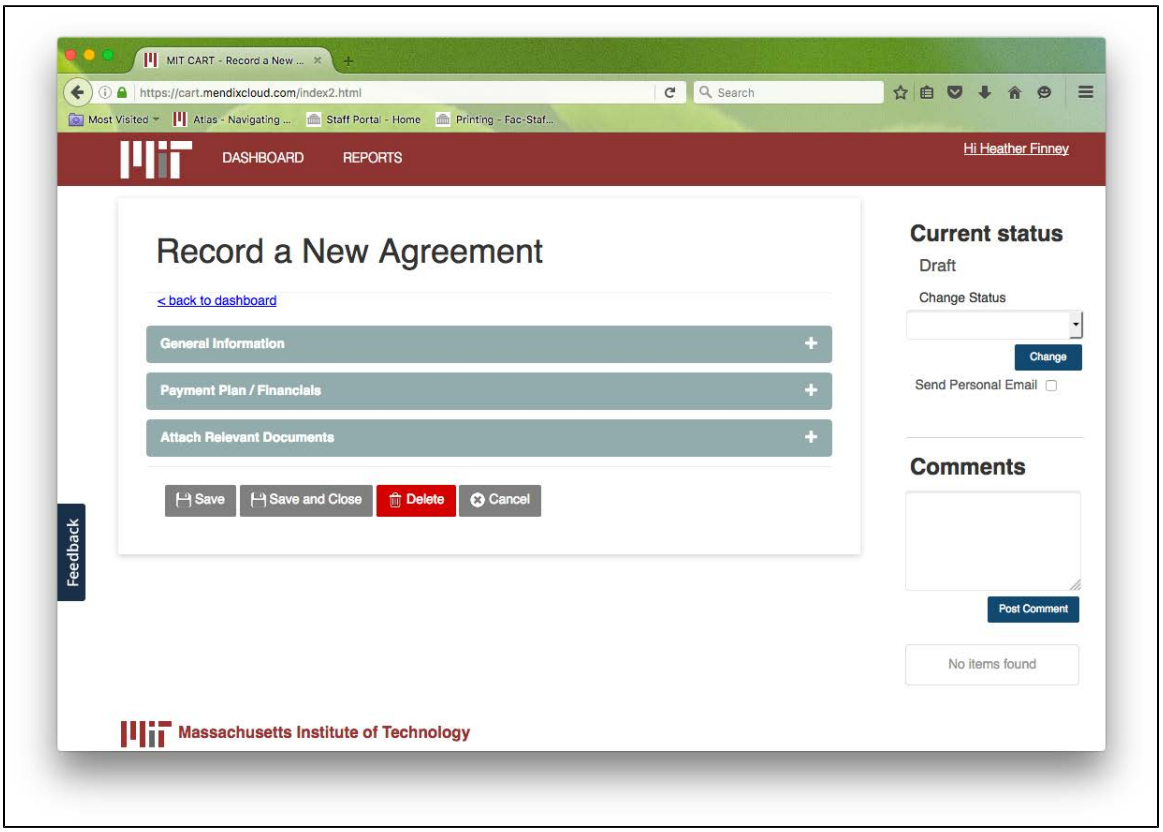
CART - Record Agreement

Q: How do I create an agreement in CART?

1. 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.

