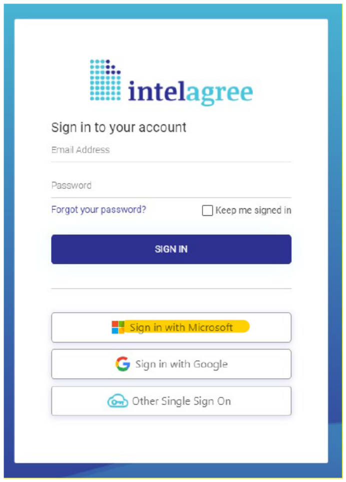
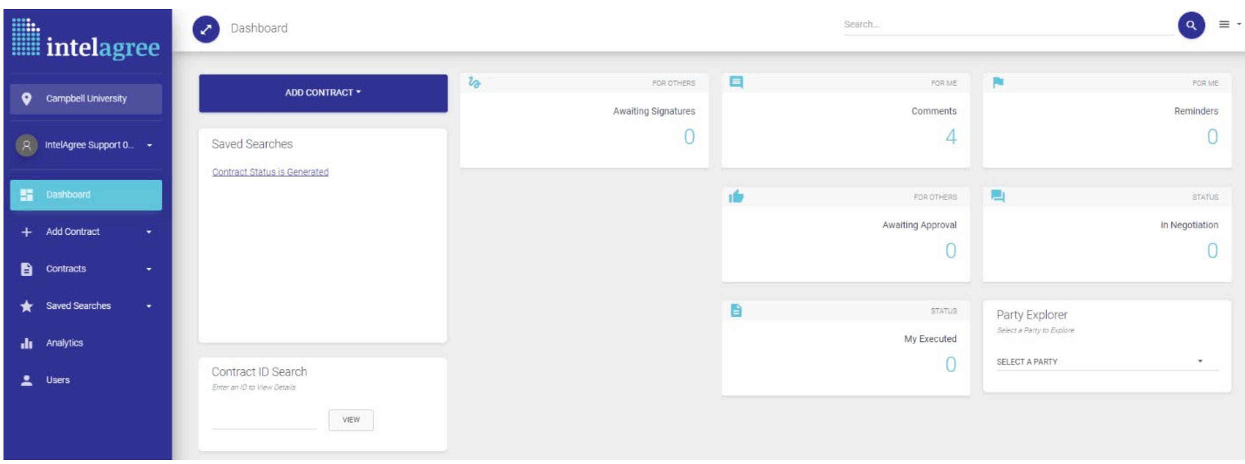
Getting Started in IntelAgree for the General User:

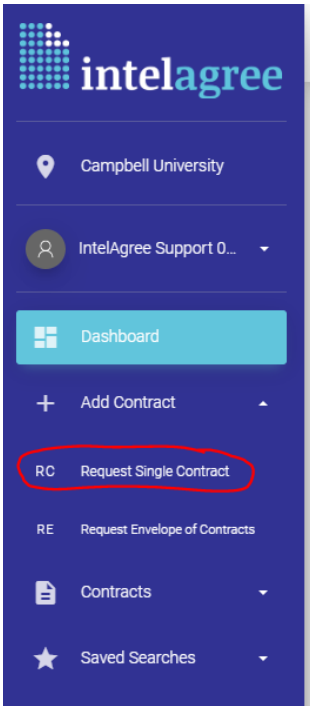
1. Go to https://prod.intelagree.com/

2. Click on the "Sign in with Microsoft " button, and then sign in using your CU credentials.

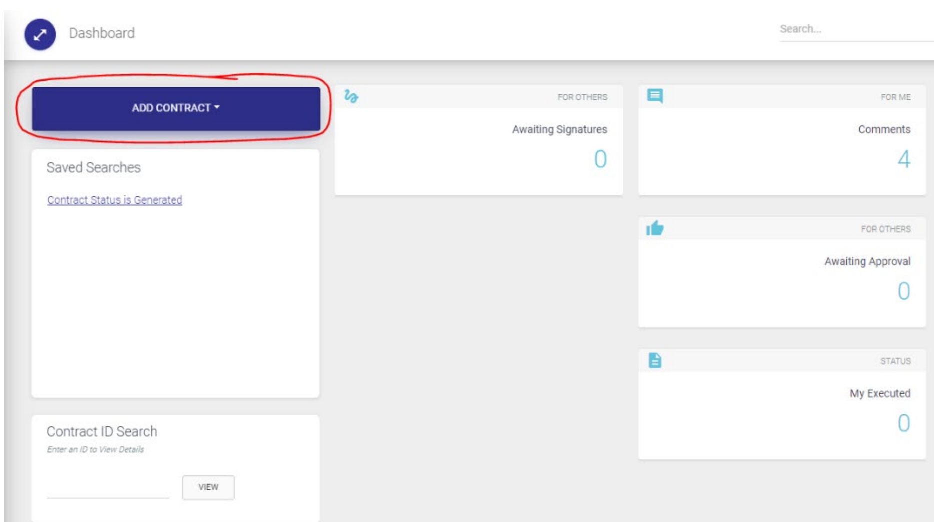


3. You should see a dashboard with multiple panes. The blue menu box on the left of the screen contains several options, but the one you may use most is "Request Single Contract" under the “+ Add Contract” button.





You can also use the large dark blue "Add Contract" button located on your dashboard:



4. When you click on the "Request Single Contract" button, you should see a "Contract Request Wizard" that contains several fields for data entry.

Select “Template” if you are asking Counsel’s Office to generate a contract using an approved template.

You will be asked to select a “Contract Type”. The Contract Type available to you depends upon your organization but could be any of the following:

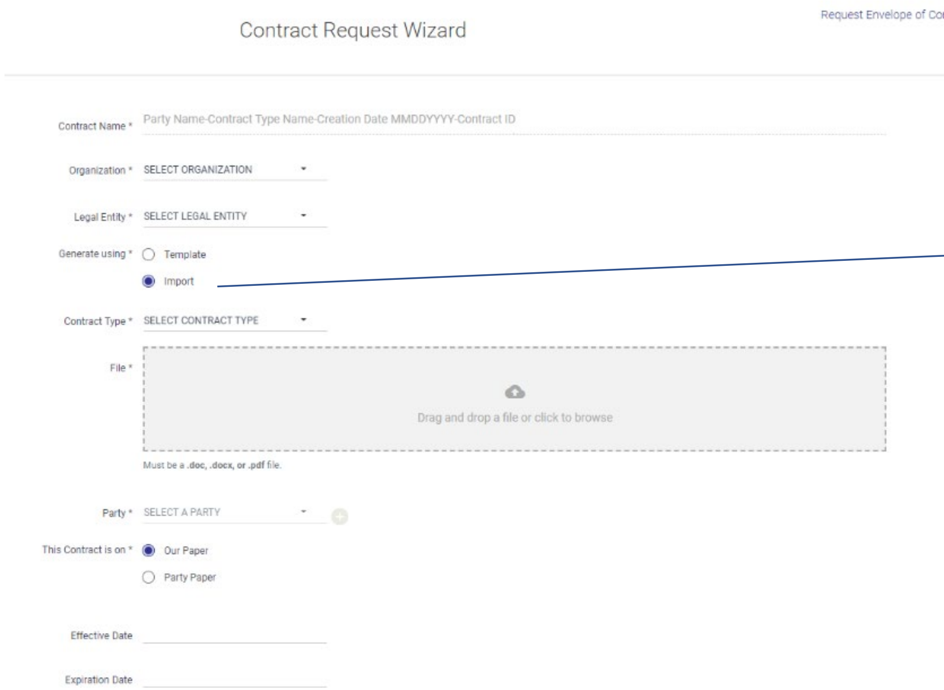
Academic Affairs Employment (for use only by designated staff in the offices of the Provost, Dean of CUSOM, and Dean of CPHS)
Affiliation Agreement (for use only by CUSOM and CPHS for affiliations with institutions that host medical, pharmacy and other health sciences students for residencies, internships and other practical training)
Assumptions of Risk/Liability Waiver (for use when students are traveling off campus for a university-sponsored event or for camp participants)
Athletic Contest (for use only by Athletics Department)
Athletics Employment (for use only by Athletics Department)
Business Associate (for use primarily by CUSOM and CPHS with a contractor to maintain confidentiality of protected health information in compliance with the Health Insurance Portability and Accountability Act of 1996 [HIPAA])
Charitable Gift (for use primarily by Institutional Advancement and/or President’s Office to document charitable gifts to the university)
Construction (for construction or major renovation of a facility)

