

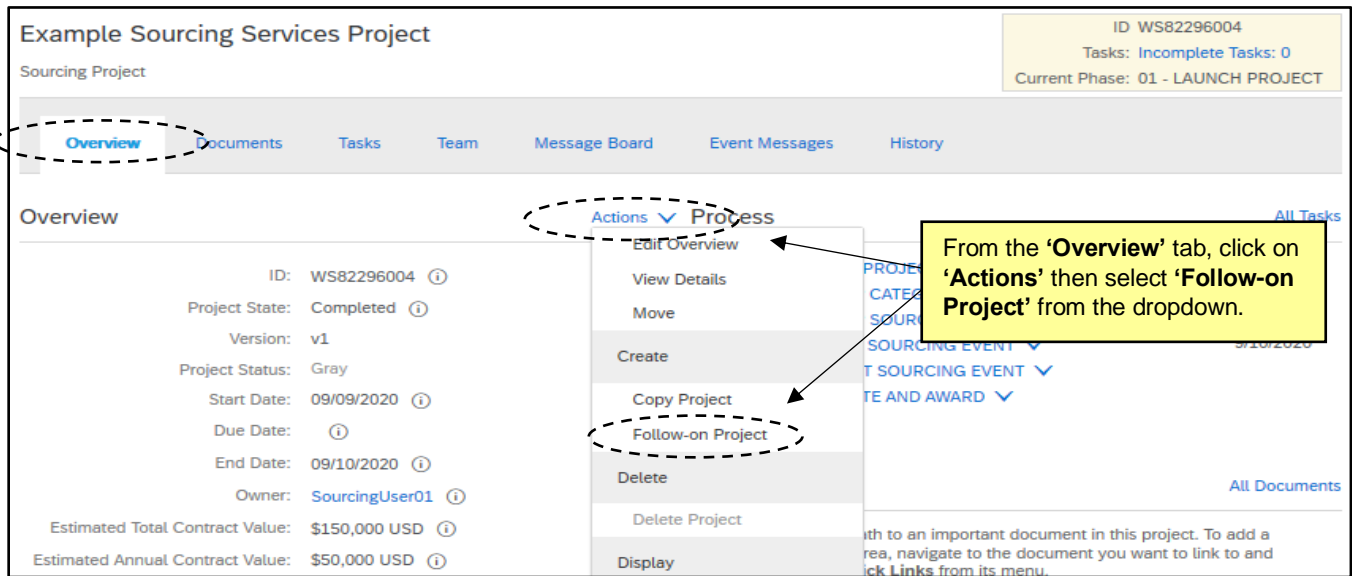
# NC eProcurement

## Creating a Contract Workspace from a Sourcing Project

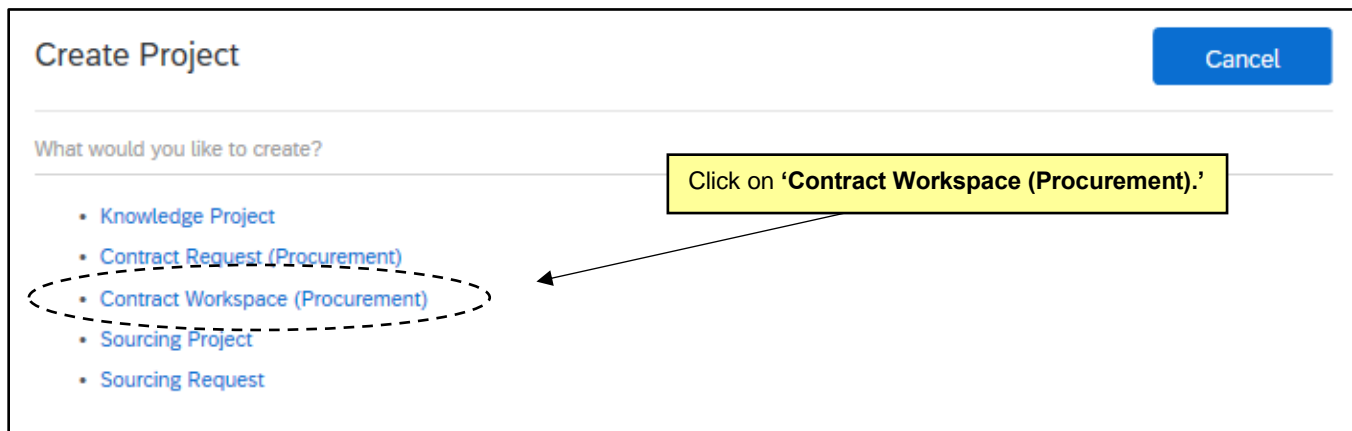
After a Sourcing Event has ended and the solicitation has been awarded to the winning vendor(s), the Project Owner can create a Contract Workspace (CW) to manage the subsequent contract with the vendor(s) directly from the recently completed Sourcing Project.

