

January 18, 2024

DARTMOUTH





# Contract Management System

## Objectives:

- Improve efficiency of processing through standardization and automation
- Improve transparency and reporting
- Reduce risk and exposure





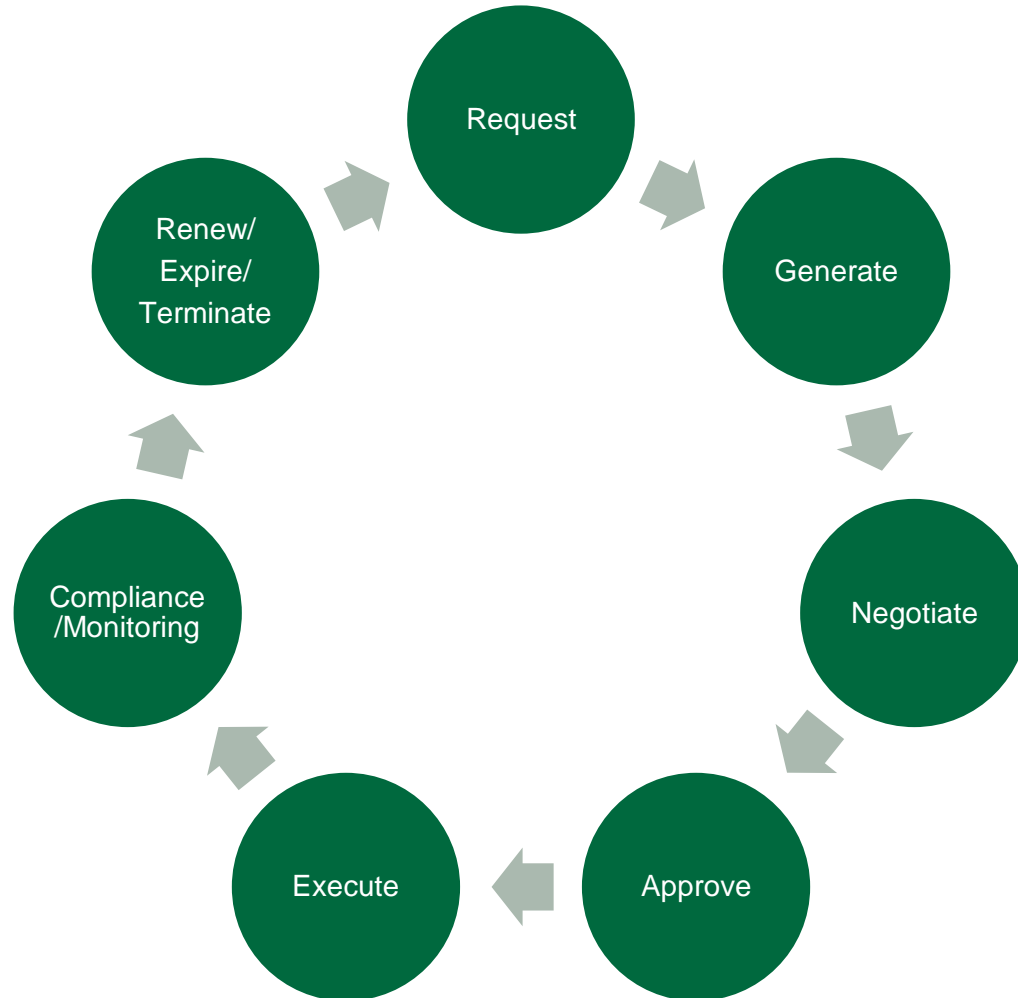
# Today's Agenda

- What is the Agiloft Contract Management System and how does it fit into the Finance Systems at Dartmouth?
  - Contract Lifecycle Management
  - Agiloft Contract Management System Use Cases
  - PO Policy Review
  - Common Procurement Agreements
- Pre-Contract Diligence
- Process for Hiring Individuals
- Agiloft Contract Management System Overview
- Creating a Contract Request
- Approving a Contract Request
- Navigating the Contract Management System Power User Interface



# What is the Agiloft Contract Management System?

A cloud-based contract lifecycle management tool that helps us manage all stages of the contracting process.





## Contract Lifecycle Glossary

- **Request:** a contract request is the initial form submitted in Agiloft that includes details about an agreement that is the subject of the request. A contract request can be any of the following:
  - A request to review a vendor form of agreement.
  - A request to draft an agreement.
  - A request to review and store a historic contract that is already active.
  - A request to amend an existing contract.
- **Generate:** Based on the details of the contract request, a Contract Manager will generate a contract document to meet the needs of your purchase, or will provide comments on the vendor agreement. If the contract request pertains to a historic contract that has been submitted for record keeping, we do not generate another agreement.
- **Negotiate:** If appropriate, the Contract Manager will work with you to negotiate the agreement with the vendor until final terms are reached.



