an additional question will display: **'Will Contract Terms for Buying be enforced for this Contract?'** At this time, select **'No,'** as **'Contract Terms'** in this context refers to a feature of the software not yet implemented in the system, but additional training will be added and advertised when this feature becomes available.

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.

Statewide IT Procurement Process

Statewide Term Contract:

- A contract awarded by S/ITP as a result of a S/ITP strategic sourcing event, cooperative agreement or service for a specified period of time.

Is this a Contract for Goods or for Services? Services

Will Contract Terms for Buying be enforced for this Contract? No

When the **'Statewide IT Procurement Process'** Template is selected and the answer to the question is **'Services,'** an additional question about **'Contract Terms'** will be asked, and the answer should always be **'No.'**

4. The selection of the **'Agency Contract Process'** option prompts the user to answer two questions in a drop-down menu.

- a. The first question is **'Is this contract for Goods or for Services?'** If the answer is **'Consulting Services'** or **'General Services,'** an additional question will display: **'Will Contract Terms for Buying be enforced for this Contract?'** At this time, select **'No'**, as **'Contract Terms'** in this context refers to a feature of the software not yet implemented in the system.
 - b. The second question is **'Is this an IT Contract?'** and the two options in the drop-down are **'Yes'** or **'No'**.
5. After selecting the correct Template and answering all subsequent questions, click the blue **'Create'** button (at either the top or bottom of the screen – there are two instances of this button). This action saves the CW in the system and assigns it a unique ID number beginning with 'CW.' The site will now take the user to the **Overview** screen where the user can begin managing the various aspects of the Contract Workspace.

The screenshot shows the 'Agency Contract Process' form. It includes sections for 'Agency Specific Contract' and 'Agency Contract' with descriptive bullet points. Below these are three questions with dropdown menus: 'Is this a Contract for Goods or for Services?' (set to 'General Services'), 'Will Contract Terms for Buying be enforced for this Contract?' (set to 'No'), and 'Does this Contract have an IT component?' (set to 'No'). The 'No' dropdown for the IT component question is circled with a dashed line. At the bottom right, there are 'Create' and 'Cancel' buttons, with the 'Create' button also circled with a dashed line. A yellow callout box with a black border contains the text: 'When the 'Agency Contract Process' Template is selected, the additional question 'Is this an IT Contract?' will be asked. Once the Template is selected and all questions have been answered, the final step is to click 'Create' to save the CW.' Arrows point from the callout box to the 'No' dropdown and the 'Create' button.

III. Overview and Managing Tasks

After clicking **'Create'** on the **Contracts Attributes** page, the Contract Workspace (CW) is saved, and the **Overview** screen is displayed. This screen contains information about the contract captured on the previous **Contract Attributes** page. From this screen, users 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: Maps out organization's standardized process for contract creation in a simple Checklist.

'Team' tab: Contains a list of individuals and groups considered as 'Team Members' who will take 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 organized in topics.

'History' tab: A detailed record of all changes to information in the CW over time.

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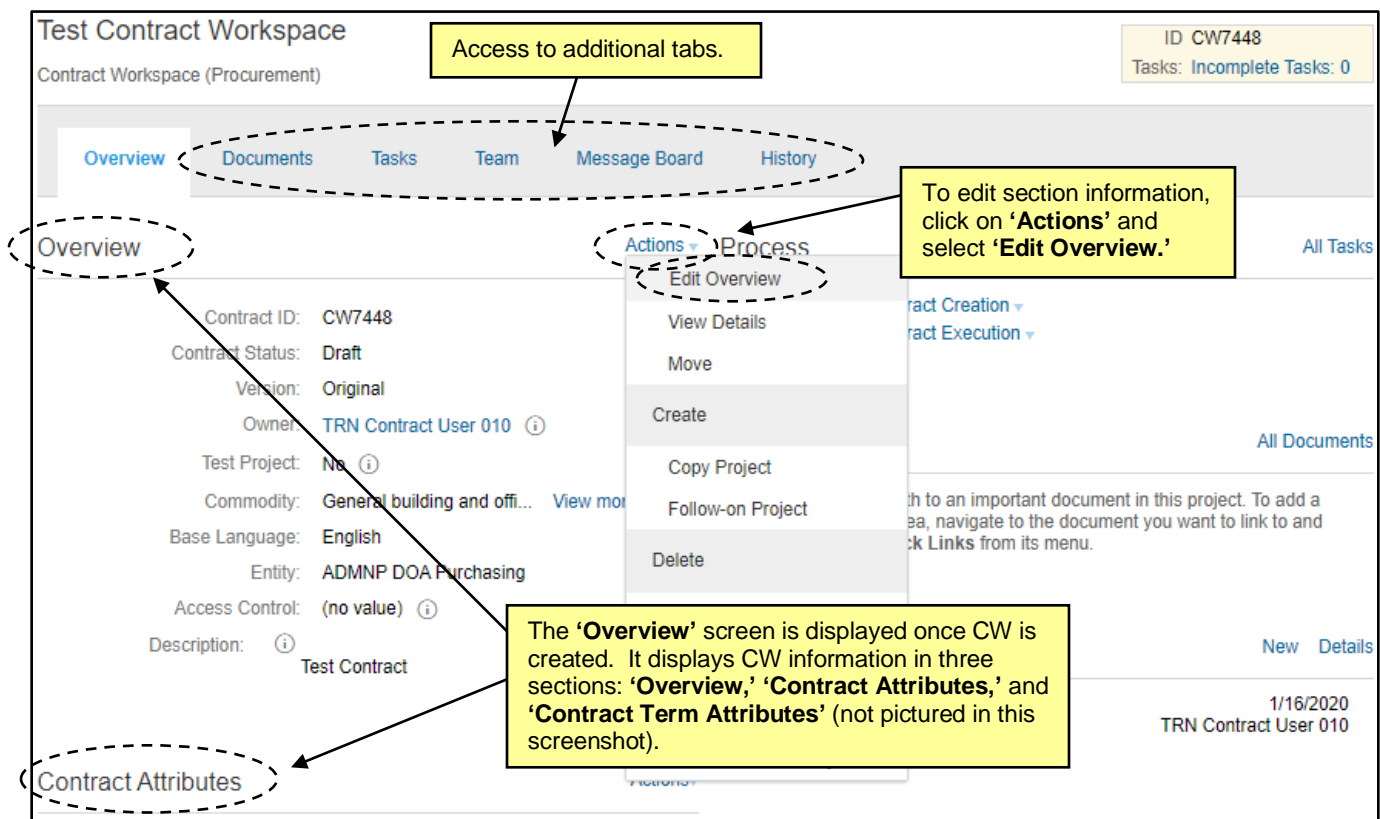
1. Scroll down the screen to verify the accuracy of the information populated in the **‘Overview,’ ‘Contract Attributes,’** and **‘Contract Term Attributes’** sections of the **Overview** screen.

