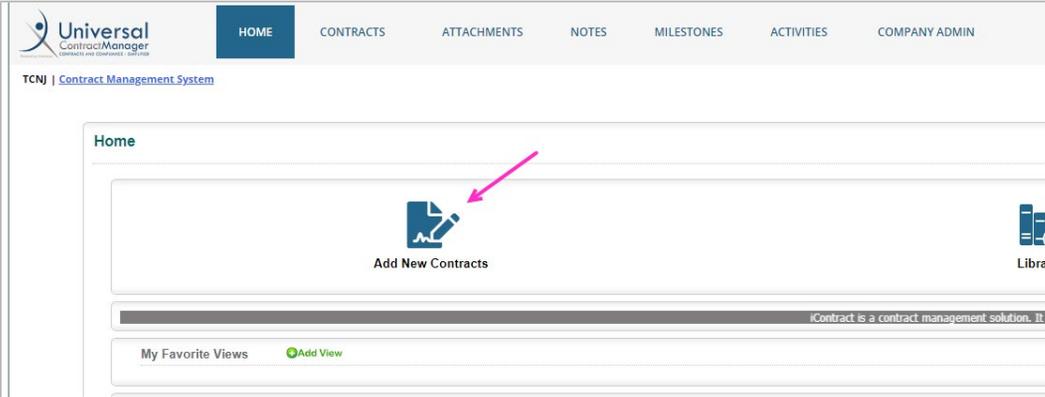
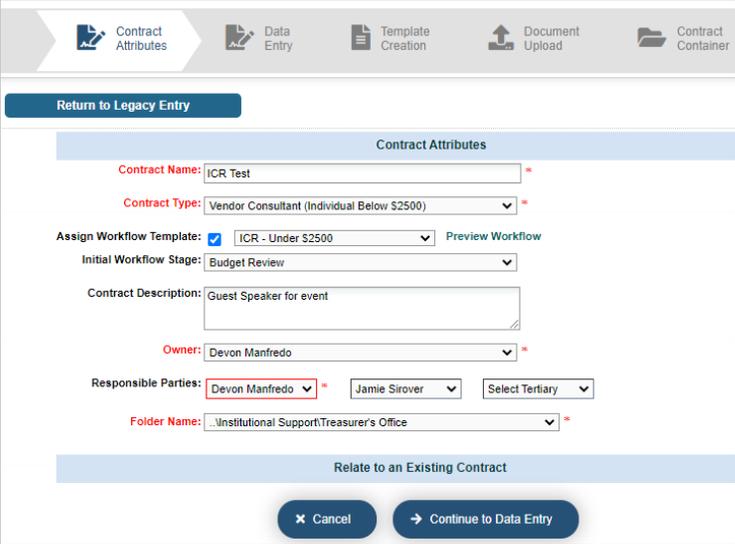


Process Name: Entering a Contract

STEP	DETAIL
1	<p>Sign in to iContracts through <a href="https://ucm.icontracts.com/">https://ucm.icontracts.com/</a></p> <p>Click <b>Company Single Sign-On</b></p> <p><b>Username:</b> TCNJ login</p> <p><b>Password:</b> your password</p>
2	<p>Click <b>Add a New Contract</b></p> 
3	<p>Enter the Contract Attributes in the available fields</p> <ul style="list-style-type: none"> <li>- Contract Type</li> <li>- Workflow (takes the place of Routing Form)</li> <li>- Contract Description</li> <li>- Responsible Parties: Budget Manager, Secondary &amp; Tertiary Approver</li> <li>- Contract Folder</li> </ul> 

4

Choose your **Contract Type**

**Note:** not all contract types will be available to all users

5

Choose your required Workflow (this replaces the routing form)

**Note:** this may autopopulate depending on the Contract type. You can choose another workflow.

To make sure the Workflow is correct, click **Preview Workflow**

Workflow Template Name: ICR - Under \$2500

Stage	Individual Users
Budget Review	Primary
HR Review	Catherine Colina Silva
Ready For Signatures	Owner
Active	
Expired	
Terminated	

Close

6

Assign the Workflow Approvers

**Note:** Only the people in the Workflow will approve the contract. If you do not choose a workflow with Secondary approval, but assign a Secondary person, they will only have Viewing access.

