How to Create a New Contract

To create a new Contract, the first step is to either create an SRA, or locate the SRA that the Contract should be based on. All Contracts must originate from an SRA. To find the SRA, use the SRA Search function by following these steps.

Once the SRA is created/located, on the Resource Tab, select the Resource that the Contract is for, and using the "Actions" menu in the top right corner of the screen, choose "Create Contract"
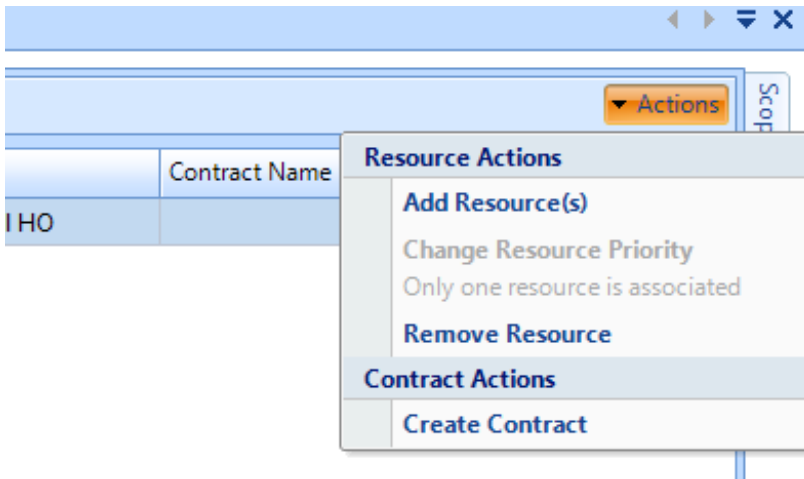
The "Create Contract" dialog box will appear. Fill in a descriptive name and description that explains what the Contract covers and select the "Contract Group Type" - this will either be Comprehensive or Pay As You Go. This Group Type selection will impact how the Contract behaves, so if there is a Comprehensive requirement to the Contract ensure that Comprehensive is selected as this time - once the Contract is created, this cannot be changed.

Select the "Contract Type", enter when the Contract should start from and choose the Length.

PLEASE NOTE: If the Contract needs to contain Weekly or Fortnightly PPM Tasks, then choose either 26 or 52 Week durations. If the PPM Tasks will be Monthly, Quarterly, etc, then choose the Annual or Month- variations of duration. If you need a mixture of Weekly and Monthly-based PPMs, then two separate Contracts will be required to be set up.

Once the fields have been populated, click OK to create the Contract. This will inherit all the Buildings from the SRA, and if you chose a Reactive Contract in the "Contract Type" drop down, all Equipment Types and associated Buildings and Service Levels will be copied onto the Reactive SLA tab of the Contract.