## Contract Lifecycle Glossary, Cont'd

- Approve: The Contract Manager will initiate final approval requests.\*
- Execute: The Contract Manager will collect signatures.\*
- Monitor/Compliance: The contract record contains key details that can be referenced during the contract term; example: payment processing, renewal or termination deadlines.
- Renewal/Expire/Terminate: Unless a contract is silent on how a contract ends, the end of a contract term is either fixed or subject to a renewal (automatic or optional extension of the contract term).
  - Evergreen contracts do not say when or how they end.
  - Fixed term contracts define the end of the term, often as a date certain or a duration from the “Effective Date”
  - Renewing contracts will either auto-renew or a party will have an option to renew. A renewal effectively extends the term of the agreement for a certain duration (called a renewal term).

*\* Where the Signature Authorization Policy requires only one approver, approval and Dartmouth signature are handled simultaneously.*



# What is the Agiloft Contract Management System?

## USE CASES

- Contract Submitters submit contract requests to replace email communications with Procurement.
- Procurement uses Agiloft to keep track of a large volume of requests from end users to review and negotiate contracts.
- Contract approvers use Agiloft to review and approve contracts.
- Administrators use Agiloft to manage contract commitments on active contracts.
- Finance Centers reference the contract record (using the contract ID number) to verify that payment requests are associated with a valid payment obligation.
- All users can search for contracts that they have permission to view, and “Power Users” can create reports on any data that they have permission to view.



# How does the Contract Management System fit into the Finance Systems at Dartmouth?

## ONBASE

- e-forms initiate requisitioning (Purchase Request) and payment (Payment Request).

## ORACLE

- Requisitions are converted into Purchase Orders.

## AGILOFT CONTRACT MANAGEMENT SYSTEM

- Manages Procurement Agreements (purchase requests and POs are not required)



**DARTMOUTH**

Federal Tax ID #02-0222111  
 PROCUREMENT SERVICES  
 7 LEBANON STREET, SUITE 313  
 HANOVER, NEW HAMPSHIRE 03755  
 TEL: (603) 646-2811; FAX: (603) 646-3810

**STANDARD PURCHASE ORDER**

Purchase Order No: 1261013 Revision No: 0

ISSUED TO:  
 Luminex Corporation  
 PO Box 844222

DALLAS, TX 75284-4222  
 United States  
 Attn:  
 Phone: ()  
 Ordering Fax # ()

SHIP TO:  
 Dartmouth College  
 Dartmouth College  
 Class of 1853 Commons  
 6 Massachusetts Row  
 Hanover, NH 03755  
 United States  
 Attn: Suite 309 Mary Kay Brown

BILL TO: WE PREFER YOU EMAIL TO: [INVOICE@DARTMOUTH.EDU](mailto:INVOICE@DARTMOUTH.EDU)  
 OR MAIL TO:  
 Admin Provost Fin Center  
 Dartmouth College

Hanover, NH 03755  
 Attn: 7 Lebanon St, Ste 302  
 Phone: 603-646-1310  
 Fax: 603-646-1775

**STANDARD INSTRUCTIONS FOR PURCHASE ORDER:**

*If this Purchase Order is associated with a pre-existing Contract or Agreement executed by and between the Trustees of Dartmouth College and Vendor, the Terms and Conditions of the Contract or Agreement shall take precedence over the Dartmouth College Standard Purchase Order Terms and Conditions (hereinafter referred to as "T's & C's").*

*In the absence of a separate agreement or contract governing this purchase, the Dartmouth College Standard T's & C's shall apply, and Vendor shall be deemed to have accepted Dartmouth College Standard T's & C's either by written acknowledgement or by commencement of performance of the order.*

To obtain a copy of Dartmouth College Standard T's & C's, contact your buyer or visit:  
<https://policies.dartmouth.edu/policy/standard-terms-and-conditions-purchase>

For initial PO's, the P.O. DATE provided below determines the effective period of T's & C's to be applied. For any subsequent PO revisions, the REVISION DATE determines the T's & C's effective period for the revised content. Any inconsistent or additional terms included in any quote, acknowledgment, or other vendor communication do not apply unless accepted by Dartmouth College in writing.

**PLEASE ENSURE INVOICES AND ALL CORRESPONDENCE REFERENCE(S) THE PURCHASE ORDER NUMBER.**

SHIPPING INSTRUCTIONS: Follow buyer's shipping instructions. Note shipping details at line level.

