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Overview

A Contract establishes the relationship between one service customer and one service provider, both represented by organizations either in one or across multiple tenants. Contracts need to have at least either one ContractElement or one ServiceItem to be fully defined. For both ContractElement and ServiceItem, there are hardly any fields which are defined in the database as UNIQUE. This is similar even in the Contract.
In a Bridge: To identify a contract, you must use any inbound capable field or field combination as long as the result set exactly is a single entity for Contract and ContractElement.

Contract List

The contract list is used to administrate the contracts.

The following options help to administrate contracts:

- Use the **Setup** drop-down list to change the list type.
- Use the filters to search for contracts.
- Select a contract to view and edit its master data.
- Use the **Create new Contract** function to create a new contract.
- Use the **Upload Contracts** or **Download list** function to import and export contracts.

NOTE: When administrating the contracts, the administrator will only view the organizations that he is assigned to.
Check the organization membership if users or administrators cannot view existing contracts.

Create and Administrate Contract List

Contract lists are managed inside the BasicData. The contract lists are available in the location **SD.basicdata > Contracts**.

To administrate the contract lists, follow these steps:

Step 1: Choose **SD.basicdata > MyCompany > {Select the Company} > Setups > Contracts > ContractList.**

Step 2: Use the functions **Add new ContractList setup** or **Copy ContractList setup** to create new contract lists.

For more information on editing and creating list setups, refer to the chapter *Setup Editor*.

NOTE: Ensure that you provide setup permissions to enable the users to access the newly created setup.

Create a New Contract

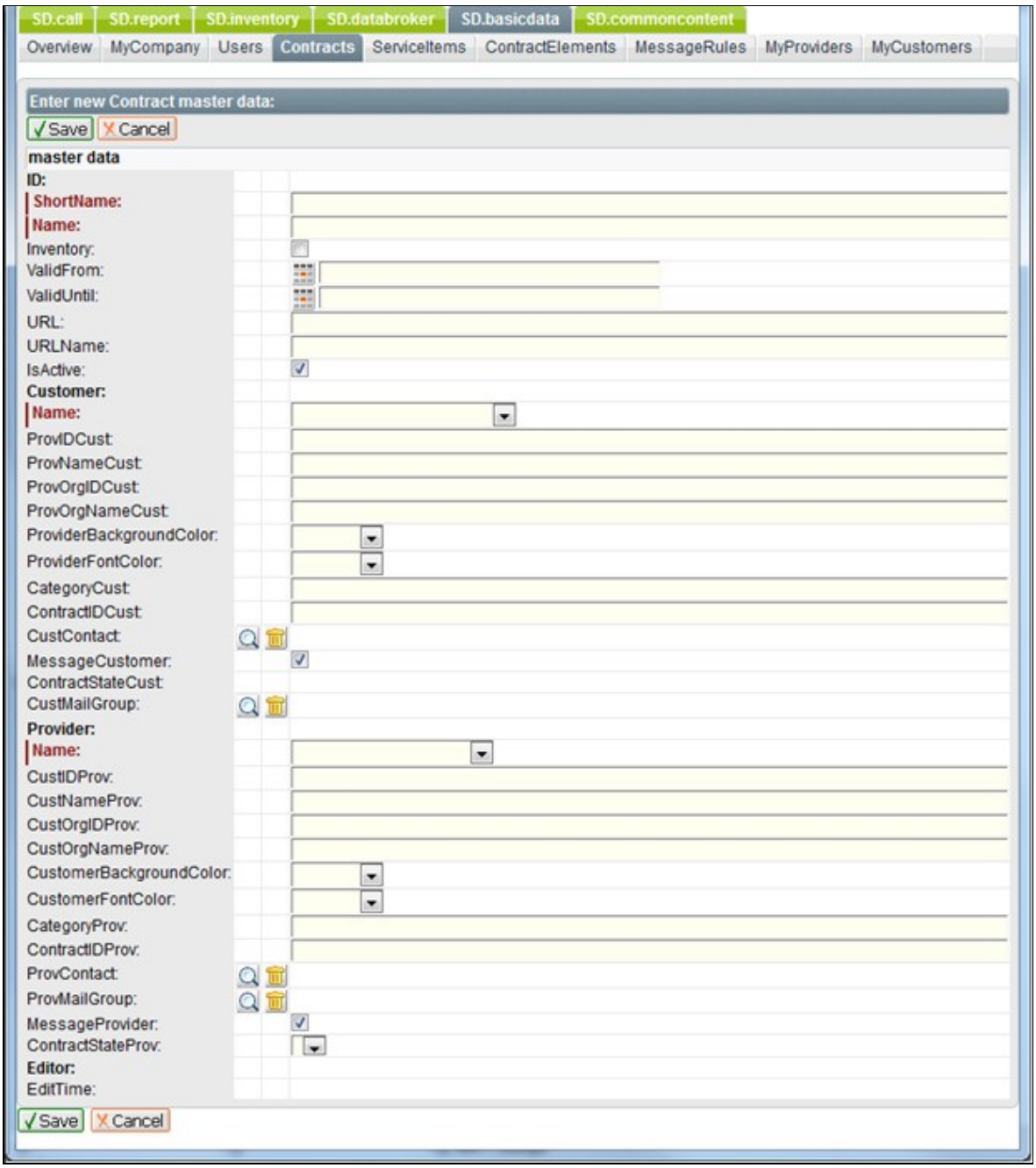
User should have write permissions to create a new contract.

