

Oracle® Contracts Intelligence

Concepts and Procedures

Release 11*i*

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Oracle Contracts Intelligence Concepts and Procedures, Release 11i

Part No. A95174-02

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Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Contracts Intelligence Concepts and Procedures.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See "[Other Information Sources](#)" for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Contracts Intelligence.

- Chapter 1—"[Understanding Oracle Contracts Intelligence](#)"—explains how Oracle Contracts Intelligence integrates with other Oracle products, explains the concept of bins, and gives an overview of Oracle Discoverer.
- Chapter 2—"[Implementing Oracle Contracts Intelligence](#)"—explains how to access Oracle Contracts Intelligence, how to set up system profile options, how to set up concurrent programs, and how to work through post-install tasks.

- Chapter 3—"Using Oracle Contracts Intelligence"—explains how to refresh the data, and offers a detailed explanation of both Oracle Contracts Intelligence bins and Oracle Discoverer.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

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Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Contracts Intelligence.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Contracts Intelligence shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Contracts Intelligence.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Contracts Intelligence (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Contracts Intelligence. This manual details additional steps and setup considerations for implementing Oracle Contracts Intelligence with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Contracts Intelligence with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Contracts Intelligence.

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Contracts Intelligence implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Contracts Intelligence and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Contracts Intelligence working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle*8i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk

retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Understanding Oracle Contracts Intelligence

1.1 Introduction to Oracle Contracts Intelligence

Oracle Contracts Intelligence is a new product available in Oracle's e-Business Suite (release 11.5.6). It is based on the Oracle Contracts family and, going forward, has visibility into other modules.

Oracle Contracts Intelligence converts contract data into contract business knowledge and helps businesses make informed tactical and strategic decisions. Primary users are mid-level and C-level management in the contract business.

Oracle Contracts Intelligence consists of four components:

- Data Model: Repository of all Contracts Intelligence data and is part of Oracle Apps schema.
- Extraction routines: Extraction and load routines which populate the schema. Refer to subsequent sections for more details.
- Bins/Reports on the home page: Components available on the CRM home page.
- Discoverer metadata and workbooks: Metadata is based on the Oracle Contracts schema. Users can use the standard workbooks or create new workbooks based on the metadata.

1.2 Integrating Contracts Intelligence With Oracle Applications

Oracle Contracts Intelligence is part of Oracle CRM product family and is completely integrated with Oracle's e-business suite.

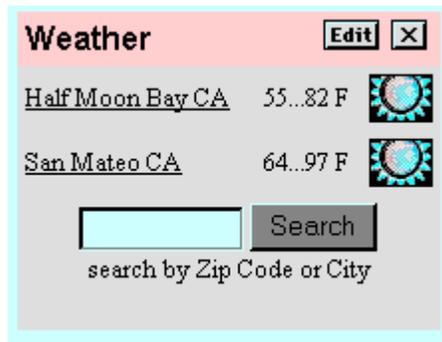
The primary integration point for this product is Oracle Contracts family. All the data populated in Oracle Contracts Intelligence is based on the transactional data from Oracle Contracts.

Secondary integration points are:

- TCA model for Party information
- GL for set of books information, daily rates
- HR for organization details
- Inventory for item details
- Install Base for Covered product details

1.3 Understanding Bins

A bin is a section of the HTML page that displays key information on a subject. The information displayed defines the bin.



Bins are rendered when the page is created. As a page may have several bins, each bin must be rendered quickly. Bins that do not or cannot be rendered quickly should not be made available for users to add to their page.

Oracle Contracts Intelligence uses the Declarative Component Framework provided by CRM JTF module. This is a standard framework used by all the CRM modules. Refer to the Oracle eBusiness Technology Foundation Developer's Guide for more information on JTF technology.

1.3.1 Characteristics of Bins

1.3.1.1 Summarized Information

The information that appears in the bin is a summarized or abstracted version of all the information available on the subject.

1.3.1.2 Parameters

Each bin displays the data based on the parameters selected by the user. Each bin has predefined default values for each parameter. Users can click the "Edit" link to modify parameters.

1.4 Understanding Discoverer

1.4.1 Discoverer Concepts

Oracle Discoverer is a data access tool. You can view the information from the databases, analyze it to support business decisions, and create reports to keep track of business flows. Discoverer provides an efficient way to retrieve a few select records or small amount of specific data from the database.

