

ILLINOIS CONTRACT SYSTEM

UIUC USER GUIDE



Copyright

Copyright © 2019 University of Illinois System – Office of Business and Financial Services. All rights reserved. No part of this publication may be reproduced or used in any form or by any means—graphic, electronic or mechanical, including photocopying, recording, taping or in information storage and retrieval systems—without written permission of University of Illinois System – OBFS.

This documentation has been created specifically for the use of the Illinois Contract System (ICS) as it has been implemented at the University of Illinois System and for no other purpose.

Course Information

Course ID:	Illinois Contract System - UIUC User Guide
Revision Date:	September 16, 2019
Version:	V6.9.1

TABLE OF CONTENTS

Ethics and Confidentiality	1
Section 1: Getting Started	2
Section 2: System Navigation	3
2.1: Main Page Layout	3
2.2: The Personal Tab	5
2.3: Cabinets Tab	7
Section 3: Creating and Importing Documents	8
3.1: Creating a Contract from an Approved Template	8
3.2: Importing an Existing Contract	9
Section 4: Creating Contract Requests/Requesting Amendments	11
4.1: Creating a Contract Request	11
4.2: Requesting an Amendment	12
Section 5: Routing Documents	13
5.1: Routing via Checklist	13
5.2: Routing to Others Outside of iCS	16
Section 6: Managing Documents	18
6.1: Viewing a Contract or Contract Request	18
6.2: Checking Out a Document and Canceling Check Out	18
6.3: Checking In and Versioning a Contract	19
6.4: Editing and Versioning a Contract or Contract Request	20
6.5: Document Dashboard	21
6.6: Related Documents	24
6.7: Notes	24
6.8: Reminders and Obligations	25
6.9: Subscriptions	29
6.10: Favorites	29
6.11: Editing Document Properties	30
Section 7: Managing Tasks	31
7.1: My Tasks	31
7.2: Reviewing Tasks	32
7.3: Completing and Rejecting Tasks	32
7.4: Assigning Proxies	33
Section 8: Reports	35
Section 9: Search	36
9.1: Quick Search	36
9.2: Advanced Search	36
9.2: Save Search	37
9.3: Manage Saved Search	37
Glossary	38

Appendix A: Contract Type and Subtype Definitions 43
Appendix B: Checklist Descriptions 50
Appendix C: Prodagio Role Descriptions 52
Appendix D: Metadata Descriptions 55
Appendix E: OBFS Resources 62
 ICS Resources 62
 OBFS News Center 62

Ethics and Confidentiality

All University of Illinois System employees must follow ethical practice and maintain confidentiality when dealing with contracts. Contracts stored in the Illinois Contract System (ICS) repository are official documents of the Board of Trustees.

With the advent of your new on-line accessibility, you will have access to electronic copies of university contracts and other contract information that historically has not been available. Please keep in mind, this access does not grant anyone within the unit the authority to email or distribute contract documents or information contained within those documents.

If a user receives a request from an outside entity for information contained within a contract, it is important to understand that often the university may need to redact certain information prior to disclosure (i.e. intellectual property or any information causing competitive harm). In general, requests by third parties for contracts should be immediately forwarded to the Office for University Relations to be processed as a Freedom of Information Act (FOIA) request. The contact information for the Office for University Relations is as follows:

Thomas Hardy
University Relations
506 S. Wright Street
Urbana, IL 61801
Email: foia@uillinois.edu
Fax: 217-333-6400

Email is the fastest and preferred method to forward a request to the Office for University Relations. Upon receipt of the contract request, University Relations staff may contact you to discuss the request and any contacts responsive thereto.

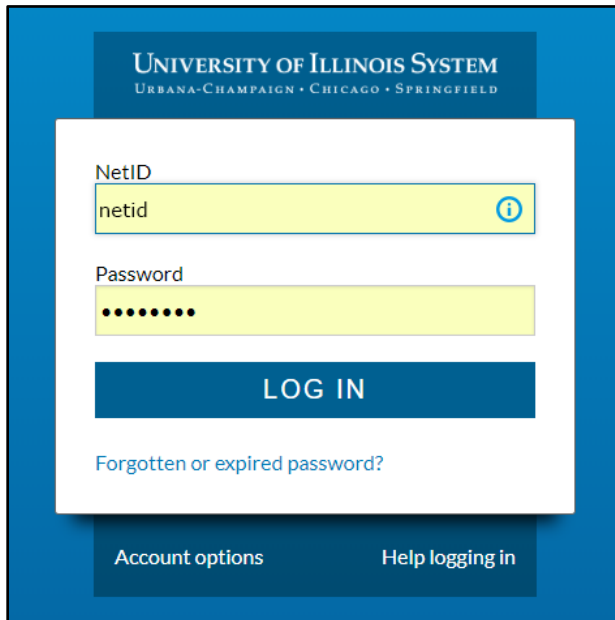
Please keep in mind that all employees must follow the University Code of Conduct and its confidentiality requirements. For more information please visit

<http://www.ethics.uillinois.edu/cms/one.aspx?portal1d=1109782&pagelid=1114598>

Section 1: Getting Started

Logging in

1. Go to <https://contracts.apps.uillinois.edu>.
2. Enter your University of Illinois System NetID and password and click the **Log In** button.



UNIVERSITY OF ILLINOIS SYSTEM
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

NetID
netid

Password
.....

LOG IN

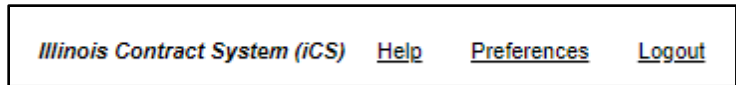
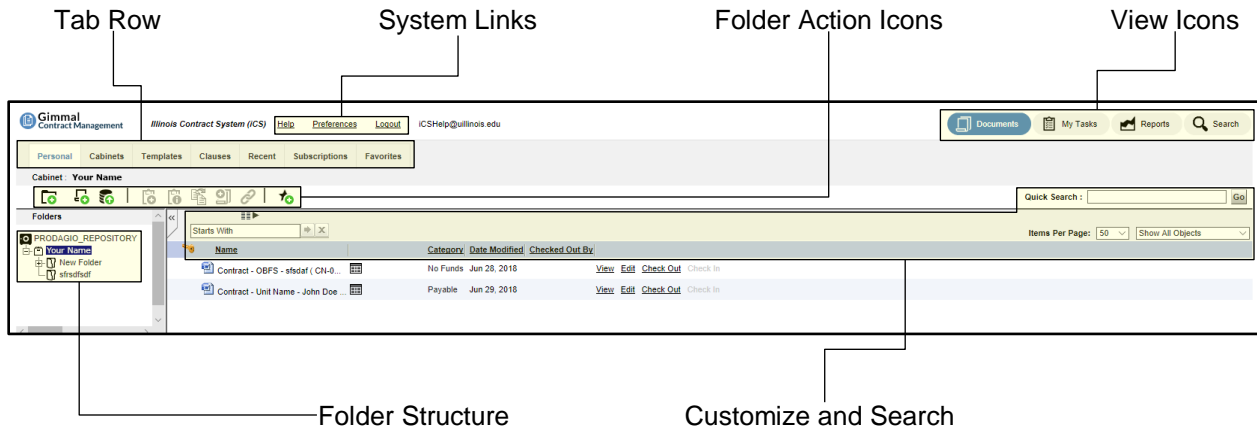
[Forgotten or expired password?](#)

[Account options](#) [Help logging in](#)

3. After login, the system launches and displays the **Document** view and your **Personal** tab.

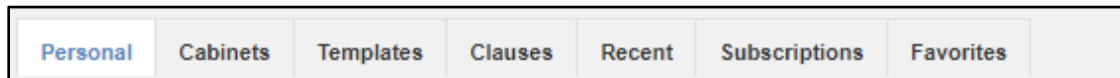
Section 2: System Navigation

2.1: Main Page Layout



1. System Links

- **Help**
- **Preferences**
- **Logout**



2. Tab Row

- **Personal:** New documents created from templates and some imported documents are stored in the Personal Cabinet.
- **Cabinets:** Repository of all contracts and other documents. Users can navigate through the folder hierarchy to access a contract or related document. Not all Cabinets are public. Your view of available cabinets and the documents stored within depends on your level of permission.
- **Templates:** Displays a library of standard templates that can be used to create contracts.
- **Clauses:** Displays a list of standard legal and business clauses which can be included in templates and other contract documents. Normally, clauses are a few standard paragraphs, but can be of unlimited length and complexity.
- **Recent:** Recently accessed documents.
- **Subscriptions:** Documents changed by others to which you have subscribed.
- **Favorites:** Your bookmarked documents for quick access.



3. **Folder Action Icons** (change depending on tab/folder)

- Hover over icon to see the screen tip.
- Grayed-out icons are not active/available.



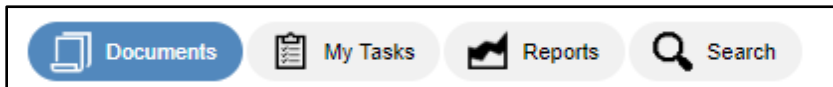
4. **Folder Structure**

- All folders/documents



5. **Customize and Search**

- << maximizes the screen layout.
- Change displayed columns.
- **Starts With** ... to filter documents.
- Sort by column heading (**Name, Document Title, etc.**).
- Change column width.
- **Items Per Page** (You can display 10, 50, or 100)
- **Filter By** menu (e.g., Show All Objects, Show Primary Documents, Show Attachments)
- **Quick Search:** Searches entire repository by document properties or content.



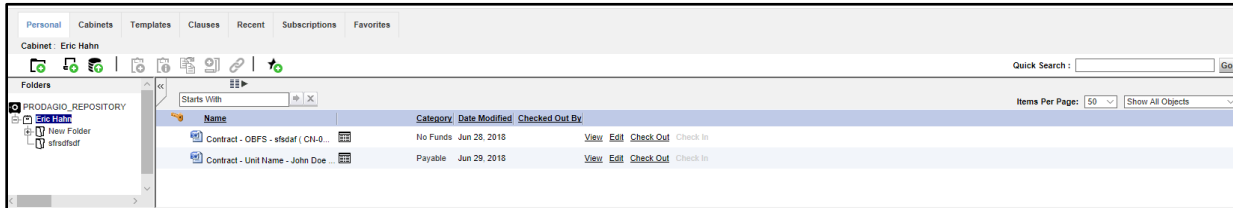
6. **View Icons:** Provide access to different functions and actions.

- **Documents:** Personal and repository documents in personal, cabinet, folder, and file structure.
NOTE: The current display is **Documents** view.
- **My Tasks:** Your “to-do” items and notifications.
- **Reports:** Run and display standard and custom reports.
- **Search:** More advanced options than **Quick Search**.

2.2: The Personal Tab

The **Personal** tab can be modified in many ways to suit the individual user's needs.

Creating folders under your **Personal** cabinet shows you to organize your various in process documents, which is similar to having folders and subfolders on your computer or within your email.



Creating a New Folder under Your Personal Cabinet:

1. Within the **Personal** tab, click on the New Folder icon
2. Enter a name for the new folder
3. Click the **Finish** button

The folder appears under your **Personal** cabinet. Documents saved in the folder will be removed from the folder once they are fully executed.

Deleting a Folder under Your Personal Cabinet

To delete a folder under your **Personal** cabinet:

1. Within the **Personal** tab, click on the folder name that you wish to delete.
2. Click on the **Delete** folder icon.

NOTE: A folder can only be deleted if it has been emptied of its contents.
3. In the **Delete** window, choose whether you want to **Delete Current Versions** or **Delete All Versions** of the documents.
4. Click the **Delete** button.

The folder disappears from under your **Personal** cabinet.

NOTE: If subfolders exist, each subfolder must be deleted individually before the folder can be deleted.

Changing number of items in Personal Tab

The number of items displayed in the **Personal** tab (and other tabs and views throughout iCS) can be changed by clicking on the **Items Per Page** menu.

Sorting Items

Items can be sorted by any column heading. By default, items are sorted by the Name heading, ascending (a - z).

1. Click the column heading to use for sorting.
2. The **Up Arrow** icon indicates items are sorted in ascending (a -z) order. The **Down** arrow icon indicates items are sorted in descending (z -a) order.
3. Click the column heading again to sort in reverse order.

Attachments Folder

iCS automatically generates an **Attachments** folder in the user's **Personal** tab when a user creates/imports a related document/attachment. If the user deletes an item from this **Attachments** folder while the contract is still in development, it will also be deleted from the related documents of the contract. When a contract is fully executed, the attachments will auto-file to the **Contracts** cabinet, along with the contract itself, and will disappear from the user's **Attachments** folder. Related documents are covered in greater detail throughout this guide.





