Routing via Checklist and Assigning Items

1.	Click the **Open Dashboard** icon next to the contract, or right-click the contract and select **Open Dashboard.**
2.	Select the **Checklist** icon.
3.	Click the **Add Checklist** link.
4.	Within the **Select Checklist** window, select the: **Checklist Type** (Contract) **Checklist Category** (No selections available; leave blank) **Checklist Name** (Refer to the *Checklist Descriptions* job aid)
5.	Click the **OK** command button.
6.	Select the **Assign Item** link next to the Item Name you wish to assign, or right-click on the Item Name and select **Assign Item** from the actions menu
7.	In the **User/Role** field, either type the name of the User or the Role to which you would like to assign the item, or click the down arrow and scroll through the list of options
	Note: Refer to the *Role Descriptions* job aid for assistance in selecting the correct role.
8.	In the **Reject To** field, either type the name of the User or the Role you would like to receive notification if the item is rejected by the assignee, or click the down arrow and scroll through the list of options
9.	In the **Notify When Complete** field, either type the name of the User or the Role you would like to receive notification when the item is completed, or click the down arrow and scroll through the list of options
10.	In the **Due Date** field, either type a date or, choose a date using the calendar icon
11.	Click the **Assign Item** command button.
	Note: At this point, the person(s) in the role to which this task has just been assigned receives an iCS notification in their My Tasks list, as well as an email notification.
12.	Click the **Close** command button
	Note: When the assigned item in the Checklist has been completed, the user or role entered in the Notify When Complete field will receive an iCS notification in their My Tasks list, as well as an email notification.
13.	Within the **Personal** tab, click the **Open Dashboard** icon next to the contract or right-click the contract and select **Open Dashboard**
14.	Select the **Checklist** icon
15.	Repeat steps 6 – 12 for each item to be completed on the **Checklist**

NOTE:
- Not all Checklist items are mandatory. Some items only apply to certain contracts (e.g. Dean/Director approval is only required for contracts $50,000 or more).

- Checklist items must be assigned and approved one-at-a-time. However, Checklist items do not always have to be done in sequential order.
- If you have assigned the wrong Checklist or the scenario changes, a new Checklists can be added by clicking the **Add Checklist** link and choosing a different Checklist. Any items that were completed on the previous checklist will still be visible in the Checklist window.
- Some Checklist items are completed by the user instead of being assigned to another user (e.g. send contract to other party for signature or import signed contract). You do not have to assign these items to yourself. Simply right-click on the item name and select **Complete Item** (when the task is completed). Your name and the date will populate the Checklist and the item will be marked as complete.