Stage	Individual Users
Budget Review	Primary
HR Review	Catherine Colina Silva
Ready For Signatures	Owner
Active	

7

Click **Continue to Date Entry**

8

Enter the Terms of the Contract

Enter Contract Terms & Vendor Information to populate our TCNJ contract.

**Add Fields**

**Contract Information (Field Group)**

**Department:** Hold Ctrl to Select Multiple Items or [CLICK HERE](#)

3601 - Finance Business Services  
 3602 - Student Accounts  
 3603 - Payroll  
 3610 - New Jersey Risk Management

**Contract Amount:** 1500

**W-9 Uploaded:** Yes

**Certificate of Insurance Uploaded:** No

**TCNJ Reference:** Waiver Under Threshold

**Bid Number:**

**Renewal-Termination Information:**

9

**ICR Short Form (Field Group)**

**Independent Contractor Name:** John Smith

**Address Line 1:** 123 Main St

**Address Line 2:**

**City:** Ewing

**State & Country:** NJ, USA

**Zip:** 08628

**Independent Contractor Work Phone:**

**Independent Contractor - Fee for Service:** 1500

**Independent Contractor - Is total payment including travel \$2500 or more?:** No

**Independent Contractor - One time, nonrecurring engagement?:** Yes

**Independent Contractor - Current or Former \*past twelve months\* TCNJ Employee?:** No

**Independent Contractor - Employed by a New Jersey State Agency or Entity?:** No

**Independent Contractor - Related to a TCNJ Employee?:** No

**Independent Contractor - US Citizen or Lawful Permanent Resident?:** Yes

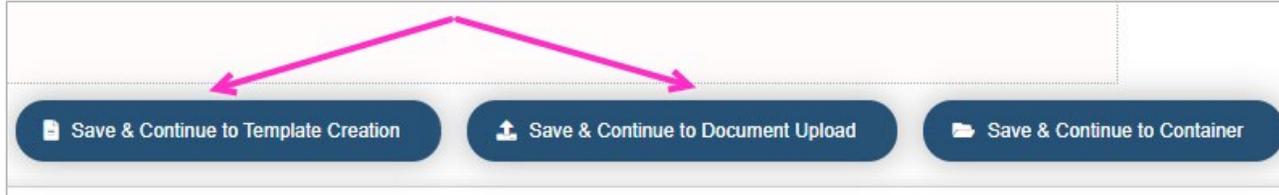
Save & Continue to Template Creation | Save & Continue to Document Upload | Save & Continue to Container

10

Click –

**Save and Continue to Template Creation:** to populate contract terms into an unsigned TCNJ Contract

**Save and Continue to Document Upload:** to upload signed contracts or Vendor Created Contracts & supporting docs (ex. W9)



**\*\*Note:** **Save and Continue to Container** will push your contract into Approval Workflow.

11

**Save and Continue to Template Creation**

- Choose the Contract Template that supports your contract type
- Click **Click to Fill Fields** for that template

