Agreement Document

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Discussion

An Agreement Document is a document that records, expresses, or provides Evidence of an Agreement.

An Agreement Document may contain all or part of the terms agreed among the Parties. More than one Agreement Document may collectively record or express a single Agreement.

Agreement Documents may include:

- Executed agreements
- Master agreements
- Schedules
- Annexes
- Addenda
- Confirmations
- Statements of work
- Amendments
- Notices
- Electronic records
- Documents incorporated by reference

An Agreement Document is distinct from the Agreement itself. The Agreement represents the negotiated understanding among the Parties. The Agreement Document is an artifact that records, expresses, or provides Evidence of that understanding.

An Agreement may be evidenced by one Agreement Document, multiple Agreement Documents, electronic communications, conduct, oral statements, or a combination of artifacts and events, subject to the applicable legal and contractual framework.

An Agreement Document may also contain information that is not itself an Agreement Term, including explanatory text, formatting, signatures, document identifiers, metadata, and administrative information.

Definition

> *document that records, expresses, or provides evidence of an agreement*

Source

Adapted from:

- Financial Industry Business Ontology, Contracts Ontology
  - Relevant concepts include Written Contract and Contract Document
  - FIBO distinguishes an Agreement from the written artifact providing concrete Evidence of that Agreement
2. OMG Commons Documents Ontology
   - Relevant concepts include Document, Record, and Document Part
3. OMG Commons Ontology Library, Version 1.3

This defines the expression *Agreement Document* to distinguish an Agreement from an artifact that records, expresses, or provides Evidence of the Agreement.

Note

- An Agreement Document is an artifact associated with an Agreement
- An Agreement and an Agreement Document are distinct modeled things
- One Agreement may be recorded or expressed by more than one Agreement Document
- One Agreement Document may record or express more than one related Agreement
- An Agreement Document may contain all or part of an Agreement
- An Agreement Document may incorporate another document by reference
- An Agreement Document may have versions
- A superseded Agreement Document must remain traceable when required for audit, Evidence, or legal review
- An Agreement Document may exist in physical or electronic form
- The file format, storage location, and serialization of an Agreement Document are implementation concerns
- The existence of an Agreement Document does not by itself establish the validity or enforceability of the Agreement
- A document associated with an Agreement is not necessarily an Agreement Document
- Evidence and provenance should identify the source and authenticity of an Agreement Document

Example

Party A and Party B enter into a master agreement consisting of an executed main document, an elected schedule, and a collateral annex.

The master agreement represents the negotiated understanding among the Parties.

The main document, schedule, and collateral annex are separate Agreement Documents that collectively record and express the Agreement.

A later Amendment is recorded in another Agreement Document. The Amendment Document does not overwrite the earlier Agreement Documents. The documents remain related and traceable as parts of the Agreement record.

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