You must implement the following guidelines while creating a contract:

- Define ShortName, Name, CustomerOrganization, and ProviderOrganization to receive the basic functionality of a contract.
- Additional information such as contact person of the companies entering the contract can be mentioned. These contracts can be used by escalation rules (MessageRules) to trigger events.
- The other fields such as ProvIDCust, ProvNameCust, CustIDProv, CustNameProv, and so on are used when communicating with other systems.

- Editor and EditTime shows how the contract was edited the last time (including the date).

NOTE: You must set the **Inventory** flag if the Contract should contain ContractElements with inventory (devices).



It is even possible to determine Contracts (CO), if their identifiers are not unique and if the supplied ContractElement (CE) allows a clear definition. If no CO + CE can be uniquely determined, an error message is generated. This is not important in an online interface (SD2 or portal) as the CO / CE is already selected from a list and identified.

ContractElements and ServiceItems contain the information about the services provided between two organizations.

The following are the features of a contract:

- A contract may or may not include inventory.
- A contract may contain one or more contract elements.

- Calls are uniquely related to one specific contract (ContractElement).

NOTE: A contract defines only the relationship between two organizations. It contains information about the service provided through assigned ContractElements and ServiceItems. It does not contain any service information in the contract data object except for a reference to the provided services (the assigned ContractElements).

Field Description

The following table displays the fields available in Contracts:

Field Name	Name of Tag in Call	Field Description
ID	</SD.call/Contracts/objID>	ObjectId of the Contract (CO); most of the times it is identical to the field </SD.call/Contracts/ID>
	</SD.call/Contracts/ID>	Identifier (ID) of the Contract: A number which usually is identical to the ObjID but it can also be different. ID and Obj ID are two different fields. Obj identifier is a unique identifier value generated by the system. However, the identifier of the record can change wherever the record is historicized for example, calls, devices, locations, in the calls is the ID = SDCallID.
ShortName	</SD.call/Contracts/ShortName>	Mandatory; Furthermore, there is (currently - 23.04.2014) an index. The string length is max. 20 Characters long. The ShortName is not UNIQUE in the DB. This is important to know because when uploading the CO-ShortName should be unique. If unique CO-ShortName is not found then it is created.
Name	</SD.call/Contracts/Name>	Mandatory?Longname of the CO.
Inventory	</SD.call/Contracts/IsInventoryFlag>	A checkbox that indicates whether there are devices linked with the ContractElement (CE) which is linked to this CO. If the

		checkbox is marked, but there is no device linked with the selected CE, this results in an error message. Important for ?New Call by Contract? where a device should to be selected.
ValidFrom	</SD.call/Contracts/ValidFrom/>	Date field, for display purpose only and is not referenced anywhere.
ValidUntil	</SD.call/Contracts/ValidUntil/>	Date field, for display purpose only and is not referenced anywhere.
URL	</SD.call/Contracts/URL/>	Valid URL ; It is seldom used. Displays location of OnLine-callable, legal contracts (for example, download as a PDF file from a third system) between customers and providers, which are represented by these Contract.
URL-Name	</SD.call/Contracts/URLName/>	URL Name has been implemented for the case that the URL is very long and it is seldom used.
isActive	</SD.call/Contracts/IsActiv>	Mandatory?important field. Specifies whether this Contract can be used or not.
Customer		
Name		Mandatory; Name of the organization of the Provider. It can be selected only by such organization that is assigned to where the users have the administration priviledges.
ProvIDCust	</SD.call/Contracts/ProvIDCust/>	Number of the provider at the customer side; pure information field; It exists from a time when there was no separation of roles.
ProvNameCust	</SD.call/Contracts/ProvNameCust/>	Name of the provider in the system of the Customers; pure information field; It exists from a time when there was no separation of roles.
ProvOrgIDCust	</SD.call/Contracts/ProvOrgIDCust/>	ID of the organization of the provider at the Customers; pure information field; It