**Note:** not all templates will be available to all users

Favorite	FillAndDownload	Name	Description	ContractType	OriginalFileName	Type	DocumentCategory	UpdatedDate	CreatedDate	Cr
♥	<a href="#">Click to fill Fields</a>	Affiliation Agreement - Psychology Student Training			HSS Affiliation Agree...	Library	Nursing	07/14/2022	07/12/2022	An
♥	<a href="#">Click to fill Fields</a>	Affiliation Agreement - School of Education			School of Ed Template...	Library	School of Education	07/14/2022	06/30/2022	An
♥	<a href="#">Click to fill Fields</a>	Affiliation Agreement - School of Nursing			School of Nursing 2022...	Library	Nursing	07/14/2022	02/23/2022	An
♥	<a href="#">Click to fill Fields</a>	Architect Contract			Architect Contract Tem...	Library	Planning & Construction	12/08/2021	10/05/2021	IC
♥	<a href="#">Click to fill Fields</a>	Articulation Agreement - School of Education	Articulation Agreement		School of Articulation A...	Library	School of Education	07/11/2022	07/11/2022	An
♥	<a href="#">Click to fill Fields</a>	Construction Contract			Construction Contract T...	Library	Planning & Construction	02/10/2022	10/05/2021	IC
♥	<a href="#">Click to fill Fields</a>	Consultant / Professional Services Contract			Professional Services C...	Library	Contract Documents	07/21/2022	10/11/2021	IC
♥	<a href="#">Click to fill Fields</a>	Engineering Contract			Engineer Contract Tem...	Library	Planning & Construction	12/08/2021	10/05/2021	IC
♥	<a href="#">Click to fill Fields</a>	Independent Contract (Below \$2500)			ICR Short Form.docx	Library	Contract Documents	01/20/2022	10/04/2021	IC
♥	<a href="#">Click to fill Fields</a>	Independent Contract (Over \$2500)			ICR Long Form.docx	Library	Contract Documents	01/20/2022	10/04/2021	IC
♥	<a href="#">Click to fill Fields</a>	Landscaping Contract			Landscap Architect Co...	Library	Planning & Construction	12/08/2021	10/05/2021	IC
♥	<a href="#">Click to fill Fields</a>	Master Billing			Master Billing.docx	Library	Center for Global Engage...	02/17/2022	10/05/2021	IC
♥	<a href="#">Click to fill Fields</a>	Master Planning Consultant			Master Plan Contract Te...	Library	Planning & Construction	12/08/2021	10/05/2021	IC
♥	<a href="#">Click to fill Fields</a>	MoA Faculty Staff Exchange Template			MoA Faculty Staff Exch...	Library	Center for Global Engage...	06/07/2022	10/05/2021	IC
♥	<a href="#">Click to fill Fields</a>	MoA for School of Record Agreement			MOA for School of Reco...	Library	Center for Global Engage...	05/18/2022	10/04/2021	IC
♥	<a href="#">Click to fill Fields</a>	MoA for Study Center Template			MOA for Study Center T...	Library	Center for Global Engage...	02/23/2022	10/04/2021	IC
♥	<a href="#">Click to fill Fields</a>	MoA Student Exchange			MOA Student Exchange...	Library	Center for Global Engage...	02/23/2022	10/04/2021	IC
♥	<a href="#">Click to fill Fields</a>	MOU - General			General MOU Template...	Library	Center for Global Engage...	02/17/2022	10/05/2021	IC
♥	<a href="#">Click to fill Fields</a>	Performance Agreement			Non-Public Speaker Per...	Library	Contract Documents	09/20/2022	10/05/2021	IC
♥	<a href="#">Click to fill Fields</a>	Sole Source Justification			Sole Source Justificatio...	Library	Contract Documents	06/29/2022	10/05/2021	IC

- Enter Template information

**A Contract Template : Independent Contract (Below \$2500)**

Template Name: Independent Contract (Below \$2500)

Description:

Contract Name: ICR Test (1000510)

Document Title: ICR Test

Document Category: Contract Documents

Document State: Active

Primary Document?:

Document Description: Guest Speaker for event

Document Folder: Documents

---

**Enter Term Values**

Term Type: Fixed

Start Date: 10/31/2022

Duration: 1 Day(s)

End Date: 10/31/2022

Notify By:

Canceled On Date:

12

- And verify Contract Terms  
 - Click **Enter Fields into Template & Preview**

**Enter Contract values**

Select All:  Save/Update Data in Container

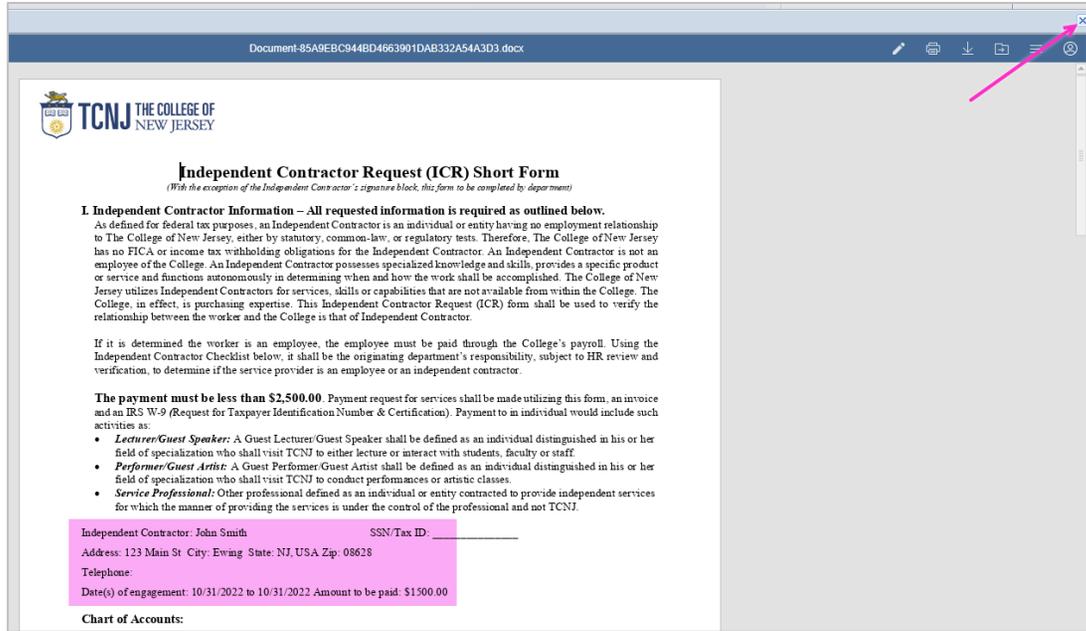
Hold Ctrl to Select Multiple Items or [CLICK HERE](#)