‘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 invested 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. Users can utilize both options if they wish to send notifications to different recipients using different schedules.

The **‘Expiration Email’** first sends 30 days before the contract expiration date, and the **‘Notice Email’** first sends on the **‘Notice Date,’** which is a specified number of days before the **‘Expiration Date.’** 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.’**

Edit Contract Attributes

OK
Cancel

Make any necessary changes to the Contract Term Attributes by changing the appropriate field below. The Effective Date is the date after which, the contract [More](#)

Term Type: * ⓘ

Effective Date: * ⓘ

Expiration Date: * ⓘ

Expiration Email Recipients: ⓘ

Email Notification: First sent days before contract expiration date.

Reminder sent every days.

Notice Period(in days): ⓘ

Notice Date: ⓘ

Notice Email Recipients: ⓘ

Notice Email Notification: First sent days before contract notice date.

Reminder sent every days.

'Expiration Email' section.

Users can edit the sending date, the recipient list, and how often reminder emails will be sent for both the **'Expiration Email'** and the **'Notice Email.'** Click **'OK'** once all changes have been made.

'Notice Email' section.

3. Click on **'Tasks'** to navigate to the **'Tasks'** tab.
4. The **'Tasks'** tab displays two **'Phases'** that contain various **'Tasks'** that serve as guidelines for the required steps for creating and executing the contract. The specific **'Tasks'** displayed are populated based on the selections for **'Entity,' 'Contract Type,'** and **'Template'** made on the **'Contract Attributes'** page of the CW.

'Phases' represent groups of activities organized in a specific order. **'Phase 1'** is for **'Contract Creation'** and guides the user from loading the solicitation documents through creating, reviewing, and approving the actual contract document. **'Phase 2'** is for **'Contract Execution'** and takes the user from getting the contract document signed to the final act of **'Publishing'** the CW to make it official.

'Tasks' represent individual activities in the CW that are assigned to a user to be completed. Each **'Entity'** sets their default **'Tasks,'** and although they are all optional, it is suggested that users follow these **'Tasks'** in order to guide them through the contracting process. Users can add ad hoc **'Tasks'** if additional steps are deemed necessary that are not captured in the default **'Tasks.'** **'Tasks'** may have **'Documents'** attached to them, and their **'Owner,'** current **'Status,'** and **'Due Date'** (if there is one) are all indicated on the **'Tasks'** tab.

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. **Review Task:** Designed to route a document to others for review, and reviewers can usually edit and suggest changes.
- d. **Approval Task:** Requests approvers to approve deny a contract document before it is finalized.

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STATE DEPARTMENT STATE BRANCH
 LOCAL GOVERNMENT CITY COUNTY
 COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
 ONLINE SHOPPING STATEWIDE TERM CONTRACTS
 ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
 QUOTE PUNCHOUT CATALOG
 PURCHASE ORDER
 SOURCING
 BIDDING
 BUY

- e. **Signature Task:** Used with 'DocuSign' to obtain electronic signatures on contract documents.
- f. **Notification Task:** Sends email reminders to users.

The screenshot shows a 'Test Contract' workspace with a table of tasks. The table has columns for Name, Document, Owner, Status, and Due Date. The tasks are grouped into two phases: 'Phase 1 - Contract Creation' and 'Phase 2 - Contract Execution'. Annotations include:

- 'Phases' pointing to the phase headers.
- 'Tasks' pointing to individual task rows.
- 'Documents' pointing to the 'Document' column.
- 'Owner', 'Status', and 'Due Date' pointing to their respective columns.

'Documents' (if present) associated with 'Tasks,' along with the 'Owner,' 'Status,' and 'Due Date' (if set) are listed to the right of each 'Task.'

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

This screenshot shows the 'Action' menu for a task. The menu options are:

- Action
- View Task Details
- Edit Task
- Mark Started
- Mark Complete
- Associate Document

Clicking on a 'Task' displays a drop-down 'Action' menu with various options including 'View Task Details.'

6. The 'Task' detail page opens and displays the 'Task' number and name above a description of the user'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 green checkmark next to that 'Task' on the 'Tasks Tab' so CW stakeholders know where things are in the process.

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To Do Task Exit

Tasks are assigned **'Task' number and name.** given date. If you have not yet started the task, click **Mark Started** to indicate that you are working on it. [More](#)

Catering Contract / Phase 1 - Contract Creation / [Verify Contract Stakeholders in Team Tab](#)

'Task' instructions.

TSK16197717 Verify Contract Stakeholders in Team Tab

'Task' status buttons.

Navigate to the Team tab and ensure the relevant parties for this contract are actually captured.

Mark Started Mark Complete Mark Cancelled

- To create a new ad hoc **'To Do Task'** or **'Notification Task,'** click **'Actions'** above the **'Task'** list and select the desired **'Task'** type from the drop-down menu.