NOTE: Current sorting is only retained until the view or tab is closed, refreshed or the user logs out of iCS.

Column Widths

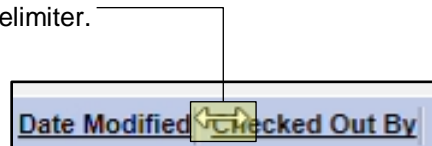
Column widths can be made wider or narrower by horizontally dragging delimiters, which are vertical lines in the column header row. Horizontal arrows appear when hovering the mouse over the delimiter.

NOTE: The changed width is remembered and displays again at the user's next login.

Delimiters

Name	Category	Date Modified	Checked Out By
 Contract - OBFS - (CN-0... 	No Funds	Jun 28, 2018	View Edit Check Out Check In
 Contract - Unit Name - John Doe ... 	Payable	Jun 29, 2018	View Edit Check Out Check In

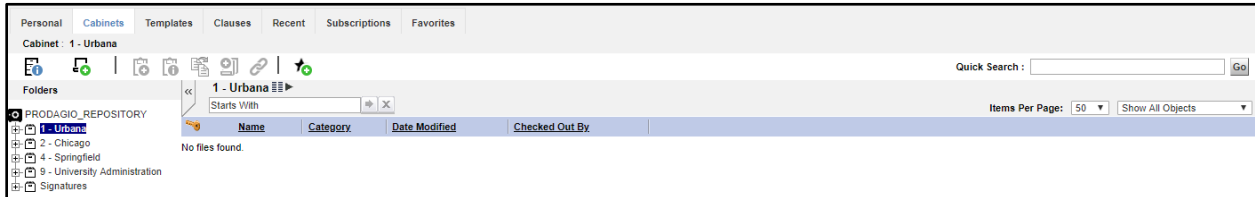
Horizontal resizing arrows appear when hovering over the delimiter.



2.3: Cabinets Tab

The **Cabinets** tab displays public cabinets containing fully executed contracts, in addition to other repository documents.

Users can navigate the cabinet hierarchy using the folders below to access a fully executed contract or related document. Not all Cabinets are public and your view of available cabinets and the documents stored within depends on your level of permission in iCS.



Section 3: Creating and Importing Documents

There are three ways to initiate contracts in iCS:

1. Creating a contract from an approved template
2. Importing an existing contract
3. Creating a contract request (covered in [Section 4.1](#))



Contract Confidentiality

If a contract has unique confidentiality requirements or restrictions, please contact your contract processing office before initiating the contract in iCS.

3.1: Creating a Contract from an Approved Template

Contract templates are pre-approved by the contract processing offices and University Counsel. iCS templates are available under the **New Document** icon.

All users have access to these standard University of Illinois System templates:

- Revenue Generating Services Agreement under \$10,000
- Procurement of Services Agreement under \$10,000
- Revenue Generating Services Agreement \$10,000 or more

Some units have additional custom templates available only to users in their chart and org.

Creating a new contract with an iCS Template

1. Navigate to the folder within the **Personal** tab where you would like the contract to be stored while in development.
2. Click the **New Document** icon.
3. Within the **New Document: Template Selection** window, select the:
 - a. **Template Type:** Select **Contract**.
 - b. **Template Category:** Select **Payable, Receivable, or No Fund**.
 - c. **Template Name:** Select appropriate template.

4. Click the **Next** button.
5. Review and verify selected **Clauses** (not applicable to every template).
6. Click the **Next** button.
7. Enter information in all applicable fields on the **Enter Info** tab.

IMPORTANT: The fields on this tab populate the resulting contract. An empty field will result in a blank field in the contract. Use complete sentences, correct spelling, grammar, etc. Be as complete and detailed as possible.

8. Click the **Next** button.
9. Enter information in all applicable fields on the **Set Properties** tab.

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. Fields marked with a red asterisk are required.

NOTE: There may be a time delay for iCS to refresh some fields (e.g., Organization Code).

10. Click the **Next** button.
11. Click the **Finish** button.

NOTE: The document appears within the **Personal** tab in the folder selected in Step 4.

3.2: Importing an Existing Contract

Import a 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.

1. Navigate to the **Folder**, within the **Personal Tab**, where you would like the contract to be stored while in development.

NOTE: If the document is not in an electronic format, it will need to be scanned and uploaded as a PDF.

2. Click the **Import** icon.



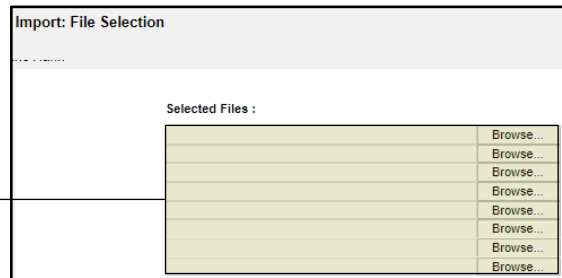
3. In the **Import: File Selection** window, click the **Choose File** button.

4. Find the file to be imported then

- a. Double-click it to open it.

OR

- b. Click it to highlight it and then click the **Open** button.



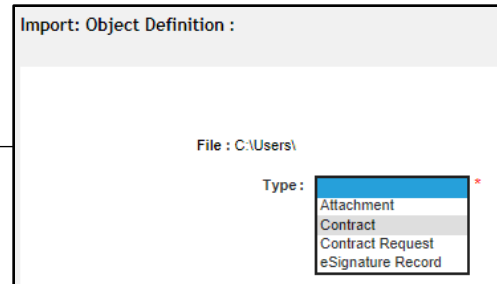
5. Click the **Next** button.

6. In the **Import: Object Definition** window:

- a. Select **Contract** in the **Type** field.

- b. Enter information in any other applicable fields.

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. Fields marked with a red asterisk are required.



7. Click the **Finish** button.

Does that document belong in iCS?

If you have a document and you are unsure about whether it should be imported into iCS (for example, a hotel room block agreement, or a banquet event order), enter the requisition in Banner and route that to Purchasing with the document attached. The buyer will analyze the document, and if they determine that it does need to be imported into iCS, they will let you know.

 **More on Metadata**

- a. Metadata is entered on the **Set Properties** tab.
- b. Metadata is used in searching and for reporting
- c. Master reports are given to AVPs, university administrators, internal and external auditors
- d. When entering metadata:
 - Not every field is required, but users should enter as much data as possible.
 - Always use proper spelling and grammar.
 - Do not use dollar signs or commas when entering dollar amounts.
 - Avoid using punctuation in the **Contracting Party Name** field.
 - Avoid using parenthesis in the **Title**, **Contracting Party Name**, and **Unit Name** fields.
- e. In the **Document Title** field, use the standard naming conventions set by your unit, if applicable. For Purchasing contracts, always include the Banner Requisition Number in this field.
- f. Do not complete the sections for University Contract Records Office (UCRO) or Capital Programs.
- g. See [Appendix D](#) for metadata descriptions.

Section 4: Creating Contract Requests/Requesting Amendments

4.1: Creating a Contract Request

When you do not have an existing contract or an available template, you should create a contract request and submit it to the appropriate contract processing office, who will create a contract from the information you provide.

To create a contract request, complete the following steps:

1. Navigate to the folder within the **Personal** tab where you would like the contract request to be stored.
2. Click the **New Document** icon.
3. When the **New Document: Template Selection** appears:
 - a. In the **Template Type** field, select **Contract Request**.
 - b. In the **Template Category** field, leave as **Any Category** (no other selections available).
 - c. In the **Template Name** field, select appropriate template type.
4. Click the **Next** button.
5. Enter information in ALL applicable fields on the **Enter Info** tab.

IMPORTANT: The fields on this tab populate the resulting contract request form. A buyer or coordinator will use this information to create the contract. Use complete sentences, correct spelling, grammar, etc. Although not all fields are required, missing or incomplete information may cause a delay in the processing of your contract. Be as complete and detailed as possible.

6. Click the **Next** button.
7. Enter information in ALL applicable fields on the **Set Properties** tab.

IMPORTANT: The fields on the **Set Properties** tab populate the contract request metadata. Fields marked with a red asterisk are required. Use complete sentences, correct spelling, grammar, etc. Be as complete and detailed as possible.

NOTE: There may be a delay for iCS to refresh the screen (e.g. organization code).

8. Click the **Next** button.
9. Click the **Finish** button.

4.2: Requesting an Amendment

An amendment changes the substantive legal terms of a fully executed contract. Common examples include extending the contract term or changing the contract amount.

Amendments are created as a related document to the fully executed original contract. Once created, an amendment is routed for approvals and execution using the same process as new contracts. Units can view an amendment and track its status by navigating to the fully executed original contract, opening the dashboard, and clicking on **Related Documents**. For quicker access to an amendment, you can add it to your **Favorites** tab by right-clicking on the **Document** icon and selecting **Add to Favorites**.

If you need to request an amendment to an existing contract, send an email to the office in which the original contract was processed (the contract processing office can be found by looking at the “OBFS Office” line on the contract jacket). Find contact information on the iCS Resource Page under Who-to-Ask (www.obfs.uillinois.edu/ics-resources/who-to-ask/). Include in the email the contract number of the existing contract, in addition to the required changes (see common examples above). Be sure to attach any documents supplied by the other party.

The contract request can also be used to submit requests for amendments.

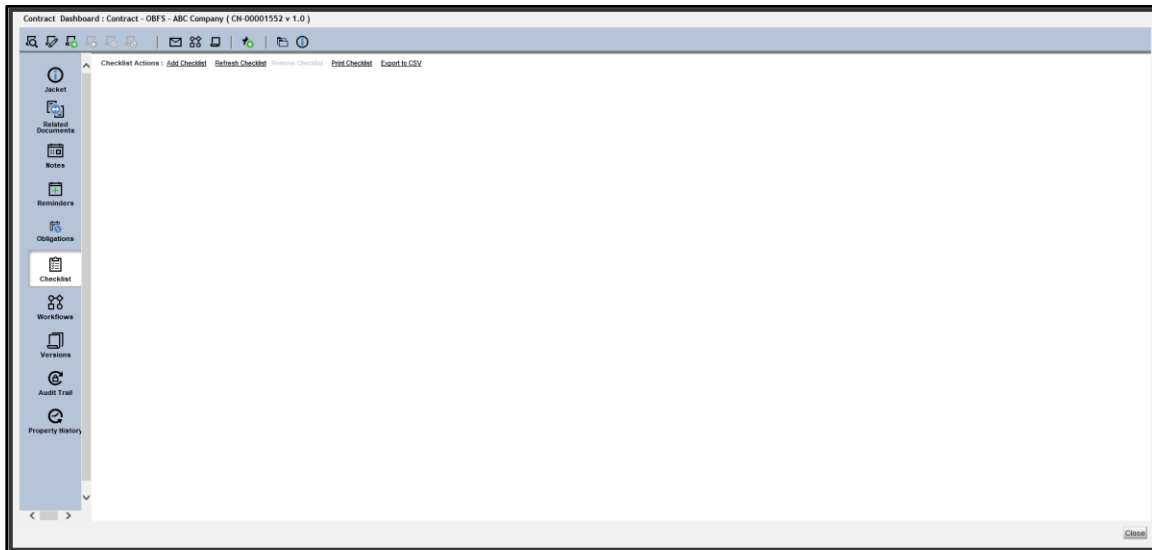
Section 5: Routing Documents

This section details the two options for routing iCS contracts for review, approvals, and signature. Those routing processes are:

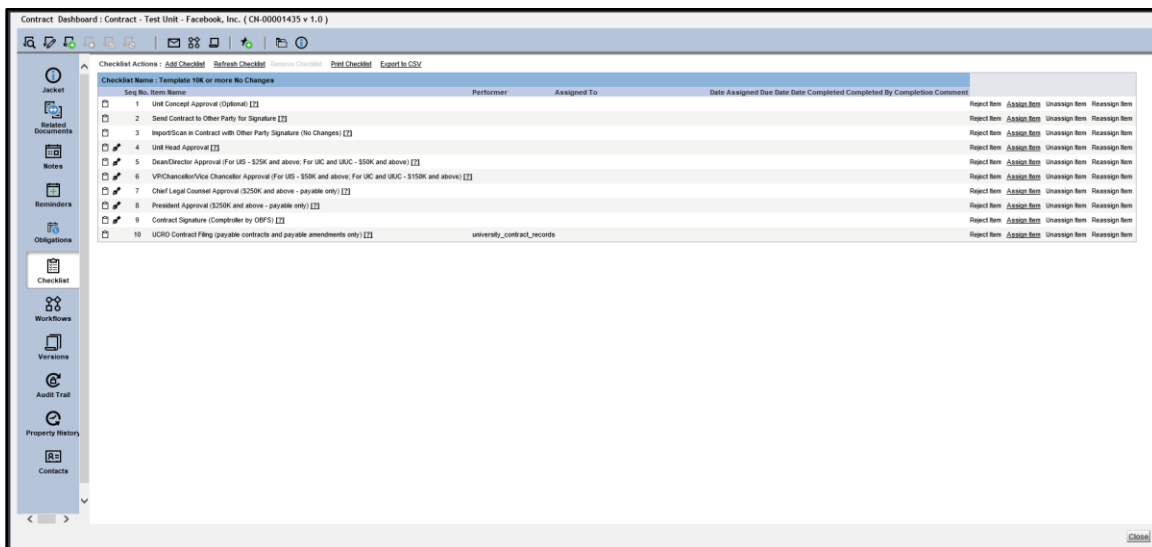
1. Routing via checklist
2. Routing to others outside of iCS

5.1: Routing via Checklist

The checklist functions in much the same way that the Contract Approval/Routing Form (CARF) does for contracts routed outside of iCS.