Department	3500 - Office of the President	<input checked="" type="checkbox"/>
	3501 - Board of Trustees	<input type="checkbox"/>
	3600 - Office of the Treasurer	<input type="checkbox"/>
	3601 - Finance Business Servi	<input type="checkbox"/>
Independent Contractor Name	John Smith	<input checked="" type="checkbox"/>
Address Line 1	123 Main St	<input checked="" type="checkbox"/>
Address Line 2		<input checked="" type="checkbox"/>
City	Ewing	<input checked="" type="checkbox"/>
State & Country	NJ, USA	<input checked="" type="checkbox"/>
Zip	08628	<input checked="" type="checkbox"/>
Independent Contractor Work Phone		<input checked="" type="checkbox"/>
Independent Contractor - Fee for Service	1500.00	<input checked="" type="checkbox"/>
Independent Contractor - Is total payment including travel \$2500 or more?	No	<input checked="" type="checkbox"/>
Independent Contractor - One time, nonrecurring engagement?	Yes	<input checked="" type="checkbox"/>
Independent Contractor - Current or Former "past twelve months" TCNJ Employee?	No	<input checked="" type="checkbox"/>
Independent Contractor - Employed by a New Jersey State Agency or Entity?	No	<input checked="" type="checkbox"/>
Independent Contractor - Related to a TCNJ Employee?	No	<input checked="" type="checkbox"/>
Independent Contractor - US Citizen or Lawful Permanent Resident?	Yes	<input checked="" type="checkbox"/>

Create Document  Upload Data

**Enter Fields Into Template & Preview**

Your created contract will pop-up with the terms populated.  
Click the **X** in the upper right.

