NC eProcurement
Modifying a Contract Workspace

Once a Contract Workspace (CW) has been published it can only be modified when a user with **'Project Owner'** capabilities initiates the **'Amendment'** process. Please note that **'Amendment'** within NC eProcurement Contracts should be understood as any of the four types of contract modifications available within the system and differs from the way in which the State defines "Amendment," usually referring to a document changing the terms of an original solicitation or contract.

When users need to modify a CW, they will do so by creating an **'Amendment'** within the system. NC eProcurement Contracts supports multiple types of **'Amendments'** and most of them temporarily change the **'Status'** of the CW to **'Draft Amendment'** until the modification is finalized and the CW is once again **'Published'** to create a new version of the CW.

I.   Types of 'Amendments'

There are four different types of **'Amendments'** available to **'Project Owners'** when they wish to modify a CW.

1. **'Administrative':** The most basic of CW modifications. This amendment allows the **'Project Owner'** to modify non-contract details such as adding a **'Team Member'** or uploading a supplemental document. No modifications are permitted to the actual contract or its terms. This **'Amendment'** type does not change the CW status to **'Draft Amendment,'** but rather it remains as **'Published.'**

2. **'Amendment':** Allows the **'Project Owner'** to modify any part of the CW such as the **'Commodity Code'** or the language of what the contract covers. This will also be used for any **'Extension'** (not a renewal) of an existing contract, so the **'Expiration Date'** can be updated. Initiating this **'Amendment'** type will change the CW status to **'Draft Amendment'** and it will need to be **'Published'** again to reactivate.

3. **'Renewal':** Allows the **'Project Owner'** to modify the **'Expiration Date'** based on any pre-negotiated renewal options built into the initial contract. Additional fields may also be editable in this **'Amendment.'** Initiating this **'Amendment'** type will change the CW status to **'Draft Amendment'** and it will need to be **'Published'** again to reactivate.

4. **'Termination':** Allows the **'Project Owner'** to modify the **'Expiration Date'** to close a contract early due to an adverse condition or disagreement.

II.   Initiating an 'Amendment'

1. On the **'Overview'** tab, scroll down to the **'Contract Attributes'** section and click **'Actions.'** From the ensuing drop-down menu, select **'Amend.'**
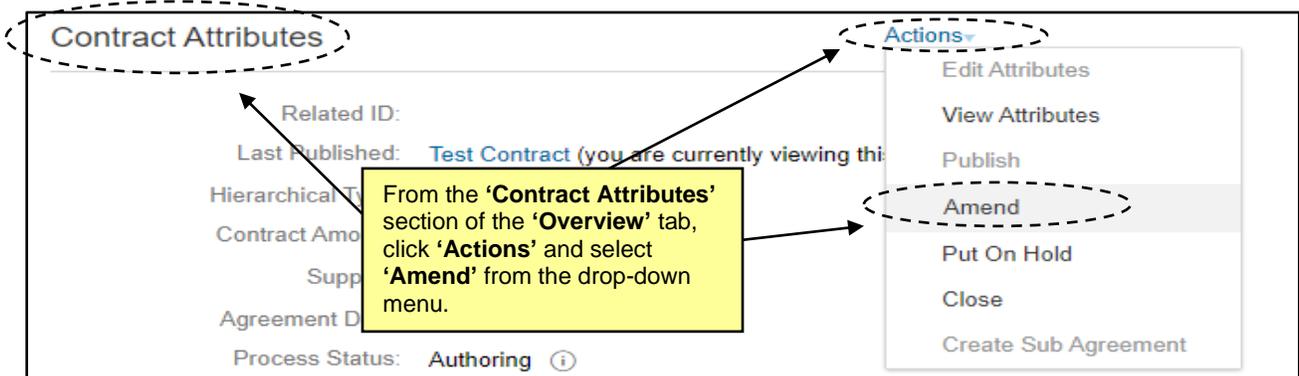
2. On the next page, select the **'Amendment Type'** from the drop-down menu and add a comment regarding the reason for the **'Amendment.'** Click **'OK'** and the **'Overview'** tab will display.
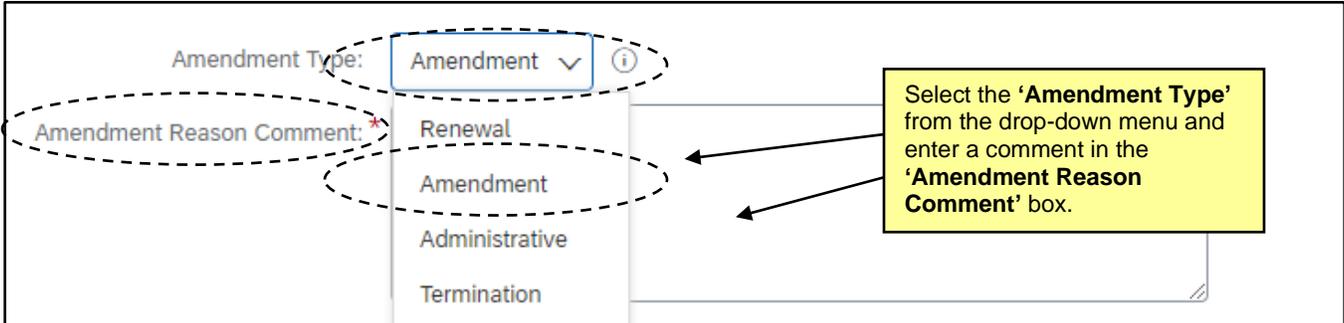
III.   'Administrative Amendment'