		exists from a time when there was no separation of roles.
ProvOrgNameCust	</SD.call/Contracts/ProvOrgNameCust/>	Name of the organization of the provider at the Customers in SD2; It exists from a time when there was no separation of roles.
ProviderBackgroundcolor	</SD.call/Contracts/ProviderBackgroundColor/>	Can be used to render in an SD2 in a call list of individual lines in different colors.
ProviderFontColor	</SD.call/Contracts/ProviderFontColor/>	Can be used to represent in an SD2 in a call list the fonts of individual lines in different colors.
CategoryCust	</SD.call/Contracts/CategoryCust/>	Used to divide Customers into categories in any form; pure information field.
ContractIDCust	</SD.call/Contracts/ContractIDCust/>	ID of Contracts in the system of Customers if they have their own identifier for the CO. pure information field.
CustContact		A user serves as the contact person or person responsible for this CO; pure information field.
MessageCustomer	</SD.call/Contracts/SendMailToCustDefaultFlag>	Specifies the default value for the field in front of the same name in the CE when it is created. If this checkbox is not selected in the CE the appropriate system (for example, MessageCustomer of the Customer) does not receive new message through a bridge - no matter what else is configured in the message rules.
ContractStateCust		Used to manage CO and is for informational character. The values are created in the Company - Contract States.
CustMailGroup		In the Message Rules, mail groups can be defined in the menu item "all mail groups", such as Groups of users, which, under certain circumstances receive mails. A mail group can be stored in this field. Afterwards, in

		the Communications this entry can be referenced by ?SCContractMailGroup? as a receiver.
Provider		
Name		Mandatory; Name of the organization of the Customer. It can be selected only by such organization that is assigned to where the users have the administration priviledges.
CustIDProv	</SD.call/Contracts/CustIDProv>	Number of the Customers at the provider; pure information field; It exists from a time when there was no separation of roles.
CustNameProv	</SD.call/Contracts/CustNameProv>	Name of the customer in the system of the provider; pure information field; It exists from a time when there was no separation of roles.
CustOrgIDProv	</SD.call/Contracts/CustOrgIDProv>	ID of the organization of the Customers at the provider; pure information field; It exists from a time when there was no separation of roles.
CustOrgNameProv	</SD.call/Contracts/CustOrgNameProv/>	Name of the organization of the Customer at the provider in SD2; It exists from a time when there was no separation of roles.
CustomerBackgroundcolor	</SD.call/Contracts/CustomerBackgroundColor/>	Can be used to render in an SD2 in a call list of individual lines in different colors.
CustomerFontColor	</SD.call/Contracts/CustomerFontColor/>	Can be used to represent in an SD2 in a call list the fonts of individual lines in different colors.
CategoryProv	</SD.call/Contracts/CategoryProv/>	Used to divide the Provider into categories in any form; pure information field.
ContractIDProv	</SD.call/Contracts/ContractIDProv/>	ID of Contracts in the system of Provider if they have their own identifier for the CO; pure information field.
ProvContact		A user serves as the contact person or person responsible for this CO; pure information

		field.
MessageProvider	</SD.call/Contracts/SendMailToSPDefaultFlag>	Specifies the default value for the field in front of the same name in the CE when it is created. If this checkbox is not selected in the CE the appropriate system (for example, MessageCustomer of the Customer) does not receive new message through a bridge - no matter what else is configured in the message rules.
ContractStateProv		Used to manage CO and is for informational character. The values are created in the Company - Contract States.
ProvMailGroup		In the Message Rules mail groups can be defined in the menu item "all mail groups", such as Groups of users, which, under certain circumstances receive mails. A mail group can be stored in this field. Afterwards, in the Communications this entry can be referenced by ?SCContractMailGroup / SPContractMailGroup? as a receiver.
Editor	</SD.call/Contracts/edi_objid>	Login name of that user who last modified the record via the online interface.
Edittime	</SD.call/Contracts/EditTimeUTC>	Date and time in the time zone of the viewing user. Specifies when the record was last modified through the online interface.
	</SD.call/Contracts/PartInBenchFlag>	Was used in an module which does not exist anymore; Ignore it.
	</SD.call/Contracts/ccu_objid>	"$1" FOREIGN KEY (ccu_objid) REFERENCES bporganizations(objid) ON UPDATE RESTRICT ON DELETE RESTRICT
	</SD.call/Contracts/csp_objid>	"$2" FOREIGN KEY (csp_objid) REFERENCES bporganizations(objid) ON

		UPDATE RESTRICT ON DELETE RESTRICT
	</SD.call/Contracts/scp_objid/>	"contracts_scp_objid_fkey" FOREIGN KEY (scp_objid) REFERENCES bppersons(objid) ON UPDATE RESTRICT ON DELETE RESTRICT
	</SD.call/Contracts/spp_objid/>	"contracts_spp_objid_fkey" FOREIGN KEY (spp_objid) REFERENCES bppersons(objid) ON UPDATE RESTRICT ON DELETE RESTRICT
	</SD.call/Contracts/esc_objid/>	"contracts_esc_objid_fkey" FOREIGN KEY (esc_objid) REFERENCES entitystates(objid) ON UPDATE RESTRICT ON DELETE RESTRICT
	</SD.call/Contracts/esp_objid/>	"contracts_esp_objid_fkey" FOREIGN KEY (esp_objid) REFERENCES entitystates(objid) ON UPDATE RESTRICT ON DELETE RESTRICT
	</SD.call/Contracts/mgc_objid/>	"contracts_mgc_objid_fkey" FOREIGN KEY (mgc_objid) REFERENCES mailgroups(objid) ON UPDATE RESTRICT ON DELETE RESTRICT
	</SD.call/Contracts/mgp_objid/>	"contracts_mgp_objid_fkey" FOREIGN KEY (mgp_objid) REFERENCES mailgroups(objid) ON UPDATE RESTRICT ON DELETE RESTRICT

Edit or Manage a Contract

To manage a contract, select the contract from the contract list. The detailed view lists all information about the selected contract including all assigned ContractElements of the selected contract. The assigned contract elements will be shown in the left frame as a tree view.