Test Contract

Name	Document	Owner	Create	Date
Phase 1 - Contract Creation	Verify Contract Stakeholders in Team Tab	Project Owner	Phase	
		Project Owner	To Do Task	
		Project Owner	Notification Task	

Click **'Actions'** and select the type of **'Task'** to create.

Actions

Create

Phase

To Do Task

Notification Task

- On the **'New Task'** page, you can set values for fields including **'Title,' 'Description,' 'Owner,'** and a **'Due Date.'** By including a **'Due Date,'** the **'Task'** will show up in the new owner's **'To Do'** portlet. When the details have been completed, click **'OK'** to send the **'Task'** to its new owner. The new owner will receive an email notification alerting them to their new **'Task.'**

Title: * New To Do Task

Description:

Owner: Project Owner

Observers: (no value)

Due Date: Days after parent phase starts: None

Fixed Date:

Add a **'Title,' 'Description,' 'Owner,'** and **'Due Date'** among other options.

IV. Managing Documents

The **'Documents'** tab is a central storage location for all documents related to a contract. It houses the associated **'Solicitation Documents,'** the **'Contractual Services Agreement,'** which serves as the main contract document, and any modification documents. Users can upload new documents, edit and replace existing documents, and associate **'Tasks'** with documents to get them reviewed, approved, and signed. Documents are version controlled and exist in a folder structure.

1. Click on the **'Documents'** tab and note the folder structure as defined by the Template selected. Click on a **Blue Triangle** 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

Name	Owner	Status
▼ Solicitation Documents		
▼ Contract Document	Project Owner	
Contractual Services Agreement	Project Owner	Draft
Document Templates	Project Owner	

Click on the **'Documents'** tab to display the document folders related to the CW. Drill down further on each folder via the **Blue Arrow** to display the documents within each folder. Note the **'Owner'** and **'Status'** to the right.

2. The first document-related **'Task'** is to **'Load Solicitation Documents for Reference.'** Click on the **'Solicitation Documents'** folder and select **'Document'** beneath the **'Upload'** option in the drop-down menu. This process works for uploading any document to the Contract Workspace (CW).
3. On the **'Create Document'** page, click **'Choose File'** to browse through the computer to select the file to upload, or drag-and-drop the file from the computer's desktop to the **'Or drop file here'** box. Enter a **'Description'** of the document and click **'Create'** to finish uploading the file.

Create Document

Upload the file and fill in additional information.

Test Contract / Solicitation Documents / Untitled Document

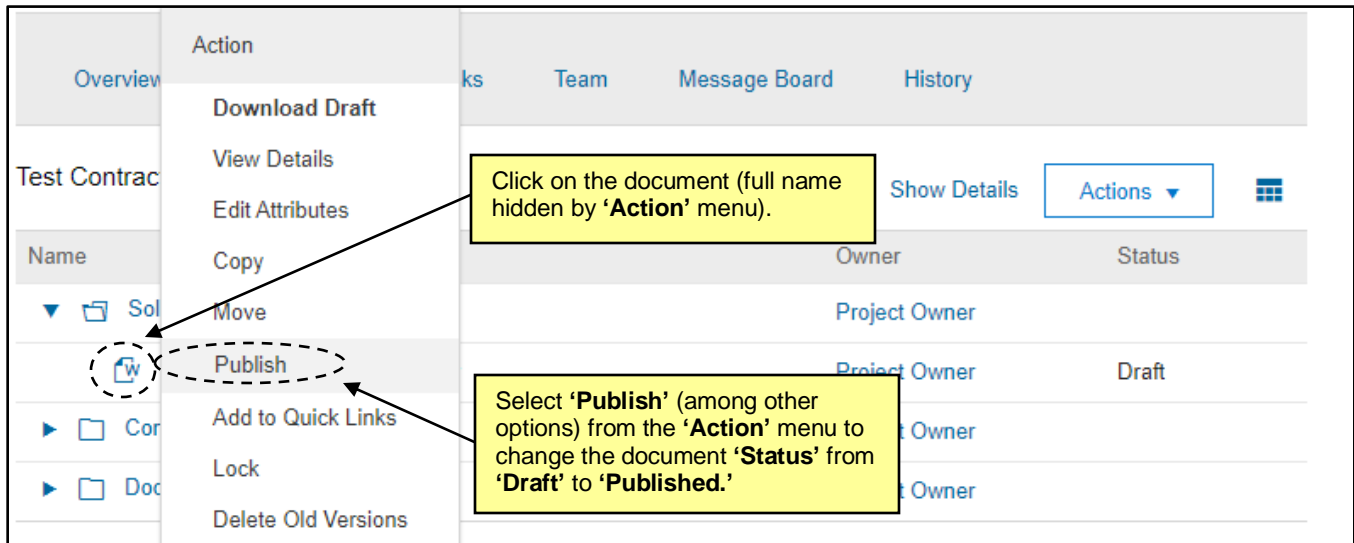
Upload file: Choose File No file chosen

Or drop file here

Description:

Upload a document by browsing the computer via **'Choose File,'** or drag-and-drop the document from the computer's desktop into the **'Or drop file here'** box. Enter a **'Description'** for the document and click **'Create.'**

