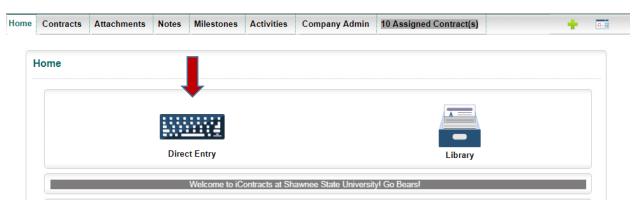




## ICONTRACTS DIRECT ENTRY JOB AID USE WHEN UPLOADING A VENDOR'S CONTRACT FOR REVIEW

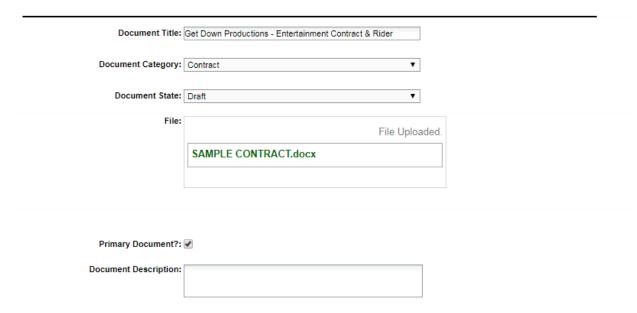
1. From the Home tab, select "Direct Entry."



- 2. Enter the information requested in the first field group (above the black line)
  - a. Contract Name: Name of vendor (ex., Get Down Productions)
  - b. Contract Type: Select from the drop-down menu
  - c. **Assign Workflow:** Workflow *is automatically assigned* based on the Contract Type you selected above.
  - d. Initial Workflow Stage: Always defaults to "Contract Request."
  - e. **Contract Description:** Skip. You will enter a description later.
  - f. Owner: Select from the drop-down
  - g. Responsible Parties: Optional
  - h. Folder Name: Select from drop-down menu

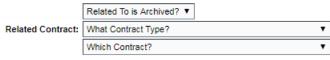
## **Upload New Contract** Contract Name: Get Down Productions Contract Type: Entertainment/Performance Assign Workflow Template: EZ IC Form Preview: Contract Request Preliminary Review Out for Electronic Signature Active Initial Workflow Stage: Contract Request • Contract Description: Owner: Sarah Brown \* Responsible Parties: Select Primary Select Tertiary Select Secondary ▼ Folder Name: Shawnee State University\Contract Management System

- 3. Enter the information requested in the second field group (below the black line)
  - a. Document Title: Use the following naming convention: (Vendor) (Document Title)
     Examples: Get Down Productions Entertainment Agreement
     ABC Software Software License Agreement
  - b. **Document Category**: Select from the drop-down menu (usually "Contract")
  - c. **Document State:** Always select "Draft" for new contracts. If uploading a signed contract, select "Signed."
  - d. **File:** Browse out to saved file location or drag-and-drop.
  - e. Primary Document: Checked by Default.
  - f. **Document Description:** Skip. You will enter a description later.

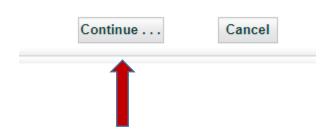


## You do not need to fill out the last field group:

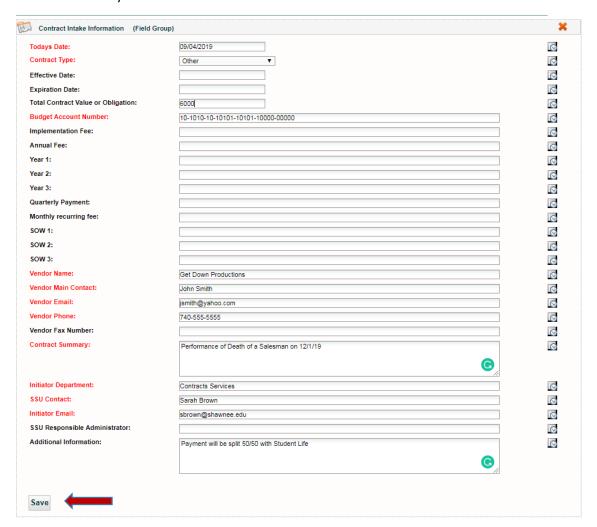
To choose an existing Contract that your new Contract is Related To, please choose a value from each of the three Drop-Down Lists, below, from to bottom.



4. Click "Continue"



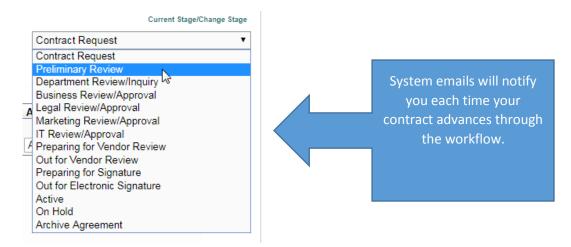
5. Complete the "Contract Intake Information" Field Group. (You may need to click the pencil icon first. Required fields appear in red. Enter as much of the optional information about your contract as you can.



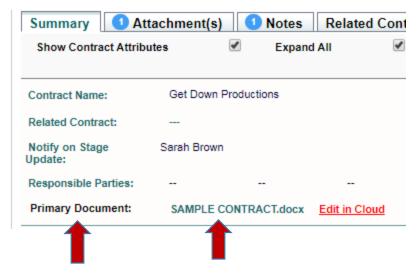
- 6. Click "Save."
- 7. You should see the number 1 in blue on the "Attachment(s)" tab. This means your document is now in the system.



8. 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. 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.