Consulting/Personal Service (for use when an individual, corporation or limited liability company is engaged to provide expert advice or services in a specialized area for a limited period of time not to exceed one year)
Equipment Lease (for acquisition of equipment over a limited period of time, typically 1-5 years)
Experiential Learning (for agreements with entities that host CU non-health sciences students for internships, externships, practicums, etc.)
Facility Use (for use only by Director, Conferencing and Event Services)
Finance (for use only by the Office of General Counsel and the department of Business & Finance)
General Service (for use when the university engages with another party to provide goods and services greater in value than $50,000; or contracts involving intellectual property rights, or purchase of IT equipment, services or software subscriptions; for contracts of less than $50,000 in value that do not involve intellectual property rights or IT equipment, services or software licenses, select "Vendor" as the contract type.)
Governance Documents (for use only by the Office of General Counsel, President's Office and Board of Trustees)
Grant (for transactions involving the university's receipt of funds from a State or federal agency, or private sponsor, for purposes of research or delivery of services by university personnel or third party sub-contractors)
Insurance (for use only by the OGC and the Business & Finance division)
Intellectual Property (for contracts involving copyrights, patents or trademarks)
IT Hardware/Software (for use in the purchase or lease of IT hardware or software, primarily by the IT department)
Non-Disclosure (NDA) (for use to maintain confidentiality of information disclosed by either the university or the potential contractor before the parties enter a formal agreement for purchase of goods or services, software licensing or other purposes)
Performer/Guest Speaker/Referee (for use only when the university is contracting with a performer or referee or offering an honorarium to a guest speaker)
Real Estate (for use only by the Office of General Counsel, President's Office and Board of Trustees for the purchase or sale of real property)
Settlement (for use only by the Office of General Counsel)
Vendor (for use when the university engages with another party to provide goods and services up to $50,000 in value; for contracts greater in value than $50,000, or for those involving intellectual property rights or purchase of IT equipment, services or software licenses, use the General Service contract type.)

Next, you will be asked to select a "Contract Template". Templates are contract forms pre-approved by the Office of General Counsel and may be used to create an agreement. The Office of General Counsel has prepared the following templates:

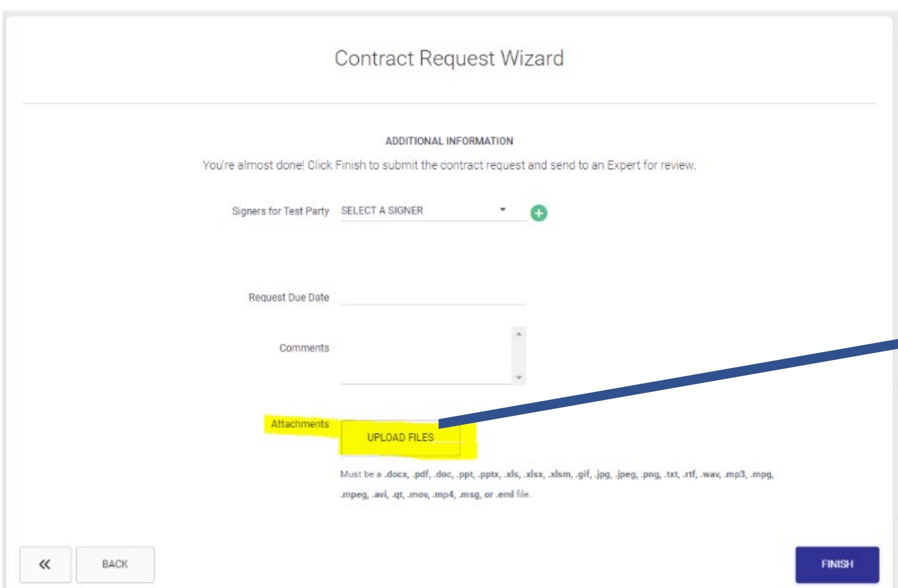
Contract Template	**For use with Contract Type:**
Academic Affairs Employment	Academic Affairs Employment
Affiliation Agreement	Affiliation Agreement
Coaching Contract (with the option to select): • P-Assistant Coach • P-Coaching Amendment • P-Head Coach	Athletics Employment
Athletics Game Contract	Athletic Contest
Camp Contract (with the option to select): • Internal • External	Facility Use
Charitable Gift Agreement	Charitable Gift
Consulting Services Agreement	Consulting/Personal Service
Facility Rental Agreement	Facility Use
Multiple Events	Performer/Guest Speaker/Referee
Performer/Guest Speaker/Referee/Official Agreement	Performer/Guest Speaker/Referee
Program Agreement – Criminal Justice	Experiential Learning
General Service Agreement	General Service
Vendor Contract	Vendor

Please contact the Office of General Counsel if you have questions about which contract type or contract template should be used in a given situation.



Select "Import" if you are uploading a contract on a form received from the other party.

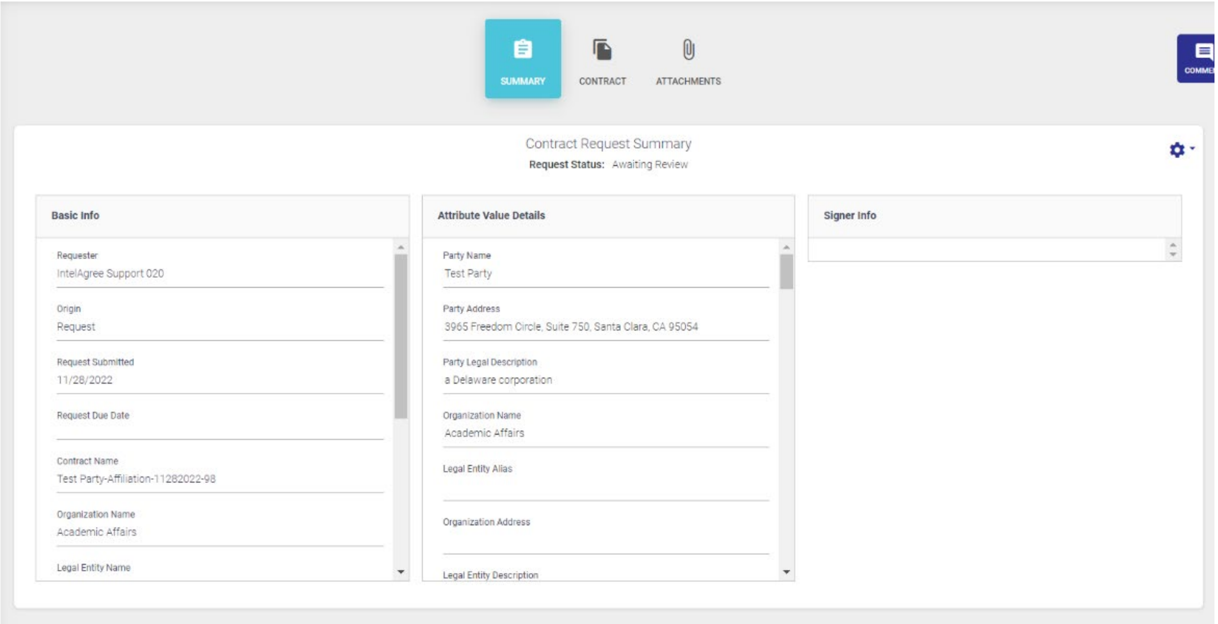
Continue following the prompts to request a contract.



You can upload attachments, such as certificates of insurance, W-9 forms, and purchase requisitions, here.

After you click "finish" your contract request will be submitted and you will be taken to a new screen summarizing your request. One of the contract request managers will be notified that a new request has been submitted and will be prompted to accept the request. You can edit the request by clicking on the "gear wheel" at the top right corner of the page and click "Edit Request." However, you can no longer edit your request once it's been accepted/generated by the Contract Request Manager

5. Once your request is submitted you will end at the following screen:



From this screen you can see a summary of your request.

A user from Campbell will review your request and route it for necessary approvals.

Communicating within IntelAgree:

You can communicate with other CU IntelAgree users via the “Comments” box in the upper right-hand corner of most pages in the contract record. Click on the blue “Comments” button, and type the “@” symbol in the text field. A list of IntelAgree users will populate a list above in alphabetical order by first name. Click on the name in the list to whom you wish to send a message. You can send the same message to multiple users by inserting their addresses from the list in the following format: [@Name] [space] [@Name] [space] [text of message]. When you click on “Send Comment,” IntelAgree will send an email to that person with your message and a link that allows them to join the discussion.

6. As the contract requestor, you will receive notifications about the contract regarding the different stages of the contract review process until the contract is executed. You will receive email notifications, but you can also edit your dashboard to help you.

