

New Agreement page

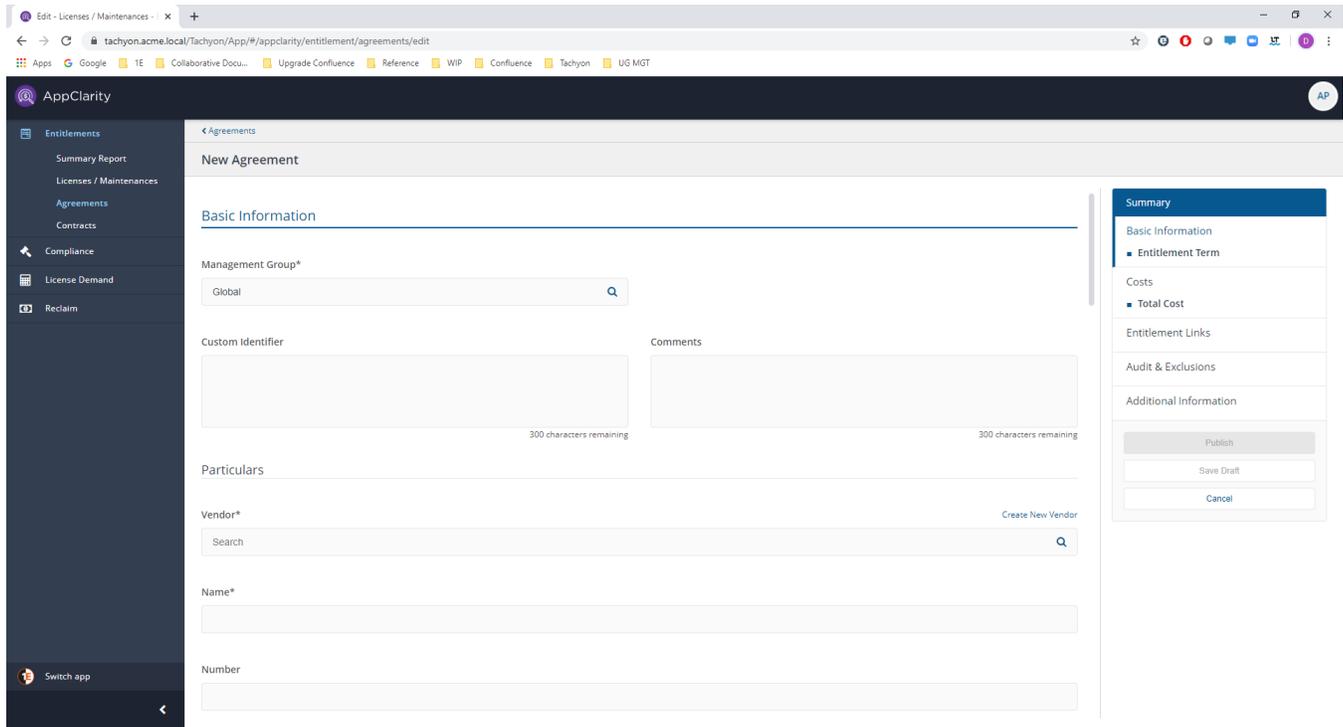
Summary

A description of the fields in each section of the **New Agreement** page. This also covers the **Edit Agreement** page.

An agreement entitlement type in AppClarity provides a structure to license and maintenance entitlements. Agreements can be used to model the contractual structure an organization uses for their purchasing process, or their internal software disbursement process.

The sections on the **New Agreement** or **Edit Agreement** page are:

- The Summary panel
- Basic Information
 - Particulars
 - Entitlement Term
 - Costs
- Entitlement Links
 - Parent
 - Associations
 - Children
- Audit & Exclusions
- Additional information (Optional)



The Summary panel

The Summary panel on the right-hand side of the entitlement displays a summary of the settings that have been made in the entitlement so far. It's always visible on screen and can be used to navigate between the various sections of the entitlement.

