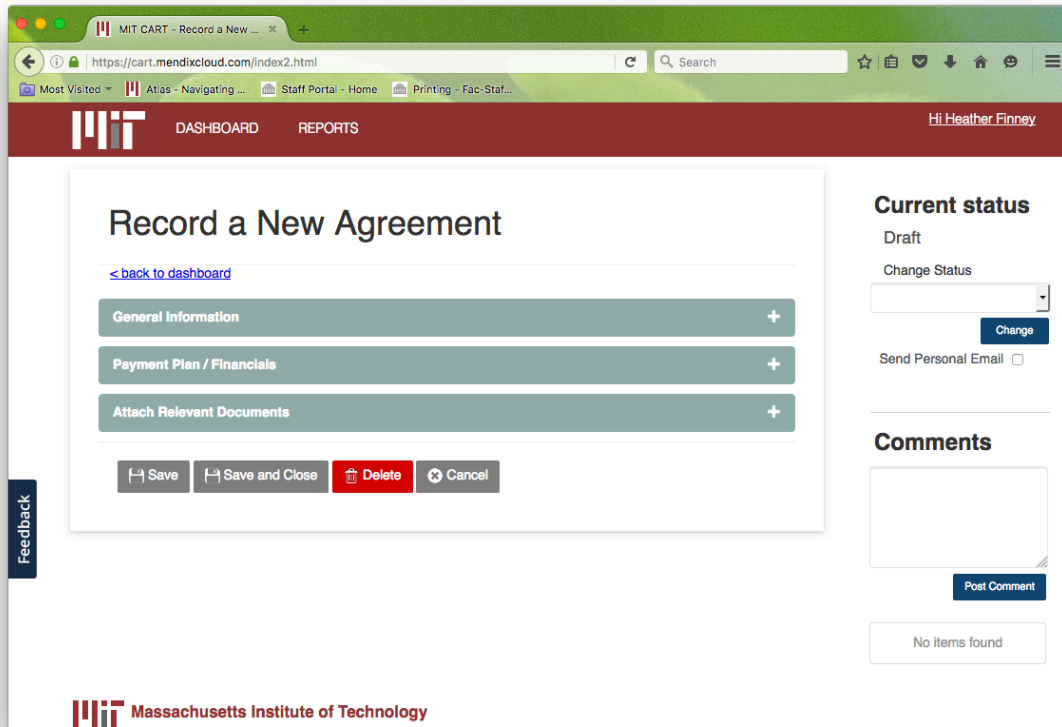


Record an Agreement



Select the **Record Agreement** button on the Dashboard page. The Record a New Agreement page opens. This page is divided into topic areas that can be expanded or closed using the plus/minus. Fill out the fields in the three sections with information about the agreement.



1. Fill out the General Information section

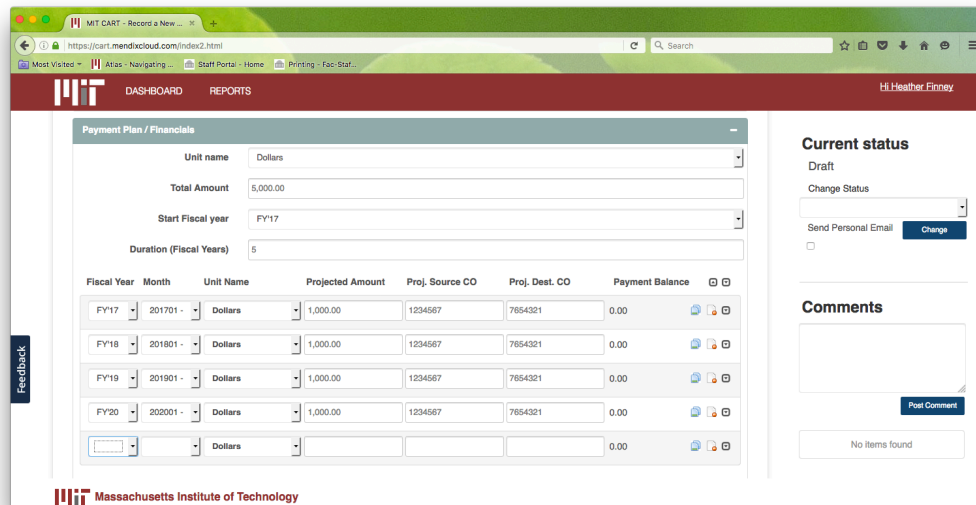
Written By and Agreement Nr	Assigned automatically. Written by is the CART creator.
Short Name	Assign a name to the agreement. This will appear in your Dashboard.
Name	Elaborate on Short Name as desired. (This will appear in notifications.)
Agreement Type	Select from the drop-down menu. This filters the Expense Reason choices.
Expense Reason	Select reason from the drop-down menu.
Related Person	Click link to Find Person by Kerberos or Name. This is the person associated with the agreement. If they are not at MIT, you can create a new person here and you can update the agreement if they get a Kerberos ID later on.
Payer - Name	Entered by default, this is the creator's DLC. If other, select from drop-down list.
Agreement Scope	Choose either Interdepartmental (where payer and receiver <i>are not</i> in the same unit) or Internal (where payer and receiver <i>are</i> in the same unit).
Receiver Name	This is the recipient of the agreement. Select from the list.
Description	Use this space for any information integral to the terms of the agreement.

