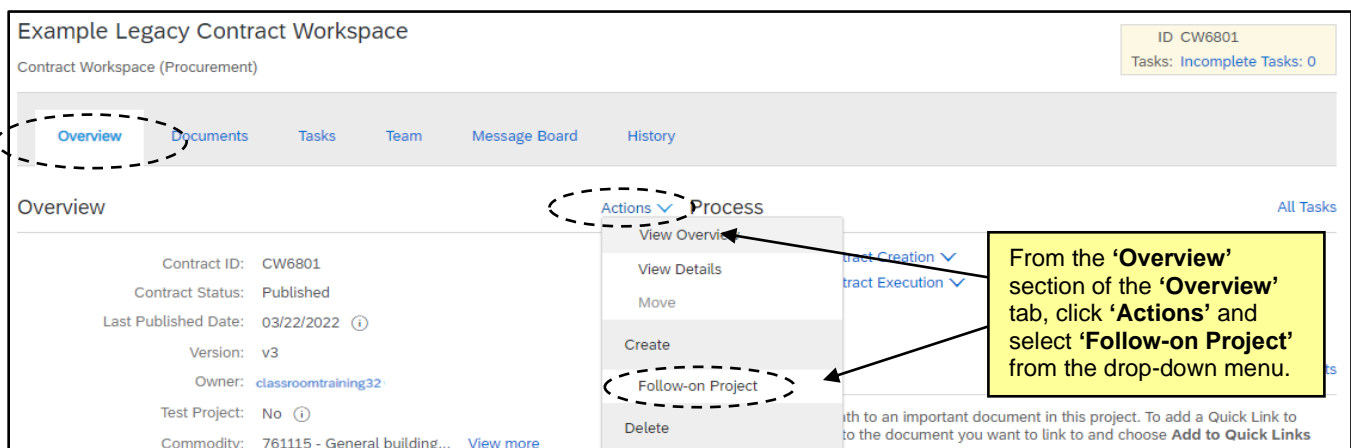# NC eProcurement
Modifying a Legacy Contract Workspace

If a Contract Workspace (CW) was created prior to March 24, 2022, and that CW needs to be modified with one of three **'Amendment'** types – **'Amendment,' 'Renewal,'** or **Termination,'** – users will need to convert that Legacy Contract Workspace (LCW) into a newer version by creating a **'Follow-on Project'** and processing the **'Amendment,'** along with the contract's future lifecycle, in the new CW. After the new CW is created, users will return to the LCW to mark it **'Closed.'**

I.   Create a Follow-on Contract Workspace

Creating a **'Follow-on Project'** from an existing Legacy Contract Workspace (LCW) will allow the user to link the new Contract Workspace (CW) and its updated Modification templates to the LCW for historical purposes.

1. From the **'Overview'** tab of a **'Published'** LCW, click the **'Actions'** link at the top of the page in the **'Overview'** section. Select **'Follow-on Project'** from the dropdown.

2. Click **'Contract Workspace (Procurement)'** on the subsequent **'Create Project'** page, then proceed to complete the attributes on the **'Create Contract Workspace (Procurement)'** page. Most of the fields will transfer information from the LCW to the new CW, but there are a few exceptions. Users must populate the following four fields themselves: **'Name,' 'Related ID,' 'Test Project,'** and **'Notice Period (in days).'**

   Note: Even if the contract is being modified in a way that would necessitate a new **'Expiration Date,'** do not update that date at this time. At this point, users should leave the date as is.