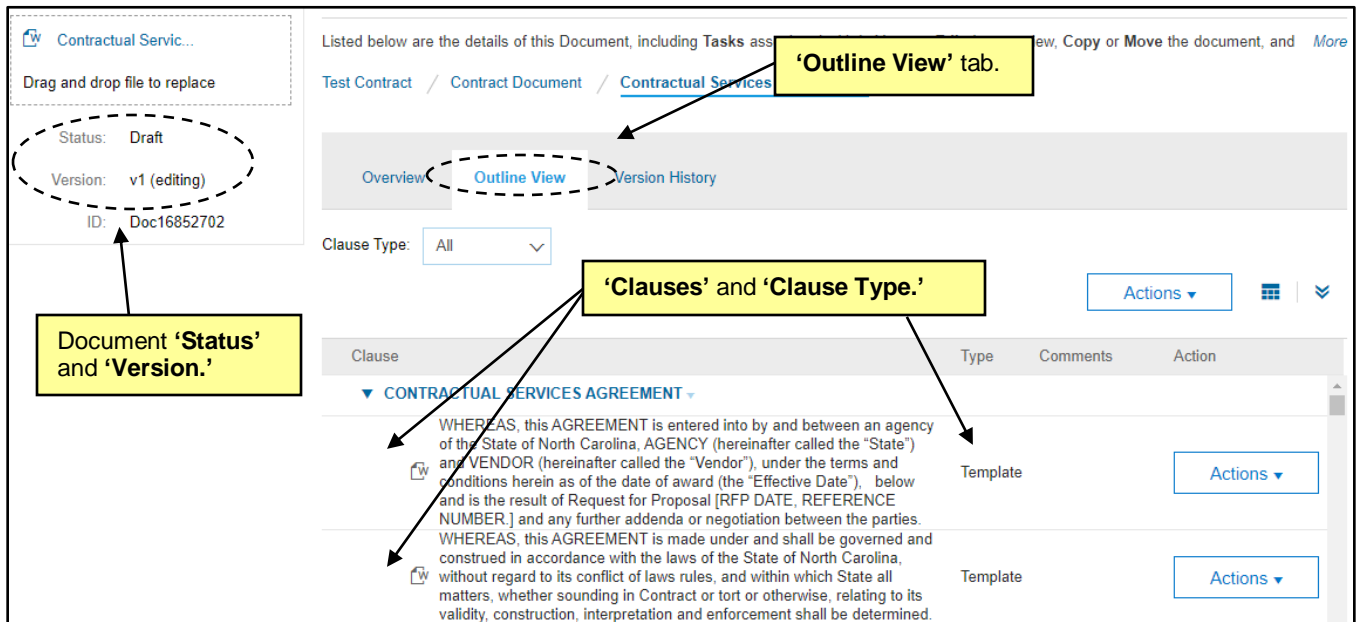
- Once the user uploads the document, it will have its own **'Action'** menu through which the user can do several things like creating new **'Tasks'** for **'Review,' 'Approval,'** and **'Signature.'** Before creating new **'Tasks,'** the user is advised to **'Publish'** the document as certain **'Document Tasks'** cannot be started until the document is published.



- The next document-related **'Task'** is to **'Capture Key Information in Contract Document.'** For this step the user clicks on the **'Contractual Services Agreement'** document within the **'Contract Document'** folder and selects **'Download Draft'** from the **'Action'** drop-down menu. This document serves as the binding contractual agreement between the **'Supplier'** and the **'Entity.'**
- Open the downloaded **MS Word** document and fill in the blank portions of the document with the requisite details of the contract being entered. All previous versions are saved and made available in the **'Version History'** tab of the document. Please remember that these changes are executed on a local copy of the document.
- When the contract document is complete, upload and **'Replace'** the original template document in the CW. In the **'Documents'** tab, click on the **'Contractual Services Agreement'** document and select **'Replace Document'** from the **'Action'** drop-down.

Note: It is advised to **'Replace'** the original document to lessen the chance of sending the wrong document for **'Approval'** or **'Signature.'** All previous versions are saved and made available in the **'Version History'** tab of the document.
- The **'Replace Document'** screen will appear, and the user can add a **'Description'** of the document replacing the original. Add the file via the **'Choose File'** or the drag-and-drop option and click **'Replace.'** On the next screen, choose the radio button next to **'Replace document by the uploaded file'** and click **'OK.'**
- The **'Outline View'** tab for this document displays. The **'Status'** and **'Version'** of the document are displayed in the top left, and the document's structure is outlined by **'Clause'** in the middle of the screen. **'Clauses'** from the original document are labeled by **'Template'** in the **'Type'** column, and any clauses that were added when the user edited the document offline will be labeled as **'Nonstandard.'** Click **'Done'** and **'Publish'** the document from its **'Action'** menu on the next screen.

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



10. The next **'Tasks'** to complete are document-related and ask the user to **'Review'** and then **'Approve'** the document. **'Review Tasks'** and **'Approval Tasks'** are initiated in a similar fashion and can be accessed from either the **'Documents'** tab or the **'Tasks'** tab, although it is advised that these **'Tasks'** be initiated from the **'Tasks'** tab.

- a. From the **'Documents'** tab, the user can click on the document and select either **'Review'** or **'Approval'** below **'Create New Task'** in the drop-down **'Action'** menu.
- b. From the **'Tasks'** tab, click on the **'Task'** and select **'View Task Details'** from the drop-down **'Action'** menu.

11. On the **'Review Task'** screen, select the reviewers by clicking the down-arrow in the search box to find the individual or group that needs to review the document. Click the box next to their name and click **'Done.'**

Note: A link for **'New External Reviewer'** is next to the search box and will allow for the document to be sent outside the **'Entity'** via email, but it is advised that all contract reviews be done within the system.

12. Select the **'Approval Rule Flow Type.'** **'Parallel'** nodes are activated at the same time; **'Serial'** nodes are activated consecutively, and the second reviewer or approver does not receive the **'Task'** until the preceding reviewer or approver completes their **'Task.'** **'Serial'** is the most common type to select.

13. Specify a **'Due Date,'** provide a message for the recipient, and click **'Submit'** to send the document for **'Review.'** The **'Reviewer'** receives an email notification as well as a **'To Do Task'** to let them know they have been asked to **'Review'** the document.