The panel also contains the following buttons:

Button	Description
Publish	Publishes the entitlement so it becomes active.
Save Draft	Saves the current settings in the entitlement to a draft. This can be used to save edits if you are part way through creating or making changes to the entitlement. It can also be used to inactivate an entitlement by removing its published status.
Cancel	Cancel the current edits and closes the page.

Summary

- Basic Information
 - Entitlement Term 02/19/2022
- Costs
 - Total Cost \$938,000.00
- Entitlement Links
- Audit & Exclusions
- Additional Information

Publish

Save Draft

Cancel

Basic Information

This section deals with the basic information for the entitlement, such as details of the product, the coverage and term of the entitlement.

Basic Information

Management Group*

Custom Identifier

300 characters remaining

Comments

300 characters remaining

Field	Details
Management Group*	Here you can associate the entitlement with Management Group of your choice.
Custom Identifier	An optional field. You can specify any alpha-numeric value to help identify the entitlement in the Draft and Published pages and when linking to other entitlements.
Comments	Enter text here to store any comments you have related to the entitlement.

Particulars

This sub-section defines the basis of the agreement.

Particulars

Vendor*

[Create New Vendor](#)

Microsoft Corporation



Name*

Microsoft Office Agreement - 2018

Number

A-9283498

Field	Details
Vendor	<p>The vendor portion of the vendor, title, version and edition attributes that are used to identify which software products the entitlement or agreement is for. For example, Microsoft Corporation or 1E.</p> <p>In the New Agreement page this must be filled out before any other fields. Suggested suitable vendors that match your text are displayed as you type into the field, which you can select to auto-complete the entry.</p>
Name	<p>The name used for the agreement. For example, you might want to define an agreement that covers all your Microsoft Office and related products, so you could name the agreement Microsoft Office Agreement - 2018.</p>
Number	<p>Corresponds to the contract number, usually supplied on the customer contract.</p>

Entitlement Term

Entitlement Term

Start Date*

03/20/2020



Duration*

23

End Date*

02/19/2022



Field	Details
Start Date	<p>When the agreement starts to be applicable.</p>
Duration	<p>How long in months the agreement is applicable for after the start date. Setting the Duration sets the End Date. Setting the End Date sets the Duration.</p>
End Date	<p>This is the last date the agreement is applicable until. Setting the Duration sets the End Date. Setting the End Date sets the Duration.</p>

Costs

This section lets you control how the entitlement is costed and how it can be considered within the overall spend.

Costs

Currency

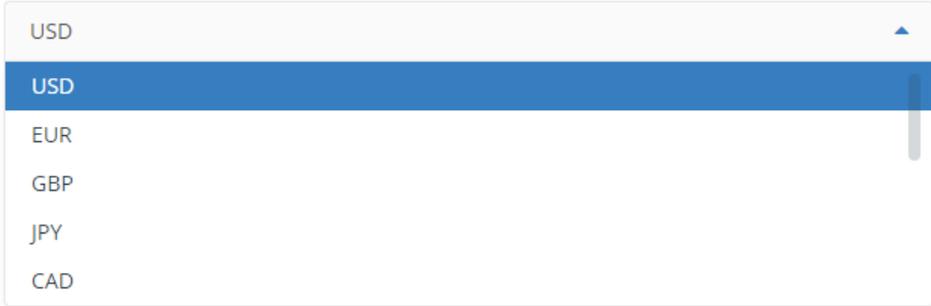
USD



Total Cost

938000

Field	Details
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Currency	<p>The currency applied to the entitlement. Clicking on the Currency field displays a list of currencies to choose from.</p> <p>Currency</p> 
Total Cost	<p>The cost of the agreement as arranged with the Vendor. Here you enter the total cost of the agreement corresponding with the currency field.</p>

