

Modifying a Contract Workspace (IT)

Introduction

This job aid is for a user that wishes to modify a Contract Workspace (CW) in the NC eProcurement Contracts Tool **for an IT contract**. Once a Contract Workspace has been published, it can only be modified when a user with **Project Owner** capabilities initiates the **Amendment** process. Please note that **Amendment** within the NC eProcurement Contracts Tool should be understood as any of the four types of contract modifications available within the system. This differs from the way in which the State typically defines “Amendment” as a document changing the terms of an executed contract.

When Project Owners need to modify a CW, they will do so by creating an **Amendment** within the NC eProcurement Contracts Tool. The NC eProcurement Contracts Tool supports multiple types of **Amendments**. Three of the four types of **Amendments** temporarily change the **Status** of the CW to **Draft Amendment** until the modification is finalized and the Project Owner puts the CW back in **Published** status.



Learning Objectives

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



Understand the different types of Amendments and how to create them.



Request approval from NCDIT to complete an Amendment.



Copy a Contract Workspace.

Modifying a Contract Workspace (IT)

Types of Amendments

- 1 There are four different types of **Amendments** available to **Project Owners** when they wish to modify a Contract Workspace (CW).
 - **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 leaves it as **Published**.
 - **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 the Project Owner will need to change the status back to **Published** to reactivate the CW.
 - **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 type. Initiating this Amendment type will change the CW status to **Draft Amendment** and the Project Owner will need to change the status back to **Published** to reactivate the CW.
 - **Termination:** Allows the Project Owner to modify the **Expiration Date** to close a contract early if the State has terminated the contract with the vendor.

Initiating an Amendment

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

The screenshot shows the 'Contract Attributes' section of a system interface. It lists various contract details such as 'Related ID', 'Last Published', 'Hierarchical Type', 'Contract Amount', 'Supplier', 'Agreement Date', and 'Process Status'. To the right, an 'Actions' dropdown menu is open, listing options: 'Edit Attributes', 'View Attributes', 'Publish', 'Amend', 'Put On Hold', 'Close', and 'Create Sub Agreement'. The 'Amend' option is highlighted and marked with a blue circle containing the number '1A'.

- B. On the next page, select the applicable **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.

The screenshot shows the 'Amendment Type' selection screen. It features a dropdown menu with 'Amendment' selected, marked with a blue circle containing the number '1B'. Below the dropdown is a text input field labeled 'Amendment Reason Comment: *'. To the right of the dropdown, a list of other amendment types is visible: 'Renewal', 'Amendment', 'Administrative', and 'Termination'. The 'Amendment' option is also marked with a blue circle containing the number '1B'.

Modifying a Contract Workspace (IT)

Administrative Amendment Type

1 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**. This section details the **Administrative** Amendment type option

- A. After selecting **Administrative Amendment**, the **Overview** tab will display. The **Status** field will remain as **Published**. Make any necessary changes on the **Overview** tab, add a **Team Member**, or load an additional supporting document.
- B. 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.

Contract Attributes

Related ID: PR1234567

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

Hierarchical Type: Stand-alone Agreement

Amendment Type: Administrative ⓘ

Amendment Reason Comment: Example Administrative Amendment

Contract Amount: \$50,000 USD ⓘ

Supplier: NC Test Supplier 083 ⓘ

Agreement Date: 12/01/2021

Actions ⓘ

- Edit Attributes
- View Attributes
- Publish
- Amend
- Complete Amendment 1B**
- Put On Hold
- Close
- Create Sub Agreement

Amendment Amendment Type

1 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.

- A. 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 **v1 (editing)** [or v2/3/4, etc., depending on what number the previous **Version** was].

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**.

Overview

Contract ID: CW31634

Contract Status: Draft Amendment 1A

Last Published Date: 05/31/2023 ⓘ

Version: v2 (editing)

Owner: classroomtraining34 ⓘ

Test Project: No ⓘ

Commodity: 811121 - Internet service... View more

Base Language: English

Actions ⓘ

Process

- 01 - Contract Execution
- 02 - Contract Modification

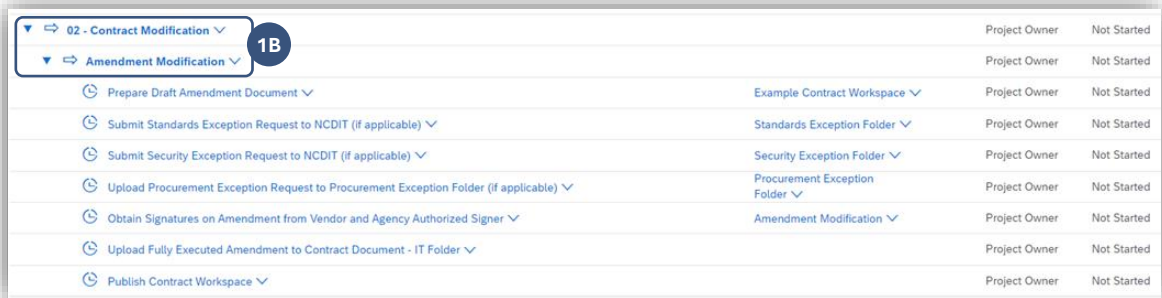
Quick Links

All Documents

A Quick Link is a path to an important document in this project. To add a Quick Link to this area, navigate to the document you want to link to and choose **Add to Quick Links** from its menu.

Modifying a Contract Workspace (IT)

- B. Navigate to the **Tasks** tab to view the newly added phase and tasks to help guide Project Owner through the amendment process. Clicking the blue arrow to the left of **02 – Contract Modification** will display a subsection titled **Amendment Modification**. Click the blue arrow to the left of the **Amendment Modification** option to reveal the tasks associated with the amendment process.