Dashboard before adding a checklist.



Dashboard after adding a checklist.

Illinois Contract System - UIUC User Guide

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 [Appendix B: Checklist Descriptions](#))
5. Click the **OK** 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.
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.

NOTE: Refer to the UIUC Checklists Cheat Sheet for assistance in selecting the correct role for each checklist task.
10. In the **Due Date** field, either type a date or, choose a date using the **Calendar** icon.

IMPORTANT: When assigning the **Assign to OBFS Reviewer** task to an OBFS role, it is recommended that you choose a due date two business days from the date you assign the task.
11. Click the **Assign Item** 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** button.

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.

 **Important Notes about Checklists**

- 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 tasks must be assigned and approved one at a time. However, checklist tasks do not always have to be done in sequential order.
- The Comptroller Signature step should not be assigned until after all other required University approval steps have been completed.

Adding Checklists to a Document

One or more checklists may be added to a single document. You can add a second checklist to a document by clicking the **Add Checklist** link and choosing another checklist from the **Checklist Name:** menu. Any number of different checklists may be added to any document of any type, with all added checklists displayed in the **Checklist** window. Each checklist may be added only once.

Removing a Checklist

If you inadvertently select the wrong checklist, it can be removed from the document as long as no items on the checklist have been completed. To remove a checklist from a document, contact the University Contract Records Office (UCRO) at contractrecords@uillinois.edu and provide them with the contract number and name of the checklist that you would like to have removed.

Completing Checklist Items

Some checklist items are tasks that a user will complete on their own, 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 tasks to yourself. You can simply right-click on the task name and select **Complete Task** (once you have completed the task). Enter comments, if desired, and click **OK**. Your name and the date will populate the checklist item information and the task will be marked as complete.

Reassigning Checklist Items

Checklist items may be reassigned at any point before they have been completed. To reassign an item, navigate to the checklist and click the **Reassign Item** link next to the task you wish to reassign. Repeat the steps for assigning the task.

Unassigning Checklist Items

Assignees can unassign checklist items at any point before they have been completed. To unassign an item, navigate to the checklist and click the **Unassign Item** link next to the task you wish to unassign.

If you need to unassign a checklist item but are unable to, contact the University Contract Records Office (UCRO) at contractrecords@uillinois.edu and provide them with the contract number and checklist item that you would like to have unassigned.

Resetting Checklist Items

Checklist items may be reset by the University Contract Records Office (UCRO) at any point before the contract is fully executed. If you need to have an item on your checklist reset, contact UCRO at contractrecords@uillinois.edu and provide them with the contract number and checklist item that you would like to reset.

After a task is reset, the completion information is removed from the checklist but remains in the audit trail. If the task requires electronic signoff, you must input your password in order to reset the item. The item remains assigned to the original assignee and that user receives a notification that the task has been reopened and is incomplete. If you wish to send this task to a different user for completion, you must reassign it.

Routing for Comptroller Signature

When a contract is ready for the executing university signature, the **Contract Signature** task in the checklist must be assigned to the appropriately authorized role.

Certain templates under \$10,000 have been approved for unit head execution. This includes the standard Revenue Generating Agreement less than \$10,000, the Procurement of Services Agreement less than \$10,000, and those unit-specific templates less than \$10,000 that have received express written authorization from the Assistant Vice President for Business and Finance.

The above standard contract templates less than \$10,000 (if unaltered) must be printed and have signatures applied by hand. Unit heads will sign their and the comptroller's names on these standard contract templates. The contract must then be scanned and imported into ICS as a new version, and have all remaining checklist items completed.

All other contracts must be routed to the appropriate contract processing office for comptroller signature.

NOTE: Refer to the UIUC Checklists Cheat Sheet for assistance in selecting the correct contract processing office role for the contract signature checklist task.

IMPORTANT: If changes are made to a standard contract template less than \$10,000, the contract cannot be executed by the unit head. Instead, the **Contract Signature** task must be assigned to the appropriate contract processing office for comptroller signature.

5.2: Routing to Others Outside of iCS

Certain situations may require a contract to be routed outside of iCS. Examples include when the other party's signature is required or when review or approval is needed from a user who does not have access to iCS. There are two options for sending a contract to someone outside of iCS:

1. Saving a Local Copy
2. Emailing as an Attachment

Saving a Local Copy

1. After logging in to iCS, click the **Documents View** icon (if necessary).
2. Right-click the contract and select **Save a Local Copy**.
3. Select a location to save the contract and click the **OK** button.
4. Send the contract as an email attachment for review or signature.

Emailing as an Attachment

1. Right-click the contract and select **Email as an Attachment**.
2. Type the email address(es) to which you would like to email a copy of the current version of the contract in the **To:** field.
NOTE: You will not have access to your address book if you use this method.
3. Type your email address in the **Cc:** field (see important note below).
IMPORTANT: A copy of the email will not appear in your Microsoft Outlook **Sent Items** folder. If you require a copy of the communication for your files, you will need to CC yourself.
4. Type the desired text in the message box.
NOTE: When sending emails through iCS, message text will appear as a single line. The system doesn't create paragraph breaks or "hard returns" after pressing the **Enter** key.
5. Check the **Checkout Document After Send** box if you would like the system to automatically check the document out for you.
6. Click **Send**.

NOTE: The Audit Trail will reflect an email as attachment action capturing the date, time, and recipient email addresses. When the contract returns to you, if any changes have been made, including a signature added by another party, you must version the contract (see the [Versioning](#) section).

Section 6: Managing Documents

6.1: Viewing a Contract or Contract Request

To view a contract that has not been fully executed or a contract request, follow these steps:

1. From the **Personal** tab, navigate to the appropriate folder (if applicable).
2. From the list of documents, locate the document you created.

NOTE: If you are not the creator of the document, you must perform a search for it. See the Searches section for additional information.

3. To view the contract or contract request, click on the **View** link.

6.2: Checking Out a Document and Canceling Check Out

Once you have created a document, you may prevent other users from making any changes to it by checking out the document.

Checking Out a Document

1. Select **Documents View** icon (if necessary).
2. In the **Personal** tab,
 - a. Click the **Check Out** link next to the contract or contract request you wish to check out.**OR**
 - b. Right-click and select **Check Out** from the menu that appears.

A key icon will display next to the document, indicating that you have it checked out.

When to Cancel Check Out

Cancelling a check-out will revert the document to its exact state when you checked it out.

You can cancel check out of a document if you:

1. Do not want to save the changes you made to the document.
2. Did not make any changes.

Canceling Check Out

1. Select **Documents View** icon (if necessary).
2. On the **Personal** tab, right-click the document name.
3. Select **Cancel Check Out**.

NOTE: You may only cancel check out for documents that you have checked out. You cannot cancel the check-out of another user. Documents checked out by another user will display a padlock icon.

Checking in a document will create a new version of the document (see the section on [Versioning](#)).

6.3: Checking In and Versioning a Contract

iCS maintains every version of a document in the **Versions** tab of the document dashboard. The two most common instances when units create new versions of a contract are when the other party requests changes and when a unit receives a signed contract from the other party.

In order to create a new version of a document in iCS, the document needs to be in an electronic format. If the updated document is in hard-copy form, it needs to be scanned in so it can be uploaded as a PDF.

IMPORTANT: The following steps assume the contract is already checked out. A contract must be checked out before a new version can be imported.

1. Right-click the document and select **Check In**.
 2. In the **Save as** field, select **2.0 (major version)**.
 3. In the **Check in from file** field, click the **Browse** button.
 4. Find the contract in the File Explorer window that appears.
 5. Open the file by
 - a. Double-clicking it.
 - OR
 - b. Clicking it once to highlight it and then clicking the **Open** button.
 4. Add log entry (if desired).
- NOTE:** Information (such as date, amount, etc.) carries over but can be edited if necessary.
5. Click the **OK** button.

Check In : Contract - OBFS - sfsdaf (CN-00001437 v 1.0)

Contract - OBFS - sfsdaf (CN-00001437 v 1.0)

Version Label : 1.0
CURRENT
GENERATED

Type : Contract
Format : msv12

Select a file from the file system to checkin.

Save as : 1.1 (minor version)
 2.0 (major version)

Check in from file

Log Entry:

Format:

Title:

Status:

Contract Category:

Contract Type:

Contract Subtype:

Document Source:

Brief Contract Description:

Chart:

Organization Code:

Amount:

Additional Payment Details:

6.4: Editing and Versioning a Contract or Contract Request

Selecting **Edit** (either by right-clicking on a document or clicking on the **Edit** link in the document menu) opens a document for changes, but only if editing is allowed at the document level (i.e. an unprotected Word document).

When templates are loaded into iCS, they are loaded as protected Word documents. This allows users to view and complete the templates in iCS, but does not allow them to edit any of the text outside of the form fields. Only staff in the contract processing offices and University Counsel have security permission and ability to edit contracts created in iCS using templates. If contract requires changes beyond its form fields, you must route that contract to the appropriate contract processing office.

Template form fields can be edited while a contract is still in development by users with sufficient permission levels.

Making Changes within Form Fields

1. Open the document's dashboard.
2. Click the **Version from Original Template** icon. This will take you back to the **Enter Info** tab, which appeared during the creation process.
3. Make the necessary changes on the **Enter Info** tab and click **Next**.
4. You will also have the opportunity to make changes on the **Set Properties** tab. If no changes to the jacket properties (metadata) are necessary, click **Next**.
5. Click **Finish**.

6.5: Document Dashboard

The screenshot shows a web browser window titled "Contract Dashboard : Contract - OBFS - sfsdaf (CN-0001437 v 1.0)". The interface includes a top toolbar with icons for search, refresh, print, and other actions. A left sidebar contains navigation options: Jacket, Related Documents, Notes, Reminders, Obligations, Checklist, Workflows, Versions, Audit Trail, Property History, and Contacts. The main content area is titled "Jacket Actions : View Properties Print Properties" and is divided into several sections:

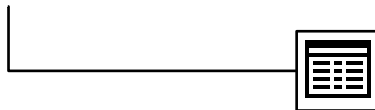
- General:** Title: Reciprocal Non-Disclosure Agreement; Document Number: CN-0001437; Status: Contract Development; Contract Category: No Funds; Contract Type: Equipment; Contract Subtype: Trial/Loan Agreement; Document Source: Custom Contract; Brief Contract Description: sfsdsdf.
- Chart:** 2 - Chicago; Organization Code: 226 - Office of Classroom Scheduling.
- Additional Payment Details:** Amount: 0; Start Date: Jun 28, 2018; End Date: Jun 28, 2018; Number Of Renewal Options: 0.
- University Insurance Certificate Issued:** OBFS Office; Health Care Related; HIPAA.
- Contractor:** Contracting Party Name: sfsdaf; Contracting Party DBA; Contracting Party Contact Name; Contracting Party Phone; Contracting Party Email.
- Contracting Party Address:** Contracting Party Address 1: sadsdf; Contracting Party Address 2; Contracting Party City: Forest Park; Contracting Party State/Province: IL; Contracting Party Postal Code: 60130; Contracting Party Country: USA.
- Additional Contracting Party Names:**
- Unit Contact:** Unit Name: OBFS; Unit Contact; Unit Phone; Unit Email; Unit City, State, Zip.
- Purchasing Only:**

Labels at the bottom of the screenshot identify the sections: "Jacket Properties/Metadata" points to the left sidebar, "Functions" points to the top toolbar, and "Jacket Actions" points to the main content area.

Opening Document Dashboard

There are three ways to open a document's dashboard:

1. Right-click the document name and select **Dashboard**.
- OR**
2. Double-click the document name.
- OR**
3. Click the **Open Dashboard** icon.