**ORDER ACKNOWLEDGEMENT REQUIRED. Send email to the Deliver-To contact email address (See line 1 below)**

P.O. DATE	REVISION DATE	SHIPPED VIA	FOB TERMS	FREIGHT TERMS
08-NOV-2023 12:30:07		Best Way	Delivered	Prepaid
BUYER: Cameron O'Brien		EMAIL:	PHONE:	FAX: 603 646-3810
TERMS: NET30				

Order Note to Supplier:

LIN E NO:	QTY	UOM	PART NUMBER	DESCRIPTION OF GOODS OR SERVICES	UNIT PRICE (USD)	EXT PRICE	TAX
1	28884.5	EACH		Q-39316 EXACTLY as written, MegaPlex-C Microspheres	1.00	28,884.50	N

UN NUMBER: UN DESC: HAZARD CLASS:

Line Note to Supplier:

DELIVER TO:

By 08-NOV-2023 20:00:00 to

Qty: 14342.25 to Suite 309 Mary Kay Brown, Mary.Kay.Brown@dartmouth.edu, 603-646-1467

Qty: 14342.25 to Suite 309 Mary Kay Brown, Mary.Kay.Brown@dartmouth.edu, 603-646-1467

Total: 28,684.50



## MASTER GOODS AND SERVICES AGREEMENT

DARTMOUTH

This Master Goods and Services Agreement ("Agreement") is made as of the Effective Date set forth below between Trustees of Dartmouth College ("Dartmouth") and the individual or entity identified in the Basic Contract Information below as "Contractor." (Each of Dartmouth and Contractor is sometimes referred to in this Agreement as a "Party" and collectively they are referred to as the "Parties.")

### Recitals

1. Dartmouth wishes to engage Contractor to provide the goods and perform the services described in this Agreement upon the terms and conditions set forth herein.
2. Contractor represents it is duly qualified, and willing and able, to provide the goods and perform the services set forth in this Agreement upon the terms and conditions set forth herein.

In consideration of the mutual covenants and promises contained in this Agreement and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged by Dartmouth and Contractor, Dartmouth and Contractor hereby agree as follows:

#### 1. Basic Contract Information.

Effective Date. The "Effective Date" of this Agreement is the date of the latest signature in the signature block at the end of this Agreement.

Name of Contractor. "Contractor" is [insert company legal name], a [insert state and entity type] with a business address at [insert business address]

Certain Definitions.

"Goods" means the goods to be delivered by Contractor under this Agreement pursuant to an executed SOW.

"Master Terms" means the portion of this Agreement exclusive of the exhibits hereto.

"Services" means the services to be performed by Contractor under this Agreement pursuant to an executed SOW.

"SOW" means a statement of work executed by the Parties that specifies the Services, applicable fees and all other pertinent information regarding the Services.

"SOW Term" means the period for the provision of Services specified in the relevant SOW.

SOWs. From time to time, Dartmouth may request Contractor to provide Goods and/or Services under this Agreement, by way of quotation, or otherwise. Dartmouth shall not be obligated to purchase, and Contractor shall not be obligated to deliver or perform, any Goods or Services unless and until the Parties have duly executed a SOW. Each SOW shall reference this Agreement and shall be subject to the terms and conditions of this



## SERVICES AGREEMENT

This Services Agreement ("Agreement") is made as of the Effective Date set forth below between Trustees of Dartmouth College ("Dartmouth") and the individual or entity identified in the Basic Contract Information below as "Contractor." (Each of Dartmouth and Contractor is sometimes referred to in this Agreement as a "Party" and collectively they are referred to as the "Parties.")

### Recitals

- A. Dartmouth wishes to engage Contractor to perform the services described in this Agreement upon the terms and conditions set forth herein.
- B. Contractor represents it is duly qualified, and willing and able, to perform the services set forth in this Agreement upon the terms and conditions set forth herein.

In consideration of the mutual covenants and promises contained in this Agreement and for other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged by Dartmouth and Contractor, Dartmouth and Contractor hereby agree as follows:

### 1. Basic Contract Information.

- 1.1 Effective Date. The "Effective Date" of this Agreement is the date of the latest signature in the signature block at the end of this Agreement.
- 1.2 Name of Contractor. "Contractor" is [insert company legal name], a [insert state and entity type] with a business address at [insert business address].
- 1.3 Services. "Services" means the services to be performed by Contractor under this Agreement as further set out on Exhibit A attached hereto, which is hereby incorporated by reference. From time to time, Dartmouth may request Contractor to provide additional Services under this Agreement, by way of quotation, or otherwise. Dartmouth shall not be obligated to purchase, and Contractor shall not be obligated to perform, any additional Services unless and until the Parties have duly executed an addendum to this Agreement which specifies such additional Services and references this Agreement. Upon execution and delivery by the Parties, each such Addendum shall be incorporated in and made a part of this Agreement.