An **'Administrative Amendment'** indicates a small administrative change and is limited in nature. The **'Contract Status'** of the Contract Workspace (CW) never changes from **'Published.'**

1. Make any necessary changes on the **'Overview'** tab, add a **'Team Member,'** or load an additional supporting document.

2. Return to the **'Overview'** tab (if the user has navigated away), scroll down to the **'Contract Attributes'** section, and click **'Actions.'** From the ensuing drop-down menu, select **'Complete Amendment.'** The CW is updated to a higher version, and it remained in **'Published'** status throughout.
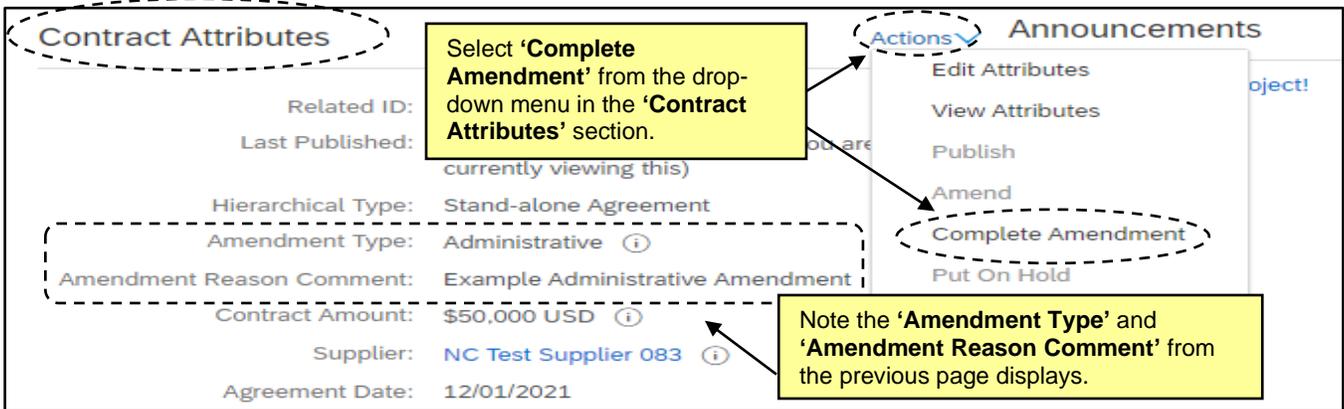
IV.   'Amendment Amendment'

An **'Amendment Amendment'** allows the **'Project Owner'** to change any part of the project, including the actual terms of the contract. This section details the **'Amendment'** option.

1. After selecting **'Amendment Amendment,'** the **'Overview'** tab will display. The **'Status'** field will be listed as **'Draft Amendment'** and the **'Version'** field will be listed as **'v2 (editing)'** [or v3/4/5, etc., depending on what number the previous **'Version'** was].

