



## ICONTRACTS JOB AID ADD AN EZ-IC CONTRACT TO AN EXISTING CONTRACT CONTAINER

- 1. Navigate to the existing contract container.
- 2. Review the information in the "Summary" tab to ensure it is still accurate—price, company contact, etc. Some of this may change if you have a renewal contract (price, etc.). To edit information, click the pencil icon. *Be sure to enter the full budget account number.*
- 3. Click the "Attachment(s)" tab.

  Summary 1 Attachment(s) Notes

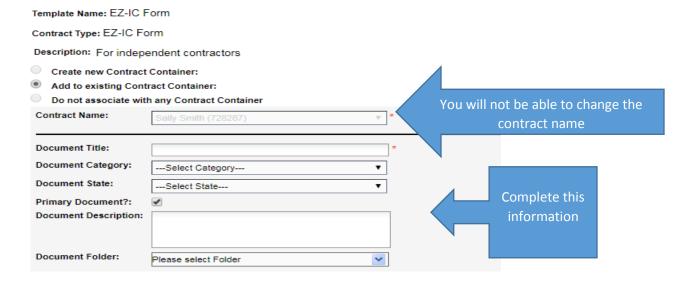
4. Click the Library box icon on the left side of the screen:



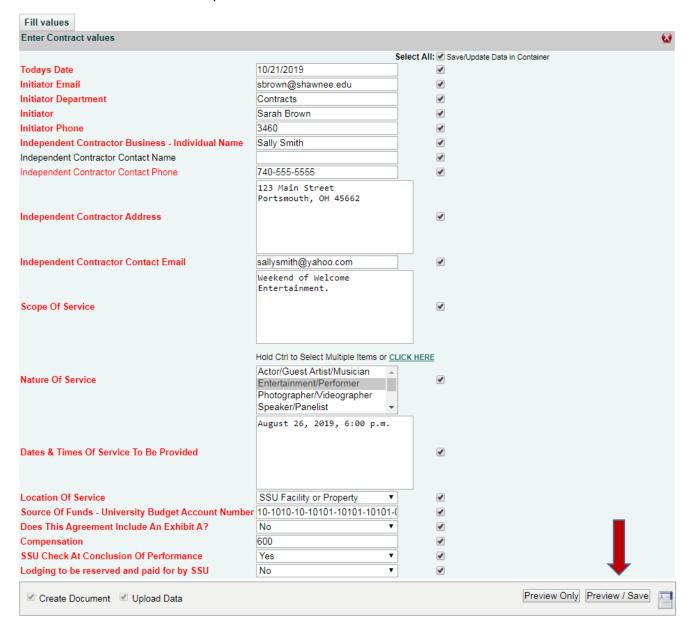
5. Locate the Library template you wish to use and select "Click to Fill Fields" next to the item.



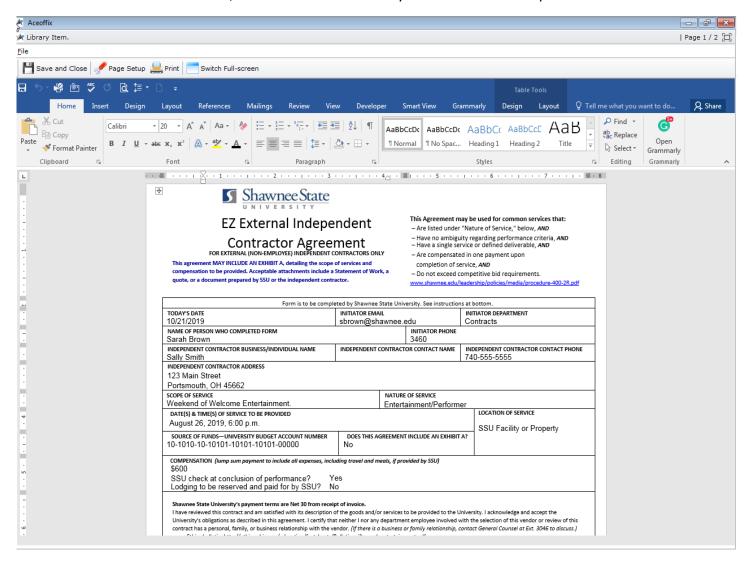
6. The system default selects "Add to Existing Container" and adds the contract name. Complete the information below the black line.



7. You will notice the "Contract Values" have already been filled in for you based on the information already entered in the summary tab. You can edit the information as needed. Then click "Preview/Save."



8. You can review and make changes from within the review screen. Once you are satisfied your document is correct, click Save and Close and you will return to the previous screen.



9. From here, click the document icon at the bottom, left-hand side of the screen.



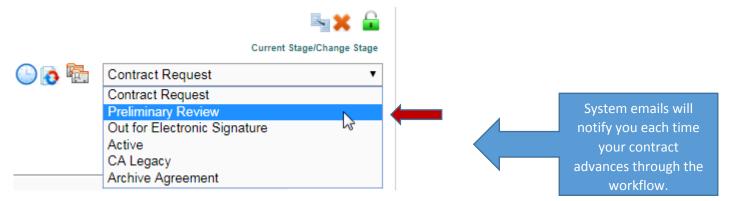
10. Unless you have additional documents or files to attach, click Cancel.



11. You will be returned to the "Summary" tab. You should see the number in blue on the "Attachment(s)" tab increase. This means your document is in the system.

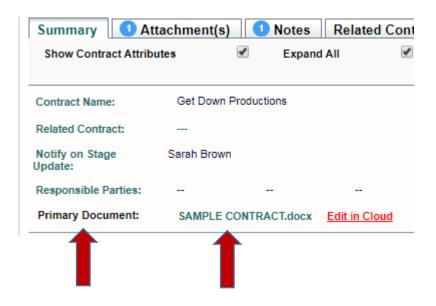


12. Scroll back to the top right of the screen and select "Preliminary Review" from the dropdown menu.



That's it—you are done! The Contracts team will be alerted to your contract and will coordinate the review process from beginning to end, including obtaining signatures, W-9 and OPERS forms. You will be updated throughout the process via system emails that notify when your contract has moved in the workflow.

In the end, you will received a fully signed contract through DocuSign. In addition, your signed contract is always available for viewing or downloading in the contract container on the "Summary" tab under "Primary Document."



- PLEASE NOTE: ICONTRACTS DOES <u>NOT</u> INTEGRATE WITH BEARTRAX. AFTER COMPLETING A CONTRACT IN ICONTRACTS, YOU WILL STILL NEED TO SUBMIT A PURCHASE ORDER THROUGH BEARTRAX TO INITIATE PAYMENT.
- ! PLEASE ALLOW SUFFICIENT TIME FOR CONTRACT REVIEW TO AVOID ANY DISRUPTION IN SERVICES. A REQUEST TO EXPEDITE A CONTRACT REVIEW SHOULD BE A RARE OCCURRENCE RESERVED FOR UNUSUAL CIRCUMSTANCES.