Task	Folder	Project Owner	Status
02 - Contract Modification		Project Owner	Not Started
Amendment Modification		Project Owner	Not Started
Prepare Draft Amendment Document	Example Contract Workspace	Project Owner	Not Started
Submit Standards Exception Request to NCDIT (if applicable)	Standards Exception Folder	Project Owner	Not Started
Submit Security Exception Request to NCDIT (if applicable)	Security Exception Folder	Project Owner	Not Started
Upload Procurement Exception Request to Procurement Exception Folder (if applicable)	Procurement Exception Folder	Project Owner	Not Started
Obtain Signatures on Amendment from Vendor and Agency Authorized Signer	Amendment Modification	Project Owner	Not Started
Upload Fully Executed Amendment to Contract Document - IT Folder		Project Owner	Not Started
Publish Contract Workspace		Project Owner	Not Started

- C. The **Tasks** are intended to serve as a road map to guide the Project Owner through the amendment process. The Project Owner should proceed through the tasks in **02** in the order listed.
- D. The first task is for the Project Owner to work with the applicable agency stakeholders (e.g., Agency Business) to develop the draft Amendment document. The Project Owner can use an agency-specific amendment document template or download a NCDIT-provided Amendment template from the **NCDIT Sourcing Library Folder** by following the steps below.
- Navigate to the **Documents** tab and click on the **Shortcut to NCDIT Sourcing Library Folder** link.
 - Click **Open**, and then click the blue arrow to the left of the **Amendment Templates** folder.
 - Select the applicable NCDIT template and then select **Download Draft**.
- E. To upload the completed draft Amendment document, the Project Owner should go to the **Documents** tab, click on the blue arrow to the left of **Modification Contract Documents** folder, and click on the blue arrow to the left of the **Amendment Modification** subfolder. Click on the **Replace with Amendment Document** document and select **Replace Document** from the pop-up menu. Either select the **Choose File** button to search for and select the completed Amendment document or drag and drop the completed Amendment document in the **Or drop files here** box. Click **Replace**, and then select **Replace document by the uploaded file** radio button. Click **OK**, then click **Save**.
- F. The Project Owner must mark the **Prepare Draft Amendment Document** task as “Complete” before initiating any other tasks in this phase. Click the **Prepare Draft Amendment Document** task name and select **Mark Completed**.
- G. Once the draft Amendment has been developed and uploaded, the Project Owner needs to determine if any Procurement, Standards, or Security Exception Requests also need to be developed and submitted to NCDIT in conjunction with the contract amendment. If so, the Project Owner should complete the following steps.
- If the amendment to the IT contract requires a **Procurement Exception Request** to be submitted to NCDIT (e.g., amendment is extending contract over three years), navigate to the **Documents** tab, click on the **Shortcut to NCDIT Sourcing Library Folder** link and select **Open** from the dropdown. Click the blue triangle to the left of the **Exceptions Folder**, click on the **Procurement Exception Request – Form A** document, select **Download** from the pop-up menu, and save a local copy of the document.

Modifying a Contract Workspace (IT)

- ii. After working with the applicable stakeholders (e.g., Agency Business) to complete the **Procurement Exception Request – Form A**, upload the form to the **Procurement Exception Folder** on the **Documents** tab. Click on the **Replace with Procurement Exception Request (Form A)** document, and select **Replace Document** from the pop-up menu. Either select the **Choose File** button to search for and select the completed document or drag and drop the completed document in the **Or drop files here** box. Click **Replace**, and then select **Replace document by the uploaded file** radio button. Click **OK**, then click **Save**.
- iii. If the amendment to the IT contract requires a **Standards Exception Request** to be submitted to NCDIT, navigate to the **Documents** tab, click on the **Shortcut to NCDIT Sourcing Library Folder** link and select **Open** from the dropdown. Click the blue triangle to the left of the **Exceptions Folder**, click on the **Standards Exception Request – Form B** document, select **Download** from the pop-up menu, and save a local copy of the document.
- iv. After working with the applicable stakeholders (e.g., Agency Business, Agency IT Security) to complete the **Standards Exception Request – Form B**, upload the form to the **Standards Exception Folder** on the **Documents** tab. Click on the **Replace with Standards Exception Request (Form B)** document, and select **Replace Document** from the pop-up menu. Either select the **Choose File** button to search for and select the completed document or drag and drop the completed document in the **Or drop files here** box. Click **Replace**, and then select **Replace document by the uploaded file** radio button. Click **OK**, then click **Save**.
- v. Add any additional supporting documents to the **Standards Exception Folder** as needed by selecting the **Standards Exception Folder** on the **Documents** tab and then selecting **Document** under the **Upload** section of the menu. Either select the **Choose File** button to search for and select the supporting document(s) or drag and drop the supporting document(s) in the **Or drop files here** box. Click **Create** and then **Done**.
- vi. Navigate back to the **Tasks** tab and click on the **Submit Standards Exception Request to NCDIT (if applicable)** task and select **View Task Details** from the drop-down. On the subsequent **Approval Task** page, add a due date from the date picker (a minimum of five business days is recommended). Add a message to NCDIT if necessary and click **Submit**.




Project Owner must enter a **Due Date** so that the approval task will show up on the approvers To Do portlet in the NC eProcurement Contracts Tool. If no **Due Date** is entered, the approver will only be sent an email to notify them of the approval request. This may delay the approval process.

- vii. If the amendment to the IT contract requires a **Security Exception Request** to be submitted to NCDIT, navigate to the **Documents** tab, click on the **Shortcut to NCDIT Sourcing Library Folder** link and select **Open** from the dropdown. Click the blue triangle to the left of the **Exceptions Folder**, click on the **Security Exception Request – Form C**, select **Download** from the pop-up menu, and save a local copy of the document.
- viii. After working with the applicable stakeholders (e.g., Agency Business) to complete the **Security Exception Request – Form C**, upload the form to the **Security Exception Folder** on the **Documents** tab. Click on the **Replace with Security Exception Request (Form C)** document, and select **Replace Document** from the pop-up menu. Either select the **Choose File** button to search for and select the completed document or drag and drop the completed document in the **Or drop files here** box. Click **Replace**, and then select **Replace document by the uploaded file** radio button. Click **OK**, then click **Save**.

