

## Creating a New Contract: Using a Contract Template

<ol> <li>Login to iCS (if necessary)</li> <li>Click the Documents View icon (if necessary)</li> <li>Click on the Personal tab (if necessary)</li> <li>Navigate to the folder, within the Personal tab, where the document will be stored while in development</li> <li>Click the New Document icon</li> <li>Within the New Document: Template Selection window, select the:         <ul> <li>Template Type (Contract)</li> <li>Template Category (Payable, Receivable, or No Fund)</li> <li>Template Name</li> </ul> </li> <li>Click the Next command button</li> <li>Review and verify selected Clauses (not applicable to every template)</li> <li>Click the Next command button</li> <li>Enter information in ALL applicable fields on the Enter Info tab</li> <li>IMPORTANT: The fields on this tab populate the resulting contract. An empty field will result in a blank field in the contract. If information truly does not apply, be sure to edit the resulting Word document to remove any blanks or document error messages. Use complete sentences, correct spelling, grammar, etc. Be as complete and detailed as possible.</li> <li>Click the Next command button</li> <li>Enter Information in ALL fields on the Set Properties tab</li> <li>IMPORTANT: The fields on this tab populate the contract metadata. Metadata is used in searching and reporting. These fields have all been determined to be critical in those functions.</li> <li>Note: There may be a time delay for some fields (e.g., Organization Code).</li> </ol>		
<ul> <li>3. Click on the Personal tab (if necessary)</li> <li>4. Navigate to the folder, within the Personal tab, where the document will be stored while in development</li> <li>5. Click the New Document icon</li> <li>6. Within the New Document: Template Selection window, select the: <ul> <li>Template Type (Contract)</li> <li>Template Category (Payable, Receivable, or No Fund)</li> <li>Template Name</li> </ul> </li> <li>7. Click the Next command button</li> <li>8. Review and verify selected Clauses (not applicable to every template)</li> <li>9. Click the Next command button</li> <li>10. Enter information in ALL applicable fields on the Enter Info tab</li> <li>IMPORTANT: The fields on this tab populate the resulting contract. An empty field will result in a blank field in the contract. If information truly does not apply, be sure to edit the resulting Word document to remove any blanks or document error messages. Use complete sentences, correct spelling, grammar, etc. Be as complete and detailed as possible.</li> <li>11. Click the Next command button</li> <li>12. Enter Information in ALL fields on the Set Properties tab</li> <li>IMPORTANT: The fields on this tab populate the contract metadata. Metadata is used in searching and reporting. These fields have all been determined to be critical in those functions.</li> <li>Note: There may be a time delay for some fields (e.g., Organization Code).</li> </ul>	1.	Login to iCS (if necessary)
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14. Click the <b>Finish</b> command button	14.	Click the <b>Finish</b> command button
Note: The document appears in the folder within the <b>Personal</b> tab selected in Step 2.		Note: The document appears in the folder within the <b>Personal</b> tab selected in Step 2.

## Additional Information:

## **Entry Standards**

- Use standard naming conventions
- Health Care Services section is primarily for UIC
- Do NOT complete the sections for University Contract Records Office (UCRO) or Capital Programs