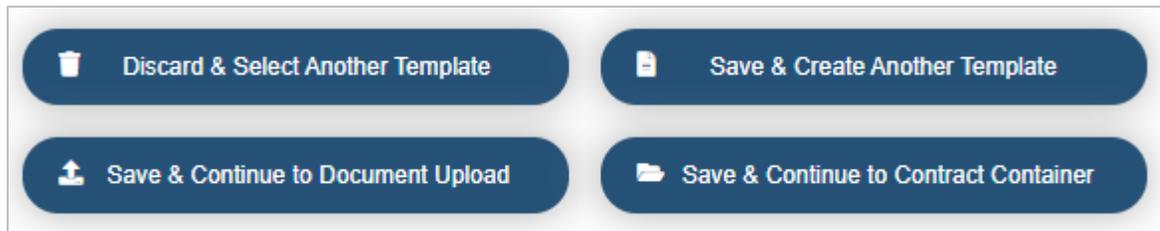


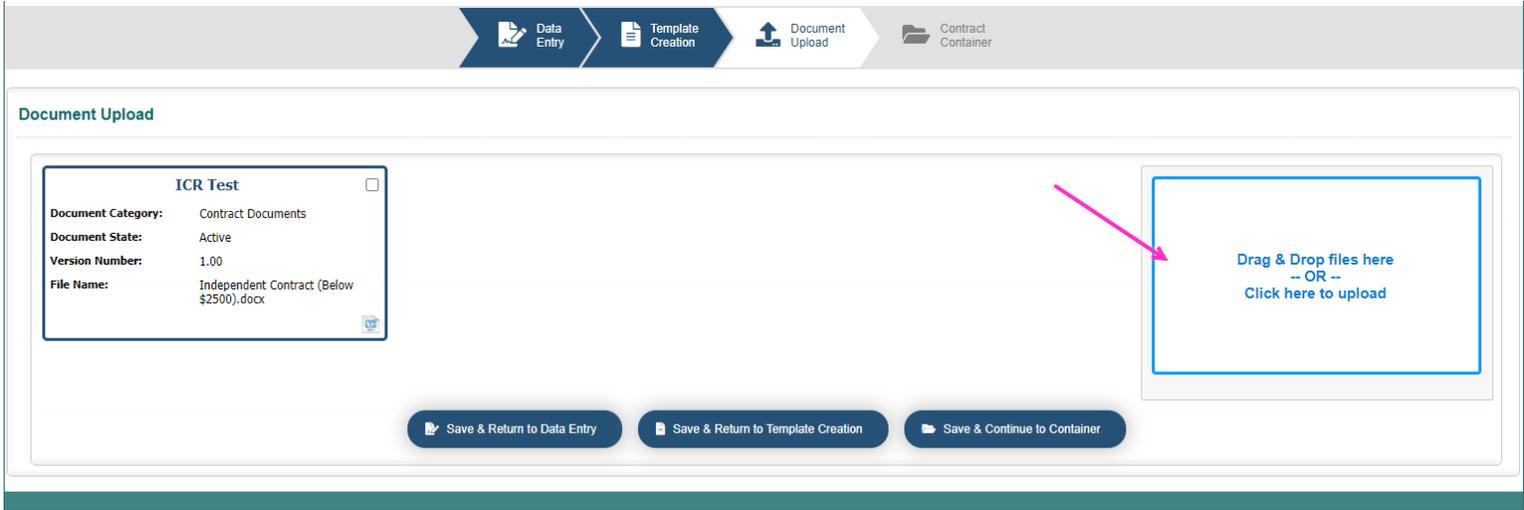
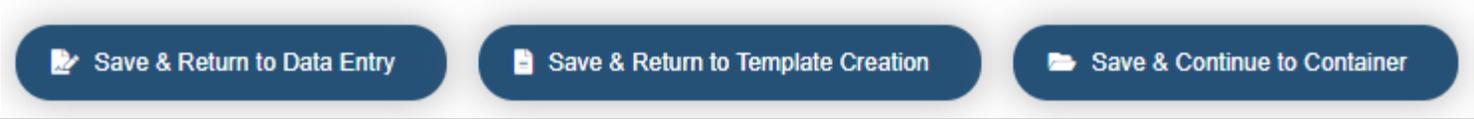
**Note:** You will be able to edit the document once you move to the Container.

Choose the action that best supports your Contract.

- If you need to upload a W9, click Continue to Document Upload
- If you are ready to push the documents to Approval Workflow, Continue to Contract Container

13



<p>14</p>	<p><b>Save &amp; Continue to Document Upload</b></p> <p>Drag and Drop all supporting documents, signed contracts or Vendor Created contracts here.</p> 
<p>15</p>	<p>Choose the action that best supports your contract.</p> 

## Contract Container

The Contract is now in Approval Workflow (routing form)

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## Workflow Stages

## Edit the Document

Use this to add COA/POETAF or other information to the created contract  
Click **Edit in Cloud**. This will create a 2<sup>nd</sup> version of the Document. Mark it as Primary.

17

Attachment(s)											
Type											
Edit	Delete	eSign	eSignStatus	AttachmentType	FileType	DocumentName	AttachmentState	CurrentFile	Description	AddedOn	AddedBy
		<input type="checkbox"/>		Primary	docx	ICR Test	Active	Independent Contract (Below \$2500).docx	Guest Speaker for event	10/12/2022 01:54:37 PM	Devon M

Enter the information on the Contract  
 Click the **X** in the upper right to Save & Close

Independent Contractor: John Smith SSN/Tax ID: \_\_\_\_\_  
 Address: 123 Main St. City: Ewing State: NJ, USA Zip: 08628  
 Telephone: \_\_\_\_\_  
 Date(s) of engagement: 10/31/2022 to 10/31/2022 Amount to be paid: \$1,500.00

**Chart of Accounts:**

Entity	Acct	Fund	Org	Category	Program	Activity	Location	Amount
TCNJ	614000	100000	3601	325	0000	0000	0000	1500

\*\*Only use the POETAF columns below if the expense relates to a Grant or Project\*\*