Note: While a CW is in a **'Status'** of **'Draft Amendment,'** all scheduled **'Expiration Notification'** emails will be suspended until the modification is complete and the **'Status'** goes back to **'Published.'**

2. Navigate to the **'Tasks'** tab to view the newly-added phase (3) and tasks to help guide user through the amendment process. Clicking the blue arrow to the left of **'Phase 3 – Contract Modification'** will display a subsection titled **'Amendment Modification.'** Clicking the blue arrow to the left of that will reveal an **'Amendment'** subsection. Click the blue arrow to the left of the **'Amendment'** option to reveal the tasks associated with that type of modification.

3. As with the **'Tasks'** in the first two phases associated with the initial creation of the Contract Workspace, the tasks themselves are not required to be completed to finalize a modification, but rather are intended to serve as a road map for best practices. The exception to this is if the contract being amended is over the entity's delegation. In this case an additional **'Approval Task'** to **'Gain P&C Approval of Amendment Over Delegation'** will appear on the **'Tasks'** tab. If this is not the case, users can skip to **Step 9**.

4. The **'Gain P&C Approval of Amendment Over Delegation'** task is tied to two documents on the **'Documents'** tab that must be downloaded, completed, and replaced before the task can be assigned to P&C for approval. Navigate to the **'Documents'** tab and click the blue arrow to the left of the **'Modification Contract Documents'** folder to reveal a sub-folder for **'Amendment Modification.'** Click the blue arrow to the left of the relevant option, and the documents will appear.

5. Click on each of the document templates and select **'Download'** from the popup menu. Update the documents accordingly and save a local copy. Click back on the templates, and this time select **'Replace Document.'** Add and save the updated versions of the **'Contract Amendment Template'** and the **'Modification Request Template.'**
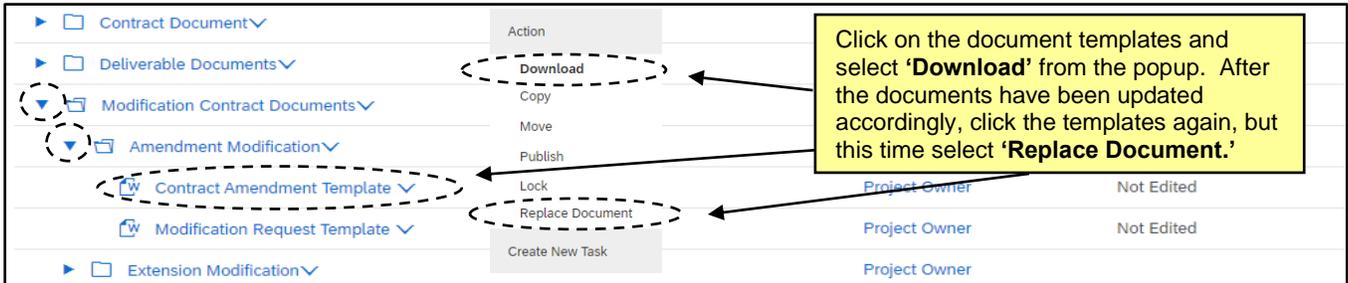
Click on the document templates and select **'Download'** from the popup. After the documents have been updated accordingly, click the templates again, but this time select **'Replace Document.'**

6. Navigate back to the **'Tasks'** tab and click on the **'Gain P&C Approval of Amendment Over Delegation'** task and select **'View Task Details'** from the drop-down.