Discoverer consists of four components:

- [Administration Edition](#)
- [User Edition](#)
- [Oracle 9iAS](#)
- [End User Layer \(EUL\)](#)

1.4.2 Administration Edition

The Administration Edition builds and maintains the End User Layer. Its design determines how users access and view data. This is where administrators define the business areas used by the User Edition.

1.4.3 User Edition

Designed for business professionals who do not have a computer programming or database background, the Oracle Discoverer User Edition is an easy-to-use read-only data access tool. It provides logical and intuitive access to information

from your organization's relational databases for ad hoc query, analysis, and reporting.

1.4.4 Oracle 9iAS

Oracle9iAS Discoverer is a business intelligence tool for analyzing data.

The two Oracle9iAS Discoverer products are:

- Discoverer Plus: This is the Internet version of the award-winning product, Discoverer Desktop Edition.
- Discoverer Viewer: This is a tool for viewing workbooks that users of Discoverer Plus and Discoverer Desktop Edition had created. You can use Discoverer Viewer to integrate database output into a web site and portal. You can easily customize it to conform to a particular web site look and feel or to build custom Discoverer applications for the web. Discoverer Viewer is also optimized for performance and designed to minimize network traffic.

1.4.5 End User Layer (EUL)

The End User Layer (EUL) insulates end users from database complexity and constant change. It provides an intuitive, business-focused view of the database that can be tailored to suit each user or user group. As such, the EUL lets end users focus on business issues, not data access issues.

From an operating standpoint, the EUL generates SQL statements on the client and communicates with the database using SQL*Net. When a user selects objects in the business area, the EUL generates the appropriate SQL statements that define the selections from a table, view, or column. When a user executes a query, the EUL executes that SQL statement and sends it to the database, which in turn sends the results to the User Edition interface. The end user does not have to understand any SQL to access and retrieve data.

1.5 Understanding Data Population

Oracle Contracts Intelligence has its own schema. The schema is designed to handle the summary or aggregate data, which is based on the Contracts transactional data. This implies that this schema needs to be populated using some mechanism.

Oracle Contracts Intelligence has a set of pre-built extraction and loading routines. These routines are to be run using Concurrent Manager either periodically or on an ad-hoc basis. The frequency of data population may vary from business to business.

The higher the frequency, the more accurate is the data in Oracle Contracts Intelligence. The caveat is that the data population scripts are resource intensive.

Generally, it is advisable to run these routines as nightly jobs in order to strike a balance between the data accuracy and the resource availability.

Implementing Oracle Contracts Intelligence

2.1 Introduction to Implementing Oracle Contracts Intelligence

This section explains how to:

- [Access Oracle Contracts Intelligence](#)
- [Set up system profile options](#)
- [Set up concurrent programs](#)
- [How to work through post-install tasks](#)

2.2 Accessing Oracle Contracts Intelligence

2.2.1 Accessing Discoverer

2.2.1.1 Accessing Business Area

Oracle Contracts Intelligence has a pre-defined business area called Oracle Contracts: Sales Contracts. It can be accessed by any user having a responsibility of "Contracts Intelligence EUL Administrator."

The following steps describe how to access the Business Area.

Steps

1. Click the Discoverer 4i Admin Edition icon.
2. The Connection window appears.
3. Verify that a check box (Oracle Applications User) appears below the "Connect" field.

If the Oracle Applications User check box does not appear, click Cancel.

4. Navigate to the Tool menu and select Options.
5. Click the Connection tab.
6. Select "Connect to both standard and application EUL."
7. Enter the following Applications EUL settings:
 - Gateway User Id/ Password: applsyspub/pub
 - Foundation Name: apps
8. Click OK.
9. From the File menu, select "Connect to Database."

The Connection window appears with the Oracle Application User check box.

10. In the Connection window:
 - a. Enter the user name, password, and connect string.
 - b. Select the Oracle Application User check box.

If the user has multiple responsibilities, a list appears.

11. Select "Contracts Intelligence EUL Administrator" and click OK.

Discoverer connections are established and the Load Wizard window appears.

12. Select "Open an existing business area."

All available business areas appear in the lower section.

13. Select "Oracle Contracts: Sales Contracts" and click Finish.

The business area is now accessible to the user.

2.2.1.2 Accessing Workbooks

Oracle Contracts Intelligence is shipped with pre-defined workbooks. They can be accessed by any user having a responsibility of "Contracts Intelligence Workbook Administrator."

Steps

1. Click the Discoverer 4i User Edition icon.

The Connection window appears.

2. Verify that a check box (Oracle Applications User) appears below the "Connect" field.

If Oracle Applications User check box does not appear, click Cancel.