Entitlement Links

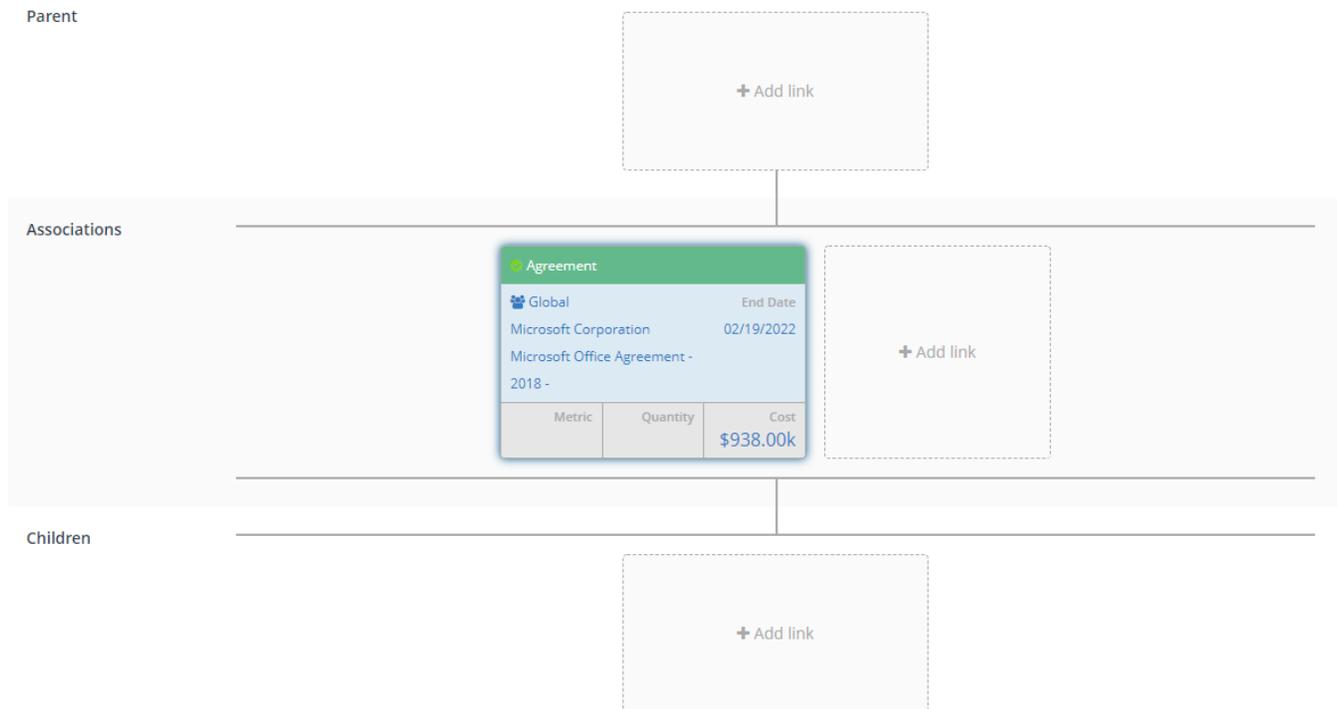
This section lets you create links between your entitlements. If you are creating a new entitlement this section will initially look like this:

Entitlement Links

Save the entitlement to start adding links

After you have saved the entitlement this section provides an interface for linking it to other entitlements:

Entitlement Links

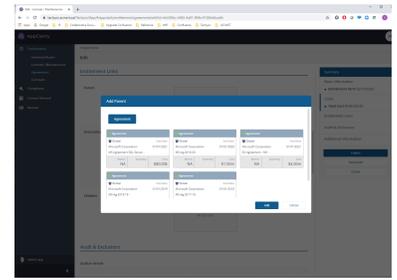


There are three sub-sections:

Parent

Here you can link parent agreements. Clicking on the **+Add link** area displays the **Add Parent** popup.

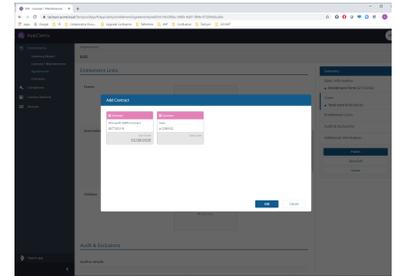
A list of agreement entitlements is displayed. Click on any of these and a green check mark will appear to indicate the selected parent, you can only select one. Once you've made your choice click the **Add** button to link the checked parent.



Associations

Here you can link contracts. Clicking on the **+Add link** area displays the **Add Contract** popup.

