

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.

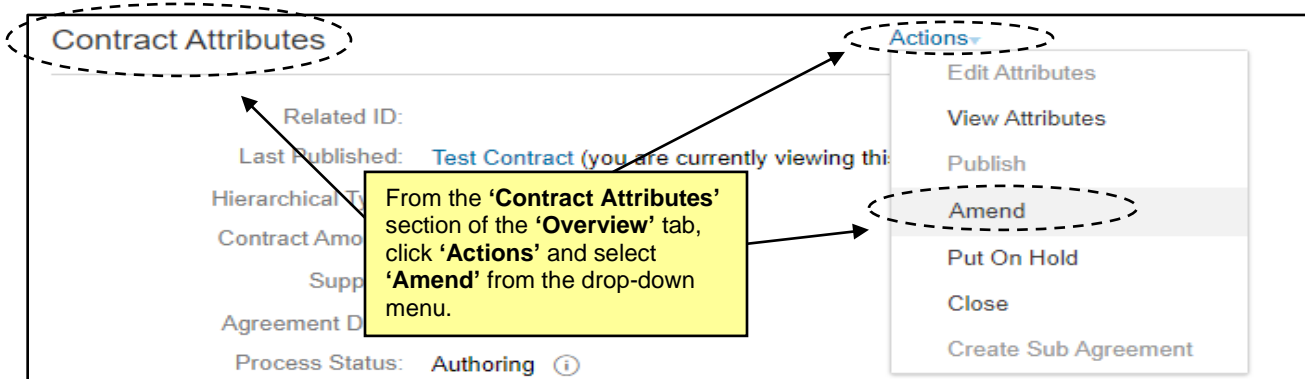
I. Types of 'Amendments'

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.'**



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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.

The screenshot shows a form with two main sections. The first section is labeled 'Amendment Type:' and contains a drop-down menu currently set to 'Amendment'. A dashed oval highlights this drop-down menu. The second section is labeled 'Amendment Reason Comment: *' and contains a text input field. A dashed oval highlights this text input field. A yellow callout box with arrows pointing to both the drop-down menu and the text input field contains the text: 'Select the **'Amendment Type'** from the drop-down menu and enter a comment in the **'Amendment Reason Comment'** box.'

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.

The screenshot shows the 'Contract Attributes' section of a contract workspace. The section includes fields for 'Related ID:', 'Last Published:', 'Hierarchical Type: Stand-alone Agreement', 'Amendment Type: Administrative', 'Amendment Reason Comment: Example Administrative Amendment', 'Contract Amount: \$50,000 USD', 'Supplier: NC Test Supplier 083', and 'Agreement Date: 12/01/2021'. A dashed oval highlights the 'Amendment Type' field. A yellow callout box with an arrow pointing to the 'Amendment Type' field contains the text: 'Select **'Complete Amendment'** from the drop-down menu in the **'Contract Attributes'** section.'

To the right of the 'Contract Attributes' section is an 'Actions' drop-down menu. A dashed oval highlights this menu, and a yellow callout box with an arrow pointing to it contains the text: 'Note the **'Amendment Type'** and **'Amendment Reason Comment'** from the previous page displays.'

The 'Actions' menu is open, showing options: 'Edit Attributes', 'View Attributes', 'Publish', 'Amend', 'Complete Amendment', and 'Put On Hold'. A dashed oval highlights the 'Complete Amendment' option.

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].

Overview

Contract ID:	CW21496
Contract Status:	Draft Amendment
Last Published Date:	02/09/2022 ⓘ
Version:	v2 (editing)
Owner:	classroomtraining32 ⓘ
Test Project:	No ⓘ
Commodity:	761115 - General building... View more
Base Language:	English

Actions Process

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

All Tasks

-
- The screenshot shows the 'Amendment Modification' menu with several options. Annotations include:
- A dashed circle around the 'Amendment Modification' menu item.
 - A dashed circle around the 'Amendment' sub-option.
 - A dashed circle around the 'Tasks' section of the menu.
 - Three yellow callout boxes with arrows pointing to specific items:
 - 'New Modification 'Phase.' points to the 'Amendment Modification' menu item.
 - 'Amendment' sub-option. points to the 'Amendment' sub-option.
 - 'Tasks.' points to the 'Gain P&C Approval of Amendment Over Delegation' task.