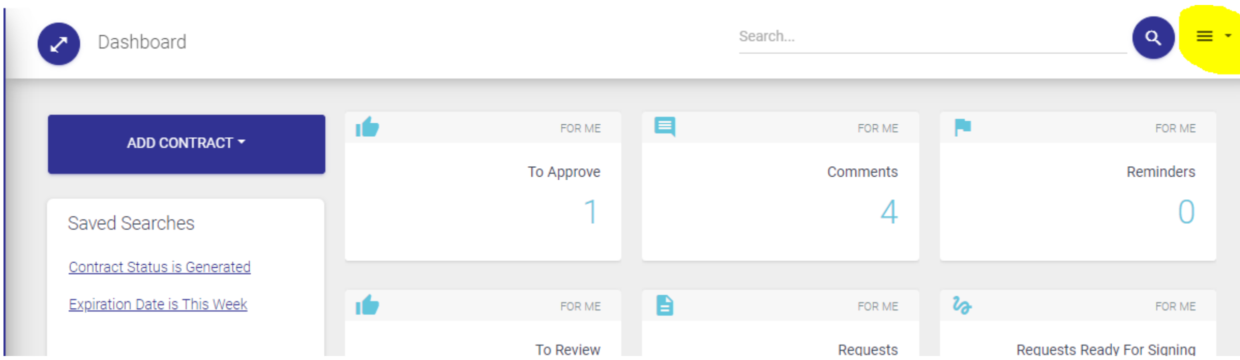
When the legal staff in OGC review a contract and propose changes, they will return a markup (redline) of the agreement to the departmental user who requested the contract. The requestor is responsible for communicating with the other party and requesting approval of the proposed changes in contract language. If the other party wholly accepts or rejects CU’s proposed changes, the departmental user should notify the attorney to whom the contract was assigned for review via the blue “Comments” box that appears on most pages in the contract record. Click on the Comments box. A dialog box will open and provide space at the bottom to type text. Type the “@” and the first name of the person to whom you want to send a message. The user’s name and email address should appear in the box above. Click on the full name and email address and the “@[full name]” will appear in the text box below. Move the cursor one space and type your message. When you click the Send button at the bottom of the dialog box, the recipient will receive an email notice from IntelAgree with the message you wrote in the Comments box.

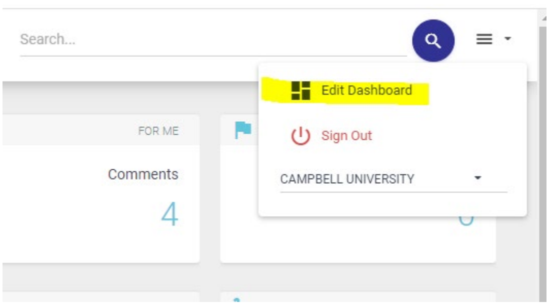
If the other party responds with any changes in the markup (or in a contract that we originated and sent to them for review), click on the Versions tab at the top of your Contract Details page, upload the markup as a new version and notify the appropriate attorney in OGC via the Comments box.

Editing the Dashboard:

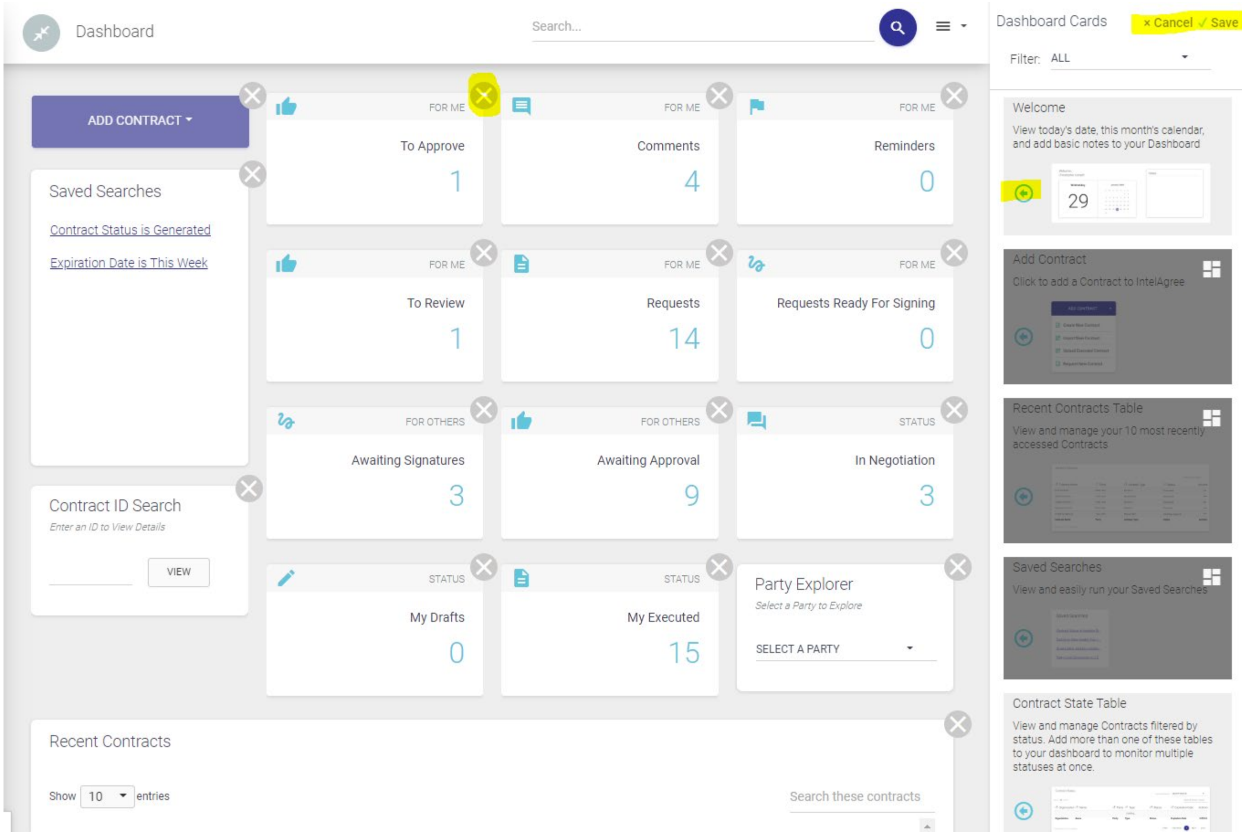
Your dashboard allows you to see all contracts that you have requested as they move through the procurement process, legal review and approval process.

1. Click on the logo at the top right corner of the dashboard and click “edit dashboard.”





2. From here you can edit what you have on your dashboard.
   - The column to the right contains all of the available dashboard tiles. Those in dark grey are on the dashboard and those in light grey are available but not on your dashboard yet.
   - To remove a tile from the dashboard click on the now available X at the top right corner of the tile
   - To add a tile to the dashboard click on the blue arrow
   - Before clicking “save” you can drag the tiles on your dashboard to re-order the desired tiles.
   - To remove a tile from the dashboard click on the now available X at the top right corner of the tile



Suggested Tiles for the General User:

- Add contract
- My contracts
- My contract requests
- Recent contracts
- Comments
- Contract ID Search
- In Negotiation
- My Executed

IntelAgree University is a useful tool for learning the system. This site includes courses and videos on a variety of topics:

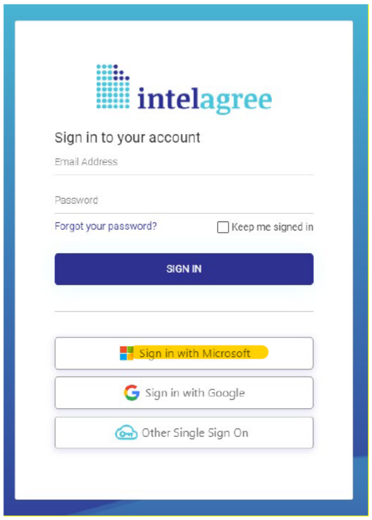
1. Please use the following URL to access IntelAgree University:
   a. https://intelagreeuniversity.com/?KeyName=cG4FI2TeiGwdEvM6vXVI
2. Once you've used the link, you can create an account
3. Once your account is created you will have access to a number of tutorial courses and videos that will help you use IntelAgree.
4. A few courses that might be helpful to different users include:

- Import Contract Request: https://vimeo.com/532367202
- Contract Requestor: https://vimeo.com/408614518
- Searching and Reporting: https://intelagreeuniversity.com/#/online-courses/f75cbb5e-c9fa-4803-a18e-0d121ef5d7e8
  - Structured Search: https://vimeo.com/505832500
  - Free Text Search: https://vimeo.com/521197643
  - Save a Search: https://vimeo.com/563368709
  - Scheduled Search: https://vimeo.com/560961691