### 2. Term and Termination.

- 2.1 Term. This Agreement shall be for a term of [ ] year, commencing on the Effective Date (the "Term"), unless terminated sooner as provided in Section 2.2, 2.3 or 3.3.
- 2.2 Dartmouth Termination for Convenience. Dartmouth, in its sole discretion, may terminate this Agreement at any time, without cause, by providing at least sixty (60) days' prior written notice to Contractor.



# Do I need to submit a Contract Request or a Purchase Request/PO?

- If the vendor asks you to sign their contract, regardless of whether a PO is required:
  - Request a contract via Agiloft – include vendor terms for review.
- If the vendor has not provided a contract and, pursuant to the PO Policy, a PO is required:
  - Request a PO or request a contract in Agiloft if you want a written agreement.
- If the vendor has not provided a contract and, pursuant to the Policy, a PO is not required:
  - PO or contract is not required to process payment.
- If the vendor has not provided a contract and, pursuant to the Policy, a PO is not required, but you want a separate written agreement:
  - Request a contract via Agiloft – include all applicable terms on the contract request form.
- If the vendor is an individual:
  - You must follow the Independent Contractors and Guests Policy.



# Clarifying the Role of Contracts & Purchase Orders in Procurement Transactions:

POs are required when:

1. Buying Fixed Assets >\$5,000;
2. Purchasing any good or service where the annual commitment is \$10,000 or more;
3. Transacting in one of the high-risk areas;
  - Construction
  - Environmental Services
  - Food providers that have not provided Insurance & Food Licenses
  - Info Tech/Financial Services
  - Intellectual Property
  - Travel & Transportation
4. When purchasing goods bearing Dartmouth marks or logos; and
5. If the vendor requires a copy of a PO.

EXCEPTION APPLY TO 2-4:

- Purchases from food providers who are on the list of Insurance and Food License Compliant Vendors list.
- If an agreement covering the purchase has been negotiated and approved through Procurement and/or the Office of the General Counsel.



# What is a Procurement Agreement?

- Purchasing goods or services from a third-party.
- A written agreement containing terms and conditions for the purchase which is either:
  - A Dartmouth standard agreement:
    - Individuals: IC Services Agreement and Limited Engagement Agreement
    - Master Agreement and Statements of Work
    - Services Agreement
  - A Vendor/Provider's agreement
  - A bespoke agreement drafted for the purchase at hand, utilizing applicable Dartmouth standard terms of purchase and any other appropriate terms and conditions.
- A contract request will either result in the generation of a contract or will initiate a review of a vendor agreement attached to the request.

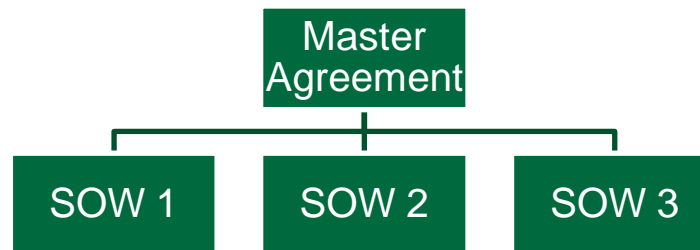


# Common Procurement Agreements that we Manage in Agiloft

## Agreements versus Master Agreements/SOWs

**Agreements** include the terms and conditions and scope of work in one document. In other words, a written agreement for the vendor to perform services/provide goods described in the agreement on the terms set forth in the agreement.

**Master Agreements** set-out *broad general terms* to govern any future engagement between Dartmouth and the provider. Think of it as the foundation of business to be conducted with the provider when the provider will perform multiple engagements, each a Statement of Work or other addendum under the Master Agreement.





# Common Procurement Agreements that we Manage in Agiloft

## Institution-wide Agreements

**Institution-wide Agreements** are approved for use across the campus. They are generally procured through Procurement activities.

- Institution-wide Agreements may be Master Agreements, in which case SOWs (or appropriate order documentation) are required for each transaction.
- Institution-wide Services agreements do not require separate SOWs or order documents – vendor can submit invoices.

*Unless a contract is identified as an Institution-wide Agreement, the only business units that have access to the agreement are those Orgs who have approved the agreement. They are listed on the contract record.*





# Pre-Contract Diligence

## Vendor Sourcing

- Vendor selection:



- If the total value < \$10,000:
  - Best judgement to get best price and quality
- If the total value > \$9,999 – 24,999:
  - 3 quotes required
  - or a [Sole Source Justification](#)
- Any agreement > \$25,000
  - Source with Procurement Services

See: [Procurement Sole Source/Competitive Bid Policy](#)

## Diligence

- When Engaging an Individual:
  - Independent Contractor vs. Employee
  - International vs. Domestic
- For Vendors with access to Dartmouth Data: Dartmouth Information Security Controls (DISC)
- For Software Purchases
  - DISC
  - Records Management
  - Accessibility
- Conflict of Interest
  - Code of Ethical Business Conduct

See: [Contract Management under Buying & Paying](#)



# Individuals Performing Services: HONORARIUM

## DEFINITION:

Honoraria are payments to guests. An honorarium payment is a modest gesture of appreciation for the individual's efforts of preparing and performing a service without expectation of payment. An honorarium payment may be of any amount and is taxable income to the recipient.

