



ICONTRACTS - USING TEMPLATES THROUGH THE DOCUMENT LIBRARY USE WHEN COMPLETING AN EZ-IC FORM OR OTHER SSU TEMPLATE CONTRACT

The EZ-IC Form and other University template contracts are stored in the Document Library. To access them:

1. From the Home screen, click on "Library."



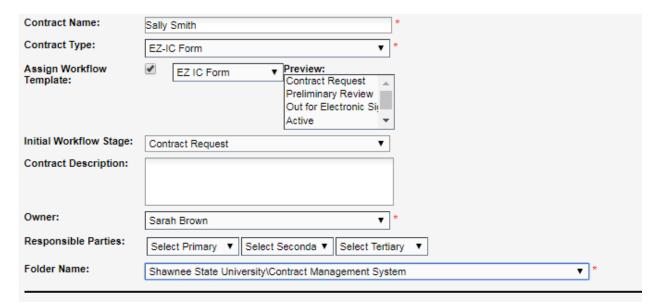
2. Locate the Library template you wish to use and select "Click to Fill Fields" next to the item. (In this example, we are completing an EZ-IC form). If you do not see "Click to Fill Fields," your iContracts administrator can assist you with adding the column.



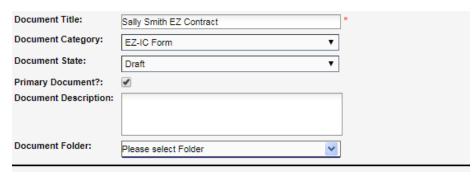
3. Click "Create New Contract Container."



- 4. Enter the information requested in the first field group (above the black line)
 - a. Contract Name: Name of vendor (ex., Sally Smith)
 - b. **Contract Type:** Select from the drop-down menu. **Select EZ-IC Form if that is what you are using.**
 - 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 menu.
 - g. Responsible Parties: Optional
 - h. Folder Name: Select from drop-down menu.

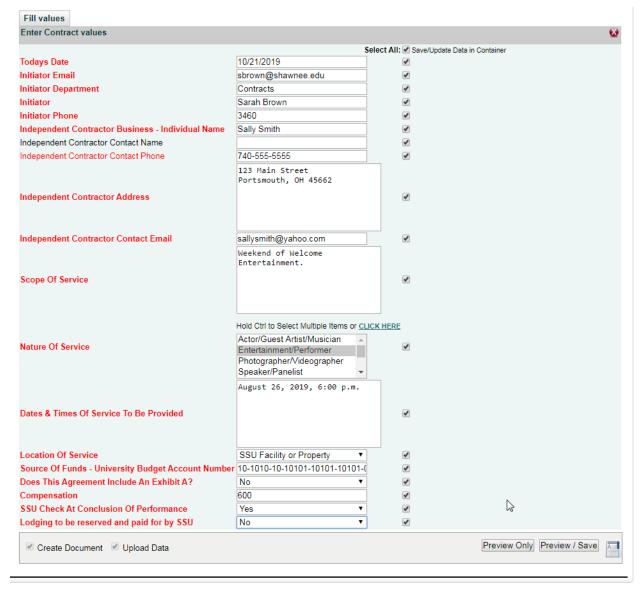


- 5. Enter the information requested in the second field group (below the black line)
 - a. **Document Title:** Use the following naming convention: (Vendor) (Document Title) *Example:* Sally Smith EZ-IC Contract Homecoming 2019
 - b. **Document Category**: Select from the drop-down menu. **Select EZ-IC Form if that is what you are using.**
 - c. **Document State:** Always select "Draft" for new contracts. If uploading a signed contract, select "Signed."
 - d. Primary Document: Checked by Default.
 - e. **Document Description:** Skip. You will enter a description later.
 - f. **Document Folder:** Skip.



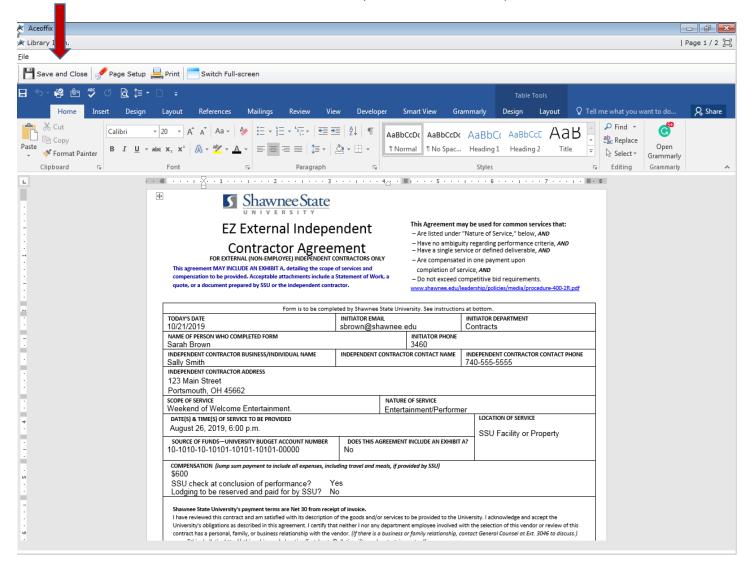
To choose an existing Contract that your new Contract is Related To, please choose a value from each of the three Drop-Down Lists, below, from to bottom. Related Contract: What Contract Type? Which Contract? 6. Click "Fill Values." Fill values Create Document Upload Data Preview Only Preview / Save

7. Fill in this information and click. Please note: this information corresponds with the paper EZ-IC contract form. You may find it helpful to have one handy the first few times you enter an EZ form in iContracts.





The information you entered on the previous screen will automatically populate the EZ Form. 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.



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



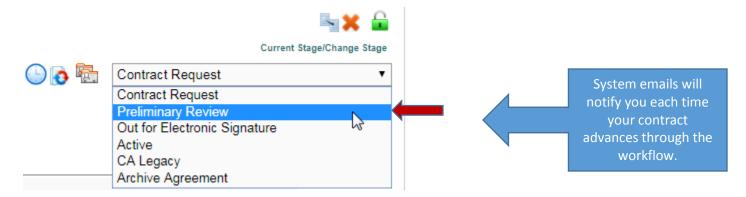
10. Unless you have additional documents or files to attach, click Cancel.



11. You will be returned to the "Summary" tab. You should see the number "1" in blue on the "Attachment(s)" tab. This means your document is in the system.

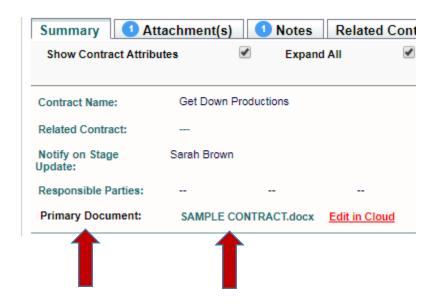


12. Scroll back to the top right of the screen and select "Preliminary Review" from the dropdown menu.



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.