Select **'View Task Details'** on the drop-down from the **'Gain P&C Approval of Amendment Over Delegation'** task.
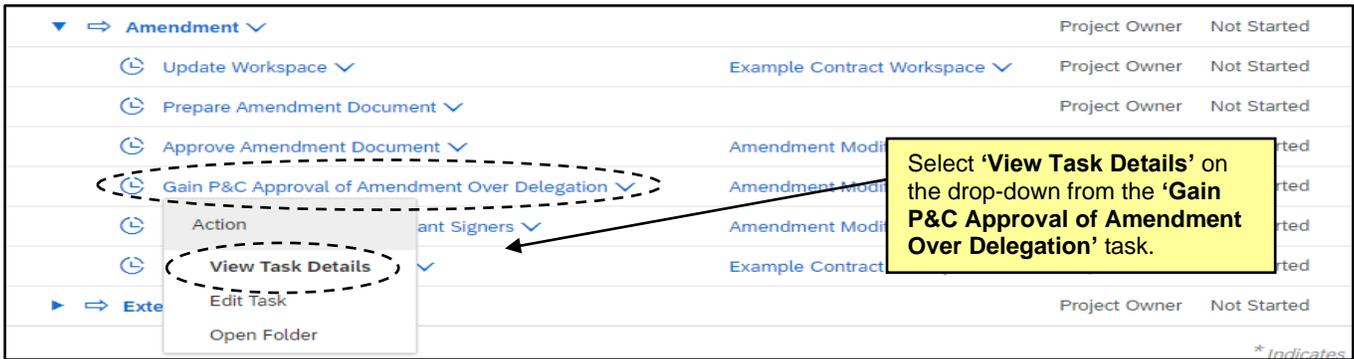
7. On the subsequent **'Approval Task'** page, the user should add their **'P&C Service Team'** to the **'Select Approvers'** field, set a **'Due Date'** with the date picker in the **'Specify Due Date'** field, enter a message if necessary, and click the **'Submit'** button to send the **'Amendment'** to P&C for approval.

'Amendment Modification' documents uploaded to **'Documents'** tab.

Add the appropriate P&C Service Team to the **'Select Approvers'** field and provide a **'Due Date'** by using the date-picker.

Add a brief message to P&C if necessary and click **'Submit.'**

8. After the task is submitted to P&C, the status will change to **'In Approval'** and the user will wait for P&C to approve the request allowing the user to proceed to the next steps, or P&C will **'Deny'** the task and request that the user adjust aspects of the CW and document and resubmit for approval. Once P&C provides final approval, the task **'Status'** will automatically update to **'Approved.'**

9. Once all requisite changes, 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 CW will revert to **'Published'** status and cannot be edited until another **'Amendment'** is initiated.

V.   'Extension Amendment'

If the user wishes to negotiate an **'Extension'** to a current contract, they will select an **'Amendment Amendment'** from the **'Amendment Type'** dropdown. This section details the **'Extension'** option.

1. After selecting **'Amendment Amendment,'** the **'Overview'** tab will display. The **'Status'** field will be listed as **'Draft Amendment'** and the **'Version'** field will be listed as **'v2 (editing)'** [or v3/4/5, etc., depending on what number the previous **'Version'** was].

   Note: While a CW is in a **'Status'** of **'Draft Amendment,'** all scheduled **'Expiration Notification'** emails will be suspended until the modification is complete and the **'Status'** goes back to **'Published.'**

2. Navigate to the **'Tasks'** tab to view the newly-added phase (3) and tasks to help guide the user through the extension process. Clicking the blue arrow to the left of **'Phase 3 – Contract Modification'** will display a subsection titled **'Amendment Modification.'** Clicking the blue arrow to the left of that will reveal an **'Extension'** subsection. Click the blue arrow to the left of that option to reveal the tasks associated with an **'Extension'** modification.

3. As with the **'Tasks'** in the first two phases associated with the initial creation of the Contract Workspace, the tasks themselves are not required to be completed to finalize a modification, but rather are intended to serve as a road map for best practices. The exception to this is if the contract being extended is over the entity's delegation. In this case an additional **'Approval Task'** to **'Gain P&C Approval of Extension Over Delegation'** will appear on the **'Tasks'** tab. If this is not the case, users can skip to **Step 9**.

4. The **'Gain P&C Approval of Extension Over Delegation'** tasks are tied to two documents on the **'Documents'** tab that must be downloaded, completed, and replaced before the task can be assigned to P&C for approval. Navigate to the **'Documents'** tab and click the blue arrow to the left of the **'Modification Contract Documents'** folder to reveal the **'Extension Modification'** sub-folder. Click the blue arrow to the left of that folder and the documents will appear.

5. Click on each of the document templates and select **'Download'** from the popup menu. Update the documents accordingly and save a local copy. Click back on the templates, and this time select **'Replace Document.'** Add and save the updated versions of the **'Contract Extension Template'** and the **'Modification Request Template.'**

Click on the document templates and select **'Download'** from the popup. After the documents have been updated accordingly, click the templates again, but this time select **'Replace Document.'**

6. Navigate back to the **'Tasks'** tab and click on the **'Gain P&C Approval…'** task and select **'View Task Details'** from the drop-down.