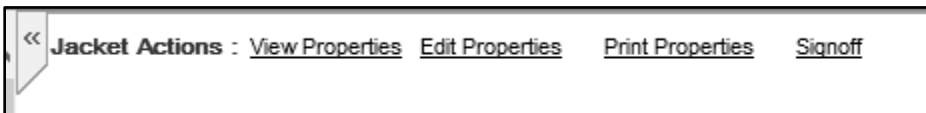


Jacket Properties/Metadata

Upon opening, the document dashboard displays the jacket properties, also referred to as the document metadata. See the following pages for an explanation of each area.

1. Available Actions

- **View:** Displays a read-only version of the document.
- **Edit:** Checks out the document and makes it available for modification.
- **Check Out:** Assigns the document to the specific user and locks the document from editing by other users.
- **Check In:** Unlocks the document and returns the document to the cabinet. The document is now available to be edited by other users.
- **Cancel Check Out:** Returns the document to the cabinet and discards any changes made after the document was checked out. The document is now available to be edited by other users.
- **Version Using Original Template:** Creates a new version of the document from the original template.
- **Email:** Allows the user to send the document via email.
- **Predefined Routing:** *The University of Illinois System does not use this feature.*
- **Ad Hoc Routing:** *Units do not use this feature.*
- **Add to Favorites:** Adds a link to that document to user's **Favorites** tab.
- **Auto File:** Moves a document to a specific cabinet location as defined by its applicable auto-file rule.

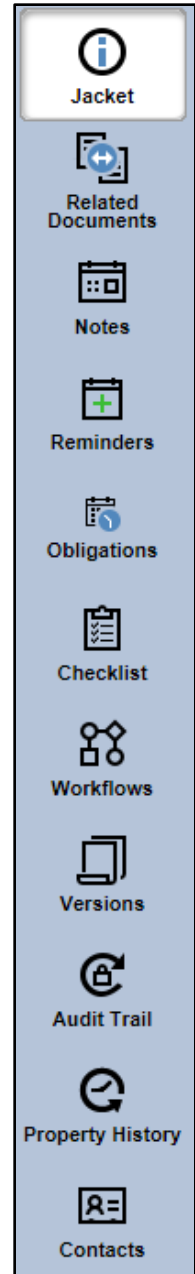


2. Jacket Actions

- **View Properties:** Allows you to view the jacket properties (metadata).
- **Edit Properties:** Allows you to make changes to the jacket properties (metadata)
- **Print Properties:** Allows you to print the jacket properties (metadata)
- **Sign off:** *The University of Illinois System does not use this feature.*

3. Functions

- **Jacket:** Displays the metadata (jacket properties) of the document
- **Related Documents:** Displays other documents (amendments, attachments, supporting documentation, etc.) related to the contract.
- **Notes:** Can be added to a contract, or read and printed by others.
IMPORTANT: Notes are read-only and once saved cannot be changed or deleted.
- **Reminders:** Remind of actions that are not material obligations of the contract (e.g. review a contract for renewal two months prior to the contract end date).
- **Obligations:** Remind of legal requirements of the contract (e.g. invoice due on a certain date).
- **Checklists:** Primary routing mechanism for contracts in the system (similar to the Contract Approval/Routing Form).
- **Workflows:** Displays ad hoc workflows, including their current status.
- **Versions:** Displays all versions of that contract, the date and time they were saved, and the name of the creator.
- **Audit Trail:** Captures every step in the contract's life cycle, as well as detailed information about the date, time, and performer.
- **Property History:** Shows a quick comparison of jacket properties (metadata) and any changes made to the metadata between versions.
- **Contacts:** *The University of Illinois System does not use this feature.*



6.6: Related Documents

A user can import supporting documentation that relates to a contract (e.g. proposal, certificate of liability, email, etc.) in the **Related Documents** area of the document dashboard.

NOTE: Contract processing offices will be creating amendments as related documents.

Import a Related Document:

1. Within the document dashboard, click the **Related Documents** icon.
2. Click the **Import Related** link.
3. Click the **Add Files** button.
4. Find the file to be imported and double-click it.

OR

Click it once to highlight it and then click the **Open** button.

5. Click the **Next** button.
6. Select **Attachment** as the relationship.
7. Select **Attachment** as the type.
8. Complete all fields.
9. Click **Finish**.

6.7: Notes

Notes allow you to add a permanent, non-editable record of relevant information to a contract.

Adding a Note

1. Within the document dashboard, click the **Notes** icon.
2. Click the **Add Note** link.
3. Select the appropriate category.
4. Enter the note text.
5. Click **OK**.

IMPORTANT: Notes are read-only and once saved cannot be changed or deleted.

6.8: Reminders and Obligations

Reminders and obligations are useful “memory jogs” that actions are required on a certain date for a particular document. Reminders and obligations must be added manually.

Reminders

Reminders notify you of actions that are not material obligations of the contract. For example, you can add a reminder to review a contract for renewal two months prior to the contract’s expiration.

When a reminder is added to a document, a task is scheduled to occur at some date in the future. On that date, an email message describing the task will be sent to the specified recipient(s) and a notification will appear in their **My Tasks** list(s). Reminders can be assigned to one or more users by name, or to an iCS role (e.g. *1_100_requestor*) in which case all users assigned to that role at the time the reminder becomes due will receive the notification. Additionally, if a reminder is created with the **Add to Outlook Calendar** option, each user on the reminder distribution list can choose to add that event to their Outlook calendar.

Adding a Reminder

1. Within the document dashboard, click the **Reminders** icon.
2. Select the **Add Reminder** link.
3. Enter the following reminder details in the **Add Reminder** window:
 - a. In the **Notification date** field, add the date when the user(s) will be sent the reminder email for the specified document.
 - b. In the **Document Dashboard** menu, select the frequency that the reminder email is generated and sent to recipients on the distribution list:
 - **None** (default)
 - **Weekly, Bi Weekly** (every two weeks)
 - **Monthly, Semi-Monthly** (twice a month)
 - **Quarterly, Semi-Annually** (twice a year), **Annually**
 - c. In the **Action** menu, select the category which will be listed on the reminder email.
 - d. In the **Instructions** field, enter other information for everyone on the distribution list. This text will appear in the body of the email accompanying the task.
 - e. In the **Display Option** menu, Select **Show User** or **Show Roles**, depending on how you want to create the distribution list.
 - f. In the **User / Roles: Dropdown List**, click on the users or roles that will receive the reminder and then click the > icon (next to the box on the right) to add them to the distribution list.

NOTE: The >> icon adds all choices in the **User / Roles: Dropdown List** to the distribution list. Use the << icon to remove individual recipients, and the <<< icon to remove all recipients from the distribution list.
 - g. Check the **Add to Calendar** box to allow recipients to add the date(s) for the obligation to their Outlook calendars.

NOTE: The email to add the reminder to the recipient’s Outlook Calendar sends immediately, even if the notification date is in the future.
4. Click **OK**.

Adding Reminder to Your Outlook Calendar

1. In Outlook, open the reminder email.
2. Double-click the **prodagioEvent.ics** icon in the **Attachments** line to open the attachment.
3. The scheduler notice displays as an Outlook calendar event.
4. Click **Save and Close**.

NOTE: You cannot add a reminder to your calendar in Webmail.

Viewing Reminders

Once a Reminder is created, the details of the reminder can be viewed.

1. Navigate to the document with the reminder(s).
2. Click the **Reminders** icon next to the document name; the **Reminder** window displays, listing all reminders for the selected document.
3. Select **View**.
4. When done viewing the details of the reminder, click **Close**.

Editing Reminders

1. Navigate to the document with the reminder(s).
2. Click the **Reminders** icon next to the document name; the **Reminder** window displays, listing all reminders for the selected document.
3. Select **Edit**.
4. Edit the details of the reminder as necessary.
5. Click **OK**.

NOTE: From the **My Tasks** view, users may change the notification date of open status reminders from the **Reminder Task Manager** windows.

Deleting reminders

1. Navigate to the document with the reminder(s).
2. Click the **Reminders** icon next to the document name; the **Reminder** window displays, listing all reminders for the selected document.
3. Select **Delete**.
4. Click **Delete**.

Closing Reminders

Once a scheduled Reminder has already occurred, the reminder cannot be deleted. It can only be closed.

1. Navigate to the document with the reminder(s).
2. Click the **Reminders** icon next to the document name; the **Reminder** window displays, listing all reminders for the selected document.
3. Select **Close**.

4. Under **Closing Comments**, include a comment to be recorded with the completed reminder (e.g. *renewal completed*).
5. Click **OK**.

Obligations

Obligations remind you of legal requirements of a contract. For example, you can set an obligation to remind you that an invoice is due on a certain date. When an obligation is added to a document, a task is scheduled to occur at some date in the future. On that date, an email message describing the task will be sent to the specified recipient(s) and the task will be added to their **My Tasks** list(s). Obligations can be assigned to one or more users by name, or to an iCS role (e.g. 1_100_requestor) in which case all users assigned to that role will receive the task notification when the obligation becomes due. Additionally, if an obligation is created with the **Add to Calendar** option, each user on the obligation distribution list can choose to add that event to their Outlook calendar.

Obligations require a user to input their password (or, electronically sign off) in order to complete them. Obligations are categorized as either financial (related to money) or non-financial (not related to money).

Adding an Obligation

1. Select **Open Dashboard** icon for the document you would like to add an obligation to.
2. Click the **Obligations** icon.
3. Click **Add Financial Obligation** or **Add Non-Financial Obligation**.
4. Enter the relevant information about the obligation in the **General**, **Deliverables**, and **Write-Up** sections.
5. In the **Timing** section,
 - a. Select a **Due Date**.
 - b. In the **Recurring**: menu, select the frequency of the obligation email to its distribution list.
 - c. In the **Total Obligations** field (appears only when a recurring frequency is selected), enter the total number of times the obligation will be sent.
6. Click **Next**.
7. In the **Lead Time** menu, select the number of days of advance notice that obligation recipients will receive.
8. Check the **Add to Calendar** box to allow recipients to add the date(s) for the obligation to their Outlook calendars.

NOTE: The email to add the obligation to the recipient's Outlook calendar is sent immediately, even if the notification date is in the future.
9. In the **Display Option** menu, select if you want to add to the distribution list by user or role
10. In the **User / Roles: Dropdown List**, click on the users or roles that will receive the reminder and then click the > icon (next to the box on the right) to add them to the distribution list.

NOTE: The >> icon adds all choices in the **User / Roles: Dropdown List** to the distribution list. Use the << icon to remove individual recipients, and the <<< icon to remove all recipients from the distribution list.

NOTE: An obligation can be set without selecting any recipients. If no recipient is selected, then no email and no task will be sent, but the obligation will remain in the document dashboard of the contract and can be viewed or edited by any user with security permissions sufficient to read the contract.

Adding an Obligation to Your Outlook Calendar

1. In Outlook, open the obligation email.
2. Double-click the **prodagioEvent.ics** icon in the **Attachments** line to open the attachment.
3. The scheduler notice displays as an Outlook calendar event.
4. Click **Save and Close**; the obligation is added to your Outlook calendar.

NOTE: You cannot add an obligation to your calendar in Webmail.

Viewing Obligations

Once an obligation is created, the details of the obligation can be viewed.

1. Navigate to the document with the obligation(s).
2. Click the **Obligations** icon next to the document name; the **Obligations** window displays, listing all obligations for the selected document.
3. Select **View**.
4. When done viewing the details of the obligation, click **Close**.

Editing Obligations

1. Navigate to the document with the obligation(s).
2. Click the **Obligations** icon next to the document name; the **Obligations** window displays, listing all obligations for the selected document.
3. Select **Edit**.
4. Edit the details of the obligation as necessary.
5. Click **OK**.

NOTE: From **My Tasks** view, users can change the due date of open status obligations from the **Obligation Task Manager** windows.

Deleting Obligations

1. Navigate to the document with the obligation(s).
2. Click the **Obligations** icon next to the document name; the **Obligations** window displays, listing all obligations for the selected document.
3. Select **Delete**.
4. Click **Delete**.

Closing Obligations

1. Navigate to the document with the obligation(s).

2. Click the **Obligations** icon next to the document name; the **Obligations** window displays, listing all obligations for the selected document.
3. Select **Close**.
4. Enter your password.
5. Enter a comment (e.g. *Invoice Paid*).
6. Click **OK**.

6.9: Subscriptions

Subscriptions are one way to keep tabs on contracts created other users. To be alerted when a document is versioned, you can subscribe to that document. All documents to which you are subscribed are listed on the **Subscriptions** tab of the **Documents** view. When a subscribed document is versioned, you will receive email and **My Tasks** notifications.

Subscribing to a Document

1. Navigate to the document to which you wish to subscribe.
2. Right-click the document name.
3. Select **Subscribe to Changes**.

NOTE: Documents cannot be subscribed to from search results. If you wish to subscribe to a document in search results, add the document to your **Favorites** first (covered in the next section), then follow the steps to subscribe to the document from your **Favorites** Tab.