-
- Project Owner
- Contract Document
 - Deliverable Documents
 - Modification Contract Documents
 - Amendment Modification
 - Contract Amendment Template
 - Modification Request Template
 - Extension Modification
- Project Owner
- Project Owner
- 'Modification Contract Documents'** folder and **'Amendment Modification'** sub-folder.
- 'Modification'** documents to be downloaded, completed, and replaced before starting task.

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- 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**.'

- 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.

- 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.

TSK393381444 Gain P&C Approval of Amendment Over Delegation Round 1: Not Started

- Amendment Modification (Read Only)**
- Select Approvers**
P&C Service Team #1 Add more
- Specify Due Date**
03/29/2022
- Provide an initial message and click Submit or Mark Cancelled**
Please approve this Amendment request
- Submit** Mark Cancelled

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**.'

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- 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	Project Owner	In Progress	03/29/2022
Update Workspace	Example Contract Workspace	Project Owner	Not Started
Prepare Amendment Document		Project Owner	Not Started
Approve Amendment Document		Project Owner	Not Started
Obtain P&C Approval of Amendment Over Delegation	Amendment Modification	classroomtraining35	In Approval 03/29/2022
Obtain Signatures from Relevant Signers	Amendment Modification	Project Owner	Not Started
Publish Contract Workspace	Example Contract Workspace	Project Owner	Not Started

- 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.

Contract Attributes

Related ID: PR1234567

Last Published Date: (v2/2)

Amendment Reason: (v2/2)

Contract Amount: \$50,000 USD

Supplier: NC Test Supplier 083

Actions

- 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.

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.

- 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.'**

Overview Actions Process All Tasks

Contract ID: CW21496

Contract Status: Draft Amendment

Last Published Date: 02/09/2022

Version: v2 (editing)

Owner: classroomtraining32

Test Project: No

Commodity: 761115 - General building... View more

Base Language: English

Updates to the 'Contract Status' and 'Version' fields.

Phase 1 - Contract Creation and Execution

Phase 2 - Contract Management

Deliverable 1 for Vendor to Complete

Complete

Complete

Complete

Complete

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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.

Phase 2 - Contract Management	Project Owner	Not Started
Phase 3 - Contract Modification	Project Owner	Not Started
Amendment Modification	Project Owner	Not Started
Amendment	Project Owner	Not Started
Extension	Project Owner	Not Started
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	Extension Modification	Project Owner Not Started
Gain P&C Approval of Contract Extension Greater than 3 Years (if Applicable)	Extended Contract Term	Project Owner Not Started
Gain P&C Approval of Extension Over Delegation	Extension Modification	Project Owner Not Started
Obtain Signatures from Relevant Signers	Extension Modification	Project Owner Not Started
Publish Contract Workspace	Extension Test Workspace	Project Owner Not Started

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.

Contract Document	Project Owner
Deliverable Documents	Project Owner
Modification Contract Documents	Project Owner
Amendment Modification	Project Owner
Extension Modification	Project Owner
Contract Extension Template	Not Edited
Modification Request Template	Project Owner Not Edited
Extended Contract Term	Project Owner

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- 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.**'

Document Template	Action	Project Owner	Status
Contract Document	Download	Project Owner	Not Edited
Deliverable Documents	Copy	Project Owner	Not Edited
Modification Contract Documents	Move	Project Owner	Not Edited
Amendment Modification	Publish	Project Owner	Not Edited
Extension Modification	Lock	Project Owner	Not Edited
Contract Extension Template	Replace Document	Project Owner	Not Edited
Modification Request Template	Create New Task	Project Owner	Not Edited

- 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.

Task	Action	Project Owner	Status
Extension	View Task Details	Project Owner	Not Started
Approve Extension Document	View Task Details	Project Owner	Not Started
Gain P&C Approval of Contract Extension Greater than 3 Years (if Applicable)	View Task Details	Project Owner	Not Started
Gain P&C Approval of Extension Over Delegation	View Task Details	Project Owner	Not Started
Action	View Task Details	Project Owner	Not Started
View Task Details	View Task Details	Project Owner	Not Started
Edit Task	View Task Details	Project Owner	Not Started

- 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.**'

TSK392221579 Gain P&C Approval of Extension Over Delegation Round 1: Not Started

- Extension Modification (Read Only)
- Select Approvers
 - P&C Service Team #1
 - Add more
- Specify Due Date
 - 03/29/2022
- Provide an initial message and click Submit or Mark Cancelled
 - Please approve this Extension request
- Submit

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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.