## PROCEDURE:

1. Individual completes and signs the "Honorarium Acceptance Form."
2. Department submits through the Payment Request – Other Payment eForm.



# Individuals Performing Services: LIMITED ENGAGEMENT

## DEFINITION:

A Limited Engagement is defined as an engagement between Dartmouth and an Independent Contractor, where:

- the independent contractor is performing a one-time service or services over a limited period of time, and the fee is \$5,000 or less; or
- multiple limited engagements with the same Independent Contractor over the course of the year may not exceed \$5,000; and
- the services are within the U.S. (excluding U.S. Territories); and
- the engagement does not involve the following high-risk services, identified in the Purchase Order (PO) Policy:
  - Construction
  - Environmental Services
  - Food providers that have not provided Insurance & Food Licenses
  - Info Tech/Financial Services
  - Intellectual Property (LIMITED EXCEPTION APPLIES)
  - Travel & Transportation

• Limited 'Works Made for Hire' Agreement for Artistic Services – can be used for photography, videography, illustration, written work, or other freelance artistic creation

## PROCEDURE:

1. Individual and Department completes and signs the “Limited Engagement Agreement” or “Limited ‘Works Made for Hire’ Agreement” Form
2. Department submits through Agiloft Contract Management System Limited Engagement Contract Type
3. Contract Record immediately moves to signed and executed
4. Invoice submitted to [invoice@dartmouth.edu](mailto:invoice@dartmouth.edu) or through the Payment Request eForm  
Tip: Provide the vendor with the Contract Request number to add to the Invoice



# Individuals Performing Services INDEPENDENT CONTRACTOR SERVICES AGREEMENT

## DEFINITION:

Independent Contractors that do not qualify as an Honorarium or Limited Engagement, example:

- Fee for services over \$5,000 in a year.
- Services are performed outside of the US.
- High risk area

## PROCEDURE:

<b>Classification</b> Purpose: Whether the individual is an Independent Contractor or an Employee	Domestic	Individual completes Independent Contractor Questionnaire ("ICQ") and submits to Procurement Services for review. Approved/rejected ICQ is returned to Individual and Department. Completed annually
	International	Department submits completed International Staffing Form ("ISF") to International Staffing Committee for review. Approved/rejected ISF is returned to Department. Contract must be consistent with approved engagement.
<b>Vendor Set-Up</b> Purpose: Collect and verify Vendor payment and tax information and documentation	PW Invitation Instructions and Invitation sent by Procurement Once Classification is approved.	
<b>Contracting</b> Purpose: Creating a written agreement between the Parties	Department submits Contract Request via Agiloft; Contract Request Preliminary Approval; Contract Manager Queue; Contract Manager Review; Contract Generation (IC Services Agreement or other form); Final Approvals; Contract Execution.	
<b>Payment Request</b> Purpose: Request and tender payment for services in accordance with agreement	Vendor Invoice ( <a href="mailto:invoice@dartmouth.edu">invoice@dartmouth.edu</a> or Department)	
	Payment Request (OnBase)	



# Process for Hiring and Contracting with Individuals

## IC Classification

International Staffing Questionnaire completed by Department for International Staffing Committee Review

Independent Contractor Questionnaire completed by Individual for Procurement Review

*International Staffing Questionnaire*

**International Staffing Questionnaire**

This form must be completed by any Dartmouth College department that wishes to engage an individual to perform services in a location outside of the United States. Complete one form per person or position. Once completed, this form should be sent to [Controllers.Office@dartmouth.edu](mailto:Controllers.Office@dartmouth.edu)

**Requestor Contact Information**

Name of Requestor: **DARTMOUTH**

Requestor's Position: **Independent Contractor Questionnaire**

Requestor's Department: \_\_\_\_\_

Requestor's Phone #: \_\_\_\_\_

Requestor's Email: \_\_\_\_\_

**International Staffing Questionnaire**

**The work:**

Proposed primary work:

What type of facility?