### I. Create a Follow-on Project to initiate a Contract Workspace

1. Navigate to the **'Overview'** tab of an awarded Sourcing Project.
2. Click on **'Actions'** then select **'Follow-on Project'** from the drop-down.



3. On the subsequent **'Create Project'** page, click on **'Contract Workspace (Procurement).'**



- 4. The **‘Create a Contract Workspace (Procurement)’** page will display, and the user will be prompted to populate the **‘Contract Attributes’** fields, select a template, and click **‘Create.’** For more information on these steps, please refer to the [‘Creating a Contract Workspace’](#) guidance within the **‘Contracts’** training module.
- 5. 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:
  - a. **Description**
  - b. **Commodity**
  - c. **Entity**
  - d. **Predecessor Project**
  - e. **Effective Date**
  - f. **Expiration Date**

**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 section at the bottom of [More](#)

Name: \* Example Follow-on Contract Workspace ⓘ

Description: Pricing for Medical Services ⓘ

Related ID:

Copy from Contract: (no value) ▾

Test Project: \*  Yes  No ⓘ

Base Language: English ▾

Hierarchical Type: \* Master Agreement ▾

Supplier: Health Services Advisory Group, Inc. ⓘ

Contract Amount: \$150,000 USD ▾ ⓘ

Commodity: \* 851015 - Healthcare centers 851015 ▾ Add more

Entity: ADMNP DOA Purchasing ▾ Add more

Predecessor Project: Example Sourcing Services Project ▾

Contract Type: \* Term Contract Agency Specific ⓘ

Solicitation Type: Competition ▾ ⓘ

Agency Contract ID: DOA #55 ⓘ

Bid Number: (no value) ▾ ⓘ

Agreement Date: 09/15/2020 ⓘ

Term Type: \* Fixed ⓘ

Effective Date: \* 21/01/2021 ⓘ

Expiration Date: \* 22/31/2023 ⓘ

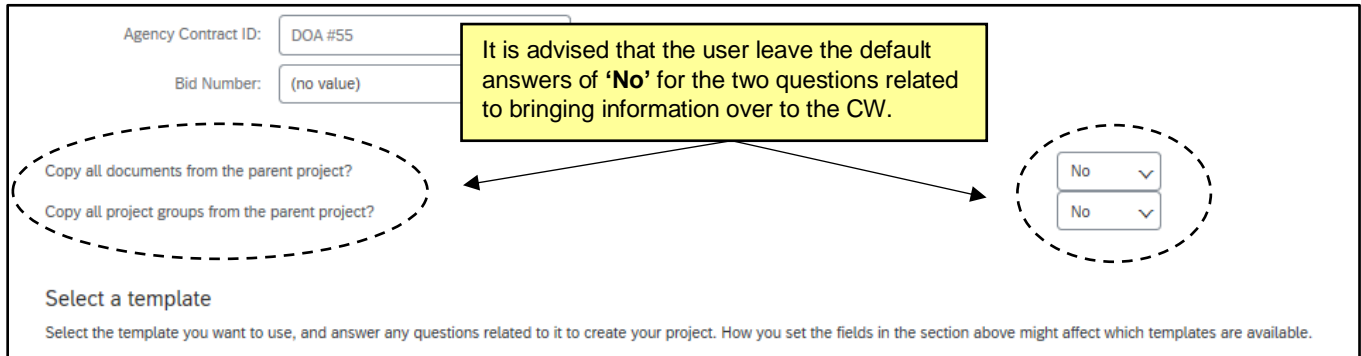
Notice Period(in days): 120 ⓘ

Copy all documents from the parent project? No ▾

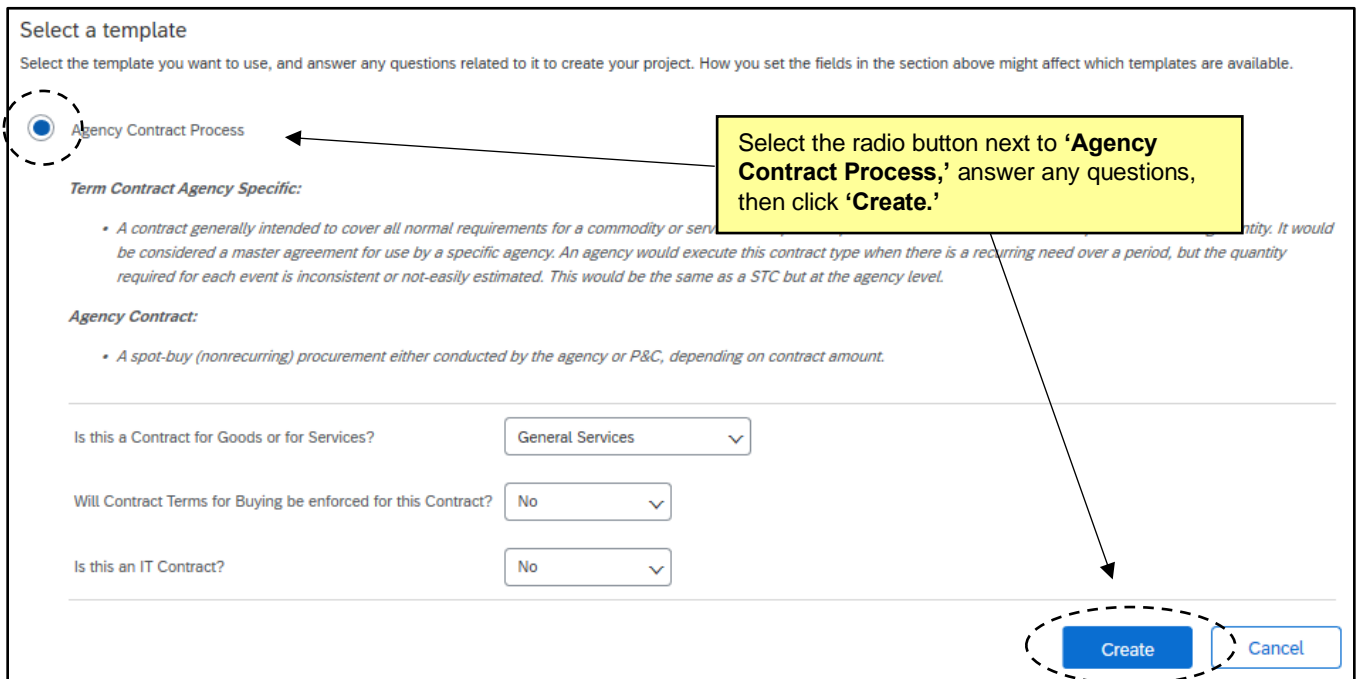
Copy all project groups from the parent project? No ▾

- 6. Above the ‘**Select a template**’ section, the user will be asked to answer ‘**Yes**’ or ‘**No**’ to two questions:
  - a. **Copy all documents from the parent project?**
  - b. **Copy all project groups from the parent project?**

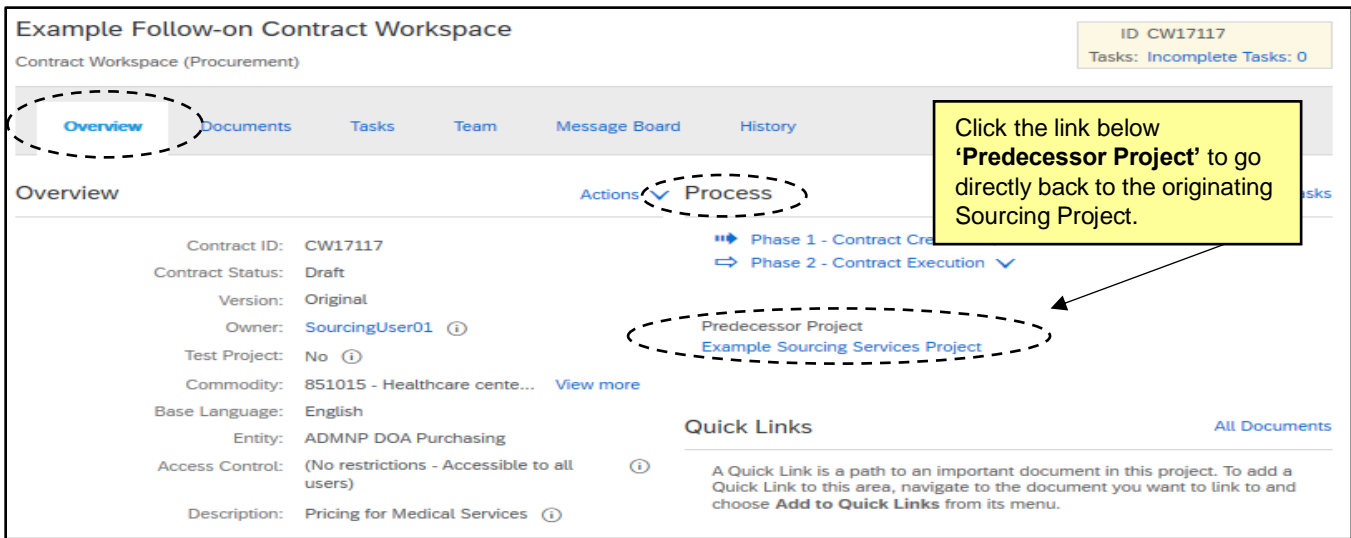
The default answer to both questions is ‘**No**,’ and it is advised that the user leave it this way. Although there will be a ‘**Solicitation Documents**’ folder within the Contract Workspace, the user cannot choose to only bring certain documents over – it’s all or none – and it is not advisable to populate the CW with all of the documents contained in the Sourcing Project.