Unsubscribe from a Document

1. Navigate to a currently subscribed contract or contract request.
2. Right-click the document name.
3. Select **Unsubscribe to Changes**.

NOTE: Unsubscribing from a document will immediately stop email and My Tasks notifications when that document is versioned by other users and will remove the document from your **Subscriptions** Tab.

6.10: Favorites

Just as a web browser allows you to store a list of favorite web sites, iCS allows you to keep a list of favorite documents that you refer to frequently. You can add a document created by another user to your **Favorites** tab, so you can to quickly navigate to it later. All of your Favorite items will display in the **Favorites** tab of the **Documents** view.

Adding a Document to Favorites

1. Navigate to the document you wish to add as a favorite.
2. Right-click the document name.
3. Select **Add to Favorites**.

Removing a Document from Favorites

When you no longer require quick access to a document, remove it from the **Favorites** tab. Like a shortcut, removing an item from the **Favorites** tab removes only the shortcut, not the original item.

1. Navigate to the document you wish to remove as a favorite.
2. Right-click the document name.
3. Select **Remove from Favorites**.

6.11: Editing Document Properties

Many document properties (jacket properties or metadata) can be edited while a contract is still in development by users with sufficient permission levels.

Editing Jacket Properties (Metadata)

1. Right-click the document icon and select **Properties**.
2. The **Properties** window will display the jacket properties (metadata) in multiple tabs across the top.
3. Make the necessary changes on each tab and click the **OK** button.

The screenshot shows the 'Properties' dialog box for a contract. The 'General' tab is selected, displaying the following fields:

- Title: Reciprocal Non-Disclosure Agreement
- Document Number: CN-00001437
- Status: Contract Development
- Contract Category: No Funds
- Contract Type: Equipment
- Contract Subtype: Total Loan Agreement
- Document Source: Custom Contract
- Brief Contract Description: stasdfdf
- Chart: 2 - Chicago
- Organization Code: 228 - Office of Classroom Scheduling
- Amount: 0
- Additional Payment Details: (empty text area)
- Start Date: Jun 28, 2010
- End Date: Jun 28, 2010
- Number of Renewal Options: 0
- University Insurance Certificate Issued: (dropdown menu)
- OBF's Office: (dropdown menu)
- Health Care Related: (dropdown menu)
- HIPAA: (checkbox)

Section 7: Managing Tasks

Priority	Due Date/Status	Subject	Item Name	From	Status	Instructions
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - IIR (CN-0001408 v 1.0)	Contract - IIR (CN-0001408 v 1.0)	Elizabeth Strate	Overdue	ERIC CHANGE ORDER \$30K or More, Unit Head/Director Approval
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - State Farm Center - Dave M...	Contract - State Farm Center - Dave Matthews Band (CN-0001408 v 1.0)	Elizabeth Strate	Overdue	UC AMENDMENT, PPS Posting
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - State Farm Center - Crede...	Contract - State Farm Center - Credeence Clearwater Revival (CN-0001402 v 1.0)	Elizabeth Strate	Overdue	CHANGE ORDER, Financial Manager Approval, Before completing, enter Checklist and assign next step.
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - State Farm Center - Bruce S...	Contract - State Farm Center - Bruce Springsteen (CN-0001387 v 1.0)	Elizabeth Strate	Overdue	AMENDMENT, Financial Manager Approval
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - State Farm Center - Bernie...	Contract - State Farm Center - Bernie Sanders (CN-0001411 v 1.0)	Elizabeth Strate	Overdue	AMENDMENT, Financial Manager Approval
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - DIA - Denise Williams (CN-0...	Contract - DIA - Denise Williams (CN-0001416 v 1.3)	Elizabeth Strate	Overdue	UC AMENDMENT \$250K or More, Chief Legal Counsel Approval
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - State Farm Center - Bernie...	Contract - State Farm Center - Bernie Sanders (CN-0001405 v 1.0)	Elizabeth Strate	Overdue	AMENDMENT, Executive Director/Vice Chancellor approval
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - State Farm Center - Bernie...	Contract - State Farm Center - Bernie Sanders (CN-0001405 v 1.0)	Elizabeth Strate	Overdue	AMENDMENT, Financial Manager Approval
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - State Farm Center - Eric Cl...	Contract - State Farm Center - Eric Clapton (CN-0001398 v 1.0)	Elizabeth Strate	Overdue	AMENDMENT, Financial Manager Approval
Overdue	7/2/2018 12:01 PM	Checklist Item - Contract - State Farm Center - Madona...	Contract - State Farm Center - Madona (CN-0001401 v 1.0)	Elizabeth Strate	Overdue	AMENDMENT, Financial Manager Approval
Overdue	7/1/2018 12:02 PM	Checklist Item - Contract - Test Unit - Test Unit (CN-0...	Contract - Test Unit - Test Unit (CN-00001513 v 1.0)	Sara Simmons	Overdue	Upon completion of this step, contract status will change to Fully Executed and contract will auto-file under the specified chart and org code.
Overdue	7/1/2018 12:01 PM	Checklist Item - Contract - Test Unit - Super Mega Tes...	Contract - Test Unit - Super Mega Test Company (CN-0001500 v 3.0)	Sara Simmons	Overdue	Upon completion of this step, contract status will change to Fully Executed and contract will auto-file under the specified chart and org code.
Overdue	7/1/2018 12:01 PM	Checklist Item - Contract - SF Center - Bruce Springst...	Contract - SF Center - Bruce Springsteen (CN-0001403 v 1.0)	Elizabeth Strate	Overdue	UC AMENDMENT \$250K or More, President Approval

7.1: My Tasks

The **My Tasks** view provides a list of tasks and notifications assigned to you or notifications sent to you, which may have come from checklists, reminders, or obligations. The **My Tasks** view functions as your “to do” list and includes three tabs: **My Tasks**, **Recent**, and **Favorites**. Each user’s **My Tasks** listing is personal and lists overdue tasks in red in the **Due Date** column.

When a task is assigned to you, you are responsible for reviewing it and either performing the action, completing the task, or rejecting the task and providing instructions or explanation to the assigner as needed.

Email Notifications

Email notifications are sent when a task is assigned and when a user completes or rejects a task assigned to them, depending on what was entered when the task was assigned. Email wording is very similar, so please review each email carefully.

Examples of notification email in ICS:

Example 1 – From Unit Requestor assigning a task to Unit Head:

From: Sally Jones [mailto:sjones@uic.edu]
To: John Smith
Subject: Checklist Item Assigned - Contract - DIA - Test (CN-00000523-01 v 1.1)

A Prodigio Checklist Task was assigned to John Smith

Example 2 – From Unit Head to Unit Requestor task completed:

From: John Smith [mailto:jsmith@uic.edu]
To: Sally Jones
Subject: Checklist Item Complete - Contract - DIA - Test (CN-00000523-01 v 1.1)

A Prodigio Checklist Task was completed by John Smith

7.2: Reviewing Tasks

In iCS you can view and then complete, delete, or reject tasks assigned to you. To view the task assigned to you, complete the following steps:

1. Click the **View Task** link within the email notification and log in to iCS or click the **My Tasks** view icon in iCS.
2. Within the task:
 - Access the document dashboard, by clicking the **Open Dashboard** icon or right-clicking the contract and selecting **Open Dashboard**.
 - View the contract, by clicking the **View** link or right-clicking the contract and selecting **View**.
3. Click the **Close** button to return to the task.
4. Click the **Close** button again to return to **My Tasks**.

IMPORTANT: If you are reviewing a contract that was created by another user, the task is your link to that document. Be sure to keep the task in your **My Tasks** list (do not delete it) until you are finished and ready to complete it.

7.3: Completing and Rejecting Tasks

Completing

Completing a task will mark the checklist item complete, insert your name as the completer, and will remove the task from your **My Tasks** list.

Rejecting

Rejecting the task will remove it from your **My Tasks** list and reassign the task to the user who assigned it to you, or the user populated in the **Reject To** field at the time the task was assigned.

Deleting

Deleting the task will not mark the checklist item complete, but will remove it from your **My Tasks** list. The task will remain assigned to you and will return to your **My Tasks** list after a set period of time for as long as it remains pending.

Completing a Task Assigned to You

1. Click on the **My Tasks** icon (if necessary).
2. Select the **View** link. Review all information (e.g., the contract, jacket information, related documents, notes) before completing or rejecting the task.
3. Enter your password (if signoff is required).
4. Enter comments, if desired.
5. Click the **Complete** button; the task will be removed from your **My Tasks** list.

Rejecting a Task Assigned to You

1. Click on the **My Tasks** icon (if necessary).

2. Select the **View** link. Review all information (e.g., the contract, jacket information, Related Documents, Notes) prior to completing or rejecting the task.
3. Enter a comment (required) to describe the reason for rejecting the task.
4. Click the **Reject** button.
5. The task will be removed from your **My Tasks** list and will be reassigned to the original assigner for further action.

 **Tips for Sorting and Managing Tasks**

- Sometimes a task is just a notification letting you know that someone else has completed a task that you assigned to them. Be sure to delete unnecessary items from your **My Tasks** list often.
- If you are reviewing a contract that was created by another user, the task is your link to that document. Be sure to keep the task in your **My Tasks** list until you are completely finished with the contract. You can also add the contract to **My Favorites** for easier access.
- Tasks can be sorted by column headings.
- The **Hide/Resend Notifications** link in the **Actions** bar in the **Task List** will filter your tasks to show only original task assignments and one reminder for each, hiding any tasks that are additional reminders.
- If you are logged into the system for an extended period of time, you may want to refresh your **My Tasks** list every so often. You can do this by clicking the refresh button on your browser or clicking on the **My Tasks** icon.

7.4: Assigning Proxies

If you are going to be out of the office or unavailable for an extended period of time, you can assign a Proxy in iCS. Your Proxy, not you, will receive all tasks assigned to you while you are out. Be sure to notify the individual that you have assigned them as your Proxy and that they will receive all tasks on your behalf.

Assigning a Proxy

1. Go to **My Tasks**.
2. Click the **I am available** link
3. Check the box next to **I am currently unavailable. Please direct my tasks to:**
4. Click the **Edit** link
5. Select the user by name (not role) you wish to assign as your proxy.
6. Click the **OK** button.
7. The link will change to **I am currently set to unavailable**.

NOTE: Any tasks assigned to your proxy will remain with your proxy until completed, unless they are reassigned by the original assigner.

NOTE: If you set an out-of-office automatic reply in Outlook, users that assign you tasks in iCS will also receive your Outlook out-of-office replies.

Unassigning a Proxy

When you return and/or become available:

1. Go to **My Tasks**.
2. Click the **I am currently set to unavailable** link.
3. Uncheck the box next to **I am currently unavailable. Please direct my tasks to:**.
4. Click the **OK** button.

NOTE: The **I am currently set to unavailable** link will now display **I am available**.

Section 8: Reports

The **Reports** view provides and displays various reports, which can be downloaded and printed.

Generating a Report

1. Click the **Reports View** icon.

NOTE: There are tabs for **Reports** and **Custom Reports**.

2. Within the **Reports** tab, select a report name from the list.
3. Enter the required criteria in the text boxes that appear to the right.
4. Click the **Generate Report** button to display the report results in the lower pane of the window.

NOTE: The report results are links to active iCS data records. The **Open Dashboard** icon will go to the dashboard of that contract.

Printing a Report

1. Complete the Steps 1-4 of **Generating a Report**.
2. In the report results page, click the **Printer Friendly View** button.
3. In the **Print** window, select the printer; click the **Print** button.
4. Close the **Printer Friendly View** window.

Downloading a Report

1. Complete the Steps 1-4 of **Generating a Report**.
2. In the report results page, click the **Download Report** button.
3. Within the **Export Contents to CSV** windows, select columns to include in the report.
4. Click the **OK** button.
5. Select **Open**, **Save**, or **Save As**.

NOTE: Must define a destination when selecting **Save** or **Save As**.

Section 9: Search

9.1: Quick Search

Quick Search is in the **Personal** and **Cabinets** tabs of the **Documents** view.

Quick Search provides “simple” searching. Use the **Advanced Search** function when looking for more specific criteria. Performing a quick search is the same as completing only the **Contains** field on the **Advanced Search**.

Performing a Quick Search

1. Within the **Quick Search** field, enter the search criteria (e.g., *1234* or *ABC Company*)

To narrow the search, use:

- Quotation Marks to find contracts with the exact word or phrase.
Example: *ABC Company*
- “*And*” to find contracts containing both words.
Example: *ABC and Company*
- “*Or*” to find contracts with at least one of the words.
Example: *ABC or Company*
- “*Not*” to find contracts with one word but not the other.
Example: *ABC not Company*

2. Click the **Go** button.

NOTE: All documents listed in the search results have full functionality. It is not necessary to return to **Documents** view to display documents.