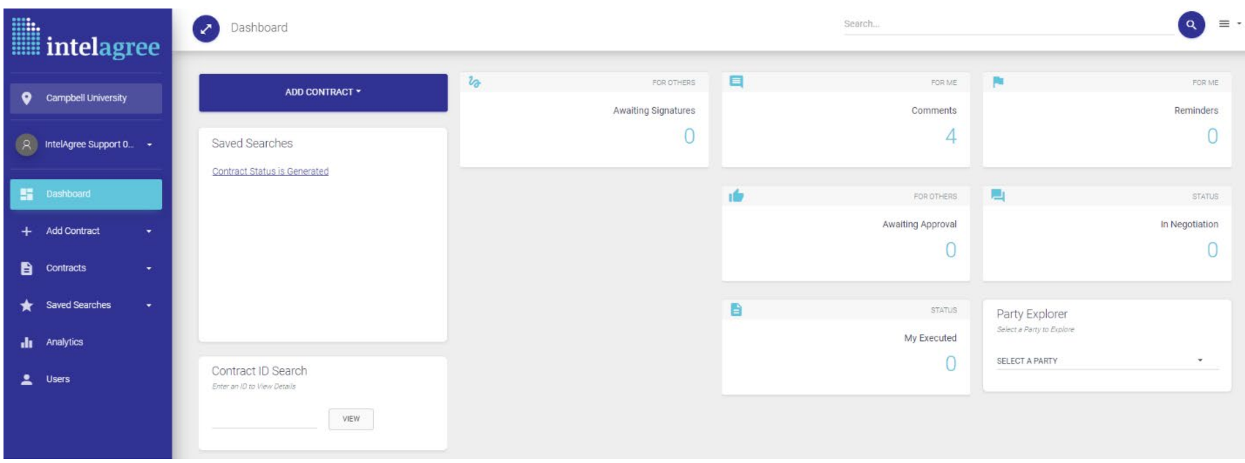
- Structured Search: https://vimeo.com/505832500
- Free Text Search: https://vimeo.com/521197643
- Save a Search: https://vimeo.com/563368709
- Scheduled Search: https://vimeo.com/560961691

Getting Started in IntelAgree for the Advanced Users:

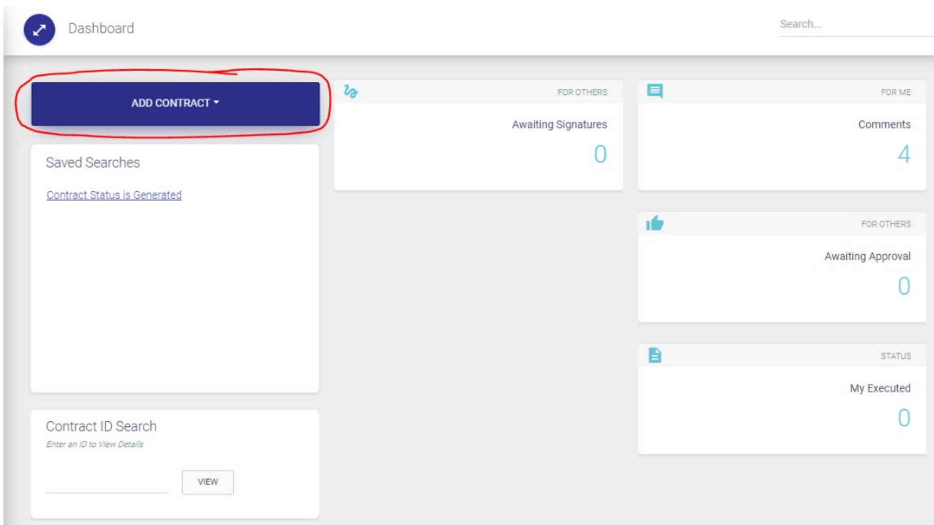
1. Go to https://prod.intelagree.com/ .
2. Click on the "Sign in with Microsoft" button, and then sign in using your CU credentials.



3. You should see a dashboard with multiple panes. The blue menu box on the left of the screen contains several options, but the one you may use most is the “+ Add Contract” button.



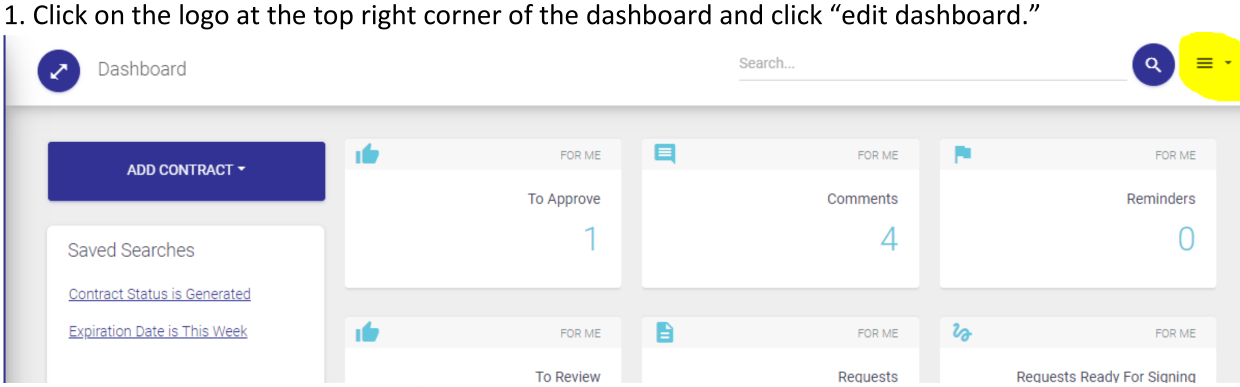
You can also use the large dark blue “Add Contract” button located on your dashboard:

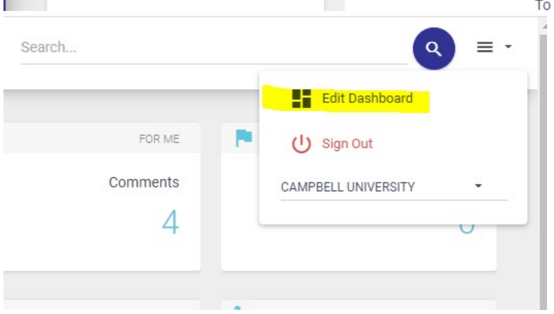


You can edit your dashboard to only contain the tiles that are most useful to you within IntelAgree.

Editing the Dashboard:

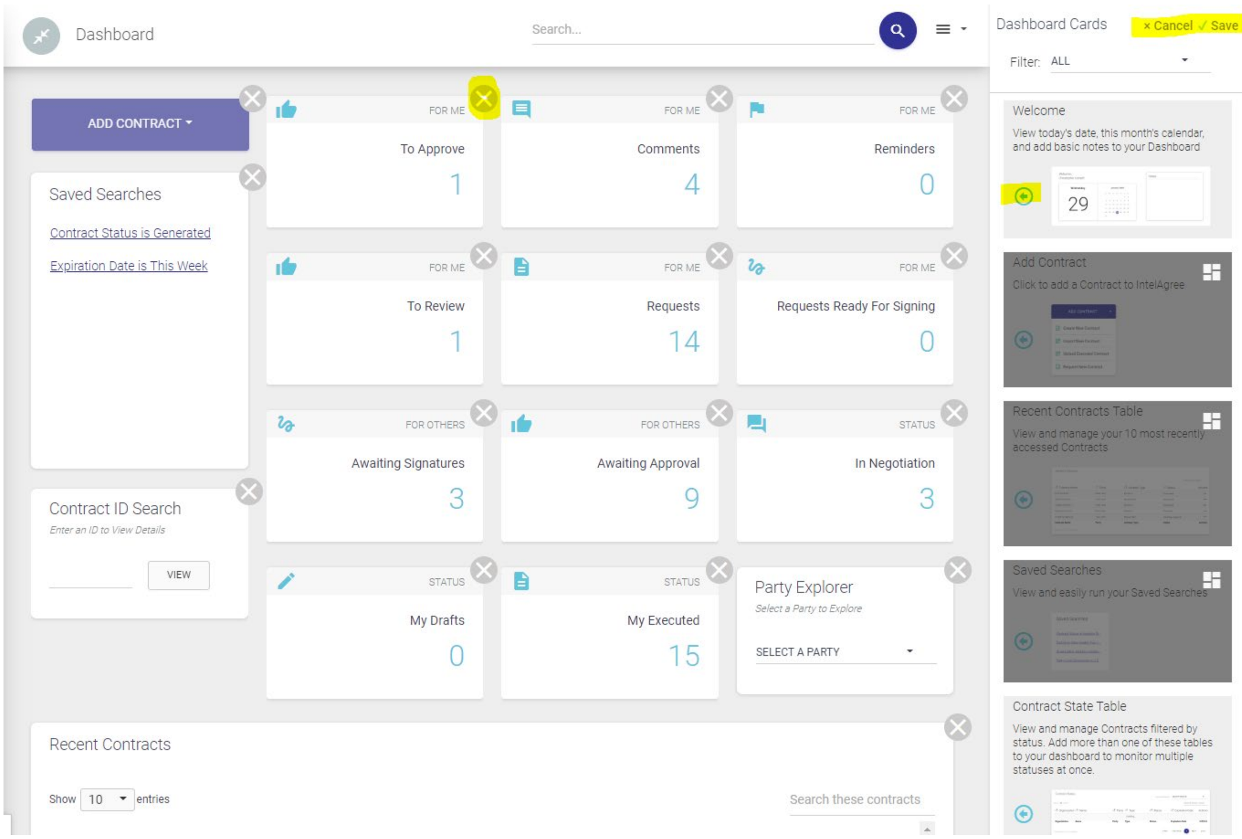
1. Click on the logo at the top right corner of the dashboard and click "edit dashboard."





