

COMPLETING A MILESTONE IN iCONTRACTS

WHAT IS A MILESTONE?

Milestones are reminders that a contract is nearing its expiration/auto-renewal date. You are receiving the email because you are identified as the contract owner or responsible administrator. *iContracts automatically sends Milestone emails to identified users at 90, 60, and 30-day intervals before the contract expiration date.* Here is what the email looks like:

From: iContracts Admin <donotreply@icontracts.com>
Sent: Wednesday, July 31, 2019 6:06 AM
To: Sarah Brown <sbrown@shawnee.edu>
Subject: Your List of Milestones for today (7/31/2019)- [Shawnee State University]

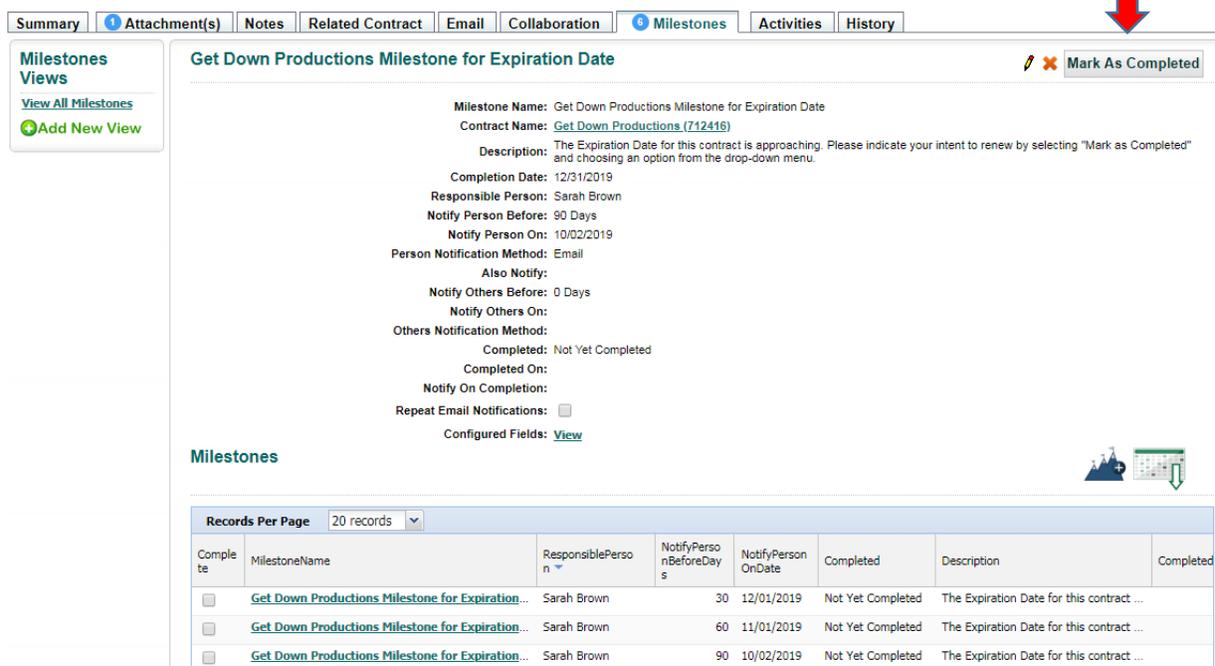
Be sure to whitelist this email address or the message may go into your "Junk" folder!

Milestone Name: Sample Contract Milestone for Expiration Date (MS ID: 5820299)
For Contract: Sample Contract (ID: 555555)
Milestone Date: 8/30/2019
Milestone Description/Instructions: The Expiration Date for this contract is approaching. Please indicate your intent to renew by selecting "Mark as Completed" and choosing an option from the drop-down menu.
Milestone Assigned To: Sarah Brown
Notify Before Days: 30 Days
Expiration Date: 08/30/2019
 If you are a user of UCM and would like to see this Milestone for review and completion, please [Click Here](#)

Click here to complete the Milestone directly from your email.

WHAT SHOULD I DO WHEN I RECEIVE A MILESTONE EMAIL?

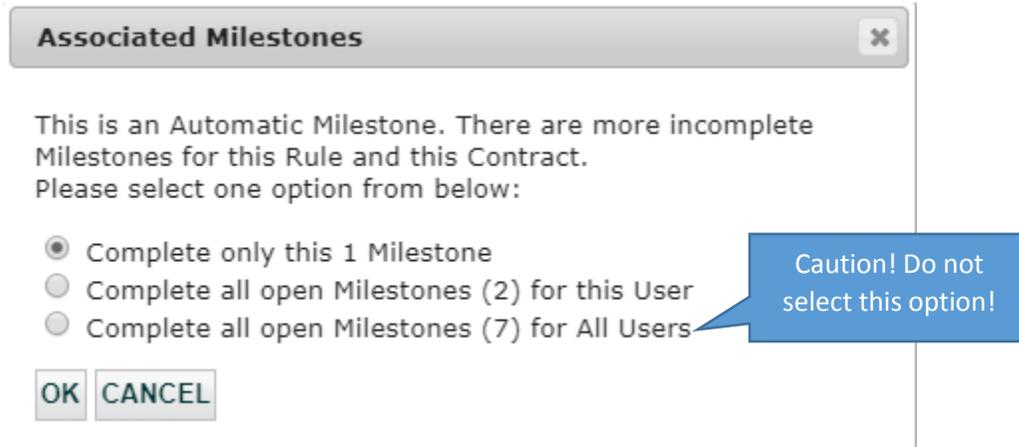
1. From the email, select the "Click Here" link (see above).
2. You will be re-directed to the Milestones tab of the relevant contract container. From this screen, click "Mark As Completed."