The following options can be used:

- Change master data?To change the contract data
- Add new contract element?To create a new ContractElement (SLA)
- Delete contract?To delete the contract

- Display Service Items?To display assigned ServiceItems

Click on one of the ContractElements listed on the left side to view its details.

Changing a Contract and/or a ContractElement

There are usecases where it is important to create a ticket before it is fixed on usage of Contract or ContractElement for the ticket. Due to the fact that for creating a ticket, a Contract and ContractElement is mandatory you should change them later.

To change a Contract/ContractElement, follow these steps:
Step 1: Using an interface (SD2 or Portal): select a Contract/ContractElement from a list.

Step 2: You can change a Contract and/or a ContractElement through a template.
While performing this, you must ensure that you provide the following tags:

- Name or ShortName of the Contract and ContractElement you are already using.
- Name or ShortName of the new Contract and ContractElement.

- You should always provide both?Contract and ContractElement.
- You should always provide both?Old values which you want to substitute along with the new one.
- It does not matter if you are using the ShortName or the Name of Contract and ContractElement?the system should be able to identify uniquely the records.

Step 3: Always provide the four XML-Tags as listed below:

1. SD.call/Contract/ShortName
2. SD.call/Contracts/NewShortName
3. SD.call/ContractElements/ShortName
4. SD.call/ContractElements/NewShortName

To change the ContractElement, only the Tag <SD.call/Contract/NewShortName> should contain the value of <SD.call/Contract/ShortName>

View in CommonContent the following:
/SD.call/Contracts/NewShortName
/SD.call/Contracts/NewName
/SD.call/ContractElements/NewShortName
/SD.call/ContractElements/NewName

NOTE: When changing a Contract and/or a ContractElement the SLA is newly calculated. The SLA will always be recalculated regardless of the CallState you are currently using the State-SLA-Flag is set or not.

Delete Contracts

To delete a contract, follow these steps:

Step 1: Select a contract from the contract list.

Step 2: Click the **Delete contract** function.

Users with write permissions for BasicData can delete a contract.

NOTE: You can delete contracts only if they have not been used inside the calls and if all other references (such as ContractElements, ServiceItems, and so on) have been deleted.

Deactivate Used Contracts

Maintaining the data integrity demands that used data objects cannot be deleted from the Cisco ServiceGrid platform. This means that you cannot delete once a contract is used inside a call.

However, there is a soft deletion option to exclude such contracts from contract lists and selections.

To deactivate used contracts, follow the below step:

Step 1: Deselect the **IsActive** flag to make the contract disappear from all lists.

To activate the contract again, follow the below step:

Step 1: Check the **IsActive** flag again or recycle the contract by renaming and changing its values.

NOTE: A contract can only be deleted if it is not assigned to a call.
A contract cannot be deleted as long as it holds contract elements and service items.

The following two options will enable you to perform a soft deletion of a contract used in a call:

- Recycle the contract by renaming and reusing it.
- Deactivate the contract through the **IsActive** flag.

Mass Deletion of Contracts

Contracts cannot be deleted through uploads, but they can be deactivated (soft-deletion) by unchecking the **IsActive** flag.

For more information about Cisco ServiceGrid's upload and download options, refer to the SD.Databroker document.

Add a New ContractElement

For information on how to create and use ContractElements, refer to the ContractElements document.

Assign and Delete Service Items

ServiceItems are services which can be assigned to multiple contracts whereas ContractElements can be assigned to one contract only. ServiceItems make it easier to manage many similar services.

To assign service items to the contract, follow these steps:

Step 1: Click the Display serviceitems option. The system will display all assigned service items.
Step 2: Use upload, but only as an additive function.

To delete service items of the contract, follow these steps:

Step 1: Select the Change assignment function. The system will change the assigned service items.
Step 2: Click **Submit** to change the assigned service items.

NOTE: Relationship between existing service items cannot be deleted using upload.

Upload and Download Contract Lists

Contract lists can be uploaded and downloaded with the Cisco ServiceGrid application. The **Upload Contracts** and **Download Contracts** functions located at the user list are used to upload and download contract lists.

For more information about the Cisco ServiceGrid's Upload and Download options, refer to the SD.Databroker document.

Automated Contract Data Exchange

Contract data can be automated (using schedulers) for exporting to and importing it from other systems.

For more information about automated data exchange and import, refer to the SD.Databroker document.

Using Contracts and ContractElements in the GRID-Core

You need to create two contracts in general.