2. From here you can edit what you have on your dashboard.
   - The column to the right contains all of the available dashboard tiles. Those in dark grey are on the dashboard and those in light grey are available but not on your dashboard yet.
   - To remove a tile from the dashboard click on the now available X at the top right corner of the tile.
   - To add a tile to the dashboard click on the blue arrow.
   - Before clicking "save" you can drag the tiles on your dashboard to re-order the desired tiles.

- To remove a tile from the dashboard click on the now available X at the top right corner of the tile.

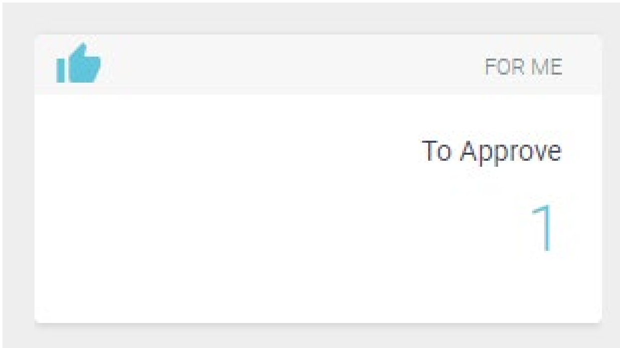


Suggested Tiles for the Advanced User:

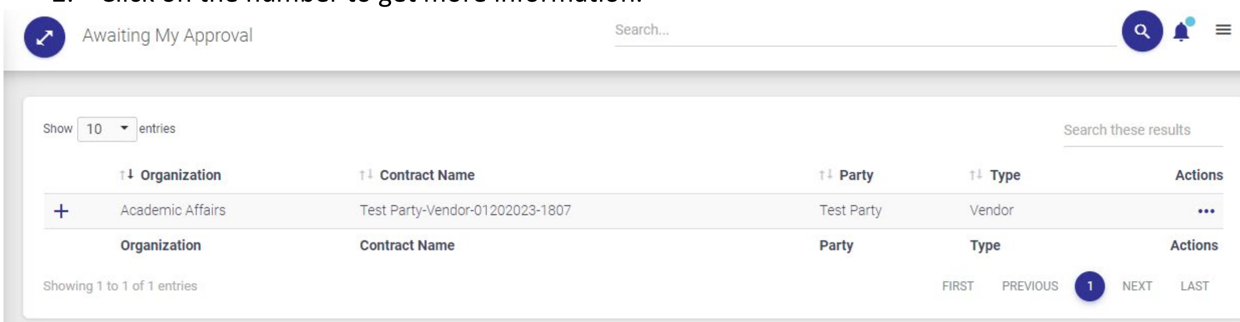
- Add contract
- My contracts
- My contract requests
- Recent contracts
- Comments
- Contract ID Search
- In Negotiation
- My Executed
- Saved Searches
- To Approve (for me)
- To Review (for me)
- Requests (for me)
- Contracts awaiting my signature table
- Contract quick search
- Party explorer

<u>Approvals:</u>

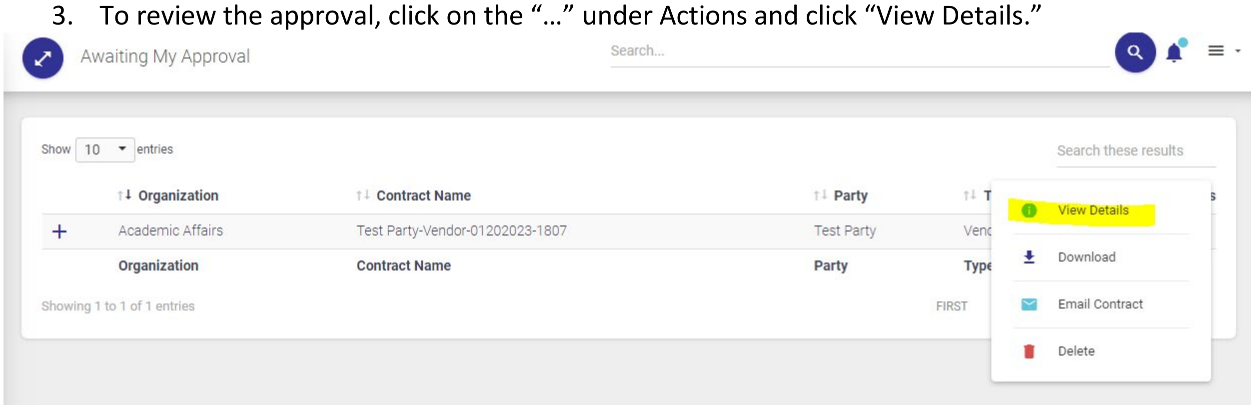
1. When you log into IntelAgree, if there is a contract awaiting your approval, you can see it on your “To Approve (for me)” tile.



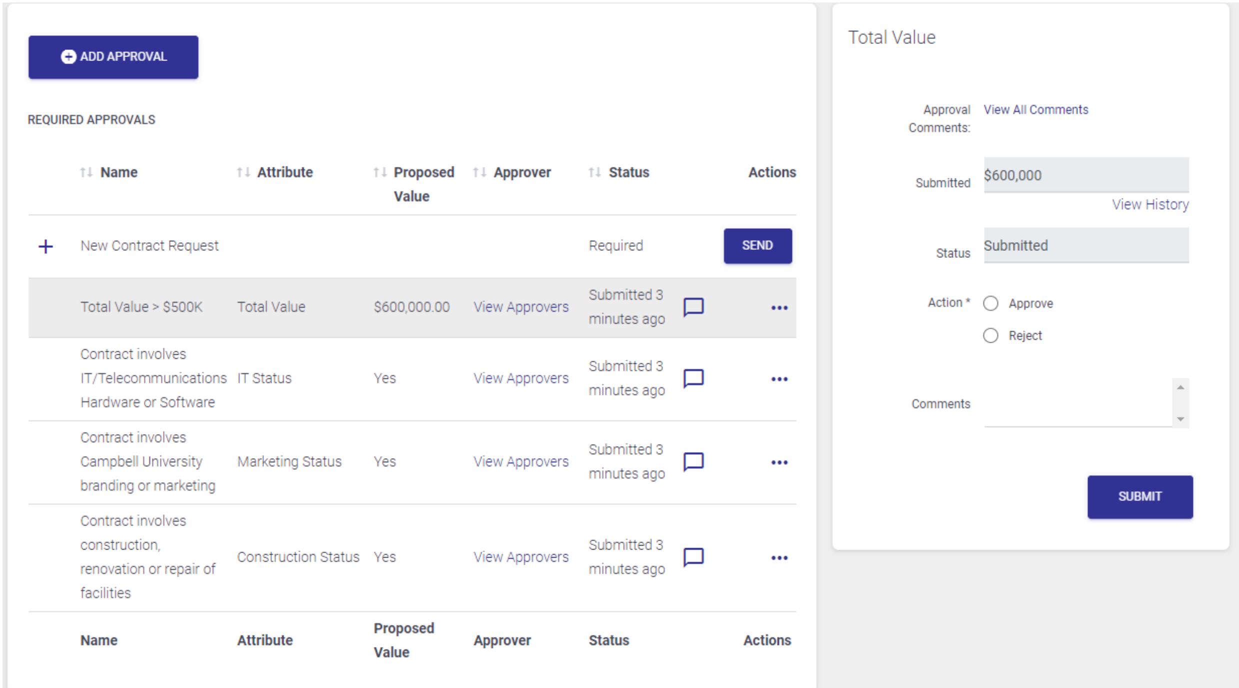
2. Click on the number to get more information.



3. To review the approval, click on the "…" under Actions and click "View Details."



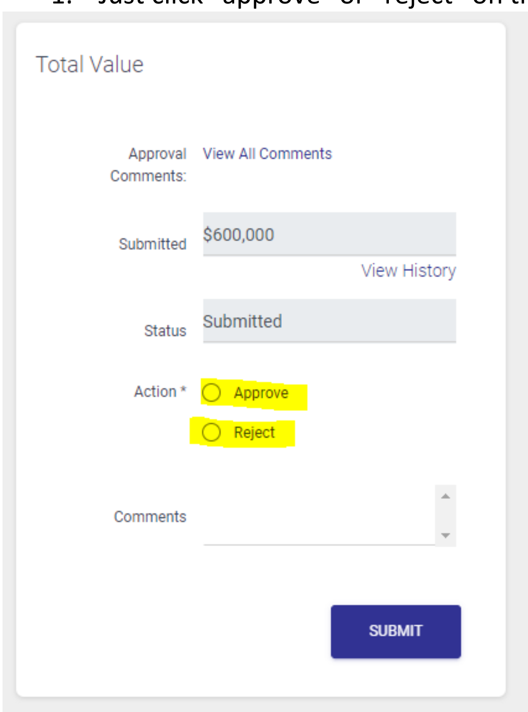
4. You will be taken to the approval page.



From here you can download the contract, approve the contract, etc.