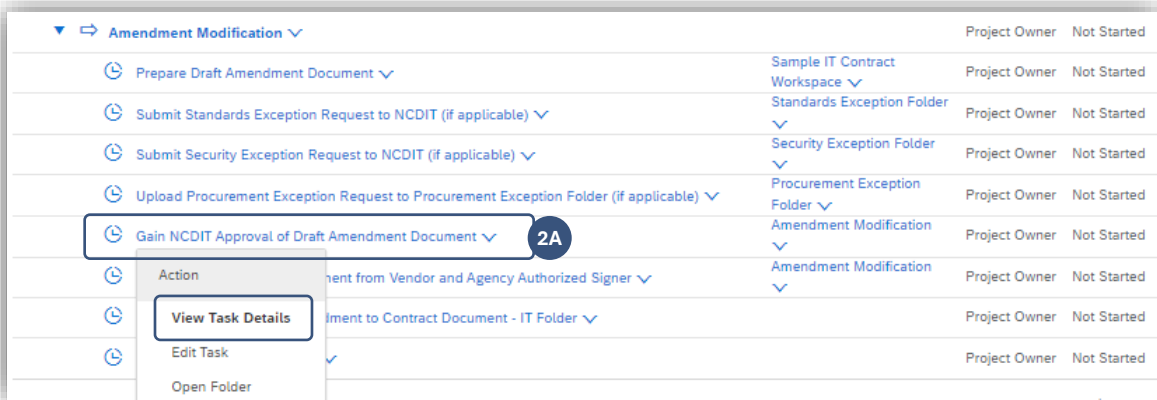
Modifying a Contract Workspace (IT)

- ix. Add any additional supporting documents to the **Security Exception Folder** as needed by selecting the **Security Exception Folder** on the **Documents** tab and then selecting **Document** under the **Upload** section of the menu. Either select the **Choose File** button to search for and select the supporting document(s) or drag and drop the supporting document(s) in the **Or drop files here** box. Click **Create** and then **Done**.
- x. Navigate back to the **Tasks** tab and click on the **Submit Security Exception Request to NCDIT (if applicable)** task and select **View Task Details** from the drop-down. On the subsequent **Approval Task** page, add a due date from the date picker (we recommend a minimum of five business days). Add a message to NCDIT if necessary and click **Submit**.


 Project Owner must enter a **Due Date** so that the approval task will show up on the approvers To Do portlet in the NC eProcurement Contracts Tool. If no **Due Date** is entered, the approver will only be sent an email to notify them of the approval request. This may delay the approval process.

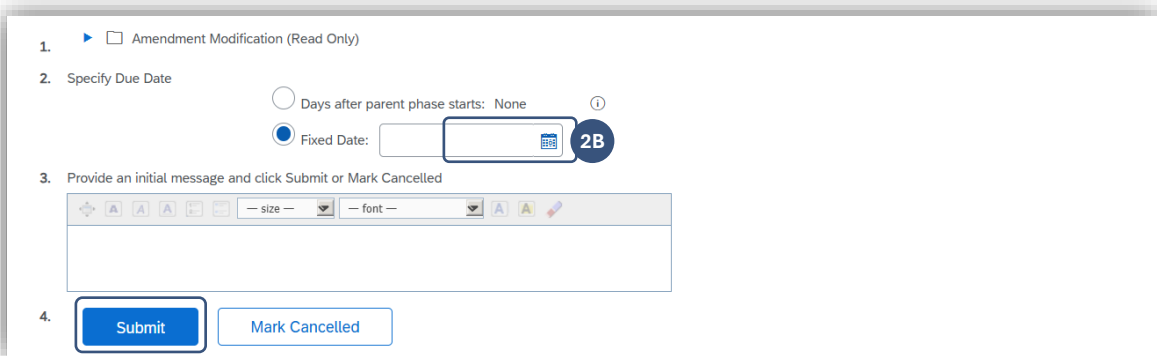
2 If the contract being amended is over the entity’s delegation, an additional **Approval Task to Gain NCDIT Approval of Draft Amendment Document** will appear on the **Tasks** tab. If this is not the case, Project Owners can skip this step.

A. Navigate back to the **Tasks** tab and click on the **Gain NCDIT Approval of Draft Amendment Document** task and select **View Task Details** from the drop-down.



B. On the subsequent **Approval Task** page, add a due date from the date picker (minimum of five business days). Add a message to NCDIT if necessary, and then click **Submit**.

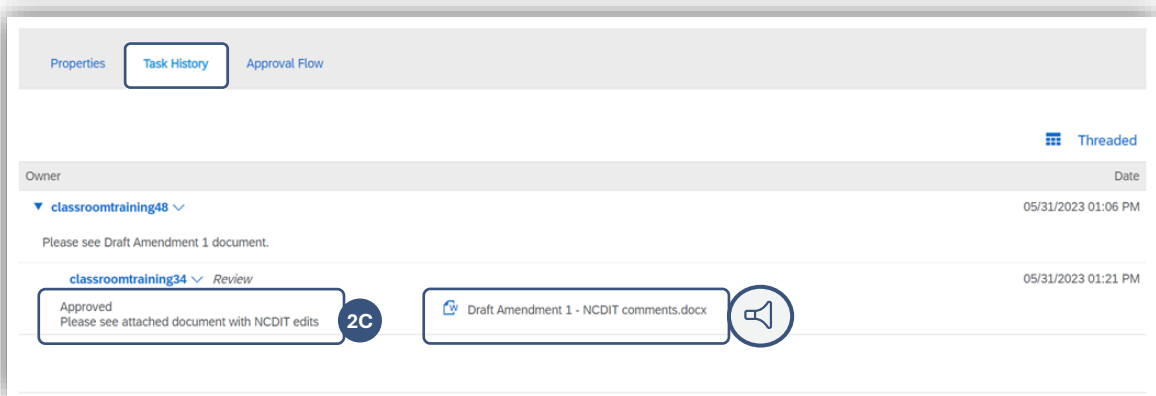
 Project Owner must enter a **Due Date** so that the approval task will show up on the approvers To Do portlet in the NC eProcurement Contracts Tool. If no **Due Date** is entered, the approver will only be sent an email to notify them of the approval request. This may delay the approval process.