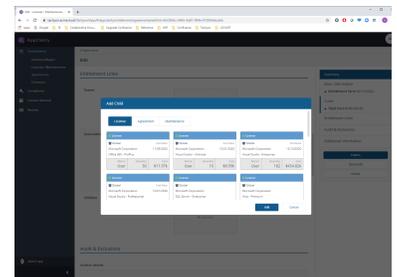
A list of contracts will be displayed. Click on any of these and a green check mark will appear to indicate the selected contract, you can select more than one contract to link. Once you've made your choice click the **Add** button to link the checked contract(s).



Children

Here you can link child licenses, agreements or maintenances. Clicking on the **+Add link** area displays the **Add Child** popup.

Select **License**, **Agreement** or **Maintenance** to add that type of link, a list of entitlements of the selected type will be displayed. Click on any of these and a green check mark will appear to indicate the selected child - you can select more than one. Once you've made your choice click the **Add** button to link the checked children.



Audit & Exclusions

This section lets you control how the entitlement is audited.

Audit & Exclusions

Auditor details

300 characters remaining

Auditor frequency (months)

Auditor notice period (days)

Audit tool

Audit scope

300 characters remaining

Field	Details
Auditor Details	Organizations that are allowed to perform the audit including (if appropriate), the licensor organization and any third-party organizations, according to what was agreed in the contract.
Audit Clause	Provides additional information on what could trigger the audit.
Auditor Frequency	Definition of the highest agreed frequency of the audit expressed in months.

Auditor Notice period	Notice period in days.
Audit Tool	Name of the tool(s) which are approved for use in the audit.
Audit Scope	Defines what part of the software customer organization is allowed to be audited.

Additional information (Optional)

This section lets you enter additional information related to the entitlement that may come from a Vendor agreement or contract.

Sub-Section	Field	Field Details
	Business Unit	Specifies the Business Unit the agreement will be applied to. This may correspond to your management groups, depending on how you have those configured.
	Sponsor	Name of the person who manages the budget associated with an agreement (this field is likely to be used only on agreements, but could be extended to other entitlements)
Invoice	Number	The invoice number, usually specified in the customer contract.
	Line Item Number	This optionally identifies the line number (if provided) on the customer contract that pertains to the invoice.
	Date	The date for the invoice.
Purchase Order	Number	The purchase order number, usually specified in the customer contract.
	Line Item Number	This optionally identifies the line number (if provided) on the customer contract that pertains to the purchase order.
	Date	The date for the purchase order.
Direct Supplier	Number	The number that identifies the direct supplier. For example, in some organizations this may be the same as the contract number.
	Line Item Number	This optionally identifies the line number (if provided) on the contract that pertains to the direct supplier.
	Date	The date for the contract.
Internal Order	Number	The ITARS or similar internal identifier for the order as specified in the customer contract.
	Line Item Number	This optionally identifies the line number (if provided) on the contract that pertains to the internal order.
	Date	The date for the contract.
Licensor Details	Number	The number (or name) of the licensor, could be the vendor or a VAR.
	Line Item Number	This is intended as a reference to a licensor source other than an invoice, e.g. to an on-line portal of license purchases.
	Date	The date for the contract.
FOSS Details	IsFoss	This value is true only if the granted rights fulfill the requirements of both definition of the Free software maintained by the Free Software Foundation.
	Copy Left	This value provides information on whether derivative works (which are always allowed for open source software) are themselves required to be open source software. There are three allowed values: "strong" means that all kinds of derivative works are required to be open source software themselves, "no" means that for all kinds of derivative works, it is allowed to distribute the derivative work as proprietary software. The intermediate value of "weak" means that there are some restrictions and the details are to be checked in the license.

Additional Information (Optional)

Business Unit Sponsor

Invoice

Number Line Item Number Date

Purchase Order

Number Line Item Number Date

Direct supplier

Number Line Item Number Date

Internal Order

Number Line Item Number Date

Licensor details

Number Line Item Number Date

FOSS details

IsFOSS Copy Left

Trademark restrictions

30 characters maximum

Trade mark restricti ons	FOSS trademark restrictions.
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