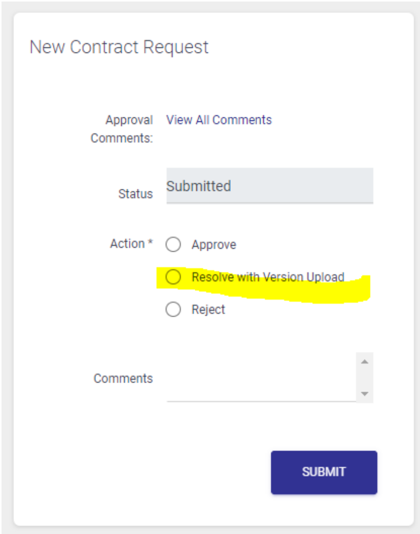
<u>To approve or reject the initial version of the contract:</u>

1. Just click “approve” or “reject” on the right side of the screen.

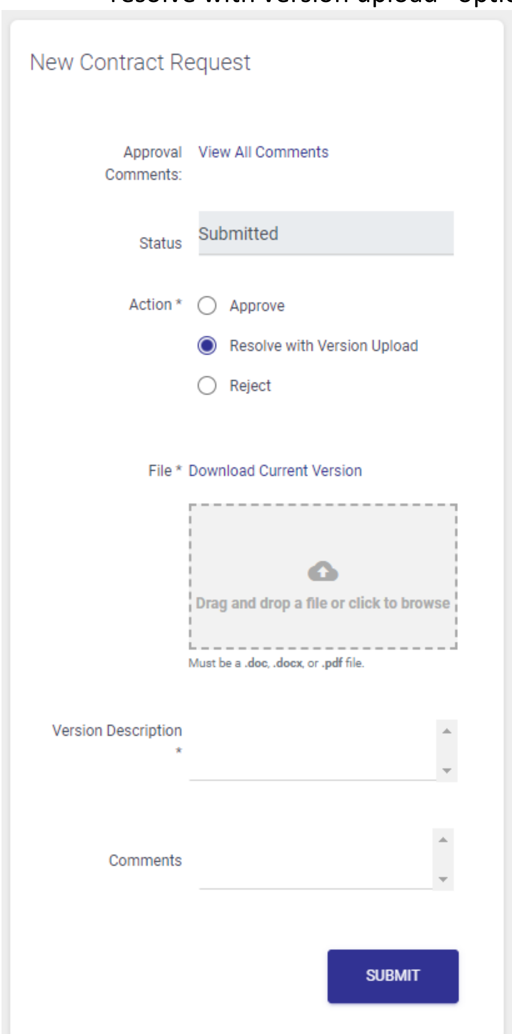


<u>Approve with Version Upload:</u>

1. Some approvals will allow you to approve with a new version:



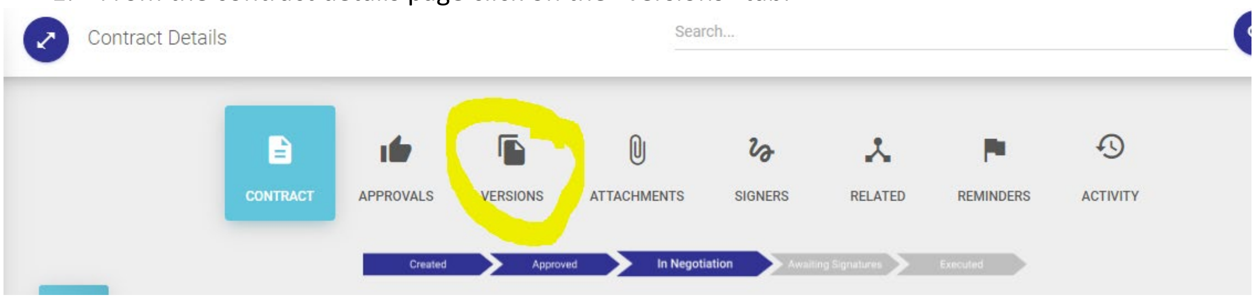
2. If you need to make an edit to the contract in order to complete your approval, click on the "resolve with version upload" option.



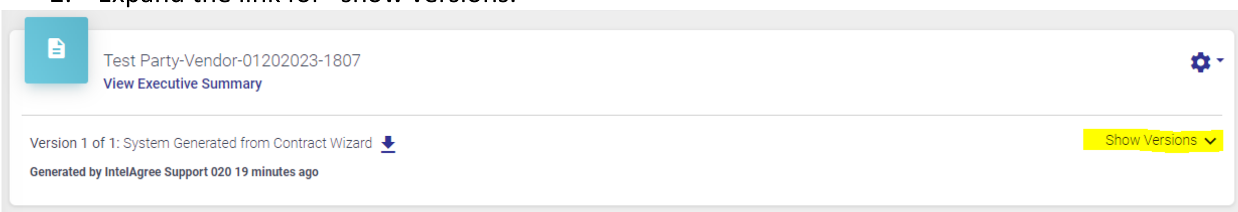
From here you will have the option to download the current version of the contract, make the changes, and upload the new version. Once you submit this, it will add your new version and approve the contract.

<u>Upload a new version</u>:

1. From the contract details page click on the "versions" tab.



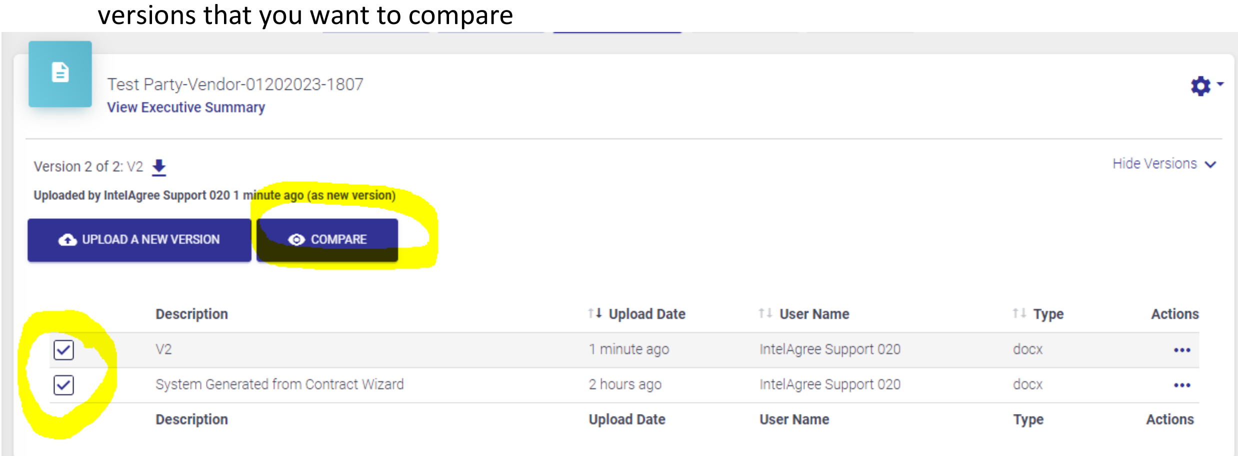
2. Expand the link for "show versions."



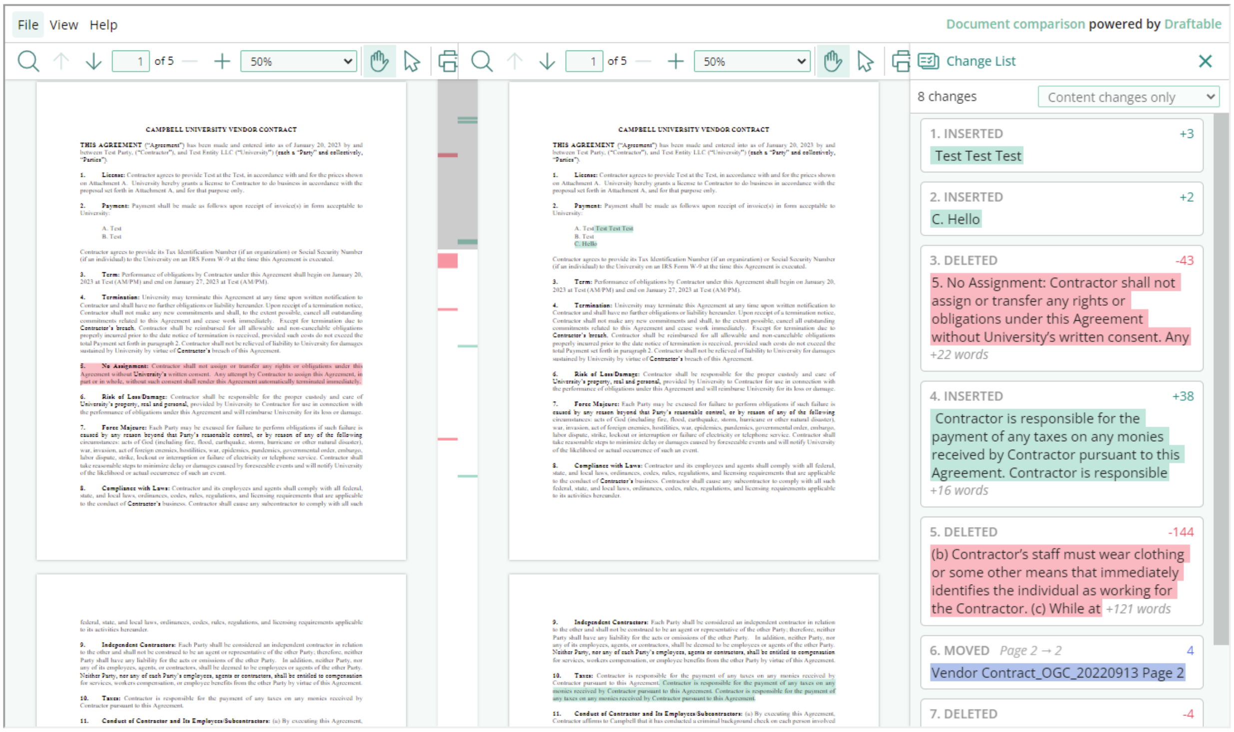
3. From here you can see any versions that have been uploaded and upload a new version.