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1. Contract Document (Read Only)

2. Select Reviewers

Approval Rule Flow Type:

- Parallel
- Serial
- Custom

3. Specify Due Date

- Days after parent phase starts: None
- Fixed Date: 01/20/2020

4. Provide an initial message and click Submit or Mark Cancelled

Please Review

Additional Attachments...

5.

Select the 'Reviewer,' 'Approval Flow Type,' and 'Due Date.'

Include a 'Message' for the 'Reviewer' and click 'Submit.'

14. The reviewer can mark the document **'Reviewed'** as-is, or the reviewer can propose changes to the document before sending it back. The **'Project Owner'** will receive an email notification when the document has been **'Reviewed.'**

15. If the **'Reviewer'** does not suggest changes, click **'Mark Complete'** to indicate the **'Task'** is done and the document has been **'Reviewed.'** A green checkmark appears next to the **'Task'** on the **'Tasks'** tab at this point. If the **'Reviewer'** makes edits, click the **'Review Change'** link to view those edits.

- Review and merge document changes sent back from the reviewer. Clicking the document icon lets you see the document attached by the reviewer and clicking the **Review Change** link allows you to merge those changes into the server version of the document. If this link is not visible for a document, then you must merge the changes manually.

Contractual Services Agreement1.docx (Review Change)

Click 'Review Change' to see proposed edits by the 'Reviewer,' or click 'Mark Complete' if no edits have been made.

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16. On the 'Review Changes' screen, the user can 'Process All Changes' if they agree with the edits, or 'Reject All Changes' if they do not. The user can also accept or reject changes individually.

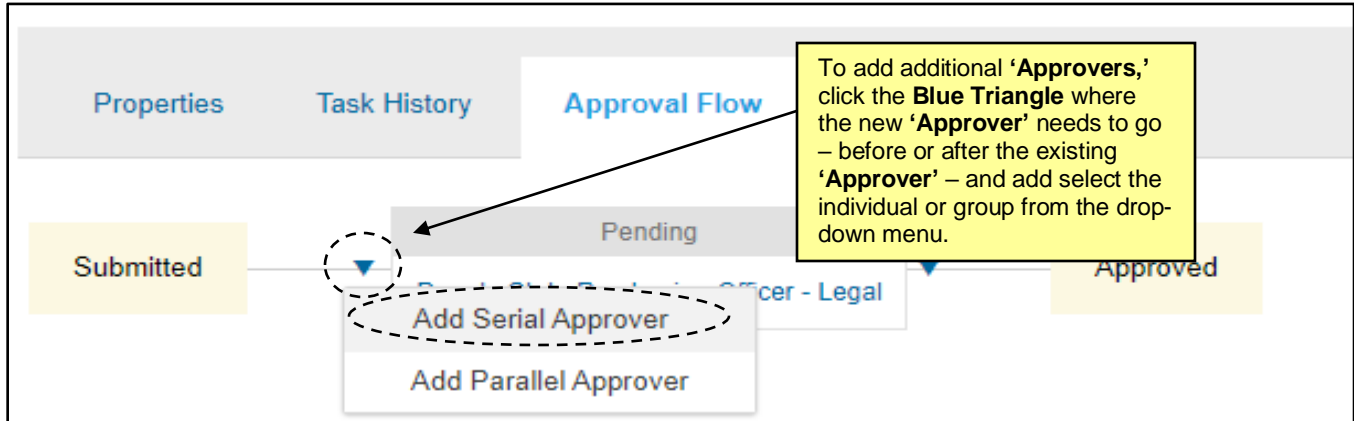
17. Click 'Save' on the next screen and then 'OK' to mark the 'Task' completed. If additional reviews are necessary, click 'New Round' to begin the process again.

18. To send the document for 'Approval,' click on the 'Approve Final Version of Contract Document (Including Award Recommendation)' link and select 'View Task Details' from the drop-down menu.

19. On the 'Approval Task' screen, click on the 'Custom' link to begin adding 'Approvers.'

20. Click 'Add Initial Approver' and select the 'Approver' from the drop-down menu and click 'OK.'

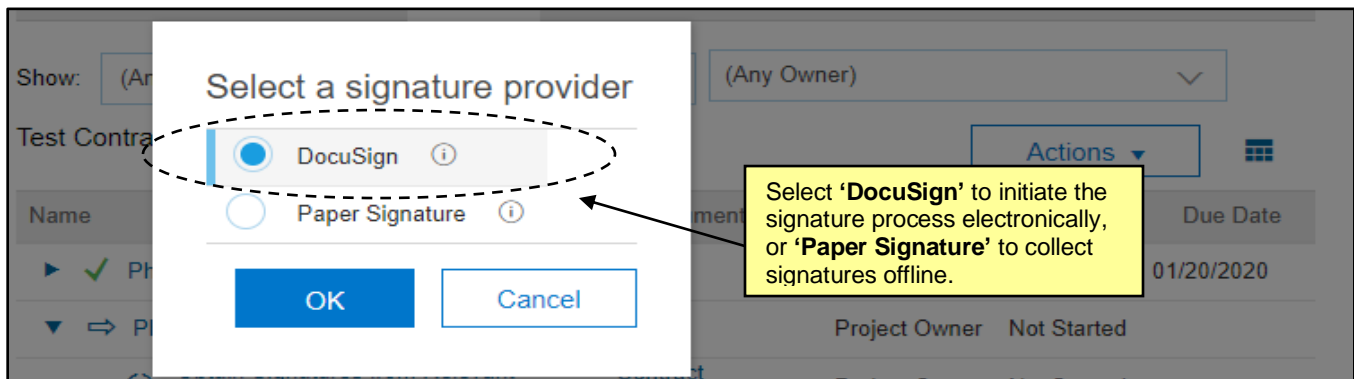
21. If additional **'Approvers'** are needed, click the **Blue Arrow** before or after the existing **'Approver'** and add the new **'Approver'** in **'Serial'** or **'Parallel.'** Specify a **'Due Date,'** add a message, and click **'Submit.'**



Note: **'Approvers'** receive an email notification as well as a **'To Do Task'** to let them know they have been asked to **'Approve'** the document. If an **'Approver'** is also a **'Project Owner,'** they will have the ability to make edits to the document before approving, or they can **'Approve'** or **'Deny'** the document as-is. Each time the document is approved or denied, the **'Project Owner'** receives an email to let them know the **'Approver'** has acted. To see the status of the **'Approvals,'** click on the **'Approval Flow'** tab within the **'Task.'** A green checkmark indicates a successful **'Approval,'** while a red 'X' indicates a **'Denial.'** A **'Pending'** status indicates the document is still awaiting **'Approval.'** Clicking on the **'Task History'** tab provides time stamps for all steps in the process.