- **Partner 1 <-> GRID-CORE**
- **Partner 2 <-> GRID-CORE**

This leads to the following scenario:

Partner 1 <-> GRID-CORE <-> Partner 2

This creation task is identical. Therefore, the creation of Contracts and ContractElements are shown only one time.

The creation of Contracts and ContractElements through the GRID-CORE works different from the normal functionality. Technically, a Contract/ContractElement is a record in the database. You must know the following:

- Each record has an unique identifier (field ID in the mask).
- Each Contract and ContractElement has both a ShortName and a Name.

The ShortName of the Contract/ContractElement must be the ID of the Contract/ContractElement on the other end.

Use the following procedure while creating a Contract/ContractElement through GRID-CORE:

1. Create a contract between Partner 1 and the GRID-CORE. Choose a desired ShortName and a Name. Repeat this step for ContractElement also.
2. Note down the IDs of your newly created Contract and ContractElement.
3. Repeat the same actions for Partner 2 and enter the IDs that were taken down earlier as ShortNames on Partner 2.
4. Go back to your newly created Company and change the ShortNames of your newly created Contracts and ContractElements to the IDs of Partner 2.

The filed **ContractIDProv** must contain a special value. For example, SP/B2B/B2B/sdcall.

This string consists of four differents values separated by a slash:

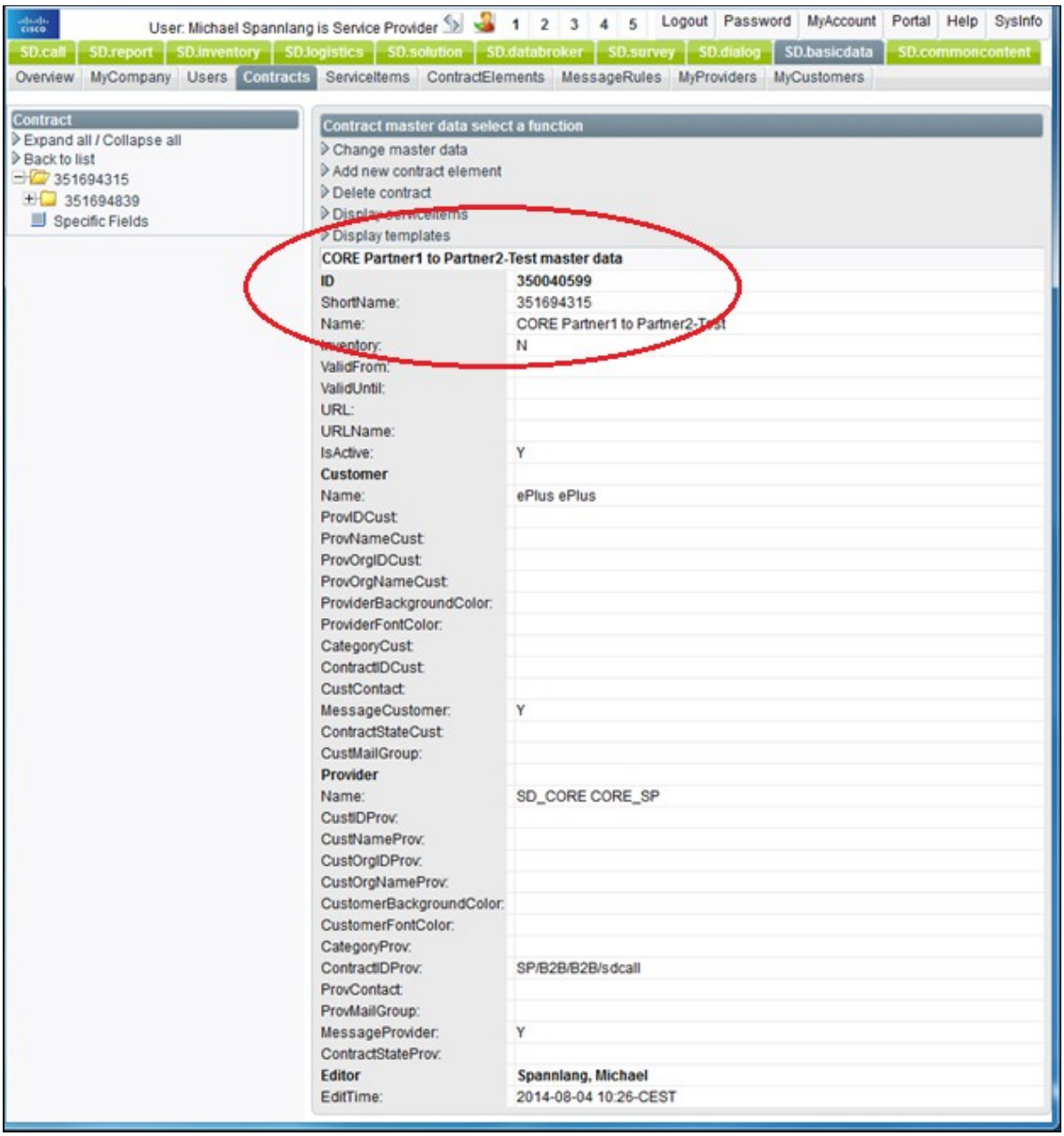
- The role of the company on the other end.
- The type of system of your newly created company
    - ♦ SD2 for a SD2
    - ♦ B2B for a Bridge
- The type of system of Partner 2
    - ♦ SD2 for a SD2
    - ♦ B2B for a Bridge
- The platform on which Partner 2 is installed

NOTE: You must exercise caution while filing the ContractIDProv as it is error prone.

