

Modifying a Legacy Contract Workspace

Introduction

If a Contract Workspace (CW) was created prior to May 2024, 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**.



Learning Objectives

At the end of this job aid, **you will be able to:**



Create and Publish a Follow-on Contract Workspace.



Create an Amendment.



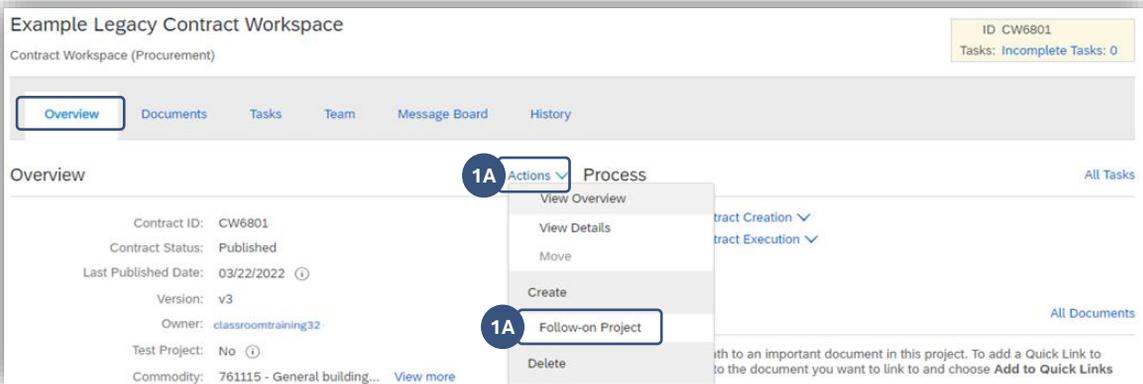
Mark the Legacy Contract Workspace Closed.

Modifying a Legacy Contract Workspace

Create a Follow-on Contract Workspace

1 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 and approval flows to the LCW for historical purposes.

A. 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.



B. 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)**.

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.

C. 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.



D. 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.

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Manage and Publish Follow-on Contract Workspace

2 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.

- A. 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.
- B. 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 [calendar] ⓘ

Expiration Date: * 06/30/2022 [calendar] ⓘ

2B Expiration Email Recipients: (no value) [dropdown] ⓘ

Email Notification: First sent 30 days before contract expiration date.

Reminder sent every 7 days.

Notice Period(in days): 120 ⓘ

Notice Date: 03/02/2022 ⓘ

2B Notice Email Recipients: (no value) [dropdown] ⓘ

Notice Email Notification: First sent 30 days before contract notice date.

Reminder sent every 7 days.

- C. Navigate to the **Documents** tab and add any important documents from the Legacy Contract Workspace, such as the existing contract document, into the **Contract Document** folder.
- D. 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.
- E. 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**.

Create an Amendment

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

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

Contract Attributes

Related ID:

Last Published: Example Follow-on Contract Workspace (you are currently viewing this)

Hierarchical Type: Stand-alone Agreement

3A [Actions] [dropdown]

- Edit Attributes
- View Attributes
- Publish
- 3A Amend
- Put On Hold

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- B. 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.

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



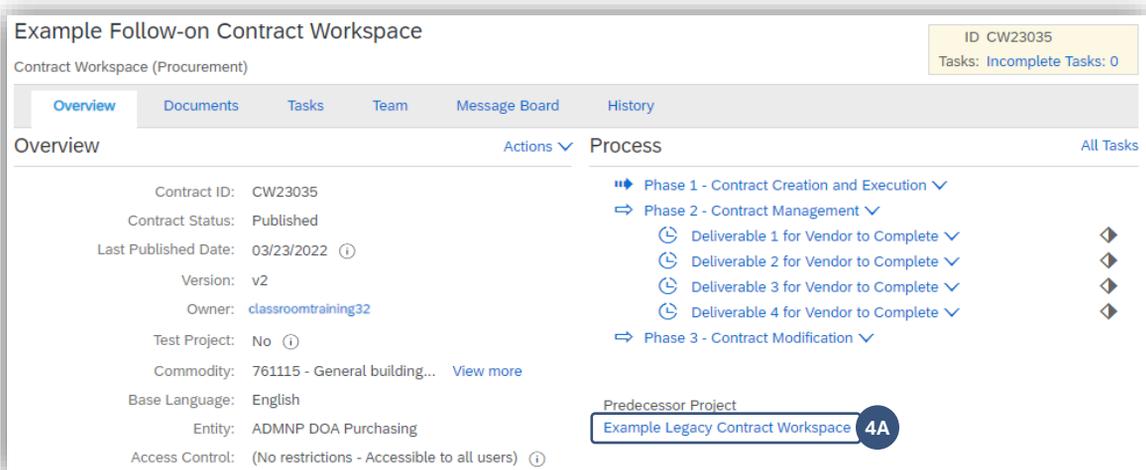
The screenshot shows a form with a dropdown menu for 'Amendment Type'. The dropdown is open, showing options: 'Renewal', 'Amendment', 'Administrative', and 'Termination'. A blue callout box with '3B' points to the 'Amendment' option. To the right is a text area for 'Amendment Reason Comment: *'.

- C. Process the **Amendment** in a normal fashion. For more guidance on handling an **Amendment**, please consult the [Modifying a Contract Workspace](#) job aid.
- D. 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.

Mark the Legacy Contract Workspace Closed

- 4 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.

- A. On the **Overview** tab, click the link to the Legacy Contract Workspace beneath **Predecessor Project**.



The screenshot shows the 'Example Follow-on Contract Workspace' interface. The 'Overview' tab is active. The contract ID is CW23035. The contract status is 'Published'. The last published date is 03/23/2022. The version is v2. The owner is classroomtraining32. The test project is 'No'. The commodity is '761115 - General building...'. The base language is 'English'. The entity is 'ADMNP DOA Purchasing'. The access control is '(No restrictions - Accessible to all users)'. The 'Process' section shows a list of deliverables for vendor completion. A 'Predecessor Project' section is visible at the bottom, with a link to 'Example Legacy Contract Workspace' highlighted by a blue callout box with '4A'.

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- B. 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**.

Contract Attributes

Related ID: PR123456

Last Published: Example Legacy Contract Workspace (you are currently viewing this)

Hierarchical Type: Stand-alone Agreement

Amendment Type: Administrative ⓘ

Amendment Reason Comment: amend

Contract Amount: \$75,000,000 USD ⓘ

Actions

- Edit Attributes
- View Attributes
- Publish
- Amend
- Put On Hold
- Close
- Create Sub Agreement

- C. 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

Contract Workspace (Procurement)

ID CW6801

Tasks: Incomplete Tasks: 0

Overview Documents Tasks Team Message Board History

Overview Actions Process All Tasks

Contract ID: CW6801

Contract Status: Closed 4C

Last Published Date: 03/22/2022 ⓘ

Version: v3

Owner: classroomtraining32

Test Project: No ⓘ

Follow-on Projects

Example Follow-on Contract Workspace 4C

Phase 1 - Contract Creation

Phase 2 - Contract Execution