Some Approvers may be added automatically based on **'Entity'** rules. In this case the user just needs to add a **'Due Date'** and click **'Submit,'** but if additional ad hoc **'Approvers'** are needed, scroll down and click the **Blue Triangle** as indicated above to add new **'Approvers.'**

22. When the document has been fully **'Approved,'** a green checkmark will display next to the **'Task'** to indicate its completion. The document **'Status'** will also automatically update to **'Published.'**
23. The final step in managing the contract document is the first **'Task'** in **'Phase 2,'** **'Obtain Signatures from Relevant Signers.'** Click on the **'Task'** and select **'View Task Details'** from the **'Action'** drop-down. All documents must be **'Published'** to initiate a **'Signature Task.'**
24. On the next screen, select either **'DocuSign'** to initiate the process electronically, or **'Paper Signature'** if the document will be signed offline and loaded onto the CW and then click **'OK.'**



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STATE DEPARTMENT STATE BRANCH
 LOCAL GOVERNMENT CITY COUNTY
 COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
 ONLINE SHOPPING STATEWIDE TERM CONTRACTS
 ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
 QUOTE PUNCHOUT CATALOG
 PURCHASE ORDER
 SOURCING
 BIDDING
 BUY

25. Click **'Add Signer'** to assign an existing user to sign the document. All internal individual signers should exist in the drop-down list. To add a signer from the **'Supplier,'** click **'From this supplier...'** and the designated supplier contact will display. Click on **'New Email Signer'** if a new external signer needs to be created. Click **'OK'** and add a **'Due Date.'**

Note: The first (top) signer listed will get the document first, and after they have signed it, the document will then be routed to the next signer, so it is important to consider the order in which signers are added. Typically, the **'Supplier'** would sign the document first before returning it to the user to sign and finalize.

2. Select Signers

By entering a Signer name and/or email address here, you acknowledge that you have the authority to allow transfer of this personal data to systems operated by Ariba and also to systems operated by the electronic signature provider selected by you and enabled for your account, and you consent to such transfer and related storage. These systems may be located in a country other than where you or the Signer are located. The signer names are submitted to the signature provider in the order shown. You can drag and drop signer names to change the order.

Name _____ Email _____

NO ITEMS

Click **'Add Signer'** to select individuals from both the **'Entity'** and the **'Supplier'** to sign the document.

Add Signer ▼

Other...

3. Sp **From this supplier...**

Days after parent phase starts: None ⓘ

Fixed Date: 01/20/2020 📅

26. Select the folder where the signed document will be stored and click **'Submit.'** This will route the user to the **'DocuSign'** site.

5. Choose a destination folder

Signed documents are stored in this location.

▼ Test Contract

▼ Contract Document

▶ Document Templates Project Owner

▶ Solicitation Documents Project Owner

Select the **'Contract Document'** folder to store the signed document and click **'Submit.'**

6. **Submit** Mark Cancelled

27. Within **'DocuSign,'** the signer is indicated in the field on the upper left side of the screen. Select additional signers by clicking that drop-down. Below that, **'Standard Fields'** represent the information to be placed on the document. Drag and drop the fields from the left onto the document where the signer needs to sign.

Note: There are no restrictions on what **'Standard Fields'** are used, but it is recommended that the **'Project Owner'** follow the outline of the **'Contract Document'** and include **'Name,' 'Title,' 'Signature,'** and **'Date Signed.'**

Select the **'Signer'** from the drop-down menu and drag-and-drop the relevant **'Standard Fields'** from the left side of the screen onto the appropriate spot on the document.

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.

28. Succeeding signers are indicated by different color tags. When all **'Standard Fields'** are placed in the right place, click **'Send'** in the top right to send it off for signatures.

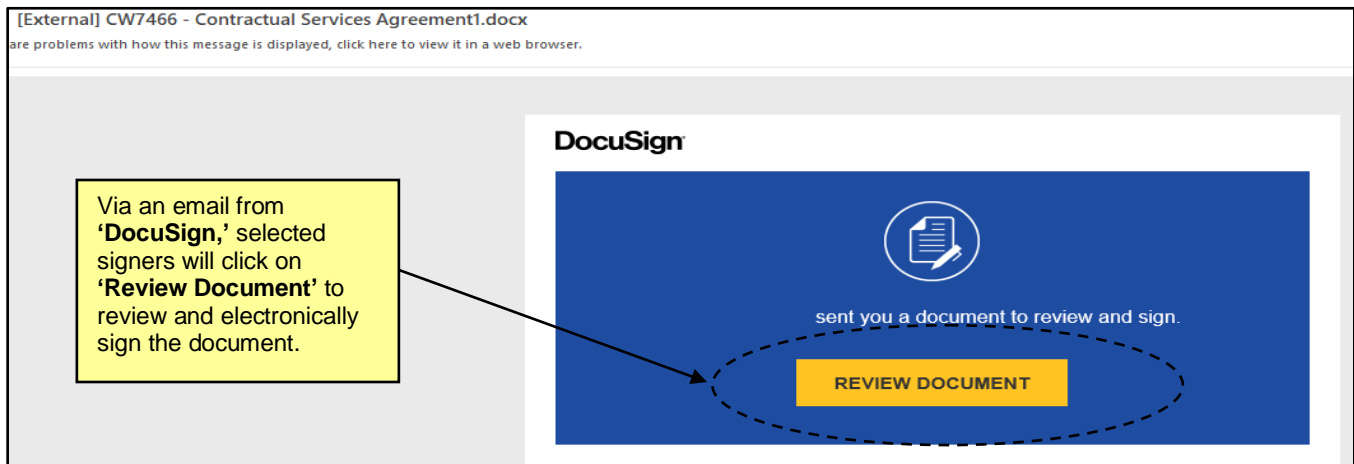
Selected **'Standard Fields'** for the first signer will be displayed in a different color than the **'Standard Fields'** for additional signers.