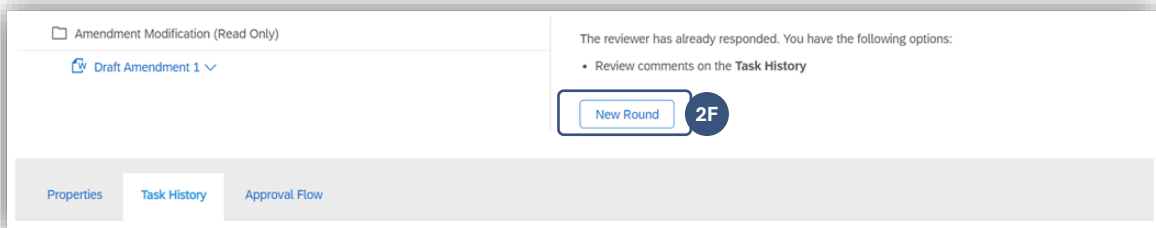
Modifying a Contract Workspace (IT)

- C. When the task has been submitted, its **Status** on the **Tasks** tab will automatically update to **In Approval**. To monitor the process of the approval, click on the task and select **View Task Details** from the dropdown. Look for any comments by an agency or NCDIT approval group on the **Task History** tab (visible upon scrolling down the **Approval Task** page). To see which approval groups are included in the approval workflow, click on the **Approval Flow** tab next to **Task History**.
- An approval group that has not been sent the approval task will be displayed in the **Approval Flow** tab with the word **Pending** in the top box that is shaded gray. These groups have yet to receive the approval request and will not become **Active** until the approval task is submitted by the Project Owner and any previous approval node completes their approval.
 - An approval group that is currently in the process of approving the task will be displayed in the **Approval Flow** tab with the word **Active** in the top box that is shaded blue.
 - An approval group that has completed its approval will be displayed in the **Approval Flow** tab with the word **Approved** in the top box that is shaded green.

 NCDIT may attach an edited version of the Amendment document in the **Task History** tab.




- D. If NCDIT denies the approval request, the Project Owner should work with applicable Agency staff to address NCDITs feedback and develop an updated Amendment document.
- E. The Project Owner should return to the **Documents** tab and replace the Amendment document draft with the updated version.
- F. The Project Owner should go to the **Gain NCDIT Approval of Draft Amendment** task and click the **New Round** button.






Modifying a Contract Workspace (IT)

- G. On the next page, the Project Owner can set a new **Due Date** (minimum of five business days), add a note letting NCDIT know that the identified issues have been addressed, and re-submit the task for another round of approvals.

 Project Owner must enter a **Due Date** so that the approval task will show up on the approvers To Do portlet in the NC eProcurement Contracts Tool. If no **Due Date** is entered, the approver will only be sent an email to notify them of the approval request. This may delay the approval process.

- H. After NCDIT reviews and fully approves the Amendment document, the task will automatically update to **Approved** status on the **Tasks** tab, and a checkmark will appear to the left.

 Upload Procurement Exception Request to Procurement Exception Folder (if applicable) ▾	Procurement Exception Folder ▾	Project Owner	Not Started
 Gain NCDIT Approval of Draft Amendment Document ▾	Amendment Modification ▾	classroomtraining34	Approved 06/01/2023
 Obtain Signatures on Amendment from Vendor and Agency Authorized Signer ▾	Amendment Modification ▾	Project Owner	Not Started

- I. The next step is for the Project Owner to obtain vendor and agency signatures on the approved Amendment document. This should be done outside of the NC eProcurement Contracts Tool using existing agency-established process and tools (e.g., DocuSign, Adobe Sign).

- J. After the Amendment document has been fully executed, the Project Owner should upload the Amendment document to the **Contract Document – IT** folder on the **Documents** tab. Select the **Contract Document - IT** folder on the **Documents** tab and then select **Document** under the **Upload** section of the menu. Either select the **Choose File** button to search for and select the fully executed contract amendment document or drag and drop the fully executed Amendment document in the **Or drop files here** box. Click **Create** and then **Done**.

- K. When all of the applicable preceding tasks have been completed, the Project Owner must return to the **Overview** tab, click **Actions** in the **Contract Attributes** section, and select **Publish** from the drop-down. The status of the CW will be changed to **Published** and cannot be edited until another **Amendment** is initiated.

Contract Attributes

Related ID: PR1234567

Last Published: Example Contract Workspace (v2/2) ⓘ

Hierarchical Type: Stand-alone Agreement

Amendment Type: Amendment ⓘ

Amendment Reason Comment: Example Amendment Amendment

Contract Amount: \$50,000 USD ⓘ

Supplier: NC Test Supplier 083 ⓘ

Actions ▾ **2K**

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

Modifying a Contract Workspace (IT)

Renewal Amendment Type

1 A **Renewal** Amendment type allows the Project Owner to change the active dates of the contract to extend it beyond its originally agreed-to **Date of Expiration**. This section details the **Renewal** Amendment type option.

A. After selecting **Renewal** Amendment type, the **Overview** tab will display. The **Status** field will be listed as **Draft Amendment** and the **Version** field will be listed as **v1 (editing)** [or v2/3/4, etc., depending on what number the previous **Version** was].

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**.