9.2: Advanced Search

The **Search** view provides searching by document properties (metadata) for any document in the repository. All searches require certain information to be entered before the search can display results. Entered information filters all information in the repository and displays only matching results. All individual user searches can be named and saved, and can be available to all users. The **Search** view has three tabs: **General**, **My Saved Searches**, and **All Saved Searches**.

Advanced Search should be used if you need to search using multiple fields. There is no known maximum for the number of parameters that can be used in an Advanced Search. The default when using Advanced Search is for all documents.

Performing and Advanced Search

1. Click the **Search** view icon (if necessary).
2. On the **General** tab, enter the search properties for each needed field of information

NOTE: To search based on additional properties, click **Add another property**.

3. Click the **Search** button

Customizing Search Results

Your search results display can be customized by clicking on the **Column Preferences** icon. The columns or properties that you select to display will be the same properties available when using the **Export to CSV** option.

NOTE: All documents listed in the search results have full functionality. It is not necessary to return to the **Documents** view to display a document.

9.2: Save Search

1. Search for contracts using the quick search or advanced search feature.
2. On the search results page, click the **Save Search** icon
3. Within the Save Your Search window,
 - a. Fill in the **Name** field.
 - b. Fill in the **Description** field.
 - c. Check the **Include Results** box if you want to save the results of your current search, not just the search parameters.
 - d. Check the **Make Public** box if you want to make the search available to others.
 - e. Click **OK**.

9.3: Manage Saved Search

1. Click the **Search View** icon (if necessary).
 2. Select the **My Saved Searches** tab.
 3. Click the **Search** link to run saved search and view its results.
- OR**
- Click the **Edit**, **Remove**, or **View Saved Results** links.

Glossary

Acquired

A task status indicating that the performer has opened the task, but has not yet completed the task. Compare with dormant.

All Saved Searches

Searches uniquely titles users have saved. All saved searches are available to all users.

Ascending

Alphabetical order, from a–z, used to sort information by column.

Asterisk

Indicates that a field's information is required and must be entered.

Attribute (properties, metadata)

A characteristic defining a document. Example attributes are document name, authors, and title. Attributes are also often referred to as properties or metadata.

Audit Trail

A listing of all actions that have been taken on a selected document. The audit trail is read-only; it cannot be edited or deleted.

Auto File

Moves a document to its proper location, as determined by the document's category and type properties (metadata). A contract is auto-filed when its status changes to fully executed. It is critical that this not happen before the contract image has actually received all of the necessary signatures.

Cabinets Tab

In the **Documents** view, the **Cabinets** tab displays all public cabinets. These cabinets store all folders, subfolders and related contracts and documents available to users based on their security access. The cabinets are structured by chart, three-digit org, then contract type.

Check In

Saves a file in the repository after it has been checked out for revision. After check in, a document is available to all users.

Check Out

Padlocks a file in a repository so neither the document nor its attributes can be edited by other users. Downloads the document's content to the user's computer for editing. Checked-out files are stored by default in the C:\Documents and Settings\Your name\Documentum\Checkout folder. Changes made to a file's attributes or content are not saved in the repository until the file is checked in.

Checklists

A uniquely named set of business process tasks assigned to a contract. Checklists control the routing of the contract to various groups or individuals.

Clauses Tab

On the **Documents** view, the **Clauses** tab displays a list of external clauses that may be used when building contracts or contract templates. Clauses are stored and updated by OBFS.

Clipboard

A holding place for multiple documents, with a separate clipboard for each user. Most common uses for the clipboard are copying and moving, particularly from the **Personal** to the **Cabinets** tabs.

CSV

Comma separated variable, a standard, basic spreadsheet format in which tabular information is separated by the comma character, and is exported from and imported into the system.

Dashboard

The document dashboard is the highest-level display for each document and includes available document actions, available document features, links of available jacket actions, high-level document jacket properties.

Delegate (workflow task)

A feature allowing checklist tasks to be assigned to a different user.

Descending

Reverse alphabetical order, from z–a, used to sort information by column.

Document Action Icons

Clickable icons providing access to all actions available for the selected document. Most of these actions are found on the document dashboard.

Document Action Menu

The document action menu can be accessed with a right-click of the item name.

Document

Any file with content that resides in iCS such as a contract, attachment, spreadsheet, memo or email.

Document Numbers (document versions)

Automatically assigned, sequential and configured to generate specific numbers based on organizational rules. The University of Illinois System contract numbering scheme includes a two letter prefix, a five-digit number, a two-digit sub-number (for amendments) and a version number.

Documents View

The main Prodagio contract view for users, which includes seven tabs and access to the three other views.

Document Type

A grouping or categorization of documents that is similar in format, content and/or purpose. Document type is an important metadata property.

Dormant

A task status indicating that the performer has not yet seen the task. Compared with acquired.

Favorites Tab

A shortcut to the file, not the original file. On the **Document** view, the **Favorites** tab displays all cabinets, folders, and files “bookmarked” by the user, to better enable quick access.

Import

Bring in a document from outside of iCS and add it to the repository.

Item

A general term used to describe all documents (of all types), tasks, obligations, and reminders displayed in various windows on which an action can be taken.

Jacket

The document folder listing all document properties. Allows changing these properties if user has write permissions.

Links

On various windows, underlined words which, when clicked, jump the user to another window. For example: *Edit, Check Out, Preferences*.

Locations

A document action menu selection which lists all places (locations) in the cabinet and folder structure where a document is stored.

Metadata (properties, attributes)

Information about a stored document such as its author, subject, and creation date. Metadata, also called properties or attributes, can be used to locate the document during a search.

My Saved Searches

Uniquely titled searches which you have saved and are available to all other users.

My Tasks View

A “to-do” list of all items and tasks requiring a user’s attention, including checklist tasks, subscribe notifications, reminders and obligations.

Notes

Permanent notes added to a document for others to view. All users with access to the document can view the notes written by all other users. Notes cannot be deleted once they are created.

Notifications

Notifications display on your **My Tasks** view and are generated each time a user changes a document to which you have subscribed.

Obligations

Tasks that must be completed in order to meet the legal requirements of a contract. Obligations are mandatory. Contrast with reminders.

Open Status

A reminder, obligation, or checklist task that a user has not completed. Users must view a task to open it.

Open Dashboard

An icon displayed after an item name on a view listing or after an item name in reports results. If clicked, the item (usually a document) dashboard displays. Performs the same action as the right-click **Open Dashboard** selection.

Permissions

Access privileges that determine what operations a user can perform on a file (such as: view, edit, and delete). For example, a unit requestor, unit head, and purchasing buyer each have differing levels of permissions.

Personal Tab

The default Tab displayed on the **Documents** view. The **Personal** tab displays a cabinet only available to the logged-in user, and is usually where that user creates new documents before they are fully executed.

Properties

See metadata or attributes.

Property History

Provides a way to review the complete history of every property in a document, as well as “backtracking” to view when each property change was made.

Quick Search

Provides searching for all principal documents that match entered key words. Displays on the **Documents** view's **Personal** tab and **Cabinets** tab and can be used to limit the objects displayed on each tab.

Recent Tab

On the **Documents** view, the **Recent** tab displays files the user has most recently accessed, regardless of the file location, including files created, edited or checked out.

Refresh Checklist

Removes from the selected document all not yet completed checklist items and any new items from the rebuilt checklist are added (unless these new items match any of the currently checked items in the checklist).

Reminders

Useful “memory jogs” for yourself or for others to take some action on a particular document. Reminders are “ticklers”, and are not mandatory. Contrast with obligations.

Renditions

A copy of the original document in a different format, such as PDF. For example, if an original document is stored in Microsoft Word format, the same document saved as an Acrobat PDF file is considered a rendition of the original. Especially useful for external routing, when control of the document format is required and editable master documents should not be routed.

Repeating Attribute

A property that can have more than one value. For example, a document's “authors” property is a repeating attribute because a document can have more than one author.

Reports - custom

Unique reports custom-configured for the University of Illinois System.

Reports - standard

Standard reports available to all users. Additional standard reports can be added.

Reports View

Provides access to all standard and custom reports.

Reset Item

Reopening a completed checklist item from the **Checklist** window.

Repository

The database of iCS information. A central location that allows users to store documents of any kind—text, graphics, and scanned images. A repository holds both document content and information about a document (metadata), such as its author, subject, and creation date, usable to locate the document.

Scheduled status

A reminder or obligation task that is scheduled to occur in the future. No notifications have yet been sent.

Search

Under the **Search** view, identify the unique configuration of search parameters and run the search.

Search View

Provides access to all search capability, as well as to all previously saved individual and group searches.

Signoff

A documented approval initiated by entering your log in password. Signoffs may be required for certain tasks during checklists and obligations processing.

Subscription

Turning on email and **My Task** notifications to alert the subscriber when a document or documents are changed by any user.

Tasks

Actions to complete, usually found on your **My Tasks** view, including reminders, obligations and checklist tasks.

Templates Tab

On the **Documents** view, the **Templates** tab displays the contents of the **Templates** cabinet, housing a library of Templates used to create contracts. Templates are stored and updated by OBFS.

Templates

A model, previously prepared and stored, used to create new contracts. Templates provide an input form or forms for variable information to be added. Templates are dynamic documents, containing many instances of variable content. Some templates are available to all users, while others are created for a specific unit.

Type

A grouping or categorization of documents that is similar in format, content, and/or purpose. Type is a common metadata property.

User Preferences

Provides access to changing the default user display. Available from any view or document dashboard with the **Preferences** link. Once changed by a user, the changes remain in effect at each log in until changed again by the user.

Appendix A: Contract Type and Subtype Definitions

Type	Subtype
<p>Affiliation Agreements: Agreements that provide a benefit to University of Illinois System students in terms of experience and additional learning opportunities and a benefit to the other party that receives the services of Illinois students (typically, without having to pay them wages). Includes Internships, Externships, Federal-Work Study Agreements, etc.</p>	<p>Student Placement Clinical: University sends student(s) to another clinic or school in order to receive training, practicum, or instruction in a specialization or facility that is not available here, or receives students from another clinic or school.</p> <p>Student Placement Non-Clinical: University students are placed in local and/or regional elementary and secondary schools as student teachers.</p> <p>Government-Funded: Federal Work Study, etc.</p> <p>Medical Rotation - Resident/Fellows: University sends medical residents/fellows to another institution, or receives another institution's medical residents/fellows for a brief, pre-determined period of time.</p> <p>Faculty/Staff: University sends faculty or staff to another institution, or receives another institution's faculty or staff for a brief, pre-determined period of time. This may also be a faculty exchange arrangement.</p> <p>International: Any affiliation agreement with an international institution, including agreements for Study Abroad opportunities and programs.</p> <p>Master: Single university system agreement under which several units may contract with one entity; usually no-funds.</p>
<p>Athletic Event Agreements: For use by university Athletic departments only.</p>	<p>Games: For university athletic offices only. Athletic Game Agreements.</p> <p>Premium Seating License: For university athletic offices only. Licenses for premium seating in athletic facilities.</p> <p>Concession Stands: For university athletic facilities only. Concession stands operated in athletic facilities during athletic, entertainment, or other events.</p>
<p>Capital: For use by the University Office of Capital Programs and Real Estate Services only.</p>	<p>Professional Services Consultants (PSC) Agreements: For Capital Programs use only.</p> <p>Contractor Contracts: For Capital Programs use only.</p>
<p>Concessions: Agreements that grant access to university system property, whether tangible or intangible, in exchange for payment. This payment may come in the form of a percentage of a vendor's sales resulting from the concession agreement.</p>	<p>Concessions</p>

Illinois Contract System - UIUC User Guide

Type	Subtype
<p>Equipment: Agreements related to equipment owned by, or being leased to or borrowed by the university system.</p>	<p>Lease: Lease of equipment by university.</p> <p>Purchase: Purchase of equipment by university.</p> <p>Lease to Own: Lease of equipment by university that will result in ownership.</p> <p>Sponsored Equipment: Must be processed through the Grants and Contracts Office.</p> <p>Rental: Rental of equipment by university.</p> <p>Trial/Loan Agreement: Loan or trial of equipment by university.</p> <p>Maintenance: Agreement for maintenance to university equipment.</p>
<p>Events: Agreements related to events held on university premises, or being sponsored or managed by University units.</p>	<p>Catering: Catering services provided by the University to individuals or other entities using university premises, or catering services procured by university for university-sponsored events.</p> <p>Conference: Conference management services, either provided or procured by university.</p> <p>Entertainment: Artistic or musical services, performances, or productions held at venue operated by the university.</p> <p>Hotel: Use of hotel rooms or other space for university-sponsored events.</p>
<p>Facility Use Agreements: Short-term space rental agreements, not related to research activities. May be payable or receivable.</p>	<p>Facility Use Agreements</p>
<p>Financial Services: Agreements for collection services, banking services, credit card, spend/procurement analysis, and other types of financial services. These agreements may require review and approval from the University Office of Cash Management.</p>	<p>Financial Services</p>
<p>Healthcare Agreements: Agreements for healthcare services, with healthcare professionals, or organizations.</p>	<p>Patient/Clinical Care: An agreement whereby university provides clinical services or patient care services such as surgery, OB/GYN, psychiatry, radiation oncology, annual flu shots, and on-call services at another healthcare facility.</p> <p>Provider/Participation Enrollment Agreement: Agreements to enable healthcare providers to bill Medicare/Medicaid eligible health care clinical services with the state(s).</p>