Example:

Contract and ContractElements of Partner1

Contracts				**Contract Elements**		
ID	**ShortName**	**Name**	**ContracIDProv**	**ID**	**ShortName**	**Name**
350040599	351694315	CORE Partner 1 to Partner 2-Test	SP/B2B/B2B/sdcall	350041318	351694839	SL1-Partner 1-to-Partner 2 Test
351307970	351695753	CORE Partner 1 to Partner 2-Prod	SP/B2B/B2B/sdcall	351308248	351696247	SL1-Partner 1-to-Partner 2 Prod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1 2 3 4 5
Logout Password MyAccount Portal Help SysInfo
SD.call SD.report SD.inventory SD.logistics SD.solution SD.databroker SD.survey SD.dialog SD.basicdata SD.commoncontent
Overview MyCompany Users Contracts ServiceItems ContractElements MessageRules MyProviders MyCustomers
Contract
Expand all / Collapse all
Back to list
351694315
351694839
Specific Fields
Contract master data select a function
Change master data
Add new contract element
Delete contract
Display templates
CORE Partner1 to Partner2-Test master data
ID 350040599
ShortName: 351694315
Name: CORE Partner1 to Partner2-Test
Inventory: N
ValidFrom:
ValidUntil:
URL:
URLName:
IsActive: Y
Customer
Name: ePlus ePlus
ProvIDCust:
ProvNameCust:
ProvOrgIDCust:
ProvOrgNameCust:
ProviderBackgroundColor:
ProviderFontColor:
CategoryCust:
ContractIDCust:
CustContact:
MessageCustomer: Y
ContractStateCust:
CustMailGroup:
Provider
Name: SD_CORE CORE_SP
CustIDProv:
CustNameProv:
CustOrgIDProv:
CustOrgNameProv:
CustomerBackgroundColor:
CustomerFontColor:
CategoryProv:
ContractIDProv: SP/B2B/B2B/sdcall
ProvContact:
ProvMailGroup:
MessageProvider: Y
ContractStateProv:
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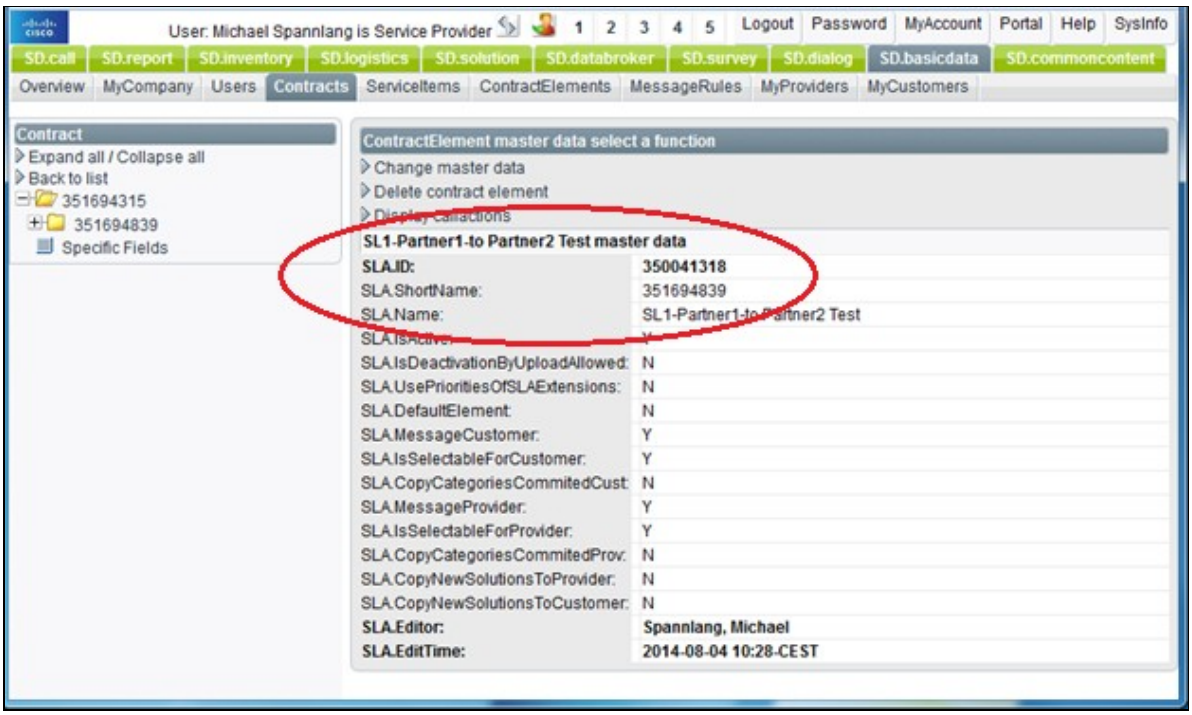
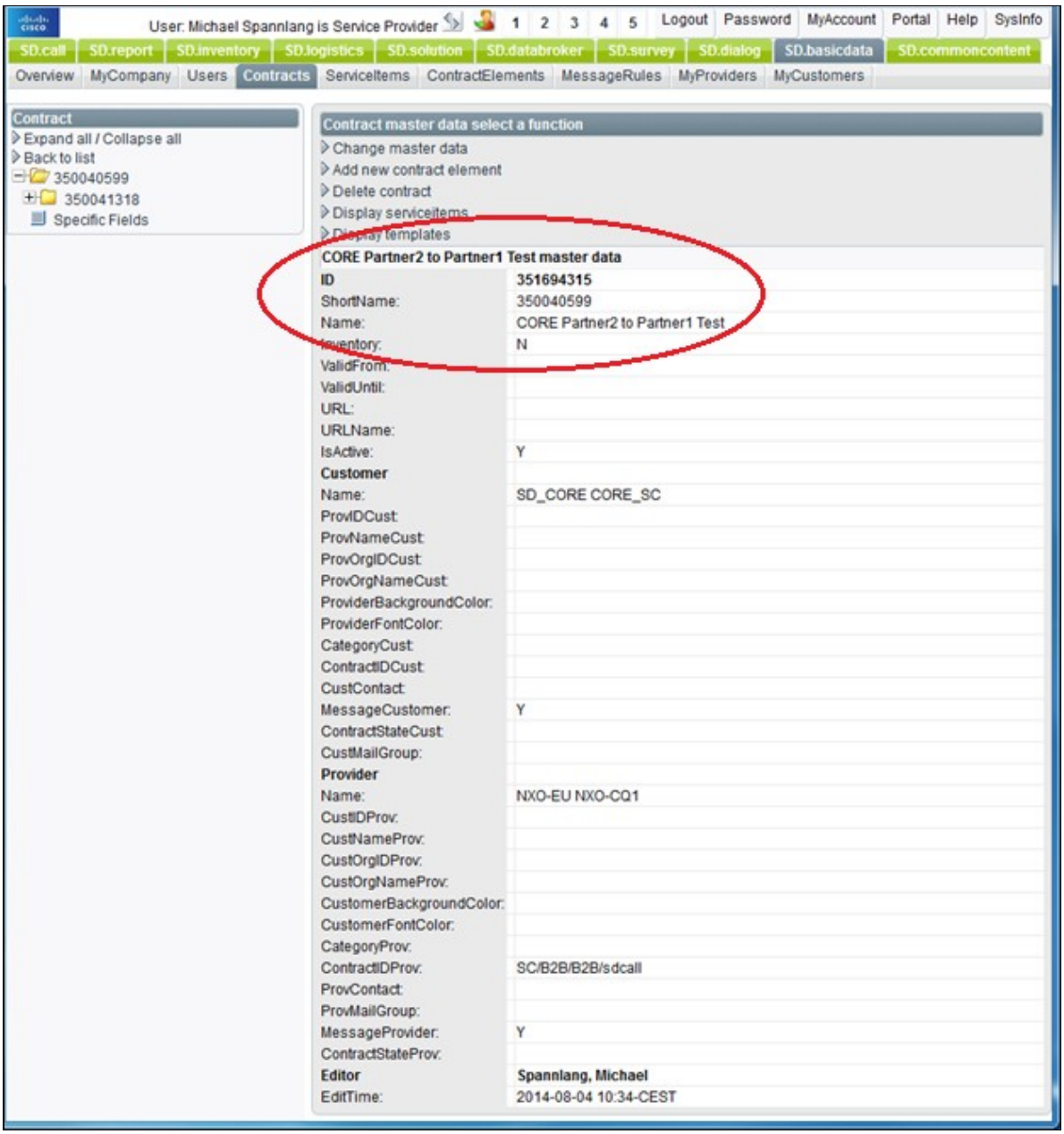
EditTime: 2014-08-04 10:26-CEST