3. Above the **'Select a template'** section, two additional questions will appear: **'Copy all documents from the parent project?'** and **'Copy all project groups from the parent project?'** Both questions can be answered with either **'Yes'** or **'No'** from the drop-down menus, but it is suggested that users answer **'No'** to both to avoid the creation of duplicate folders on the new CW.
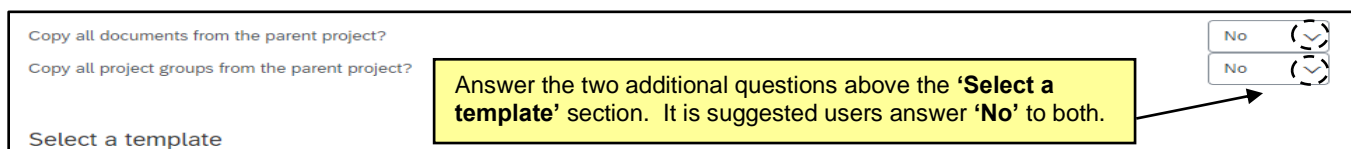
4. When all Contract Attribute fields are filled in and all questions are answered, click **'Create.'** The new CW will be created and assigned a unique **'ID number,'** and the user will be taken to the **'Overview'** tab from which they can begin to manage the CW, eventually putting it into **'Published'** status.

II. Manage and Publish Follow-on Contract Workspace

Before updating the new Follow-on Contract Workspace (CW) from **'Draft'** to **'Published'** status, the user should update the **'Expiration Email Recipients'** and load any existing contract documentation.

1. On the **'Overview'** tab of the new CW, scroll down to the **'Contract Term Attributes'** section and click **'Actions,'** then select **'Edit Term Attributes'** from the dropdown.

2. On the **'Edit Contract Attributes'** page, add any additional users beyond the **'Project Owner'** to the **'Expiration Email Recipients'** or **'Notice Email Recipients'** fields. Users who were in these fields on the Legacy Contract Workspace (LCW) do not automatically transfer over to the new CW. When all desired users have been added, click **'OK.'**

3. Navigate to the **'Documents'** tab and add any important documents from the Legacy Contract Workspace, such as the existing executed contract document, into the **'Contract Document'** folder.

4. There is no need to add any users to the **'Team'** tab unless the CW is protected by **'Access Control.'** If that is the case, add the appropriate **'P&C Service Team'** to the **'P&C Approver'** group.

5. When all updates have been made, navigate back to the **'Overview'** tab, scroll down to the **'Contract Attributes'** section, and click **'Actions.'** From the ensuing drop-down menu, select **'Publish.'**

III. Create an 'Amendment'

The Follow-on Contract Workspace is needed to utilize the document templates and **'Tasks'** available to the user once an **'Amendment'** is initiated.

1. On the **'Overview'** tab, scroll down to the **'Contract Attributes'** section and click **'Actions.'** From the ensuing drop-down menu, select **'Amend.'**

2. On the next page, select the **'Amendment Type'** from the drop-down menu and add a comment regarding the reason for the **'Amendment.'** Click **'OK'** and the **'Overview'** tab will display.

    Note: An **'Amendment Type'** of **'Amendment'** should be selected if the user wishes to negotiate an **'Extension'** to the current terms of the contract.
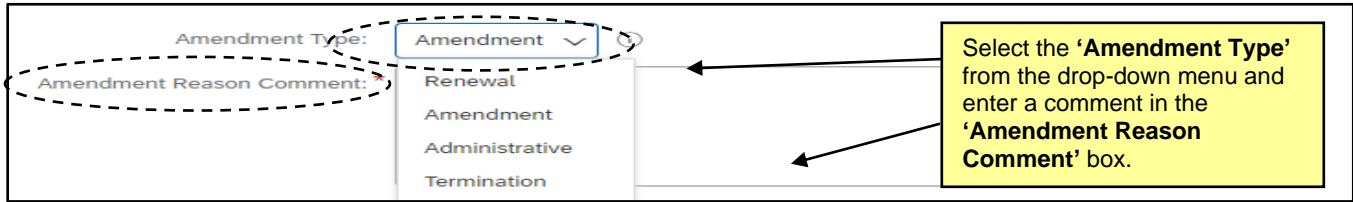

3. Process the **'Amendment'** in a normal fashion. For more guidance on handling an **'Amendment,'** please consult the **'Modifying a Contract Workspace'** job aid.