Dartmouth-funded

Other Dartmouth-

Private residence c

Other (please expl

Are there any other c

No  Yes

Reason for request fo

**Behavior Control Factors:**

	Yes	No
1. Do you make decisions as to when, where, and how the work is to be performed?	<input type="radio"/>	<input checked="" type="radio"/>
2. Do you have the necessary training or skills to perform the task?	<input type="radio"/>	<input checked="" type="radio"/>
3. Do you hire, supervise, and pay your own employees or assistants?	<input type="radio"/>	<input checked="" type="radio"/>
a. If yes, please provide number of employees, excluding yourself:		
4. Do you set your own work hours?	<input type="radio"/>	<input checked="" type="radio"/>
5. Do you determine the sequence of tasks required to complete the work?	<input type="radio"/>	<input checked="" type="radio"/>
6. Are regular written or oral reports required to be submitted to Dartmouth College?	<input type="radio"/>	<input checked="" type="radio"/>
<b>Financial Factors:</b>		
7. Do you perform your services as a separate company with a Federal Tax ID?	<input type="radio"/>	<input checked="" type="radio"/>
8. Do you receive payments on the basis of set deliverables?	<input type="radio"/>	<input checked="" type="radio"/>
9. Do you furnish your own space, tools, and materials?	<input type="radio"/>	<input checked="" type="radio"/>
10. Are you able to make a profit or potentially suffer a loss for this work?	<input type="radio"/>	<input checked="" type="radio"/>
<b>Relationship Factors:</b>		
11. Do you provide similar services to other non-Dartmouth clients or advertise services to the public?	<input type="radio"/>	<input checked="" type="radio"/>
12. If goods or services are not delivered, would you expect payment to be withheld from Dartmouth College or be required to refund money back to the Dartmouth College?	<input type="radio"/>	<input checked="" type="radio"/>

Explanation(s) for any "No" answers:

I confirm that the answers provided above are true and complete to the best of my knowledge.

Signature of Independent Contractor: \_\_\_\_\_ Date: \_\_\_\_\_

Independent Contractor Review:

Reviewer: \_\_\_\_\_ Decision: \_\_\_\_\_

Decision Date: \_\_\_\_\_

## PaymentWorks Registration

Notification is sent to department & individual of decision



If approved, new IC invited to register



## Contracting

If approved, department submits Contract Request & agreement is created

**Custom Portal**

Language: English | User: contractoruser | Logout

Home New View My Profile

**Create a Contract**

Contract

Save Cancel Contract Details Contract Documents and Attachments Approvals Renewal / Related Contracts History

Contract ID: 1026

Demo Data:  Yes  No

\*Record Type: Master Agreement

You must select a record type and contract type before proceeding.

\*Contract Type: Master Procurement Goods and/or Services

Save Draft

**Requester Information**

\*Submitting on behalf of another?  Yes  No

Requester Name: Test Creator Requester Phone: \_\_\_\_\_ Ext. \_\_\_\_\_

Requester Email: jordanaharone@gmail.com

For Department: Finance and Admin

**Vendor Information**

\*Is the Vendor an Individual? (Independent Contractor/Independent Consultant)  Yes  No