Select **'View Task Details'** on the drop-down from the **'Gain P&C Approval Extension Over Delegation'** task.

7. On the subsequent **'Approval Task'** page, the user should add their **'P&C Service Team'** to the **'Select Approvers'** field, set a **'Due Date'** with the date picker in the **'Specify Due Date'** field, enter a message if necessary, and click the **'Submit'** button to send the **'Extension'** to P&C for approval.

Extension Modification documents uploaded to **'Documents'** tab.

Add the appropriate P&C Service Team to the **'Select Approvers'** field and provide a **'Due Date'** by using the date-picker.

Add a brief message to P&C if necessary and click **'Submit.'**

Note: All **'Extension'** modifications will include a **'Gain P&C Approval of Contract Extension Greater than 3 Years (if Applicable)'** task tied to a document in the **'Extended Contract Term'** folder in the **'Modification Contract Documents'** folder. The task and documents can be ignored if the **'Extension'** is not greater than three years, but if it is, this task should be submitted to P&C for approval BEFORE beginning the traditional Extension Approval task outlined above.

8. After the task is submitted to P&C, the status will change to **'In Approval'** and the user will wait for P&C to approve the request allowing the user to proceed to the next steps, or P&C will **'Deny'** the task and request that the user adjust aspects of the CW and document and resubmit for approval. Once P&C provides final approval, the task **'Status'** will automatically update to **'Approved.'**

▼ ⇥ Amendment Modification ∨		Project Owner	In Progress	12/22/2023
▶ ⇥ Amendment ∨		Project Owner	In Progress	
▼ ⇥ Extension ∨		Project Owner	In Progress	12/22/2023
🕐 Document Factors for Extension ∨		Project Owner	Not Started	
🕐 Update Workspace ∨	Extension Test Workspace ∨	Project Owner	Not Started	
🕐 Prepare Extension Document ∨		Project Owner	Not Started	
🕐 Approve Extension Document ∨	...ension Modification ∨	Project Owner	Not Started	
🕐 Gain P&C Approval of Contract Extens...	...ended Contract Term ∨	Project Owner	Not Started	
☑ Gain P&C Approval of Extension Over Delegation ∨	Extension Modification ∨	classroomtraining53	In Approval	12/22/2023
🕐 Obtain Signatures from Relevant Signers ∨	Extension Modification ∨	Project Owner	Not Started	
🕐 Publish Contract Workspace ∨	Extension Test Workspace ∨	Project Owner	Not Started	

After being submitted to P&C for approval, the task 'Status' will update to 'In Approval.'

9. Once all requisite changes – including an updated **'Expiration Date'** if an extension was agreed to – approvals, and signatures have been completed, and the executed **'Extension'** document has been uploaded to the Contract Workspace, return to the **'Overview'** tab, click **'Actions'** in the **'Contract Attributes'** section, and select **'Publish'** from the drop-down. The CW will revert to **'Published'** status and cannot be edited until another **'Amendment'** is initiated.

Contract Attributes   Actions ∨

Related ID: PR1234567

Last ...   (v2/2) ⓘ

Hierarc...

Amend...

Amendment Reason ...

Contract Amount: $50,000 USD ⓘ

Supplier: NC Test Supplier 083 ⓘ

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

Select 'Actions' from the drop-down menu in the 'Contract Attributes' section then click 'Publish' to finalize the Amendment.

VI.   'Renewal Amendment'

A **'Renewal Amendment'** allows the **'Project Owner'** to change the active dates of the contract to extend it beyond its originally agreed-to **'Date of Expiration.'** Renewals do not need additional P&C approval because the optional additional term was approved during the original contract negotiation process.

1. After selecting **'Renewal Amendment,'** the **'Overview'** tab will display. The **'Status'** field will be listed as **'Draft Amendment'** and the **'Version'** field will be listed as **'v2 (editing)'** [or v3/4/5, etc., depending on what number the previous **'Version'** was].

   Note: While a CW is in a **'Status'** of **'Draft Amendment,'** all scheduled **'Expiration Notification'** emails will be suspended until the modification is complete and the **'Status'** goes back to **'Published.'**

2. Navigate to the **'Tasks'** tab to view the newly-added phase (3) and tasks to help guide user through the renewal process. Clicking the blue arrow to the left of **'Phase 3 – Contract Modification'** will display a subsection titled **'Option to Renew.'** Clicking the blue arrow to the left of that will reveal the tasks associated with the renewal process.