- 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	Project Owner	Not Started	
Gain P&C Approval of Contract Extension	Project Owner	Not Started	
Gain P&C Approval of Extension Over Delegation	Extension Modification	Not Started	
Obtain Signatures from Relevant Signers	Extended Contract Term	Project Owner	Not Started
Publish Contract Workspace	Extension Modification	classroomtraining53	In Approval 12/22/2023
	Extension Modification	Project Owner	Not Started
	Extension Test Workspace	Project Owner	Not Started

- 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

Related ID: PR1234567

Last Modified: (v2/2)

Amendment Reason: Amendment

Contract Amount: \$50,000 USD

Supplier: NC Test Supplier 083

Actions

- 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.

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STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

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.'

Overview

Contract ID: CW21496
Contract Status: Draft Amendment
Last Published Date: 02/09/2022
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

Updates to the 'Contract Status' and 'Version' fields.

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.

Phase 2 - Contract Management

Phase 3 - Contract Modification

Termination Modification

Update Workspace

Prepare and Send Request to Cure Notice

Prepare Termination Letter

Approve Termination Letter

Gain P&C Approval of Termination Over Delegation

Print Termination Letter and Send to the Vendor

Publish Contract Workspace

Example Contract Workspace

Request to Cure Notice

Termination Letter Template

Termination Modification

Termination Letter Template

Example Contract Workspace

Project Owner

Not Started

New Modification 'Phase.'

'Termination Modification' subsection and related 'Tasks.'

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.

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- 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.

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.'**

Document Template	Action	Project Owner	Status
Contract Termination Request Template	Download, Copy, Move, Publish, Lock, Replace Document, Create New Task	Project Owner	Not Edited
Request to Cure Notice Template		Project Owner	Not Edited
Termination Letter Template		Project Owner	Not Edited

- 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.

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

Task	Project Owner	Status
Update Workspace	Project Owner	Not Started
Prepare Termination Letter	Project Owner	Not Started
Approve Termination Letter	Project Owner	Not Started
Gain P&C Approval of Termination Over Delegation	Project Owner	Not Started

- 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.

Termination 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 if necessary and click **'Submit.'**

1. Termination Modification (Read Only)

2. Select Approvers

Approval Rule Flow Type: ☒ Parallel ☐ Serial ☐ Custom

3. Specify Due Date

03/29/2022

4. Provide an initial message and click Submit or Mark Cancelled

Please approve the Termination documents

5. Submit

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- 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.'**

Termination Modification	Project Owner	In Progress	02/21/2022
Update Workspace	Example Terminated	Project Owner	Not Started
Prepare Termination Letter	Termination Letter Draft	Project Owner	Not Started
Approve Termination Letter	Termination Modification	Project Owner	Not Started
Gain P&C Approval of Termination Over Delegation	Termination Modification	classroomtraining32	In Approval 02/21/2022
Print Termination Letter and Send to the Vendor	Termination Letter Draft	Project Owner	Not Started
Publish Contract Workspace	Example Terminated Contract	Project Owner	Not Started

- 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.'**

Contract Attributes

Related ID: PR1234567

Last Published: Example Contract Workspace (v2/2)

Hierarchical Amendment

Amendment Reason Code

Contract Amendment

Supplier: NC Test Supplier 083

Actions

- 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.

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.

- There are two options to begin the process of copying a Contract Workspace:
 - On the **'Overview'** tab of an existing CW, click **'Actions'** in the **'Overview'** section and select **'Copy Project'** on the drop-down menu.

Overview

Documents Tasks Tea View Details

Move

Create

Copy Project

Follow-on Project

Contract Status: Draft

In the **'Overview'** section of the **'Overview'** tab, click **'Actions'** (hidden in this screenshot) and select **'Copy Project'** from the drop-down menu.

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- 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.

Name: * Untitled Contract Workspace (Procurement)

Description:

Related ID:

Copy from Contract: (no value) [dropdown arrow]

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.'**

Do you want to copy documents that were modified in the project being copied? Yes [dropdown arrow]

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? Yes [dropdown arrow]

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

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.