Contract and ContractElements of Partner2

You must also create Contracts with ContractElements for Partner 2. Additionally, you must enter the string with which this contract will be indentified in the field CONTRACTIDCUST. The following image displays the corresponding Contract/ContractElement for Partner 2.

Contracts				**Contract Elements**		
ID	**ShortName**	**Name**	**ContracIDProv**	**ID**	**ShortName**	**Name**
351694315	350040599	CORE Partner 2 to Partner 1-Test	SP/B2B/B2B/sdcall	351694839	350041318	SL1-Partner 2-to-Partner 1 Test
351695753	351307970	CORE Partner 2 to Partner 1-Prod	SP/B2B/B2B/sdcall	351696247	351308248	SL1-Partner 2-to-Partner 1 Prod


User: Michael Spannlang is Service Provider
1 2 3 4 5
Logout Password MyAccount Portal Help SysInfo
SD.call SD.report SD.inventory SD.logistics SD.solution SD.databroker SD.survey SD.dialog SD.basicdata SD.commoncontent
Overview MyCompany Users Contracts ServiceItems ContractElements MessageRules MyProviders MyCustomers
Contract
Expand all / Collapse all
Back to list
350040599
350041318
Specific Fields
Contract master data select a function
Change master data
Add new contract element
Delete contract
Display serviceitems
Display templates
CORE Partner2 to Partner1 Test master data
ID 351694315
ShortName: 350040599
Name: CORE Partner2 to Partner1 Test
Inventory: N
ValidFrom:
ValidUntil:
URL:
URLName:
IsActive: Y
Customer
Name: SD_CORE CORE_SC
ProvIDCust:
ProvNameCust:
ProvOrgIDCust:
ProvOrgNameCust:
ProviderBackgroundColor:
ProviderFontColor:
CategoryCust:
ContractIDCust:
CustContact:
MessageCustomer: Y
ContractStateCust:
CustMailGroup:
Provider
Name: NXO-EU NXO-CQ1
CustIDProv:
CustNameProv:
CustOrgIDProv:
CustOrgNameProv:
CustomerBackgroundColor:
CustomerFontColor:
CategoryProv:
ContractIDProv: SC/B2B/B2B/sdcall
ProvContact:
ProvMailGroup:
MessageProvider: Y
ContractStateProv:
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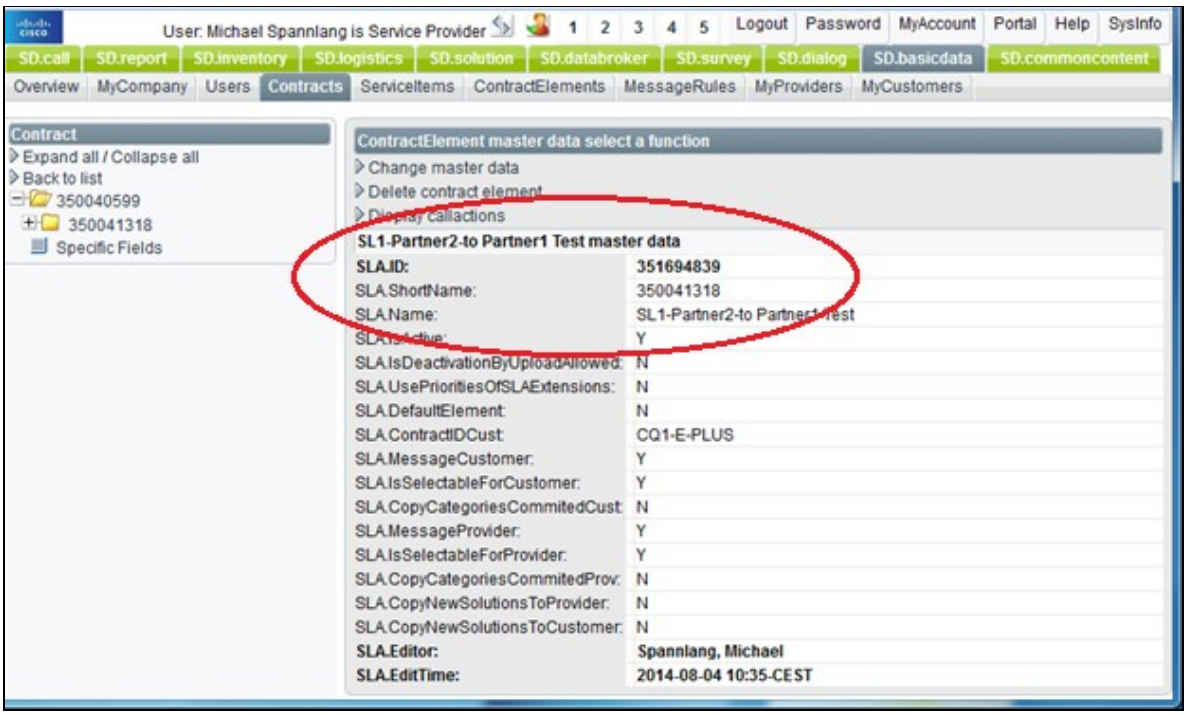

Selection of GridCore Organizations within Contracts

A new functionality has been added in release 8.1 to enable each user, who has permission for creating or editing a contract, to select CORE organizations (CORE_SC and CORE_SP).

Based on this selection, a contract is created between the core and the user's organization. CORE organizations can be selected and can be seen on both the customer and the provider side.

NOTE: The error message ?Contract between two Cores is not possible? will be displayed, when a user attempts to create a CORE-CORE connection.

For a complete list of Cisco ServiceGrid Articles, go to the List of Articles page.

Related Articles

ContractElements

Contract Data