Note: Different signers would not normally be placed next to each other on the document. This placement was for illustrative purposes.

29. Signers will receive an email notification from the **'DocuSign'** system. They will click **'Review Document'** on the email and be directed to the document for review and to apply an electronic signature by clicking on the **'Sign'** icon. Once all required fields have been populated, the document will be sent to the next signer for them to complete the same steps.

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30. When all signers have affixed their signature, each of the signers receives a copy of the signed document and the Project Owner receives an email notification about the document's completion. A PDF of the signed contract will be attached to the email and will also be placed in the designated folder on the 'Documents' tab within the CW. A green checkmark will automatically display next to the 'Signature Task' on the 'Tasks' Tab to indicate completion of this step.

Name	Owner	Status
▶ Solicitation Documents	Project Owner	
▼ Contract Document	Project Owner	
▶ Signed_Contract Document	Project Owner	Signed
▶ Contractual Services Agreement1	Project Owner	Signed
▶ Document Templates	Project Owner	

Once all parties have signed the document, the 'Status' will update to 'Signed,' and a 'Signed_Contract Document' PDF will be added to the document folder.

V. Managing Team Members

The 'Team' tab lists the 'Project Groups' and its 'Members.' Each 'Project Group' can have different roles that specify the permissions for the users in that group, the objects the user can access, and the actions they can perform. Each 'Entity' template is set up with the necessary 'Project Groups,' but it is possible to edit the assigned 'Project Groups' within each Contract Workspace (CW) should the need arise.

1. The first 'Task' in 'Phase 1' is to 'Verify Contract Stakeholders in Team Tab.' To complete this 'Task,' navigate to the 'Team' Tab and review the 'Project Groups' and their 'Team Members.' For more details on these, click on them to open a 'Details' page. The pre-loaded 'Project Groups' based on the CW 'Template' should be sufficient, but if changes need to be made, click on 'Actions' and select 'Edit' from the drop-down menu.

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From the 'Team' Tab, click on the specific 'Project Group' name or 'Project Member' name for more details on who is in each 'Group.'

To edit any 'Project Groups,' click on 'Actions' and select 'Edit' from the drop-down menu.

- On the 'Team' page, change a 'Team Member' by clicking on the down arrow in the 'Member' box or click on 'Add more' to include other users. There is also an 'Add Group' button that will allow for additional 'Team 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 CW's that also use the same 'Template.'

Click the down arrow to change a 'Group Member' or 'Add More' to add other users to a 'Project Group.' Click 'OK' when done.

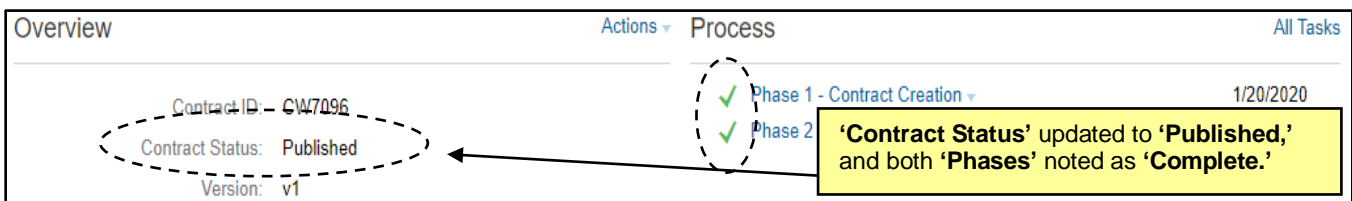
VI. Publish a Contract Workspace

The final 'Task' in the Contract Workspace (CW) is to 'Publish Contract Workspace.' This freezes the current version of the CW so no further editing is possible unless an 'Amendment' is created. 'Publish' is only available if all required 'Tasks' are completed, however all default 'Tasks' within a CW are optional so this should not be an issue unless the 'Project Owner' created any ad hoc 'Tasks' set as 'Required.'

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



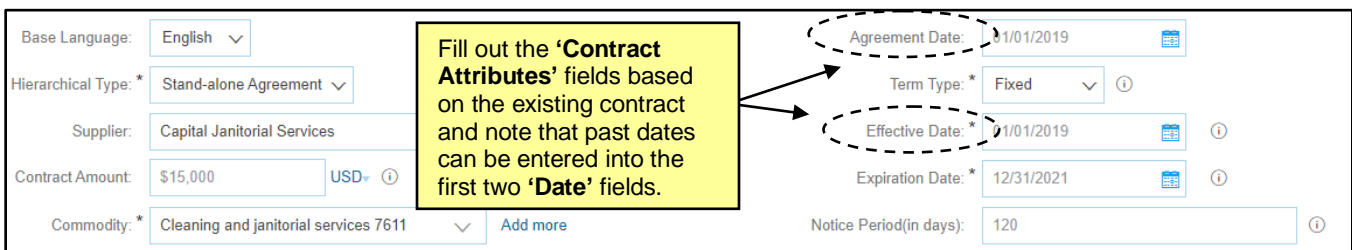
- The **'Contract Status'** updates accordingly from **'Draft'** to **'Published'** when the contract is currently effective, or to **'Pending'** when the effective date is in the future. On the effective date, the **'Contract Status'** will automatically update to **'Published.'**



VII. Load an Existing Contract

If an existing contract was initiated outside of the NC eProcurement Contracts system, it can still be added in a Contract Workspace (CW) in order to take advantage of the benefits of the system including online storage, notice of expiration, and reporting. Because most of the steps outlined on the **'Tasks'** tab would have already taken place – **'Review,' 'Approval,'** and **'Signature'** – this is an abridged process with the focus primarily on entering the **'Contract Attributes'** and loading the already-executed contract document.