2. Then, fill out the General Information section.

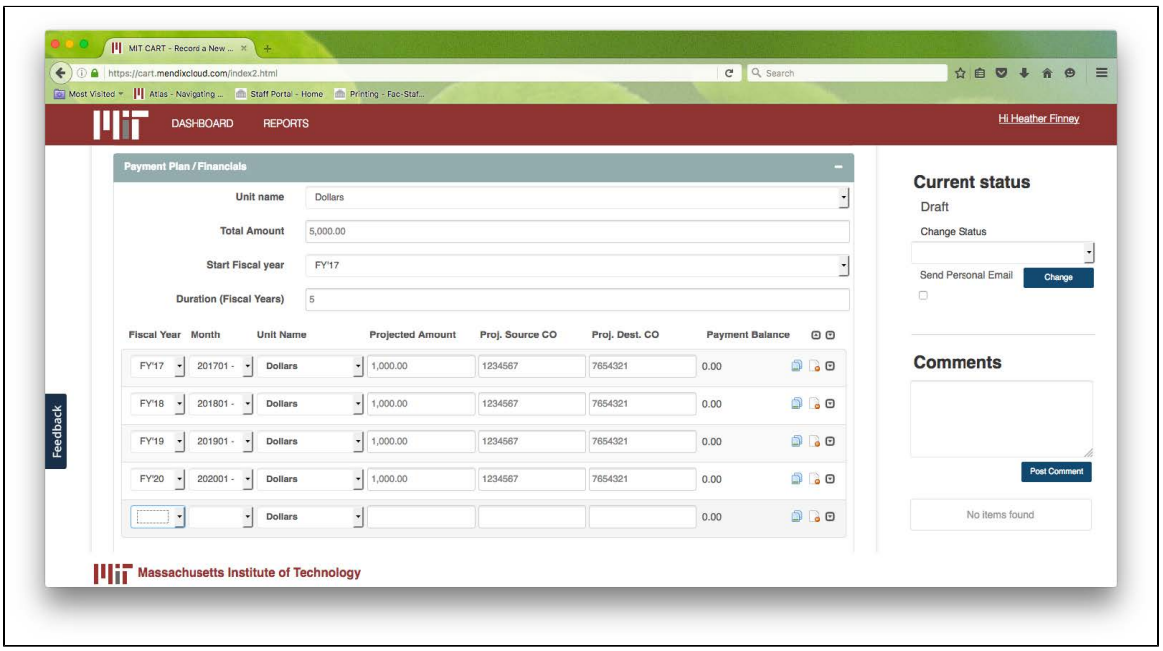


Written By and Agreement Number	(Assigned automatically)
Written by	(Assigned automatically)
Short Name	Assign a name to the agreement. This will appear in your Dashboard.
Name	Elaborate on Short Name as desired. (This will appear in notifications.)
Agreement Type	Select from the drop-down menu. This 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 dropdown list.
Agreement Scope	Choose either Interdepartmental (where payer and receiver are not in the same unit) or Internal (where payer and receiver are 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.

3. Fill out the Payment Plan/Financials section

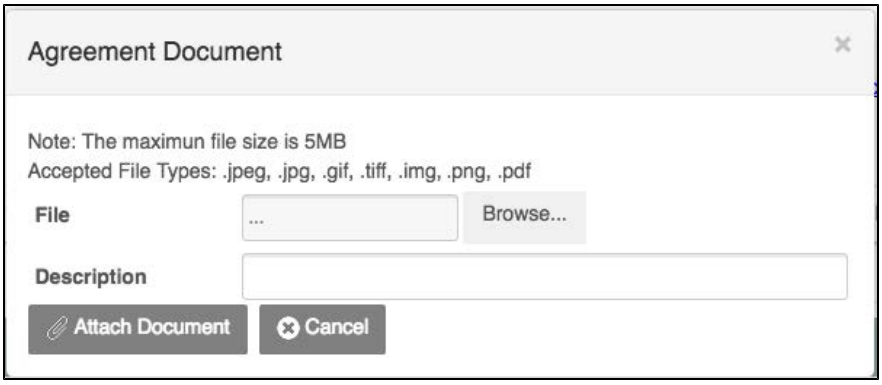


Unit Name	Select Dollars, Months, Square feet, etc. for type of units promised by the agreement.
Total Amount	Enter total amount of units promised by the agreement.
Start Fiscal Year	Select the fiscal year in which the agreement is to start.
Duration (Fiscal Years)	Enter the number of years the agreement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

Click +Add Another Fiscal Year to begin entering a payment schedule. This adds a row of cells to the schedule. Select Fiscal Year, Month, and Unit Name from the dropdown lists and 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). Repeat for each payment you'd like to schedule. Utilize the Copy and Delete buttons as necessary.

4. Attach Relevant Documents

To attach documents expand the Attach Relevant Document area and click +Add Document. 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. Another dialog box opens allowing you to navigate to your files.



Enter a description of the document and Select Attach Document.

Context

- Mendix Platform, cloud-based.
- Web-based app, requiring MIT, duo-authenticated certificates.