<u>Compare Versions</u>:

1. From the Versions tab after the "show versions" dropdown has been expanded, click on the 2 versions that you want to compare



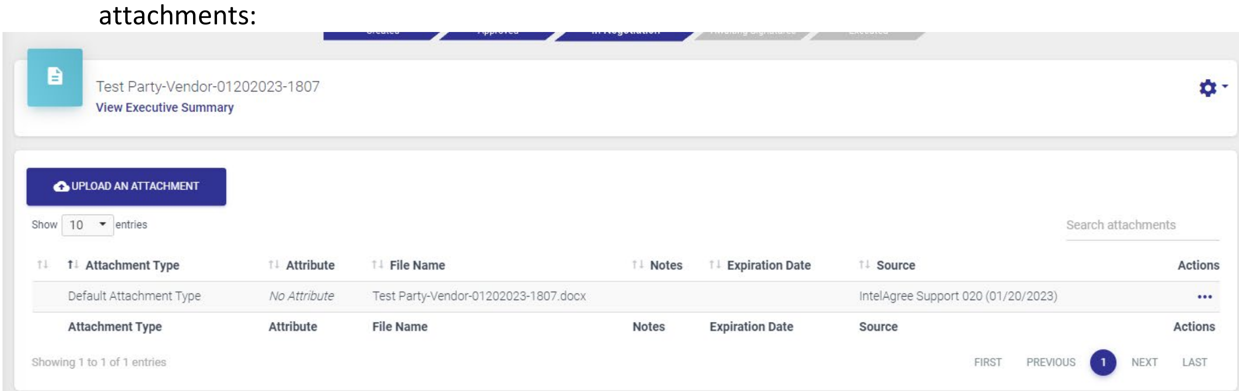
2. The two versions will be compared. Anything added will be highlighted in green and anything deleted will be highlighted in red.



Adding an Attachment to a Contract Record:

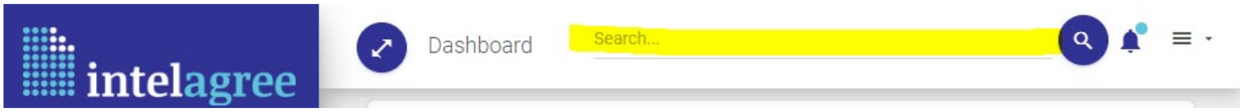
1. From the contract details page, click on the "attachments" tab.

2. From here, you can see any other attachments that are uploaded and upload more attachments:

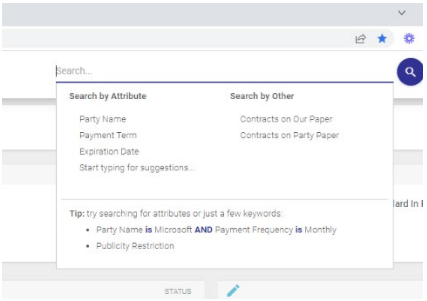


Searching and Reporting:

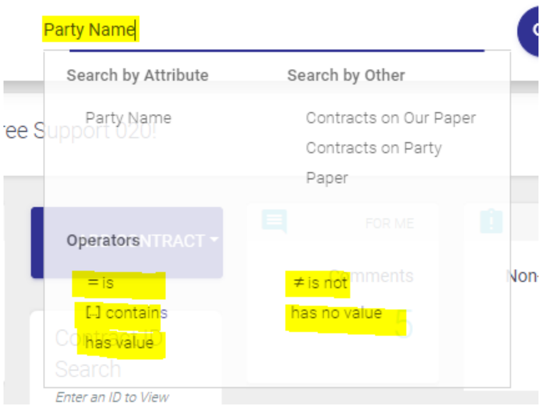
1. You will search using the 'search' bar at the top of your IntelAgree screen



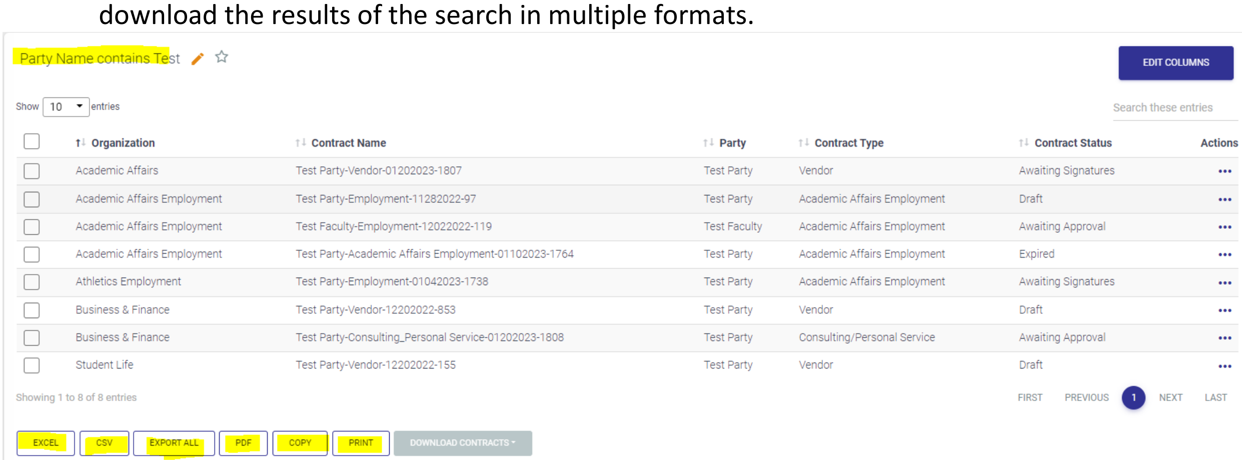
2. When you click in the search bar you will see a drop down that will provide some guidance on how to structure the search.



3. Start the search by starting to type an attribute. You will see a drop down of attributes and you can then click on the one you are interested in using in your search.
4. After that you will select an operator as part of the search.

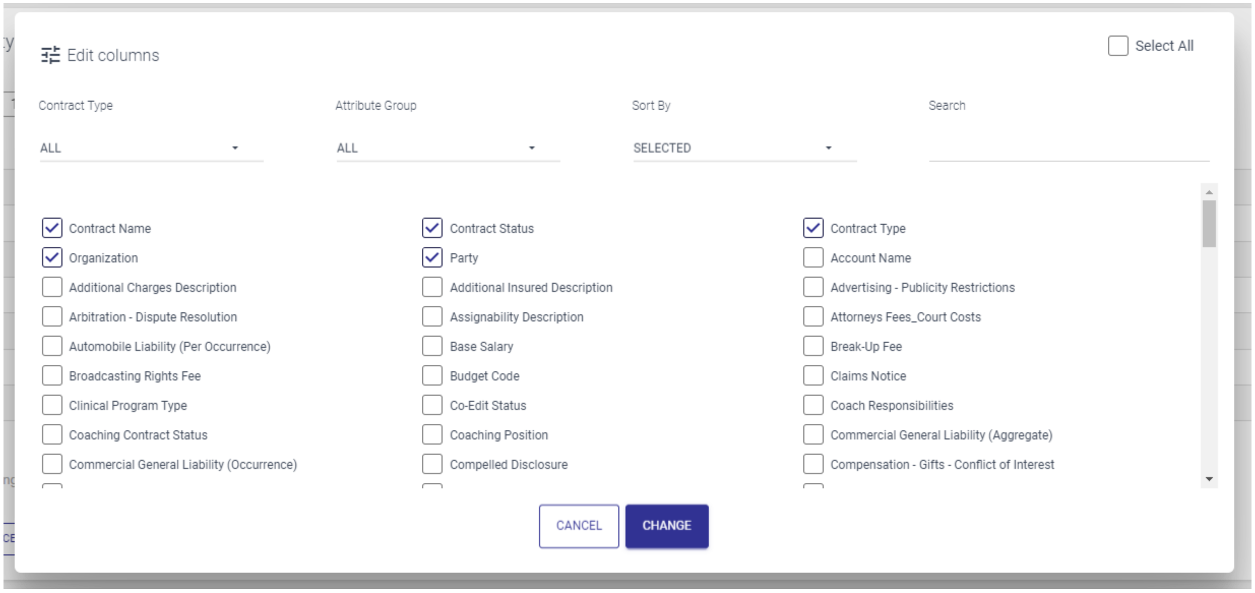


5. Once the search is ready, click "enter" and you will be taken to the results. You will be able to download the results of the search in multiple formats.