Illinois Contract System - UIUC User Guide

Type	Subtype
	<p>Administrative: An agreement whereby a university health services college oversees another healthcare facility's operations. Medical directorship is a typical example.</p> <p>Managed Care Agreement: Contracts between healthcare provider networks and the university whereby the healthcare provider network or University offers or directly administers one or more health benefit products or plans to the enrollees of such products or plans for the other.</p> <p>Healthcare Consulting: An agreement whereby university faculty or staff provides expertise for non-patient services - provide information, assess and recommend policies and procedures, review medical records, etc.</p> <p>Reimbursements: Repayment of expenses incurred by healthcare providers.</p> <p>Purchase of Care: Agreements wherein university purchases the services of professional providers for patient care that are not available at university medical facilities.</p> <p>Veterinary Services: Veterinary services provided by the university to individuals or outside entities.</p>
<p>Intergovernmental Agreements: Agreements between the university system and another state agency or governmental entity.</p>	<p>Federal: Agreements between the university system and one or more federal agencies or entities.</p> <p>State: Agreements between the university system and one or more state agencies or entities.</p> <p>County: Agreements between the university system and one or more county agencies or entities.</p> <p>City: Agreements between the university system and one or more city agencies or entities.</p>
<p>General Services (Purchasing): For Purchasing use only. Services not otherwise classified as professional and artistic.</p>	<p>General Services (Purchasing)</p>
<p>Memberships and Subscriptions: Agreements related to membership and subscription purchases and sales.</p>	<p>Memberships and Subscriptions</p>
<p>Miscellaneous</p>	<p>Miscellaneous</p>
<p>Museum: Agreements related to museum activities, including loan and commission of artifacts and/or artwork, and curation activities.</p>	<p>Commissioning: University engages the services or products of an artisan for the purpose of displaying his/her works.</p> <p>Loan Agreement: Artifacts or works of art are loaned to or from the university for temporary display.</p>

Illinois Contract System - UIUC User Guide

Type	Subtype
	<p>Permanent Donation: Art and artifacts donated to a museum for permanent exhibit or conservation.</p> <p>Deacquisition: Art and artifacts relinquished by university to reduce inventory.</p>
<p>Nondisclosure Agreements (Non-Research): Agreements outlining the treatment of each party's confidential or proprietary information. Also commonly referred to as confidentiality agreements.</p>	<p>General: Must be executed prior to university conducting business with another entity. University may be providing or receiving services.</p> <p>Procurement: Must be executed prior to the university purchasing goods or services from another entity.</p>
<p>Professional & Artistic Services (Purchasing): For Purchasing contracts only. Agreements used when a non-university system employee will provide a specific service, or services, and will receive payment for their work. Professional & artistic services (P&A) are primarily intellectual in nature.</p>	<p>Accounting: Purchase of accountant, auditor, billing, or collection services.</p> <p>Law: Purchase of administrative law judge, arbitrator, attorney, court reporting, hearing officer, law clerk, and other legal services. Agreements for legal services must be processed by the Office of University Counsel.</p> <p>Artistic: Purchase of art and historical objects repair, maintenance and restoration; commissions for paintings or other artwork that would not be included in graphic design; entertainment limited to performances requiring extraordinary skill and expertise, including guest speakers and presenters; commissions for music composition; and sculptor services.</p> <p>Management/Administrative Services: Purchase of actuary, banking, bookstore operations, consultant-management, economist, executive search, investment services, and training/development services.</p> <p>Clinical Psychology: Purchase of psychiatrist or psychotherapist services.</p> <p>Marketing/Media Services: Purchase of audio/video production, photography requiring a high degree of professional and artistic expertise (can include photography for public relations and marketing projects), editor, graphic designer, media consultant, and public relations services.</p> <p>Information Technology: Purchase of information technology consulting, technical support, network design, programmer, and systems analyst services.</p> <p>Medicine: Purchase of audiologist, chiropractor, coder/coding, dietician, temporary medical staffing, medical transcriber, nurse, occupational therapist, optometrist, orthopedist, pathologist, pharmacist, physical therapist, physician, podiatrist, radiologist, surgeon, and veterinarian services.</p>

Illinois Contract System - UIUC User Guide

Type	Subtype
	<p>Dentistry: Purchase of dentist, orthodontist, and periodontist services.</p> <p>Science/Research: Purchase of archaeologist, biologist, botanist, chemist, educator, entomologist, historian, and other science/research services.</p> <p>Environment/Land: Purchase of cartographer, environmental analyst, environmental engineer, geologist, hydrologist, land appraiser, land use planner, meteorologist, and naturalist services.</p>
<p>Publishing: Agreements most commonly used by the University of Illinois Press in order to secure publishing rights to someone else's written work. The University signs these agreements only when the university is the entity securing publishing rights.</p>	<p>Author/Editor: One or more individuals provide original content or editing services, which fall outside the scope of professional & artistic services.</p> <p>Journal: University provides content and/or management/oversight.</p> <p>Sales: Agreements with non-university system sales representatives, who receive a commission based on sales volume.</p>
<p>Real Estate: Agreements related to the use, lease, or license of property. The property may be owned by the university system or by another party from whom the university system is leasing or licensing.</p>	<p>Lease: The owner of real estate property allows use of the property for a specified period of time (term) for specific periodic payments (rent), and other terms and conditions.</p> <p>Easement: Grants the right to use real property of another for a specific purpose. The easement is itself a real property interest, but legal title to the underlying land is retained by the original owner for all other purposes.</p> <p>License: A private grant of right to use real property for a particular purpose, or to perform a specific act.</p>
<p>Relocation: Agreements related to the relocation of university system employees.</p>	<p>Relocation</p>
<p>Revenue Generating Services (Non-Healthcare): Agreements related to services provided by the university system for an outside entity and for which payment is received by the university system. Does not include revenue generated by gifts, grants, or sponsorships.</p>	<p>Archival Services: Archival services provided by university libraries to outside entities.</p> <p>Conference Services: Conference coordination or conference management services provided by the university system to outside entities.</p> <p>Consulting Services: Various types of consulting services provided by the university system to outside entities.</p> <p>Data Collection Services: Data collection services provided by the university system to an outside entity, resulting in the return of factual data for interpretation by the client and not related to any research project or activity.</p>

Type	Subtype
	<p>Evaluation Services: Evaluation services provided by the university system to an outside entity when those services are not related to any research project or activity.</p> <p>Geographical Information System Services: Geographical Information Systems (GIS) services provided by the university system to an outside entity. This could include the development, presentation, and/or collection of GIS data, tools, maps, etc.</p> <p>Geological Services: Geological services provided by the university system to an outside entity.</p> <p>IT Services: Information Technology (IT) services provided by the university system to an outside entity.</p> <p>Laboratory Services (Excluding Research & Technical Testing): Laboratory services provided by the university system to an outside entity when those services are allowable under university policy and are not related to any research or technical testing project or activity.</p> <p>Marketing/Media Services: Marketing and media services provided by the university system to an outside entity.</p> <p>Other</p> <p>Student Field Experience: Services provided by university system students to an outside entity, resulting in revenue paid to the university system when such activity is allowable under university policy. Not a student placement (see under: Affiliation Agreements).</p> <p>Survey Creation/Development Services: Creation of surveys and development of survey tools by the university system for use by an outside entity and when no data collection, analysis, or other such services are provided.</p> <p>Test Administration Services: Test administration and proctoring services provided by university system testing centers for an outside entity.</p> <p>Translation Services: Translation services provided by the university system to an outside entity.</p>
<p>Software: Agreements related to software owned by an outside entity and being purchased, licensed, or otherwise used by the university system. (Agreements related to university-owned software, or other forms of intellectual property must be processed through the Office of Technology Management.)</p>	<p>License: Software licensed by the university system.</p> <p>Maintenance: Purchase of maintenance for university system-owned or licensed software.</p> <p>Trial/Loan Agreement: Loan or trial of software to the university system.</p>

Illinois Contract System - UIUC User Guide

Type	Subtype
<p>Sponsorship Agreements: Agreements related to sponsorships, not otherwise defined as gifts. (Gifts must be processed through the University of Illinois Foundation.)</p>	<p>Sponsorship Agreements</p>
<p>Trade Agreements: Agreements related to the reciprocal trade of one party's goods or services for another's having an equal value. No cash is exchanged.</p>	<p>Trade Agreements</p>
<p>Transportation: Agreements related to the procurement of chartered transportation services.</p>	<p>Charter: Procurement of charter services.</p>
<p>Training & Course Development Services: Agreements related to the development, delivery, and/or management of courses, workshops, seminars, or other programs. These may be credit or non-credit offerings.</p>	<p>Academic Credit Course: Courses developed and/or provided by the university system to an outside entity for academic credit.</p> <p>Non-Credit Course: Courses developed and/or provided by the university system to an outside entity where no academic credit is offered.</p> <p>Other</p> <p>Program Development: Program development services provided by the university system to an outside entity.</p> <p>Seminar/Workshop: Seminars and workshops conducted, facilitated, and/or hosted by the university system for an outside entity.</p>
<p>Utilities: Agreements related to university system-provided utility services, such as water, gas, steam, etc.</p>	<p>Utilities</p>

Appendix B: Checklist Descriptions

Name	Use
Template 10K or more No Changes	Routing pre-approved University templates in amounts of \$10,000 or more when no changes have been made to the template.
Template Under 10K No Changes (Unit Head Signature)	Routing pre-approved University templates in amounts of \$9,999 or less that allow Comptroller signature to be applied by a unit head when no changes have been made to the template. Note that this permission has been granted for all unit heads on the Revenue-Generating Services Agreement less than \$5,000 and the Services Agreement less than \$5,000. From time to time, the AVP for Business and Finance may also expressly grant this authority to a unit head for a custom pre-approved template.
Template Under 10K No Changes (OBFS Signature)	Routing pre-approved University templates in amounts of \$9,999 or less that require Comptroller signature to be applied by an OBFS signature delegate when no changes have been made to the template.
Template with Changes	Routing University templates in any amount when changes to the template have been requested. Unit heads may not execute agreements less than \$10,000 where changes have been made to the standard, pre-approved template.
Custom or Other Party Contract (Non-Purchasing)	Routing Contracts that are not procurement-related and are not on a University-approved template (for example, another party's Contract). These Contracts will be routed to the AVP Office for review and approval.
Custom or Other Party Contract (Purchasing)	Routing Contracts that are procurement-related and are not on a University-approved template (for example, another party's Contract). These Contracts will be routed to the Purchasing Division for review and execution.

UIUC/UIS only

Name	Use
UIS/UIUC Contract Request	Routing any Contract Request, whether payable or receivable. If procurement-related, route to the appropriate Purchasing role (1_purchasing_reviewer). If non-procurement related, route to the appropriate AVP Office role (1_avp_office).

Illinois Contract System - UIUC User Guide

UIC Only

Name	Use
UIC Contract Request	Requesting revenue or purchasing contract.
UIC Revenue Template	Routing pre-approved template (with or without changes).
UIC No Funds	Routing no fund contracts.

OBFS Only

Name	Use
University Signing First	Routing contracts that must be signed by the university system first (usually another party's contract).