- Click **'Create Workspace (Procurement)'** from one of its two locations on the **'Contracts'** tab home page.
- Fill out the **'Contract Attributes'** fields based on the contents of the executed contract.
- Set the **'Agreement Date'** and **'Effective Date'** fields to the past dates on which the contract was awarded and the contract went into effect, respectively.

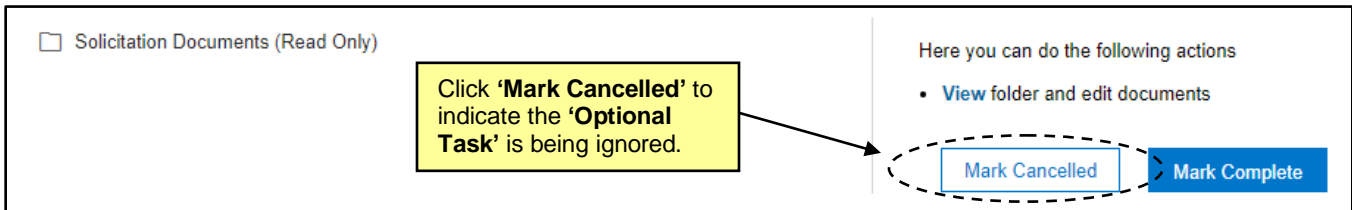


- Select the appropriate **'Template'** based on the nature of the contract and answer the ensuing prompted questions, then click **'Create.'**
- Review the **'Overview'** tab for accuracy and add any additional **'Expiration'** or **'Notice'** email recipients, then click on the **'Tasks'** tab.

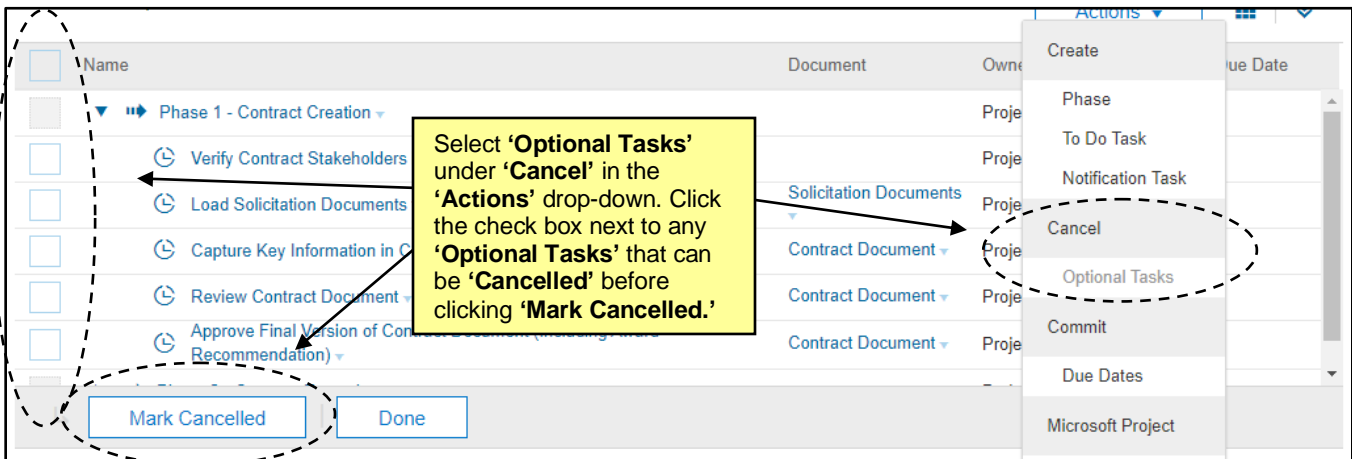
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- Note that most of the **'Tasks'** have already occurred during the initial creation of this contract. As none of the tasks are required, they can be ignored, or the user can choose to **'Cancel'** them, either individually or several at a time. To cancel a **'Task'** individually, click on the **'Task'** and select **'View Task Details'** from the **'Action'** drop-down.
- Click the **'Mark Cancelled'** button and enter a message on the next screen before clicking **'OK.'** A circle-with-a-slash-through-it symbol will display next to the **'Task'** and its **'Status'** will update to **'Cancelled.'**



- To cancel several **'Optional Tasks'** at once, click the **'Actions'** button on the **'Tasks'** tab and select **'Optional Tasks'** beneath **'Cancel'** on the drop-down menu. On the next page, check the box next to each **'Optional Task'** to be **'Cancelled'** and click **'Mark Cancelled.'** Clicking the check box next to **'Name'** on the top line will select all unchecked boxes at once. Enter a message on the next screen and click **'OK.'**



- Navigate to the **'Documents'** tab to load any relevant contract documents in either the **'Solicitation Documents'** or **'Contract Document'** folder and **'Publish'** all newly-loaded documents.
- Return to the **'Overview'** tab and select **'Publish'** from the **'Actions'** drop-down in the **'Contract Attributes'** section. The **'Status'** of the CW is now **'Published,'** and the CW is now effective, reportable, and **'Expiration Notifications'** will now generate based on the expected schedule.