Existing or New Vendor?  Existing Vendor  New Vendor

Vendor Name: \_\_\_\_\_

Location Name: \_\_\_\_\_ Primary Location ID: \_\_\_\_\_

Street Address: \_\_\_\_\_ Street Address 2: \_\_\_\_\_

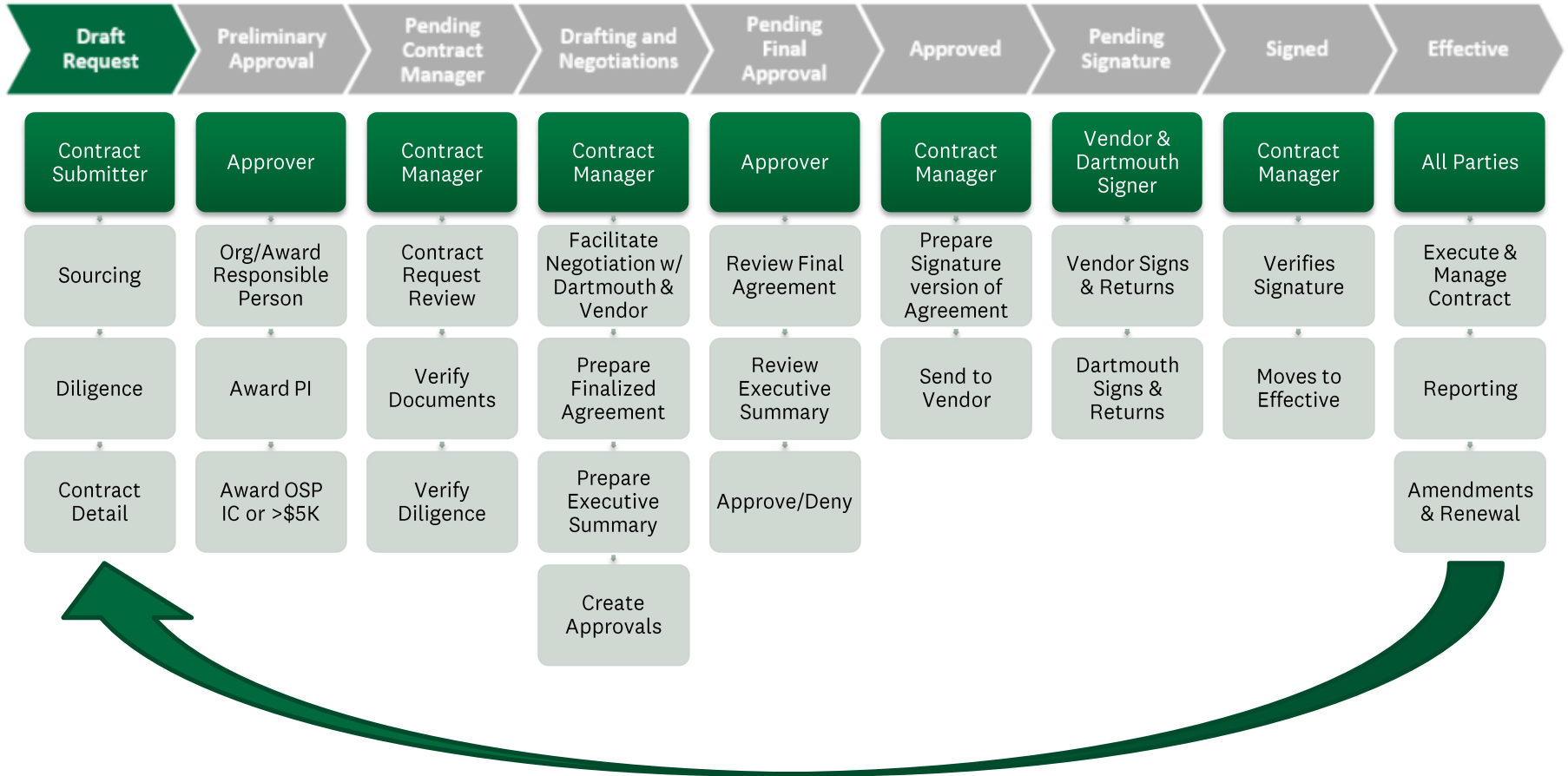


# User Groups

- **Contract Requesters**
  - Access to submit & view submitted contract requests, as well as Master Service Agreements within their department or that are identified as Institutional Agreements (Procurement /Campus Service Agreements - PIA/CIA).
  - Any employee who has not been identified as Power Users in permission groups of Department Administrator, Approver, or Contract Manager/Legal Specialist.
- **Department Administrators**
  - Power Users and have access to view all contracts within their Org-Level permissions, as well as all Institutional Agreements (PIA/CIA)
- **Approvers**
  - Power Users and have access to approve contracts either during preliminary approval or final approval.
  - Preliminary approvers are those individuals with fiscal responsibility for the GL Orgs or the Award PI
  - Final approvers are those individuals with contract signature authority for their Orgs, Divisions, or for the Institution.
- **Contract Managers/Legal Specialists**
  - These individuals are Power Users within Procurement or Campus Services and can manage the transition of the contracting process through review, drafting & negotiating, approval, and execution.



# High-level Process





# Approval Workflows – Preliminary Approval

- Immediately after Contract Submitter is submitted.
- After preliminary Approval, the Contract Request will show up in the Procurement or Campus Services Contract Manager queue.
- Preliminary Approval based on:
  - Funding Type
    - GL → Routed to Responsible Person of the GL Org, unless preliminary approver overwritten by Contract Submitter
    - PTAE0 → Routed to the Department Grant Manger with notification and automatic approval to PI & if vendor is an individual (IC) or when > \$5K, notification and automatic approval to OSP
  - Campus Services Contract Type
    - All route to Julie Findley, designated Responsible Person for any campus services agreement (for all Campus Service Orgs)





# Approval Workflows – Final Approval

- After terms are finalized with the Vendor (Drafting and Negotiation is complete)
- After final approvals, the Contract Manager will facilitate having the contract signed.
- Signed contract will be stored in Agiloft
- Final Approval work-flow based on Signature Authority Policy
  - Purchases of Goods and/or services using a GL (Appendix A - General Business Transactions)
    - Up to \$250,000 → Department Authorized Approver
    - \$250,000.01 – \$999,999 → Divisional Authorized Approver + CFO/EVP Finance (Scott Frew, Jomysha Stephen)
    - \$1,000,000 - \$4,999,999 -- > Divisional Authorized Approver + CFO/EVP Finance (Scott Frew, Jomysha Stephen) + President/Provost



