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.'

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NORTH CAROLINA ePROCUREMENT

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.

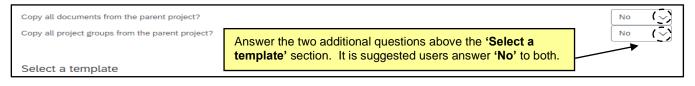
1. From the 'Overview' tab of a 'Published' LCW, click the 'Actions' link at the top of the page in the 'Overview' section. Select 'Follow-on Project' from the dropdown.

Example Legacy Cont	ID CW6801					
Contract Workspace (Procuremen	t)				Tasks: Incomplete Tasks: 0	
Overview Documents	Tasks Team	Message Board	History			
Overview		$\langle \langle \rangle$	Actions V Process		All Tasks	
Contract ID:	CW6801		View Overvice View Details	tract Creation V	From the 'Overview'	
Contract Status:	Published		Move	tract Execution 🗸	section of the ' Overview '	
Last Published Date:	03/22/2022 (i)				tab, click 'Actions' and	
Version:	v3		Create		select 'Follow-on Project' from the drop-down menu.	
Owner:	classroomtraining32		Follow-on Project		nom the diop-down mend.	
Test Project:	No (i)		Delete	th to an important document in this project. To add a Quick Link to to the document you want to link to and choose Add to Quick Links		
Commodity:	761115 - General building	View more	Delete			

 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.
- 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.'

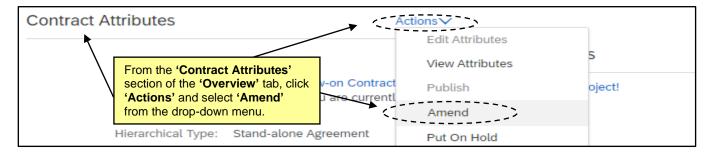
Edit Contract Attributes	OK Cancel
Make any necessary changes to the Contract Term Attributes by changing the appropriate field below. The Effective	• Date is the date after which, the contract is More
Effective Date: * 07/01/2019 (i)	
Expiration Date: * 06/30/2022	
Expiration Email Recipients: Ino value)	
Email Notification: First sent 30 days before contract expiration date.	Add users other than the
Reminder sent every 7 days.	'Project Owner' to the
Notice Period(in days): 120 (i)	'Expiration Email' and
Notice Date: 03/02/2022 ()	'Notice Email' Recipient
Notice Email Recipients: (no value)	fields if needed.
Notice Email Notification: First sent 30 days before contract notice date.	
Reminder sent every 7 days.	

- 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'

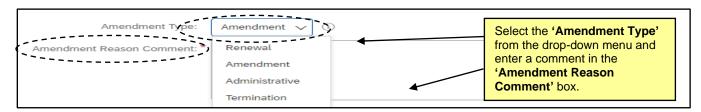
The Follow-on Contract Workspace is needed to utilize the document templates and '**Tasks**' available to the user once an '**Amendment**' is initiated.

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.



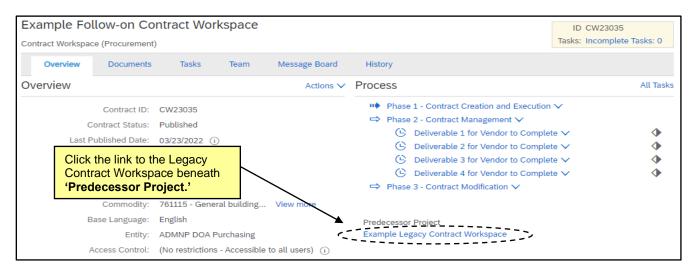
- 3. Process the 'Amendment' in a normal fashion. For more guidance on handling an 'Amendment,' please consult the 'Modifying a Contract Workspace' job aid.
- 4. Once all requisite changes including an updated 'Expiration Date' approvals, and signatures have been completed, return to the 'Overview' tab, 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.

Contract Attributes	<	Actions >> Edit Attributes	
Select 'Actions' from the drop-down menu in the 'Contract Attributes' section then click 'Publish' to finalize the 'Amendment.'	r-on Contract 1) eement	View Attributes Publish Amend Put On Hold	5 oject!

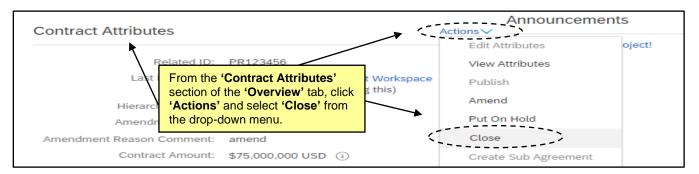
IV. Mark the Legacy Contract Workspace 'Closed'

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.

Example Legacy Contract Workspace					ID CW6801 Tasks: Incomplete Tasks: 0	
Overview Documents		Message Board	History			
Overview		Actions V	Process	On the 'Overview' tab, th 'Contract Status' is now and the new Contract Wo can be accessed via the li	'Closed,' rkspace	All Tasks
Contract ID:	CW6801		📫 Phas	'Follow-on Projects.'		
Contract Status:	Closed					
Last Published Date:	03/22/2022 i					
Version:	v3	Follow-on Projects				
Owner:	classroomtraining32					
Test Project:	No (i)					