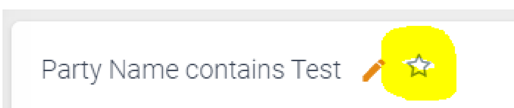


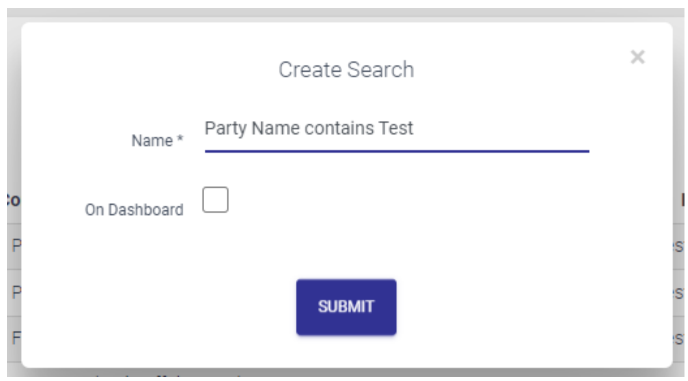
Organization	Contract Name	Party	Contract Type	Contract Status	Actions
Academic Affairs	Test Party-Vendor-01202023-1807	Test Party	Vendor	Awaiting Signatures	•••
Academic Affairs Employment	Test Party-Employment-11282022-97	Test Party	Academic Affairs Employment	Draft	•••
Academic Affairs Employment	Test Faculty-Employment-12022022-119	Test Faculty	Academic Affairs Employment	Awaiting Approval	•••
Academic Affairs Employment	Test Party-Academic Affairs Employment-01102023-1764	Test Party	Academic Affairs Employment	Expired	•••
Athletics Employment	Test Party-Employment-01042023-1738	Test Party	Academic Affairs Employment	Awaiting Signatures	•••
Business & Finance	Test Party-Vendor-12202022-853	Test Party	Vendor	Draft	•••
Business & Finance	Test Party-Consulting_Personal Service-01202023-1808	Test Party	Consulting/Personal Service	Awaiting Approval	•••
Student Life	Test Party-Vendor-12202022-155	Test Party	Vendor	Draft	•••

6. You can edit the columns of your search results by clicking "edit columns." This will pull up a list of all attributes. You can add or remove columns by checking or unchecking the boxes.



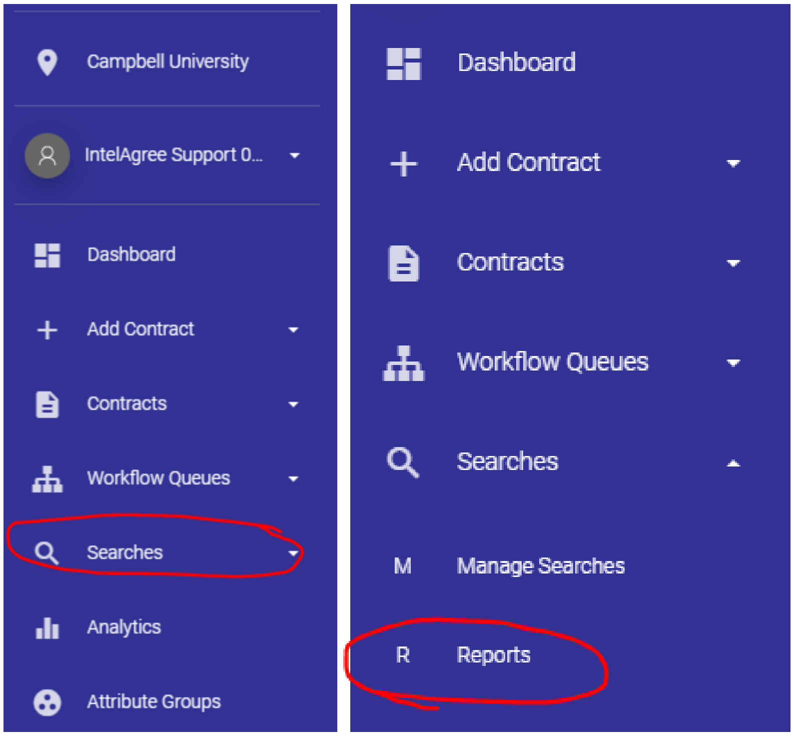
7. To save this search, click on the Star and name the search.



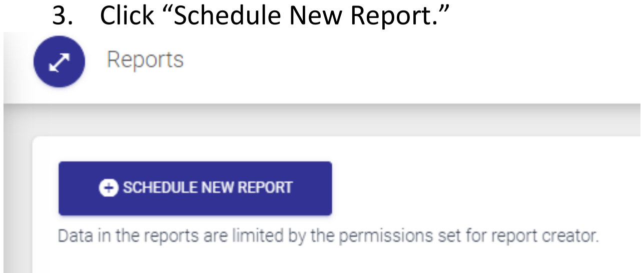


Creating a Report:

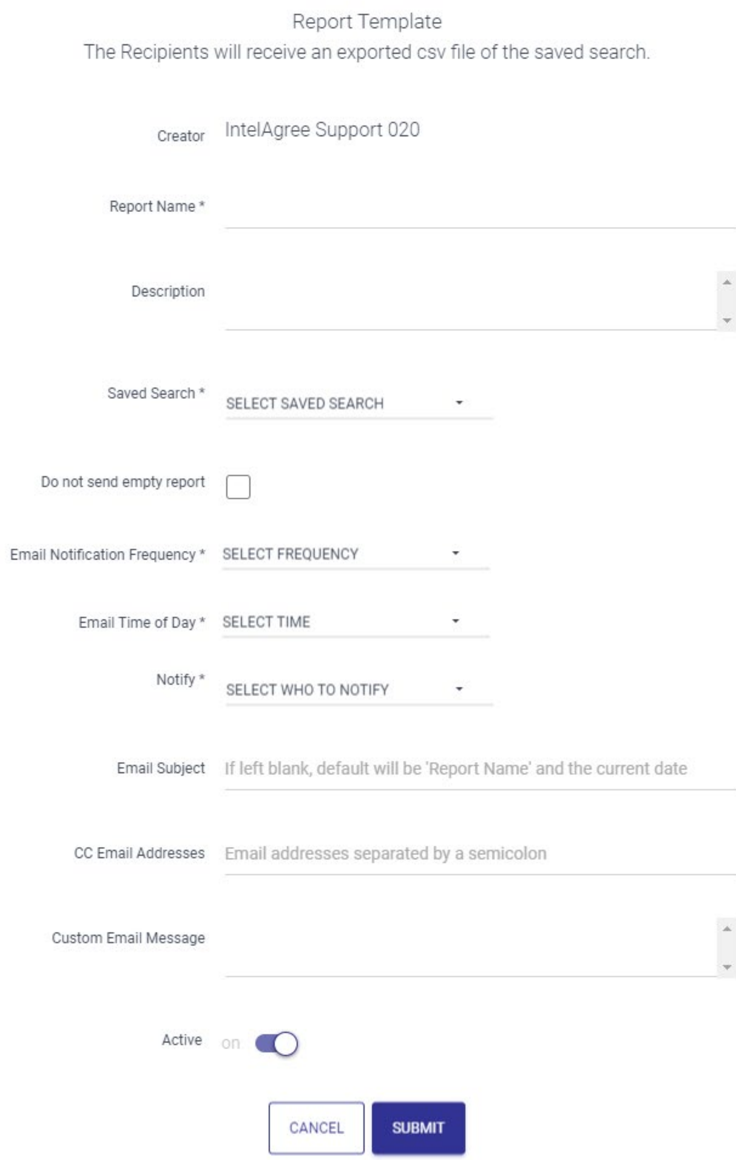
1. Using the toolbar on the left, click on "Searches."
2. Then click on "Reports."



3. Click "Schedule New Report."



4. You can then create the scheduled report. You need to use a saved search in order to schedule a report.


Report Template
The Recipients will receive an exported csv file of the saved search.
Creator
IntelAgree Support 020
Report Name *
Description
Saved Search *
SELECT SAVED SEARCH
Do not send empty report
Email Notification Frequency *
SELECT FREQUENCY
Email Time of Day *
SELECT TIME
Notify *
SELECT WHO TO NOTIFY
Email Subject
If left blank, default will be 'Report Name' and the current date
CC Email Addresses
Email addresses separated by a semicolon
Custom Email Message
Active
on
CANCEL
SUBMIT