Project	Org	Exp Type	Task	Award	Fund Source	Amount

File: Independent Contract (Below \$2500) .docx

Document Title: ICR Test w/COAs

Version: 1.10

Document Category: Contract Documents

Document State: Active

Document Description: Guest Speaker for event

Make this the Primary Document

Save Cancel

Edit	Delete	eSign	eSignStatus	AttachmentType	FileType	DocumentName	AttachmentState	VersionNumber	CurrentFile	Description	AddedOn	AddedBy
		<input type="checkbox"/>		Support...	docx	<a href="#">ICR Test</a>	Active	1.00	<a href="#">Independent Contract (Below \$2500).docx</a>	Guest Speaker for event	10/12/2022 01:54:37 PM	Devon Ma
		<input type="checkbox"/>		Primary	docx	<a href="#">ICR Test w/COAs</a>	Active	1.10	<a href="#">Independent Contract (Below \$2500).docx</a>	Guest Speaker for event	10/12/2022 02:40:46 PM	Devon Ma

Page 1 of 1

Displaying records 1 - 2 of 2

## Routing Contract for Signatures

Once the Contract has gone through Workflow, it is ready for signatures.



Use Adobe sign to send it through for signatures

- Check the box next to the document
- Click Adobe Sign & sign in with your TCNJ SSO
- Click Upload

18

Summary | Documents | Notes | Related Contract | Collaboration | Milestones | Activities | History

Document(s) Views  
 View All Documents (2)  
 Add New View

Primary Document

test\_contract\_-\_Anup  
 Version: 1.00 / Document Category: / Document State:  
 Related To:  
 Current File: test\_contract\_-\_Anup.pdf  
 Document Description:  
 Added On: 10/12/2022 3:53:34 PM / Added By: Devon Manfredo  
 Updated On: 10/12/2022 3:53:34 PM / Updated By: Devon Manfredo

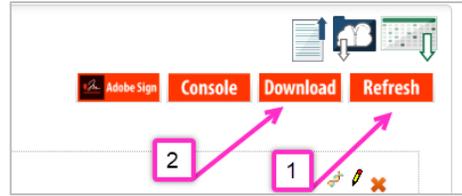
Attachment(s)												
Attachment(s) Type												
Edit	Delete	eSign	eSignStatus	AttachmentType	FileType	DocumentName	AttachmentState	VersionNumber	CurrentFile	Description	AddedOn	AddedBy
		<input checked="" type="checkbox"/>		Support...	docx	Test - Anup	Active	1.00	Consultant / Professional Services Contract.docx		10/12/2022 03:20:54 PM	Devon Ma
		<input type="checkbox"/>		Primary	pdf	test_contract_-_Anup		1.00	test_contract_-_Anup.pdf		10/12/2022 03:53:34 PM	Devon Ma

Page 1 of 1 | Displaying records 1 - 2 of 2

- Insert the email address of those that must sign the contract
- Insert the signature and date fields in your document via Adobe Sign
- Click Send

### Downloading the Signed Contract

- Click **Refresh** to access the Download button
- Click **Download**



- Click the document name of the signed Contract

Attachments												
Attachment(s) Type												
Edit	Delete	eSign	eSignStatus	AttachmentType	FileType	DocumentName	AttachmentState	VersionNumber	CurrentFile	Description	AddedOn	AddedBy
		<input checked="" type="checkbox"/>	completed	Support...	pdf	<a href="#">Test - Anup - Signed</a>	Active	1.05	<a href="#">Consultant / Professional Services Contract - Signed.pdf</a>		10/13/2022 02:14:04 PM	Devon Ma
		<input type="checkbox"/>		Primary	pdf	<a href="#">test contract - Anup</a>		1.00	<a href="#">test contract - Anup.pdf</a>		10/12/2022 03:53:34 PM	Devon Ma

Page 1 of 1

Displaying records 1 - 2 of 2

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- Click the document file to download it to your computer

Summary | **2 Documents** | 3 Notes | Related Contract | Collaboration | 1 Milestones | Activities | History

**Supporting Document**

**Test - Anup - Signed**

Version: 1.05 / Document Category: Contract Documents / Document State: Active

Related To:

Current File: [Consultant / Professional Services Contract - Signed.pdf](#)

Document Description:

Added On: 10/13/2022 2:14:04 PM / Added By: Devon Manfredo

Updated On: 10/13/2022 2:14:04 PM / Updated By: Devon Manfredo

[Promote to Primary Document](#)