Appendix C: Prodagio Role Descriptions

University

Role	Definition
Requestor	User in a unit or college who initiates contracts and contract requests. This role is chart-org specific (e.g. 1_100_requestor, 2_100_requestor, 4_100_requestor). It primarily governs access and permissions and may have multiple users assigned to it.
Business Manager	User in a unit or college, who probably oversees and reviews contracts and contract requests initiated by requestors. They may also initiate some contracts and contract requests themselves, serve as a proxy for their direct supervisor, and/or cover for other staff in their unit when necessary. This role is chart-org specific (e.g. 1_100_business_manager, 2_100_business_manager, 4_100_business_manager).
Unit Head	Department head or higher. Some units do not have department heads; some small colleges do not have departments. When there are only college-level offices for administration, the associate dean or dean may be assigned to the unit head role. This role is chart-org specific (e.g. 1_100_unit_head, 2_100_unit_head, 4_100_unit_head). It is assigned to only one user per unit. Checklist tasks are typically assigned to the role, rather than to the user by name.
Dean/Director	Administrator authorized to approve contracts \$25,000 and above for their unit or college. This role is chart-org specific (e.g. 1_100_dean_director, 2_100_dean_director, 4_100_dean_director). Checklist tasks are typically assigned to the role, rather than to the user by name.
VP/Chancellor/Vice Chancellor	Administrator authorized to approve contracts \$150,000 and above for their university. This role is chart specific (e.g. 1_chancellor_vice chancellor, 2_chancellor_vice chancellor, 4_chancellor_vice chancellor). It is assigned to only a few users per university. Checklist tasks are typically assigned to the to the appropriate user by name, rather than to the role

System Office

Role	Definition
Requestor	User in a System Office unit who initiates contracts and contract requests. This role is chart-org specific (e.g. 9_100_requestor). It primarily governs access and may have multiple users assigned to it.
Business Manager	User in a unit or college, who probably oversees and reviews contracts and contract requests initiated by requestors. They may also initiate some contracts and contract requests themselves, serve as a proxy for their direct supervisor, and/or cover for other staff in their unit when necessary. This role is chart-org specific (e.g. 9_100_business_manager).
Director/Executive Director	Administrator authorized to approve contracts up to \$149,999 for their System Office unit. This role is chart-org specific (e.g. 9_100_director_executive_director). It is assigned to only one or two users per unit. Checklist tasks are typically assigned to the role, rather than to the users by name.
AVP	Assistant vice president in the System Office. These administrators are authorized to approve contracts \$150,000 and above for the System Office units reporting to them. This role is chart-org specific (i.e. 9_100_AVP). Checklist tasks are typically assigned to the role, rather than to the users by name.

Purchasing Office

Role	Definition
Purchasing Reviewer	Supervisor in the purchasing division who receives contracts and contract requests submitted for purchasing review and assigns the contracts to a specific buyer. This role is chart specific (e.g. 1_purchasing_reviewer, 2_purchasing_reviewer, 4_purchasing_reviewer). It is assigned to only one or two users in each university purchasing division. Checklist tasks are assigned to the role, rather than to users by name.
Purchasing Buyer	Staff member who handles the development, review, negotiation, and routing of procurement contracts and contract requests. This role is chart specific (e.g. 1_purchasing_buyer, 2_purchasing_buyer, 4_purchasing_buyer). It primarily governs access and has multiple users assigned to it for each university. Purchasing Reviewers assign checklist tasks to users in this role by name.
Purchasing Director	Administrator in the purchasing division who is authorized to execute procurement contracts on behalf of the university comptroller. This role is chart specific (e.g. 1_purchasing_director, 2_purchasing_director, 4_purchasing_director). It is typically assigned to only one or two authorized individuals on each university. Checklist tasks are assigned to a user by name, rather than the role.

UIC Only

Role	Definition
OBDS Reviewer	User in the Office of Business Development Services who receives UIC revenue-generating contracts and contract requests submitted for review and assigns the contracts to a specific OBDS coordinator. This role is chart specific (e.g. 2_obds_reviewer). It is assigned to only one or two users in OBDS. Checklist tasks are assigned to the role, rather than to users by name.
OBDS Coordinator	User in the Office of Business Development Services who handles the development, review, negotiation, and routing of UIC revenue-generating contracts and contract requests. This role is chart specific (e.g. 2_obds_coordinator). It primarily governs access and has multiple users assigned to it. OBDS reviewers assign checklist tasks to users in this role by name.
OBDS Reviewer	User in the Office of Business Development Services who receives UIC revenue-generating contracts and contract requests submitted for review and assigns the contracts to a specific OBDS Coordinator. This role is chart specific (e.g. 2_obds_reviewer). It is assigned to only one or two users in OBDS. Checklist tasks are assigned to the role, rather than to users by name.

UIUC Only

Role	Definition
AVP Office Reviewer	The AVP Office role is a user in the Urbana Office of the Assistant Vice President who handles the development, review, negotiation, and approval of UIUC non-procurement contracts and contract requests. These users are also authorized to execute these types of contracts on behalf of the University Comptroller. This role is chart specific (e.g. 1_avp_office_reviewer). Checklist tasks are assigned to the role, rather than to users by name.
AVP Office	User in the Urbana Office of the Assistant Vice President who handles the development, review, negotiation, and approval of UIUC non-procurement contracts and contract requests. These users are also authorized to execute these types of contracts on behalf of the university comptroller. This role is chart specific (e.g. 1_avp_office). It primarily governs access and has multiple users assigned to it. Checklist tasks are assigned to users in this role by name.

Appendix D: Metadata Descriptions

Field Name	Definition	Notes
Document Title	By default, the name of the document you have imported or the template you used to create your contract.	This field can be overwritten. Use the data entry standard established by your unit, if applicable.
Document Number	Contract number	This number is assigned automatically by the system. It is the official university contract number.
Status	Current status of contract.	Do not change manually. Contract status is updated automatically as checklist tasks are completed.
Contract Category	Identifies a contract as payable, receivable, or zero dollar.	
Contract Type	Identifies the purpose of or activity associated with the contract.	See Contract Type/Subtype Definitions Job Aid.
Contract Subtype	Further specifies the purpose of or activity associated with the contract.	See Contract Type/Subtype Definitions Job Aid.
Document Source	Identifies the source and/or authoring organization of the contract.	<p>Custom: Contract drafted from scratch by a university buyer or coordinator.</p> <p>Other Party: Contract drafted/provided by the other party (not university).</p> <p>Template No Changes: Standard, pre-approved university system template that was accepted and signed by the other party with no substantive changes.</p> <p>Template with Changes: Standard, pre-approved university system template that was accepted and signed by the other party, but only after substantive changes were made.</p>

Illinois Contract System - UIUC User Guide

Field Name	Definition	Notes
Brief Contract Description	A brief description of the contract.	This field is searchable and reportable, so users should consider what kind of information they might use when searching for this contract later and what kind of information you would like to appear in reports.
Chart	Identifies the university of the unit creating the contract	
Organization Code	Three-digit organization code. Identifies the college or unit creating the contract.	
Amount	Identifies the total or maximum amount of the contract	Do not use dollar signs or commas.
Additional Payment Details	Optional field where additional details related to payment or amount can be specified, if needed.	e.g. \$250 per unit with a maximum total payment not to exceed \$19,999.
Start Date	Contract start date	Must be formatted as a first three letters of the month (no period), the date followed by a comma and the four-digit year. Example: <i>Jan 1, 2012</i> TIP: If you type "1/1/12" or "January 1, 2012" or some other format into the field, then click on the calendar icon and select the date, iCS will auto-format your entry for you.
End Date	Contract end date	Must be formatted as a first three letters of the month (no period), the date followed by a comma and the four-digit year. Example: <i>Jan 1, 2020</i> TIP: If you type "1/1/12" or "January 1, 2012," or another format into the field, then click on the calendar icon and select the date, iCS will auto-format your entry for you.
Number Of Renewal Options	The number of potential renewal periods allowed by the terms of the contract, regardless of the length of each period	

Illinois Contract System - UIUC User Guide

Field Name	Definition	Notes
University Insurance Certificate Issued	Identifies contracts that require the university system to provide proof of insurance coverage	This field will be populated by the contract processing office
OBFS Office	Identifies the contract processing unit through which the contract will be routed	Capital - for Capital Programs use only OBDS – for revenue generating contracts at Chicago Real Estate - for Real Estate Services use only UIC Purchasing – for purchasing contracts Chicago UIS Business Service – for revenue generating contracts at Springfield UIS Purchasing – for purchasing contracts at Springfield UIUC AVP – for revenue generating contracts at Urbana-Champaign UIUC Purchasing – for purchasing contracts at Urbana-Champaign
Health Care Related	Identifies contracts that are related to healthcare activities	
HIPAA	Identifies contracts with HIPAA implications	This field will be populated by the contract processing office
Contracting Party Name	Name of contracting party, vendor, or client	
Contracting Party DBA	“Doing Business As” - Contracting Party’s Secondary name	
Contracting Party Contact Name	Name of the primary contact person for the other party	
Contracting Party Phone	Phone number for the other party and/or their primary contact person	
Contracting Party Email	Email address for the other party and/or their primary contact person	
Contracting Party Address 1	The other party’s mailing address	
Contracting Party Address 2		

Illinois Contract System - UIUC User Guide

Field Name	Definition	Notes
Contracting Party City	The other party's city	
Contracting Party State\Province	The other party's state or province	For international addresses, the selection list can be overwritten by typing text into the field
Contracting Party Postal Code	The other party's zip or postal code	
Contracting Party Country	The other party's country	Defaults to USA, but can be changed
Additional Contracting Party Names	Other contracting party contacts	
Unit Name	Name of university unit initiating the contract	
Unit Contact	Name of the primary contact person for the unit	
Unit Phone	Phone number for the unit and/or their primary contact person	
Unit Email	Email address for the unit and/or their primary contact person	
Unit City, State, Zip	The unit's city, state and zip code	
Method of Procurement	The method by which the contracted good or service was procured	For purchasing use only
Bulletin Procurement Number	Number from the Illinois Procurement Bulletin	For purchasing use only
Subcontractor Included	Select: Yes/No	For purchasing use only
FTE Commitment	The amount of time the service provider will be allocate providing the services to Client	For contracts related to Healthcare Services only
Professional Liability Insurance Provider	Other Party, university. Who will provide the liability (medical malpractice) insurance	For contracts related to Healthcare Services only
Indicate if Professional Liability Limits other than	University System statute limits our liability to \$1M/\$3M. If the other party requires more, enter the min/max amounts.	For contracts related to Healthcare Services only
Standard University SIP coverage	Select: Yes/No	For contracts related to Healthcare Services only

Illinois Contract System - UIUC User Guide

Field Name	Definition	Notes
Provide details of Administrative Services	Scope of administrative services: Administrative Services (setting up policies, interviewing staff, etc.) are not covered by the university system insurance program. If the department will provide this type of services, the services need to be documented within this field.	For contracts related to Healthcare Services only
Will services involve university students, residents or fellows? If yes, explain	Yes/No Explanation of student/resident/fellows involvement (a continuation from admin services)	For contracts related to Healthcare Services only
Type of Compensation	Selection of compensation methods	For contracts related to Healthcare Services only
Capital Project Number		For University Office of Capital Programs use only
Encumbrance #		For University Office of Capital Programs use only
Subcontractor Name 1	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 2	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 3	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 4	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 5	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 6	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 7	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 8	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 9	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 10	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only

Illinois Contract System - UIUC User Guide

Field Name	Definition	Notes
Subcontractor Name 11	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 12	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 13	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 14	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 15	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 16	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 17	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 18	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 19	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Subcontractor Name 20	Business or first and last name of contact subcontractor	For University Office of Capital Programs use only
Date Received by UCRO		For BOT and UCRO use only
Execution Date		For BOT and UCRO use only
Fiscal Year		For BOT and UCRO use only
Filing Required By IL Comptroller		For BOT and UCRO use only
Filed with IL Comptroller		For BOT and UCRO use only
Date Filed with IL Comptroller		For BOT and UCRO use only
Comptroller Filing Tracking Number		For BOT and UCRO use only
Comptroller Filing Shipping Number		For BOT and UCRO use only
Secretary of State Filing - For UCRO use only		For BOT and UCRO use only
Filing Required by IL Sec Of State		For BOT and UCRO use only
Filed With IL Sec Of State		For BOT and UCRO use only
Date Filed With IL Sec Of State		For BOT and UCRO use only

Illinois Contract System - UIUC User Guide

Field Name	Definition	Notes
Sec Of State Filing Tracking Number		For BOT and UCRO use only
Sec Of State Filing Shipping Number		For BOT and UCRO use only
Storage - For UCRO use only		For BOT and UCRO use only
Box Barcode Number (Storage)		For BOT and UCRO use only

Appendix E: OBFS Resources

iCS Resources

- For additional information about the Illinois Contract System (ICS), including job aids, training and reference documents, and who to contact for help, please visit the iCS Resource Page.
- <http://www.obfs.uillinois.edu/ics-resources/>

OBFS News Center

If you wish to receive announcements from the OBFS functional unit sponsoring the content of this course, follow these steps:

1. Go to the OBFS home page at <http://www.obfs.uillinois.edu>.
2. Click the **News Center** tab at the top of the OBFS homepage.
3. Click the **Sign up for email updates!** link under the OBFS News Service box at the left of the page.
4. Fill out the form and be sure to select the following topic: Assistant Vice President Business and Finance