Overview

Contract ID: CW21496
Contract Status: Draft Amendment 1A
Last Published Date: 02/03/2022
Version: v2 (editing)
Owner: classroomtraining32
Test Project: No
Commodity: 761115 - General building...
Base Language: English

Process

- Phase 1 - Contract Creation and Execution
- Phase 2 - Contract Management
 - Deliverable 1 for Vendor to Complete
 - Deliverable 2 for Vendor to Complete
 - Deliverable 3 for Vendor to Complete
 - Deliverable 4 for Vendor to Complete
- Phase 3 - Contract Modification

B. Navigate to the **Tasks** tab to view the newly added phase and tasks to help guide Project Owner through the renewal process. Clicking the blue arrow to the left of **02 – Contract Modification** will display a subsection titled **Renewal Modification**. Click the blue arrow to the left of the **Renewal Modification** option to reveal the tasks associated with the renewal process.

02 - Contract Modification

- Amendment Modification
- Renewal Modification
 - Prepare Draft Renewal Document
 - Submit Standards Exception Request to NCDIT (if applicable)
 - Submit Security Exception Request to NCDIT (if applicable)
 - Gain NCDIT Approval of Draft Renewal Document

C. The **Tasks** are intended to serve as a road map to guide the Project Owner through the amendment process. The Project Owner should proceed through the tasks in the order listed.

D. The first task is for the Project Owner to work with the applicable agency stakeholders (e.g., Agency Business) to develop the draft Renewal document. The Project Owner can use an agency-specific renewal document template or download a NCDIT-provided renewal template from the **NCDIT Sourcing Library Folder** by following the steps below.

- Navigate to the **Documents** tab and click on the **Shortcut to NCDIT Sourcing Library Folder** link.
- Click **Open**, and then click the blue arrow to the left of the **Amendment Templates** folder.
- Select the applicable NCDIT template and then select **Download Draft**.

Modifying a Contract Workspace (IT)

- E. To upload the completed draft Renewal document, the Project Owner should go to the **Documents** tab, click on the blue arrow to the left of **Modification Contract Documents** folder, and click on the blue arrow to the left of the **Amendment Modification** subfolder. Click on the **Replace with Renewal Document** and select **Replace Document** from the pop-up menu. Either select the **Choose File** button to search for and select the completed Renewal document or drag and drop the completed Renewal document in the **Or drop files here** box. Click **Replace**, and then select **Replace document by the uploaded file** radio button. Click **OK**, then click **Save**.
- F. The Project Owner must mark the **Prepare Draft Renewal Document** task as **“Complete”** before initiating any other tasks in this phase. Click the **Prepare Draft Renewal Document** task name and select **Mark Completed**.

2 If the contract being renewed is over the entity’s delegation, an additional **Approval Task to Gain NCDIT Approval of Draft Renewal Document** will appear on the **Tasks** tab. If this is not the case, Project Owners can skip this step.

- A. Navigate back to the **Tasks** tab and click on the **Gain NCDIT Approval of Draft Renewal Document** task and select **View Task Details** from the drop-down.
- B. On the subsequent **Approval Task** page, add a due date from the date picker (we recommend a minimum of five business days). Add a message to NCDIT if necessary and click **Submit**.

Project Owner must enter a **Due Date** so that the approval task will show up on the approvers To Do portlet in the NC eProcurement Contracts Tool. If no **Due Date** is entered, the approver will only be sent an email to notify them of the approval request. This may delay the approval process.

- C. When the task has been submitted, its **Status** on the **Tasks** tab will automatically update to **In Approval**. To monitor the process of the approval, click on the task and select **View Task Details** from the dropdown. Look for any comments by an agency or NCDIT approval group on the **Task History** tab (visible upon scrolling down the **Approval Task** page). To see which approval groups are included in the approval workflow, click on the **Approval Flow** tab next to **Task History**.
- An approval group that has not been sent the approval task will be displayed in the **Approval Flow** tab with the word **Pending** in the top box that is shaded gray. These groups have yet to receive the approval request and will not become **Active** until the approval task is submitted by the Project Owner and any previous approval node completes their approval.
 - An approval group that is currently in the process of approving the task will be displayed in the **Approval Flow** tab with the word **Active** in the top box that is shaded blue.
 - An approval group that has completed its approval will be displayed in the **Approval Flow** tab with the word **Approved** in the top box that is shaded green.

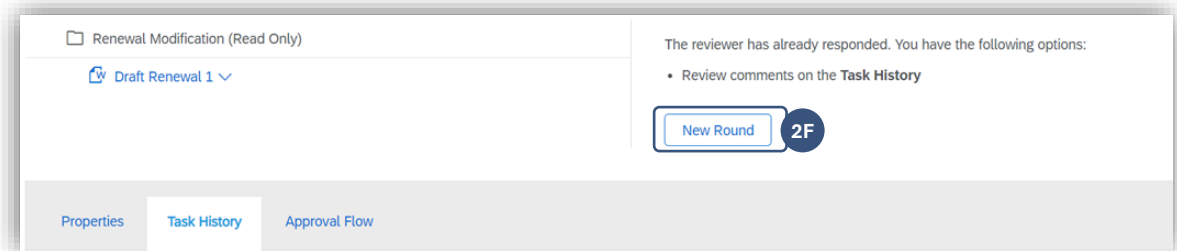
NCDIT may attach an edited version of the Amendment document in the **Task History** tab.

The screenshot shows the 'Task History' tab with the following data:

Owner	Date
classroomtraining48	05/31/2023 01:45 PM
classroomtraining38	05/31/2023 01:50 PM
Draft Renewal 1 - NCDIT Comments.docx	05/31/2023 01:50 PM

Modifying a Contract Workspace (IT)

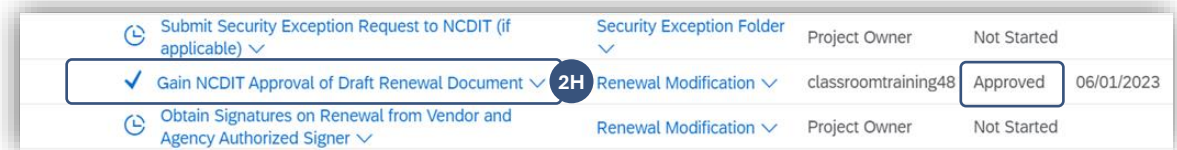
- D. If NCDIT denies the approval request, the Project Owner should work with applicable Agency staff to address NCDITs feedback and develop an updated Renewal document.
- E. The Project Owner should return to the **Documents** tab and replace the draft Renewal document with the updated version.
- F. The Project Owner should go to the **Gain NCDIT Approval of Draft Renewal** task and click the **New Round** button.