3. As with the **'Tasks'** in the first two phases associated with the initial creation of the Contract Workspace, the tasks themselves are not required to be completed to finalize a modification, but rather are intended to serve as a road map for best practices. Additionally, an **'Option to Renew'** folder will be added to the newly-created **'Modification Contract Documents'** folder on the **'Documents'** tab in which users will find a **'Contract Renewal Template'** that can be used to notify the vendor that the renewal option is being exercised.

4. Once all requisite changes have been made – such as adjusting the expiration date – and any new documents have been added, return to the **'Overview'** tab, click **'Actions'** in the **'Contract Attributes'** section, and select **'Publish'** from the drop-down. The CW will revert to **'Published'** status and cannot be edited again until another **'Amendment'** is initiated.

VII. 'Termination Amendment'

A **'Termination Amendment'** allows the **'Project Owner'** to close a contract before its originally agreed-to **'Date of Expiration'** in the event of an adverse condition or disagreement.

1. After selecting **'Termination Amendment,'** the **'Overview'** tab will display. The **'Status'** field will be listed as **'Draft Amendment'** and the **'Version'** field will be listed as **'v2 (editing)'** [or v3/4/5, etc., depending on what number the previous **'Version'** was].

    Note: While a CW is in a **'Status'** of **'Draft Amendment,'** all scheduled **'Expiration Notification'** emails will be suspended until the modification is complete and the **'Status'** goes back to **'Published.'**

2. Navigate to the **'Tasks'** tab to view the newly-added phase (3) and tasks to help guide user through the termination process. Clicking the blue arrow to the left of **'Phase 3 – Contract Modification'** will display a subsection titled **'Termination Modification.'** Clicking the blue arrow to the left of that will reveal the tasks associated with the termination process.

3. As with the **'Tasks'** in the first two phases associated with the initial creation of the Contract Workspace, the tasks themselves are not required to be completed to finalize a modification, but rather are intended to serve as a road map for best practices. The exception to this is if the contract being amended or extended is over the Entity's delegation. In this case an additional **'Approval Task'** to **'Gain P&C Approval of Termination Over Delegation'** will appear on the **'Tasks'** tab. If this is not the case, users can skip to **Step 9**.

4. The **'Gain P&C Approval of Termination Over Delegation'** task is tied to three documents on the **'Documents'** tab that must be downloaded, completed, and replaced before the task can be assigned to P&C for approval. Navigate to the **'Documents'** tab and click the blue arrow to the left of the **'Modification Contract Documents'** folder to reveal the **'Termination Modification'** folder. Click the blue arrow to the left of that folder and the documents will appear.

5. Click on each of the templates and select **'Download'** from the popup menu. Update the documents accordingly and save a local copy. Click back on the templates, and this time select **'Replace Document.'** Add and save the updated versions to the **'Termination Modification'** folder.
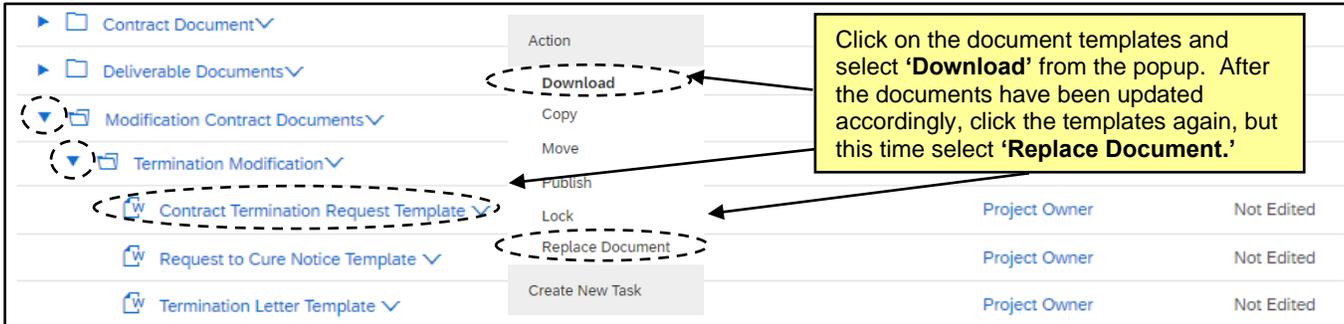
6. Navigate back to the **'Tasks'** tab and click on the **'Gain P&C Approval of Termination Over Delegation'** task and select **'View Task Details'** from the drop-down.