The screenshot shows the 'Milestones' tab for a contract named 'Get Down Productions'. The 'Mark As Completed' button is highlighted with a red arrow. Below the details is a table of milestone records.

Complete	MilestoneName	ResponsiblePerson	NotifyPersonBeforeDays	NotifyPersonOnDate	Completed	Description	Completed
<input type="checkbox"/>	Get Down Productions Milestone for Expiration...	Sarah Brown	30	12/01/2019	Not Yet Completed	The Expiration Date for this contract ...	
<input type="checkbox"/>	Get Down Productions Milestone for Expiration...	Sarah Brown	60	11/01/2019	Not Yet Completed	The Expiration Date for this contract ...	
<input type="checkbox"/>	Get Down Productions Milestone for Expiration...	Sarah Brown	90	10/02/2019	Not Yet Completed	The Expiration Date for this contract ...	

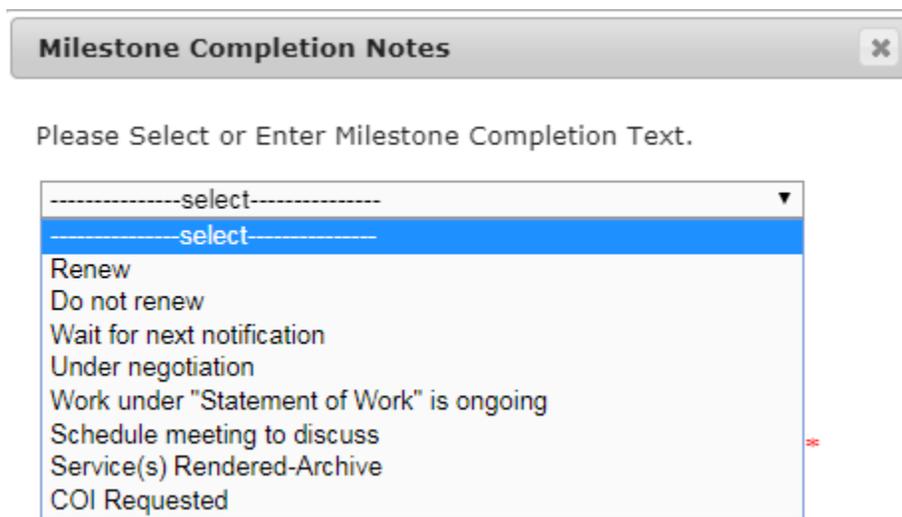
3. If any other users are also receiving Milestones, you will see this message box:



- a. Select “Complete only this 1 Milestone” to complete the current Milestone. This option is automatically selected by default.
- b. To complete all of your open Milestones at the same time (90, 60, and 30-day Milestones), click “Complete all open Milestones for this User.”

PLEASE NOTE: Do not select “Complete all open Milestones for All Users.” Doing so will complete Milestones that are not assigned to you. If you have received a Milestone email for a contract that does not belong to your department, please contact Contracts Services at extension 3460.

4. Select one of the following options from the drop-down menu:



5. Enter a comment in the comment box (see below). Use the comment space to provide as much detail as possible. Here are a few ideas for some information you could include:
 - a. An updated contract has been requested and you are waiting to receive it. (***Please note, if you plan to renew a contract that does not automatically renew, you will need to reach out to the vendor and request an updated contract. When you receive the new contract, simply upload it to the existing contract container and move the workflow to “Preliminary Review.”***)
 - b. You are waiting to receive an updated quote or invoice
 - c. A meeting is scheduled to determine whether or not your department plans to continue the service
 - d. Deliverables under a Statement of Work have not been completed. (Please provide an updated estimate for when the work is expected to be completed.)

Please feel free to type anything in the comments you believe would be helpful for the Contracts office to know about your contract.

Milestone Completion Notes [X]

Please Select or Enter Milestone Completion Text.

Renew

I have requested an updated contract and invoice and should receive them early next week. The cost is increasing due to additional services.

Save Cancel

Notify Others Before: 0 Days

Comment box

6. Once you have entered your comment, click “Save.” You’re all done! The Contracts team will automatically be notified that you have completed the contract Milestone.

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.