- 7. Select the ‘**Agency Contract Process**’ template, answer the subsequent questions, and click ‘**Create**.’



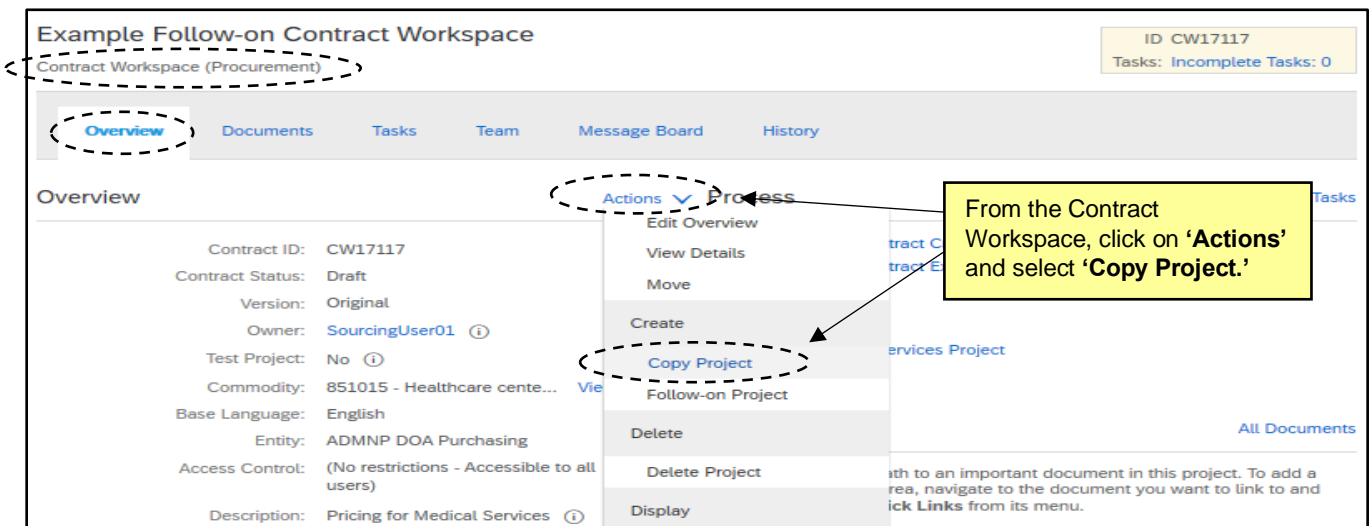
- 8. The user will be taken to the ‘**Overview**’ tab of the new Contract Workspace and they can manage the contracting process from there according to policy. To link back to the originating Sourcing Project, click the link (the name of the Sourcing Project) beneath ‘**Predecessor Project**’ below ‘**Process**.’



## II. Create Additional Contract Workspaces when Awarding to Multiple Vendors

Contract Workspaces are for single vendors only. If a Sourcing Event was awarded to multiple vendors despite a single Solicitation Document, 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.

1. 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 4 of the first section of this document, and the user should proceed to populate the **'Contract Attributes'** fields (making sure to select a different **'Supplier'**), select a template, and click **'Create,'** before managing the remainder of the contracting process for that vendor.