

# Security Documentation Request Procedure

**Effective Date:** 06/01/2025

**Audience:** External third parties including clients, prospects, partners, and auditors

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## 1. Purpose

This procedure defines the steps external parties must follow to request security-related documentation from IntelliBoard Inc. It ensures that all documentation access is secure, compliant, and traceable, in alignment with the Security Documentation Request Policy and applicable regulations.

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## 2. Applicability

This procedure applies to:

- **Existing Clients:** Organizations with an active agreement with IntelliBoard.
  - **Prospective Clients:** Organizations in active discussion with IntelliBoard sales or partnerships teams.
  - **Other Third Parties:** Auditors, partners, or vendors not under contract with IntelliBoard.
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## 3. Pre-Request Requirements

### 3.1. Use the IntelliBoard Trust Hub First

Before submitting a request, all users must visit the self-service [IntelliBoard Trust Hub](#) to access public documents such as:

- Security whitepapers
- Compliance certifications
- Sub-processor lists
- Privacy policies

If the required documentation is **not available** in the Trust Hub, proceed with the formal request.

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## 4. Submission Process

### Step 1: Access the Support Portal

Visit the IntelliBoard Support Portal at:

<https://intelliboard.atlassian.net/wiki/spaces/KB/overview>

### Step 2: Open the Request Form

Navigate to the **HelpDesk** and select the “**Security Documentation Request Form.**”

### Step 3: Complete the Form

Fill out all required fields (see attached list). This includes identifying whether you are a client, prospect, or third party.

### Step 4: NDA Submission

- **For any protected or sensitive documents** (e.g., SOC 2, FedRAMP documentation, architecture diagrams), the requester must upload an executed **Non-Disclosure Agreement (NDA)**.
- If no NDA is available, requesters may request IntelliBoard’s standard NDA for signature.

### Step 5: Internal Review and Approval

The IntelliBoard Information Security Team will review the request, verify the legitimacy of the business need, and confirm the requester’s identity and relationship to IntelliBoard. The CISO or delegated reviewer must approve access to protected materials.

### Step 6: Secure Delivery

If approved, the requested documentation will be shared through a secure, access-controlled channel (e.g., SharePoint or secure document portal with expiring link). Documentation will be watermarked and time-bound based on the intended purpose.

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## 5. Approval SLA

- **Existing Clients:** Up to 5 business days
  - **Prospective Clients:** Up to 7 business days after qualification
  - **Other Third Parties:** Up to 10 business days or longer depending on due diligence
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## **6. Restrictions**

- IntelliBoard reserves the right to deny requests that do not demonstrate a legitimate business or regulatory need.
  - All distributed documents are subject to copyright and confidentiality protections.
  - Sharing without written consent is prohibited.
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## **7. Contact for Escalation**

For questions or escalations related to your request, contact:  
[privacy@IntelliBoard.net](mailto:privacy@IntelliBoard.net)