Use the **Save Agreement** or **Cancel** buttons at any time to save the incomplete agreement or cancel the process. Use the **Save and Close** button to save the agreement and return to the Dashboard.

2. Fill out the Payment Plan/Financials section

- Unit Name** Select Dollars, Months, Square feet, etc. for type of units promised by the agreement.
- Total Amount** Enter total amount of units promised by the agreement.
- Start Fiscal Year** Select the fiscal year in which the agreement is to start.
- Duration (Fiscal Years)** Enter the number of years the agreement is to last for.

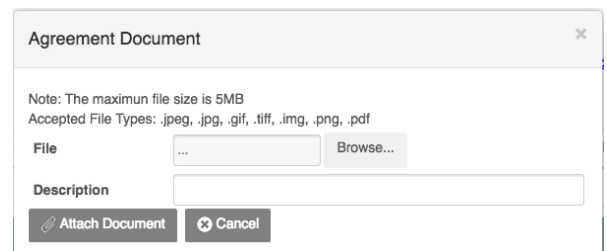
- a/ Click **+Add Another Fiscal Year to** begin entering a payment schedule. This adds a row of cells to the schedule.
- b/ Select **Fiscal Year, Month, and Unit Name** from the dropdown lists.
- c/ Enter the **Projected Amount** and **Projected Source Cost Object** (where you expect the funds to come from) as well as the **Projected Destination Cost Object** (where you expect the funds to go to).
- d/ Repeat for each payment you'd like to schedule. Utilize the **Copy** and **Delete** buttons as necessary.



- e/ To Record a Payment, click the button next to the payment line you are updating with actuals in the **Payment Plan/Financials** section. Summary information can be found at the bottom of the **Payment Plan/Financials** section and can be updated by selecting the **Update Totals** link.

3. Attach Relevant Documents

- a/ To attach documents expand the **Attach Relevant Document** area.
- b/ Click **+Add Document**.
- c/ A dialog box opens allowing you to navigate the documents your DLC has loaded into CART. Click on the document you would like to attach and press the **Select** button. If you have no documents in the library or need to add a new one, click **Add a New Document**.
- d/ Another dialog box opens allowing you to navigate to your files. Enter a description of the document. Select **Attach Document**.



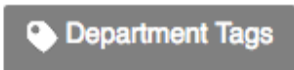
Agreement Status and Comments

There are four possibilities for **Current status** which determines what information can be changed or added to an Agreement. You cannot skip the order of the statuses, you must move between them in this order:

- DRAFT** Use this when you are writing the agreement. Anyone in your unit can see it.
- PENDING** Use this when you are negotiating the agreement and its payments and terms.
- ACTIVE** Use this when your agreement is in place and happening.
- CLOSED** Use this when your agreement is complete or terminated and cannot be edited (without changing back to Active).

Manage CART Settings and Access in your Unit

In the upper right hand corner of the tool you will see your name. Click on that link to manage your settings.



Department Tags allows you to manage the tags you have used to organize your agreements. Here you can rename your tags, combine them with other tags, or remove them altogether. This will not delete your agreements or folders, only rename or delete the tags associated with them. To “tag” an agreement, simply type in the name of an existing tag (or the name of a new one) into the text box at the top of your agreement next to “Tags:”.



Department Members allows you to manage who has access to CART and what type of access they should have.

- a/ **Administrative Access:** the ability to edit and update any field or document within their unit, control the access of others, or assign the role of Primary Contact, allowing them to receive notifications when agreement status changes. Primary Contact notifications can be managed in the account portal as well.
- b/ **Transaction Access:** the ability to edit the payment fields but read-only the rest of the agreement.
- c/ **Read-Only Access:** The ability to view/read all aspects of the agreement but without the ability to make any changes.



Edit Related Person allows you to edit the names and contact information of the associated people for agreements.