- G. On the next page, the Project Owner can set a new **Due Date** (we recommend a minimum of five business days), add a note letting NCDIT know that the identified issues have been addressed, and re-submit the task for another round of approvals.

 Project Owner must enter a **Due Date** so that the approval task will show up on the approvers To Do portlet in the NC eProcurement Contracts Tool. If no **Due Date** is entered, the approver will only be sent an email to notify them of the approval request. This may delay the approval process.

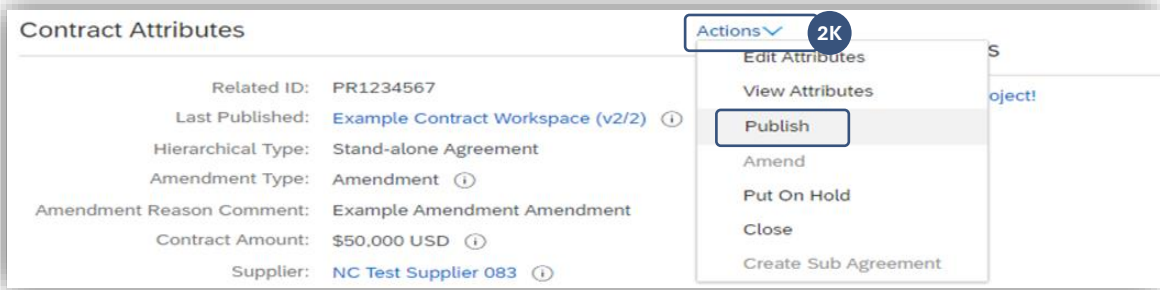
- H. After NCDIT reviews and fully approves the Renewal document, the task will automatically update to **Approved** status on the **Tasks** tab, and a checkmark will appear to the left.



- I. The next step is for the Project Owner to obtain vendor and agency signatures on the approved Renewal document. This should be done outside of the NC eProcurement Contracts Tool using existing agency-established process and tools (e.g., DocuSign, Above Sign).
- J. After the Renewal document has been fully executed, the Project Owner should upload the Renewal document to the **Contract Document – IT** folder on the **Documents** tab. Select the **Contract Document - IT** folder on the **Documents** tab and then select **Document** under the **Upload** section of the menu. Either select the **Choose File** button to search for and select the fully executed contract amendment document or drag and drop the fully executed contract Renewal document in the **Or drop files here** box. Click **Create** and then **Done**.
- K. The Project Owner then needs to update the **Expiration Date** field to reflect the new date on which the contract will expire based on the completed Renewal.
 - i. Navigate to **Overview** tab and scroll down to **Contract Term Attributes** section.
 - ii. Click on the **Actions** button and select **Edit Term Attributes** option from drop-down menu.
 - iii. Enter the updated Expiration Date in the **Expiration Date** field and select **OK**.

Modifying a Contract Workspace (IT)

- L. When all of the applicable preceding tasks have been completed, the Project Owner must return to the **Overview** tab, click **Actions** in the **Contract Attributes** section, and select **Publish** from the drop-down. The status of the CW will be changed to **Published** and cannot be edited until another **Amendment** is initiated.

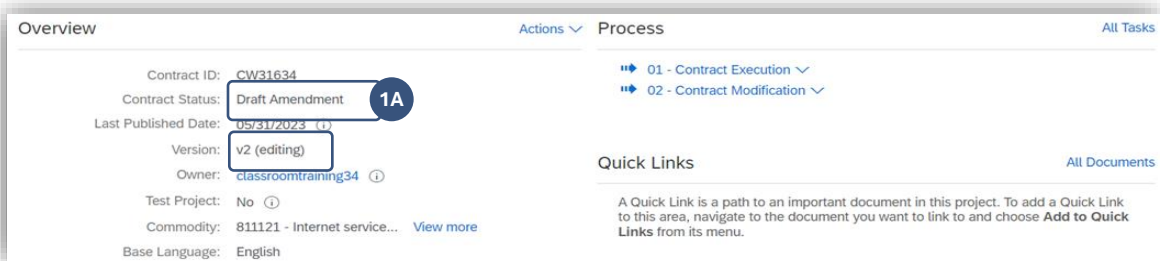


Termination Amendment Type

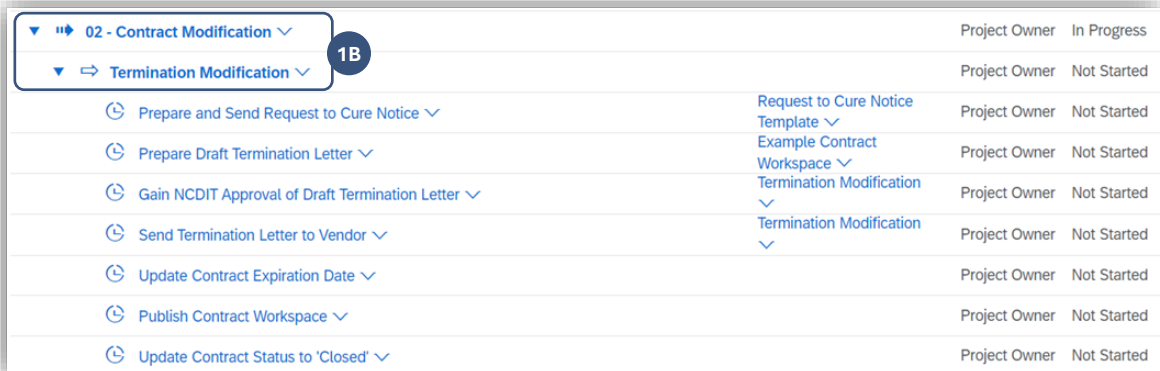
- 1 A **Termination** Amendment type allows the Project Owner to close a contract before its originally agreed-to **Date of Expiration** in the event of an adverse condition or disagreement.