4. Once all requisite changes – including an updated **'Expiration Date'** – approvals, and signatures have been completed, return to the **'Overview'** tab, click **'Actions'** in the **'Contract Attributes'** section, and select **'Publish'** from the drop-down. The Contract Workspace will revert to **'Published'** status and cannot be edited until another **'Amendment'** is initiated.
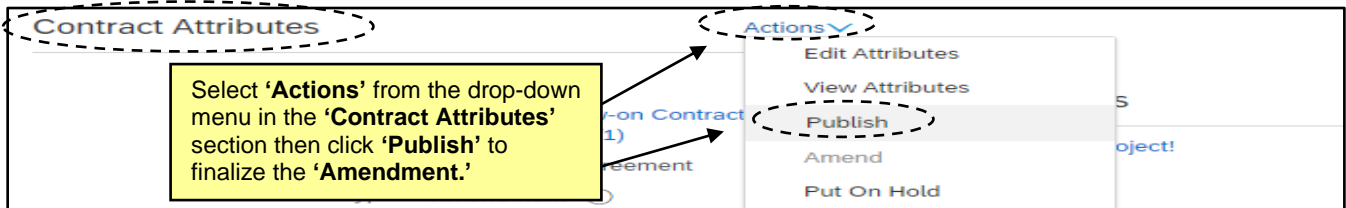
IV. Mark the Legacy Contract Workspace 'Closed'

Once the Follow-on Contract Workspace is in a **'Published'** status after the **'Amendment'** process is complete, users will go back to the Legacy Contract Workspace and mark it **'Closed'** to eliminate any duplicate notifications or confusion in reporting or contract management.

1. On the **'Overview'** tab, click the link to the Legacy Contract Workspace beneath **'Predecessor Project.'**
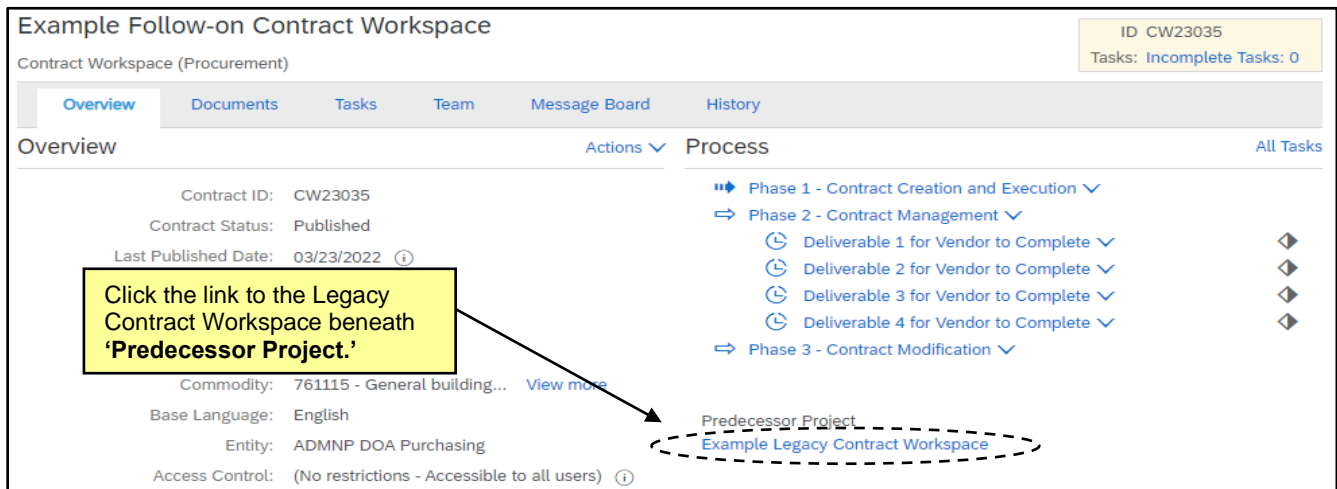
2. On the **'Overview'** tab of the Legacy Contract Workspace, scroll down to the **'Contract Attributes'** section and click **'Actions.'** From the ensuing drop-down menu, select **'Close.'**

3. The **'Contract Status'** of the Legacy Contract Workspace will update to **'Closed,'** and notifications will no longer generate from this workspace. The Follow-on Contract Workspace will always be linked to this Legacy version via the link below **'Follow-on Projects'** on the **'Overview'** tab.