



Stratocore: External Customer IDs

For external Users that do not have a speedtype, it is necessary to request a Customer ID before their account can be created within Stratocore. The process is detailed below. Failure to do so will create issues invoicing through Stratocore.

1. Meet with the external customer and ask several key questions:
 - a. Are they or their external entity already customers of CU Boulder and/or already part of Stratocore?
 1. If Yes, do they know their customer ID? We can look them up within Stratocore using their Group name
 2. If No, or there is no customer ID, Steps 2-5 will need to be completed.
 - b. Will a price quote be needed, or are your published rates sufficient for their needs?
 - c. Is an NDA needed?
 1. If Yes, Step 6 will need to be completed

If a Customer ID is needed, complete the items below

2. Complete the External Customers template
 - a. Found on the [Protocols and Procedures](#) page
3. Email the template to oucfinance@colorado.edu
 - a. OUCFinance will provide the appropriate Customer ID
4. Use this Customer ID when creating the new User and Lab within Stratocore
5. Request a new agreement with the External Customer:
 - a. Agreement/Quotation Request form found on <https://www.colorado.edu/ocg/quote-authority-management#accordion-ee7b7a3fadc57b6d620b28b3233a74c94-1>
 - b. Direct link to Form:
 1. <https://dm-unityform.prod.cu.edu/UnityForms/UnityForm.aspx?d1=AbeBkKJvXS%2fM1I3EWi%2f%2fGp6E6BIfGd5iU7cNsEosacGMpiqOzuql69OucHu6%2beQGdJZf6ad%2fsvg68pRLrbcqngRSVre3amBBsCU0CNGo7Rv1FPICGJTFLRW0XOpwY2W4%2fg5k2nc8KIP9ZG9wur2oTcVnAFxOI8fQqZuhpUST8mdcoQ0OXyHwle3r%2feiuW3gVQ5q1TOHnS25YQCJHLVyt7majAtyXtJyDRex1sF0kGNi9gNT4jE1NFrNMyeB1WP5Q%3d%3d>
 2. An example form can be found on the [Protocols and Procedures](#) page

If an NDA is required, complete the items below

6. Share with the external customer the Partially-Executed NDA/CDA Agreement (PE NDA).
 - a. This agreement is for the one-way disclosure of confidential information by an external entity to CU Boulder personnel.
 - b. <https://www.colorado.edu/ocg/partially-executed-ndacda-agreement>
 - c. This form cannot be edited by the external party as it has been designed to allow for immediate acceptance.
 - d. The signed form must be emailed to ocgcontracts@colorado.edu, or routed to ocgcontracts@colorado.edu if Docusign is being used.



7. If CU Boulder personnel will disclose confidential information to an external entity, the above PE NDA cannot be used, and the NDA Online Request Form must be completed.
 - a. <https://dm-unityform.prod.cu.edu/UnityForms/UnityForm.aspx?d1=AXbLBC4XAh24ZtMbC3YuQt%2bLReKofXX%2fgvmD7Ube1LGd4g%2bA3gflQD2HfKF1q4AH4eAD%2fc1pSsff4UwVK4fjrFYJAD%2f6%2bJt3JnFfAFsatCqls1ZDyNwSTrsYdp1g5Vx75yi2SHF6PZhsu1FIDazg0MrOWHI69wAdzoCYLi4AMb38aFRTwYH03xr%2b%2fWrrHXiMxACFNNxO4FeqjaolU1Ov5%2fkPNdRsnLHxWNsKvY9nnO4KIE1OLYo6Wv9tE1YjVktQnJF0c%2fZG9PuY7PDzWM7uRNQ%3d>