



cockpit
IT Service Manager

Infrastructure - Supplier and contract management

FAQ document

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Introduction

The objectives are:

- To centralize suppliers and contracts
- To manage the links between suppliers, contracts, equipment and software
- To receive notification before contract expiration

Suppliers

Menu: Infrastructure > Suppliers > Management

Objective: To list and manage suppliers

Setting:

Main fields	
Fields	Information
Structure (mandatory)	<p>Selection of the structure to which the supplier belongs.</p> <p>The structure of a supplier cannot be changed once it is associated with a contract.</p>
Sharing	<p>Checked: The supplier is multi-structure (shared); it can be associated with equipment or software of other structures. All contracts associated with a shared supplier are considered shared.</p> <p>Unchecked: The supplier is mono-structure; it can only be associated with equipment or software in its own structure.</p>
Name (mandatory)	Supplier name from 3 to 50 characters
Status	Active / Inactive: An inactive supplier cannot be associated with an item (contract, software, etc.) and is removed from the items with which it was linked.

Deletion:

- Cancels the supplier's contracts.
- Supplier-related software and equipment are not deleted.

Contracts

Menu: Infrastructure > Suppliers > Contracts

Objectives:

- To list and manage contracts
- To associate contracts with software or equipment

Principles:

To associate contracts with software, the 2 elements must first be associated with the same supplier. To do this, edit the software (Infrastructure> Software> Management), and in the "Supplier" field select the corresponding provider to which the contract belongs.

Setting:

Main fields	
Fields	Information
Structure (mandatory)	Selection of the structure to which the contract belongs
Supplier (mandatory)	Selection of a supplier from the selected structure
Description (mandatory)	Between 3 and 255 characters
Expiration	Contract expiration date. In order to receive notification when the contract has expired, you must enable notifications in the user's preferences.
Notification of expiration	Allows receipt of notification X days before contract expiration date You must enable notifications in the user's preferences.
Date of notice	Contract date of notice period. In order to receive notification when the date has expired, you must enable notifications in the user's preferences.
Notification of notice	Allows receipt of notification X days prior to contract date of notice You must enable notifications in the user's preferences.
Software (tab)	Allows the contract to be associated with software. - software associated with the same supplier as the contract - software of the structure for mono-structure suppliers - software of all structures for shared suppliers To access the "Software" tab the operator's profile must have at least read access to the software.
Equipment (tab)	Used to associate the contract with equipment. - equipment of the structure for mono-structure suppliers - equipment of all structures for shared suppliers To access the "Equipment" tab the operator's profile must have at least read access to the equipment.
Documents	Allows URLs and knowledge base documents to be added (e.g. electronic version of the contract).

Deletion:

- The software and equipment related to the contract are not deleted.
- The documents related to the contract are not deleted.

Document end