# Approval Workflows – Final Approval, cont'd

- Final Approval work-flow based on Signature Authority Policy
  - Purchases of Goods and/or services using Grant Funds (Appendix G - Purchases of goods and services with grant or contract funds)
    - Up to \$5,000: PI (*When a grant or contract has more than one PI, each PI is authorized to exercise the authority under this Policy with respect to the portion of the project for which he or she is responsible.*)
    - \$5,000 - \$99,999: PI (or PI's Designee) + OSP
    - \$100,000 +: PI + OSP + Dean's (or Dean's Designee)
  - Campus Service Agreements (Appendix E - Contracts for services (including facilities services))
    - Up to \$500,000: Department Approver (Project Managers, Unit Directors, Senior Financial Analysts, or Director of Geisel Facilities)
    - Up to \$1,000,000: Divisional Approver (VPCS or Chief Operating Officer, CS)
    - Over \$1,000,000: Divisional Approver (VPCS, Chief Operating Officer, CS) + Unit Director



# Contract Management Portal

## Contract Requester View

The screenshot shows the Dartmouth Agiloft System interface for a Contract Requester. The header includes the Dartmouth logo, the system name "Dartmouth Agiloft System", and user information: "Language: English" (with a dropdown arrow), "User: contractrequester", and a "Logout" link. Below the header is a navigation bar with buttons for "Home", "New", "View", and "My Profile". The main content area is divided into two columns of menu items. The left column is titled "System Access Request" and includes "Create a System Access Request", "View My System Access Requests", and "View Open System Access Requests". The right column is titled "Contracts" and includes "Create a Contract Request", "View My Contracts", and "View All Contracts". To the right of these columns is a search box with the label "Search:", a text input field, and a "Go" button. Below the search box are two checkboxes: "System Access Requests" and "Contracts". At the bottom of the page, a footer bar states "Powered by Agiloft".

- Create a Contract Request – Request a New Contract
- View My Requests - View Contracts Created
- View All Contracts – View Department/Institutional Contracts
- Search – Search Department/Institutional Contracts



# Approver Dashboard



All Search

General
Home
My Assigned
Last Opened
Contracts
System Access

\*Approver

### Useful Hyperlinks

- Create a Contract
- View My Contracts
- View My Approvals
- > View Training Guides
- > Contract Assistance: Email Procurement Services
- > Technical Assistance: Email Agiloft Help

### My Pending Approval

Status: No records Click for details...

Search: -TEXT- contains, ~= Go

Show All  Refine  String  Context  Active Only  Synonym  More Options P: Approver is User and Status is Pending Approval

Delete Request Reapproval

Views Search

### All My Approvals

Status: No records Click for details...

Search: -TEXT- contains, ~= Go

Show All  Refine  String  Context  Active Only  Synonym  More Options My Assigned Approvals

New

Views Search



# Department Admin Dashboard

All ▼  Q

Dartmouth CLM | ? Admin

General | Home | My Assigned ▼ | Last Opened ▼ | Contracts ▼ | System Access ▼

**\*Department Admin** ▼

**Useful Hyperlinks**

- [Create a Contract](#)
- [View My Contracts](#)
- [View My Approvals](#)
- [View Training Guides](#)
- [Contract Assistance: Email Procurement Services](#)
- [Technical Assistance: Email Agiloft Help](#)

Contracts Pending Approval

2

Contracts Expiring Within 60 Days

115

Contracts Expiring Within 30 Days

58

**All Contracts**

Status: More than 100 record(s) found. Click [here](#) to count records.

Page: [Page 1] [Next](#) [Last](#) Go to page  [Go](#)

Search:  contains, ~= [Go](#)

Show All 
  Refine 
  String 
  Context 
  Active Only 
  Synonym 
 [More Options](#)

New | Mass Edit | Actions
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	Edit	Contract ID	Status	Contract Type	Vendor Name (Legal Name)	New Vendor Name
<input type="checkbox"/>		5220	Request Pending Contract Manager Review	Services Agreement (Campus Services)	James LaMontagne Landscape Co Inc	
<input type="checkbox"/>		5219	Request Pending Contract Manager Review	Services Agreement (Campus Services)	Equinox Strategies Inc	
<input type="checkbox"/>		5217	Request Submitted for Preliminary Approval	Procurement Goods and/or Services Agreement	Nazarevych, Lesia Tarasivna	
<input type="checkbox"/>		5208	Effective	Procurement Goods and/or Services Agreement	AVA Gallery	

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**Contract Expiring within 30 days**



# Questions

Heading into CMS