7. On the subsequent **'Approval Task'** page, the user should add their **'P&C Service Team'** to the **'Select Approvers'** field, set a **'Due Date'** with the date picker in the **'Specify Due Date'** field, enter a message if necessary, and click the **'Submit'** button to send the **'Termination Letter'** to P&C for approval.

8. After the task is submitted to P&C, the status will change to **'In Approval'** and the user will wait for P&C to approve the request allowing the user to proceed to the next steps, or P&C will **'Deny'** the task and request that the user adjust aspects of the CW and document and resubmit for approval. Once P&C provides final approval, the task **'Status'** will automatically update to **'Approved.'**

9. 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 CW will revert to **'Published'** status and cannot be edited again unless another **'Amendment'** is initiated.

   Note: CWs will not expire immediately. The system needs to refresh on the new **'Expiration Date'** before the **'Status'** updates from **'Published'** to **'Expired.'**

VIII. Copying a Contract Workspace

When creating a new Contract Workspace (CW) that is similar to a previous CW, the **'Project Owner'** has the option to copy a previous CW.

1. There are two options to begin the process of copying a Contract Workspace:

   a. On the **'Overview'** tab of an existing CW, click **'Actions'** in the **'Overview'** section and select **'Copy Project'** on the drop-down menu.

b. Click **'Create Contract Workspace (Procurement)'** and a blank **'Create Contract Workspace (Procurement)'** page will display. In the **'Copy from Contract'** field, click the down-arrow to search for the previous CW to copy and click **'Select'** to use it as basis for the new CW.

After clicking **'Create Contract Workspace (Procurement),'** a blank **'Create Contract Workspace (Procurement)'** page will display. In the **'Copy from Contract'** field, search for the CW to be copied and select it as the base for the new CW.

2. Certain contract attribute fields will auto-populate with information carried over from the CW that was copied, but not all fields. Notably, **'Name,'** **'Description,'** **'Test Project,'** **'Agreement Date,'** and **'Expiration Date'** are required fields that will not auto-populate and must be manually entered before the **'Project Owner'** can click **'Create.'**

3. The **'Template'** type will auto-select based on the previous CW, but the **'Project Owner'** will have to answer the template questions again. Two additional questions will appear below the traditional template questions: **'Do you want to copy documents that were modified in the project being copied?'** and **'Do you want to copy project groups that were not in the template and changes made to the project groups that were in the template?'** Both questions can be answered with either **'Yes'** or **'No'** from the drop-down menus. When all Contract Attribute fields are filled in and all questions are answered, click **'Create.'**

Answer the two additional questions after the traditional template questions and click **'Create.'**

4. 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 rest of the CW, eventually putting it into **'Published'** status.

IX. Managing Multi-Vendor Contract Workspaces

If a **'Project Owner'** needs to create and link multiple Contract Workspaces (CW) for one contract with multiple **'Suppliers,'** it is advised they use the **'Copy'** feature.

1. Click **'Create Contract Workspace (Procurement)'** to create the initial CW.

2. Fill in all the contract attribute fields including the **'Statewide Contract ID'** field or **'Agency Contract ID'** field depending on the **'Contract Type.'** Select the **'Template'** type, answer the template questions, then click **'Create.'**

3. At this point the CW is ready to be copied. Initiate the copy through one of the two options outlined above.

4. On the **'Create Contract Workspace (Procurement)'** page of the newly copied CW, populate all fields for which information did not auto-populate.

5. In the **'Supplier'** field, search for a different **'Supplier'** on this contract and replace the copied **'Supplier'** with that value. Answer the template questions and click **'Create.'**

6. Repeat the process from this point as many times as there are unique **'Suppliers'** on the contract before executing any further **'Tasks'** on these linked CWs such as uploading the unique executed contract document for each CW and publishing the Workspace.