Getting Started

Have you adjusted the default column preferences on your Personal Tab?

See the *Adjusting Column Preferences* job aid for more information.

How to initiate a contract and which contract initiation method should you use?

Create a contract from an approved template

- When the other party will accept one of the University's contract templates that are pre-approved by OBFS and University Counsel.

Import an existing contract

- When you receive another party's contract, or a hard copy of a contract from a user who does not have access to iCS.

Create a contract request

- When you do not have an existing contract and there is no template available for you to use, or

- When you need to request an amendment.

See the *Creating and Importing Documents* section in the iCS User Guide, or the related job aids for more information.

Do you need to quickly access your unit's in-process contracts?

- Search for the contract(s) under your Chart-Org that are not in a fully executed status, and add them to your **Favorites** tab.

See the *Search* and *Favorites* sections in the iCS User Guide; also see Example 2 in *Search* job aid for more information.

Which checklist should you use?

See *Appendix C – Checklist Descriptions* in the iCS User Guide or *Checklist Descriptions* job aid for more information.