

Agreement Lifecycle State

[Go up to Terms and Definitions](#)

Discussion

An Agreement Lifecycle State is a [Lifecycle State](#) identifying the modeled condition of an [Agreement](#) at a specified time.

An Agreement Lifecycle State records where the Agreement is within its defined lifecycle. The applicable lifecycle model defines:

- The permitted Agreement Lifecycle States
- The meaning of each state
- The criteria for entering each state
- The criteria for leaving each state
- The permitted transitions among states
- The [Lifecycle Events](#) that cause, authorize, observe, or record transitions
- The Evidence required to support a state assignment
- The rules used to derive a state assignment

Agreement Lifecycle States may include:

- Proposed
- Under Negotiation
- Executed
- Effective
- Suspended
- Terminated
- Expired
- Superseded

The applicable lifecycle model determines which states are used. This list does not establish a universal or exhaustive state vocabulary.

An Agreement Lifecycle State is distinct from an Agreement Lifecycle Event. A state represents the modeled condition of the Agreement at a specified time or during a specified period. An event represents an occurrence that may cause, authorize, observe, or record a transition between states.

An Agreement Lifecycle State is also distinct from an [Legal Determination](#). An Agreement Lifecycle State records the model's representation of the Agreement. It does not by itself determine the Agreement's legal status, validity, effect, or enforceability.

Definition

[lifecycle state](#) identifying the modeled condition of an [agreement](#) at a specified time

Source

Adapted from:

- [Lifecycle Semantics](#)
- [Lifecycle State](#)
- [Lifecycle Stage](#)
- [Lifecycle Event](#)
- [Operational Lifecycle State](#)
- [Financial Industry Business Ontology, Agreements Ontology](#)
- [Financial Industry Business Ontology, Contracts Ontology](#)
- [OMG Systems Modeling Language Version 2.0](#)

The expression *Agreement Lifecycle State* is defined by this corpus as a specialization of Lifecycle State for Agreements.

Note

- An Agreement Lifecycle State applies to an identified Agreement
- An Agreement Lifecycle State identifies the modeled condition of the Agreement at a specified time
- The applicable lifecycle model defines the permitted states and transitions
- A change in Agreement Lifecycle State does not overwrite an earlier state assignment
- Each state assignment should identify its applicable time or Effective Period
- Each transition should identify the Lifecycle Event that caused, authorized, observed, or recorded it
- A state assignment may be asserted, observed, calculated, or derived
- A derived state assignment should identify the rule and source information used to derive it
- An Agreement may progress through different states without changing its identity
- An Amendment does not necessarily establish an Amended Agreement Lifecycle State
- An Agreement may remain Effective after an Amendment becomes effective
- A Dispute does not necessarily establish a Disputed Agreement Lifecycle State
- An Agreement may be Effective while a Dispute remains open
- Suspension does not necessarily terminate the Agreement
- Termination, expiration, and supersession represent different lifecycle outcomes
- An Agreement Lifecycle State does not by itself constitute a Legal Determination
- The platform-independent definition does not prescribe a particular state-machine notation, execution engine, or serialization format

Example

Party A and Party B negotiate an Agreement.

The Agreement is initially assigned the Proposed state. When negotiations begin, a Lifecycle Event records a transition to Under Negotiation.

The Parties subsequently execute the Agreement. The execution event records a transition to Executed.

The Agreement provides that it becomes effective on a later [Effective Date](#). When that date arrives and the applicable conditions are satisfied, a Lifecycle Event records a transition to Effective.

A later [Amendment](#) changes specified Agreement Terms. The Agreement remains in the Effective state. The Amendment and its associated Lifecycle Events are recorded separately.

A [Dispute](#) subsequently arises concerning one Agreement Term. The Agreement remains Effective while the Dispute is recorded and resolved separately.

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