- A. 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 **v1 (editing)** [or v2/3/4, etc., depending on what number the previous **Version** was].

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**.



- B. Navigate to the **Tasks** tab to view the newly added phase and tasks to help guide Project Owner through the termination process. Clicking the blue arrow to the left of **02 – Contract Modification** will display a subsection titled **Termination Modification**. Click the blue arrow to the left of the **Termination Modification** option to reveal the tasks associated with the termination process.



Modifying a Contract Workspace (IT)

- C. The **Tasks** are intended to serve as a road map to guide the Project Owner through the amendment process. The Project Owner should proceed through the tasks in the order listed.
- D. The first task is a reminder for the Project Owner to prepare and send a **Request to Cure Notice** to the vendor to formally notify them of the need to address a contractual issue. The Project Owner should use agency-approved process and tools to develop, gain agency approval, and send the **Request to Cure Notice** to the vendor.
- E. If the vendor fails to cure the identified contractual issues and the Project Owner needs to terminate the contract with the vendor, the Project Owner should work with the applicable agency stakeholders (e.g., Agency Business, Agency Legal) to develop a draft Termination Letter document. NCDIT does not provide a termination letter template, so Project Owner will need to develop this document using agency-specific guidelines.
- F. To upload the completed draft Termination Letter document, the Project Owner should go to the **Documents** tab, click on the blue arrow to the left of **Modification Contract Documents** folder, and click on the blue arrow to the left of the **Termination Modification** subfolder. Click on the **Replace with Termination Letter** document and select **Replace Document** from the pop-up menu. Either select the **Choose File** button to search for and select the completed Termination Letter document or drag and drop the completed Termination Letter document in the **Or drop files here** box. Click **Replace**, and then select **Replace document by the uploaded file** radio button. Click **OK**, then click **Save**.
- G. The Project Owner must mark the **Prepare Draft Termination Letter** task as “**Complete**” before initiating any other tasks in this phase. Click the **Prepare Draft Termination Letter** task name and select **Mark Completed**.

2 If the contract being terminated is over the entity’s delegation, an additional **Approval Task to Gain NCDIT Approval of Draft Termination Letter** will appear on the **Tasks** tab. If this is not the case, Project Owners can skip this step.

- A. Navigate back to the **Tasks** tab and click on the **Gain NCDIT Approval of Draft Termination Letter** task and select **View Task Details** from the drop-down.

Task Name	Assignee	Status
Request to Cure Notice Template	Project Owner	Not Started
Example Contract Workspace	Project Owner	Not Started
Termination Modification	Project Owner	Not Started
Termination Modification	Project Owner	Not Started
Termination Modification	Project Owner	Not Started
Termination Modification	Project Owner	Not Started
Termination Modification	Project Owner	Not Started
Termination Modification	Project Owner	Not Started

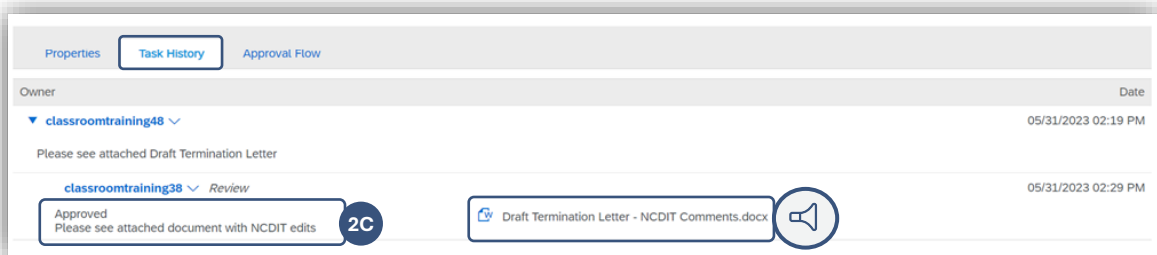
- B. On the subsequent **Approval Task** page, add a due date from the date picker (minimum of five business days). Add a message to NCDIT if necessary, and then click **Submit**.

Project Owner must enter a **Due Date** so that the approval task will show up on the approvers To Do portlet in the NC eProcurement Contracts Tool. If no **Due Date** is entered, the approver will only be sent an email to notify them of the approval request. This may delay the approval process.

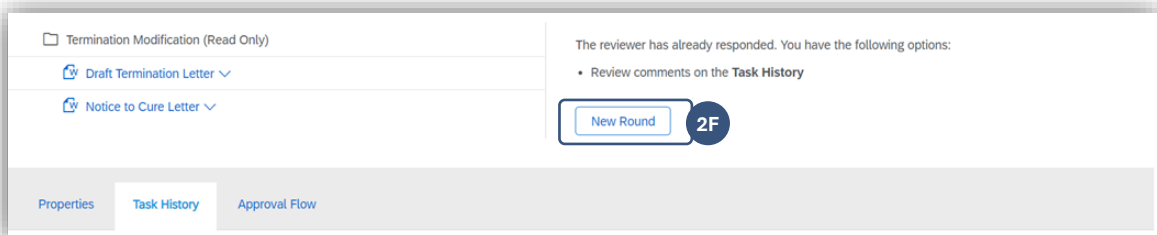
Modifying a Contract Workspace (IT)

- C. When the task has been submitted, its **Status** on the **Tasks** tab will automatically update to **In Approval**. To monitor the process of the approval, click on the task and select **View Task Details** from the dropdown. Look for any comments by an agency or NCDIT approval group on the **Task History** tab (visible upon scrolling down the **Approval Task** page). To see which approval groups are included in the approval workflow, click on the **Approval Flow** tab next to **Task History**.
- An approval group that has not been sent the approval task will be displayed in the **Approval Flow** tab with the word **Pending** in the top box that is shaded gray. These groups have yet to receive the approval request and will not become **Active** until the approval task is submitted by the Project Owner and any previous approval node completes their approval.
 - An approval group that is currently in the process of approving the task will be displayed in the **Approval Flow** tab with the word **Active** in the top box that is shaded blue.
 - An approval group that has completed its approval will be displayed in the **Approval Flow** tab with the word **Approved** in the top box that is shaded green.


 NCDIT may attach an edited version of the Termination Letter document in the **Task History** tab.



- D. If NCDIT denies the approval request, the Project Owner should work with applicable Agency staff to address NCDIT's feedback and develop an updated Termination Letter document.
- E. The Project Owner should return to the **Documents** tab and replace the draft Termination Letter document with the updated version.
- F. The Project Owner should go to the **Gain NCDIT Approval of Draft Termination Letter** task and click the **New Round** button.



- G. On the next page, the Project Owner can set a new **Due Date** (minimum of five business days), add a note letting NCDIT know that the identified issues have been addressed, and re-submit the task for another round of approvals.

 Project Owner must enter a **Due Date** so that the approval task will show up on the approvers To Do portlet in the NC eProcurement Contracts Tool. If no **Due Date** is entered, the approver will only be sent an email to notify them of the approval request. This may delay the approval process.

Modifying a Contract Workspace (IT)

H. After NCDIT reviews and fully approves the Termination Letter document, the task will automatically update to **Approved** status on the **Tasks** tab, and a checkmark will appear to the left.


Task	Example Contract Workspace	classroomtraining48	Complete
<input checked="" type="checkbox"/> Prepare Draft Termination Letter <input checked="" type="checkbox"/> Gain NCDIT Approval of Draft Termination Letter <input type="checkbox"/> Send Termination Letter to Vendor	Termination Modification Termination Modification	classroomtraining48 Project Owner	Approved Not Started

I. Once the Termination Letter is fully approved, the Project Owner sends the Termination Letter to the vendor using agency-specified process.

J. The Project Owner then must update the **Expiration Date** field to reflect the date the contract was terminated.

- i. Navigate to **Overview** tab and scroll down to **Contract Term Attributes** section.
- ii. Click on the **Actions** button and select **Edit Term Attributes** option from drop-down menu.
- iii. Enter the updated Expiration Date in the **Expiration Date** field and select **OK**.

K. The next step is for Project Owner to 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.

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

L. The Project Owner has the option to manually **Close** the contract workspace. This will immediately change the **Status** from **Published** to **Closed**. To close the workspace, go to the **Overview** tab, click **Actions** in the **Contract Attributes** section, and select **Close** from the drop-down.

Contract Attributes		Actions
Related ID:	PR1234567	Edit Attributes View Attributes Publish Amend Put On Hold Close Create Sub Agreement
Last Published:	Example Contract Workspace (v2/2)	
Hierarchical Type:	Stand-alone Agreement	
Amendment Type:	Amendment	
Amendment Reason Comment:	Example Amendment Amendment	
Contract Amount:	\$50,000 USD	
Supplier:	NC Test Supplier 083	

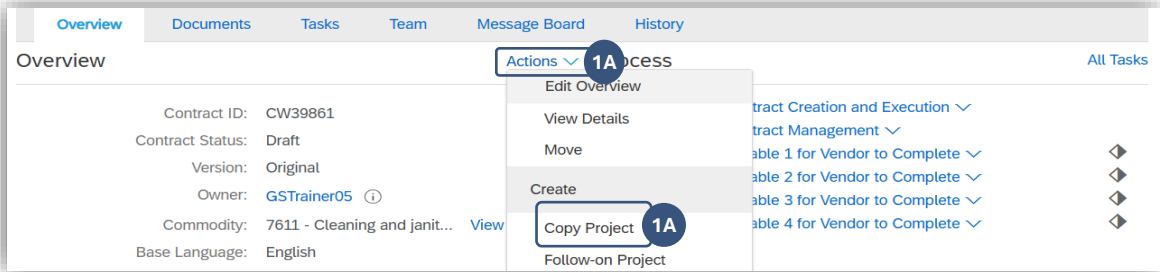
Modifying a Contract Workspace (IT)

Copying a Contract Workspace

1

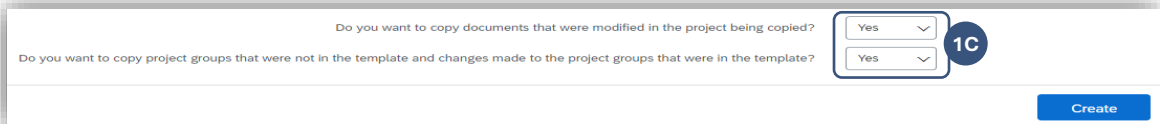
When creating a new Contract Workspace (CW) that is similar to a previous CW, the **Project Owner** has the option to copy a previous CW.

- 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. 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**.

- C. 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, although it is advised to select **No** if clean documents are needed. When all Contract Attribute fields are filled in and all questions are answered, click **Create**.



- D. 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.

Modifying a Contract Workspace (IT)

Managing Multi-Vendor Contract Workspaces

1

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.

- A. Click **Create Contract Workspace (Procurement)** to create the initial CW.
- B. 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**.
- C. At this point the CW is ready to be copied. Initiate the copy through one of the two options outlined above.
- D. On the **Create Contract Workspace (Procurement)** page of the newly copied CW, populate all fields for which information did not auto-populate.
- E. 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**.
- F. 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.