3. Navigate to the Tool menu and select Options.
4. Click the Connection tab.
5. Select "Connect to both standard and application EUL."
6. Enter the following Applications EUL settings:
 - Gateway User Id/ Password: applsyspub/pub
 - Foundation Name: apps
7. Click OK.

8. From the File menu, select "Connect to Database."

The Connection window appears with the Oracle Application User check box.

9. The Connection window:
 - a. Enter the user name, password and connect string.
 - b. Select the Oracle Application User check box.

If the user has multiple responsibilities, a list appears.

10. Select "Contracts Intelligence Workbook Administrator" and click OK.

11. From the File menu, select Open. Select the Database for "Where is the workbook you want to open?" and click Open.

All of the available workbooks appear in a window.

12. Select "Required workbook" and click Open.

If the workbook was created by another user, a window appears and prompts the user to choose whether the workbook will be opened with the current account or with the account that saved the workbook.

- In the case that the user chooses to open with the account that saved the workbook, the connection window appears where the user has to enter the user name and password of the other account.
- In the case that the user chooses to open the workbook with the current account, Discoverer continues to open the workbook.

2.2.1.3 Seeing Contracts Data

Individual contracts are protected by Contracts Security. Contracts Security allows access to view contracts to be granted to responsibilities. As shipped, the Contracts Intelligence Workbook Administrator responsibility does not have privileges to view any type of contract. This means that a user who uses the Discoverer Plus Edition to create or edit workbooks will not be able to query contract information.

To access one or more categories of contracts, you must have access to the Contracts Intelligence Workbook Administrator responsibility. Set this up using the Define Categories screen in Oracle Contracts Core. This is described in section 3.12, *Defining a Category*, in the Oracle Contracts Core Concepts and Procedures Manual. You can choose "Read Only" or "Modify" privileges.

Note that Contracts Security will also control which contracts end users of a workbook will see when they query a workbook. If access to a workbook is granted to two different responsibilities, and the first responsibility has privileges to see contracts in category A and B, while the second responsibility has privileges to see contracts only in category A, users accessing the workbook under the first responsibility will see more contracts than those users accessing the contracts using the second responsibility.

2.2.2 Accessing Bins and Reports

In order to see the Contracts Intelligence bins and reports, users must log on to the HTML applications using a responsibility that has been granted access to bins and reports, collectively known as "components".

2.2.2.1 Grant access to the components

Steps

1. Log on to the HTML applications as a user who has the CRM HTML Administration responsibility.
2. Select Design tab > Declarative Components > Component Security.
3. Choose "Responsibility to Component" and click Next.
4. Choose the application and responsibility to which you wish to grant access. Click Next.
5. Choose "OKI" as the "Component App Code."

A list of components appears on the left-hand side of the shuttle.

6. Select the components to which access is to be granted, and, using the buttons in the middle, shuttle them to the right.
7. Click Update when you are finished.

These components will be available for users under that responsibility. They can click the "Personalize" link on the home page and select what is to appear on the page. Bins appear on the left-hand side of the page, and reports appear on the right.

2.3 Setting Up System Profile Options

This function allows users to change the system profile options. The five system profile options are:

- OKI: Aging Range - The range for each aging bucket for display and aggregation. A value of "30" means that contracts are placed in aging buckets that span 30 days. A value of 30 also represents the following aging buckets: 0-30 Days, 31-60 Days, 61-90 Days, 91+ Days. The default value is 30.
- OKI: Default Period Set - The default GL period set for aggregation and display. A value of "Accounting" means that contracts are aggregated and displayed for the Accounting period set.
- OKI: Default Period Type - The default GL period type for aggregation and display. A value of "Month" means that contracts are aggregated and displayed for the month period type. The default value is Month.
- OKI: Default conversion type - The default currency conversion type for aggregation. A value of "Corporate" means that contract amount is converted using the corporate conversion rate. The default value is Corporate.
- OKI: Base Currency Code - The currency that will be used to store all of the amount type data in Oracle Contracts Intelligence, for example, Forecast amount, Expired, Not Renewed amount, WIP amount. The default value is "USD" (US dollars).

2.3.1 Updating Profile Options

Steps

1. Log in to Oracle Applications.
2. Select Profile.

3. Select System.
4. Enter OKI: Aging Range in the profile.
5. Click Find.
6. Update the current value if you wish to change it.
7. Click Save.
8. Repeat 3-6 for each of the profiles mentioned in the Setting up Profile Options section.

2.4 Setting Up Concurrent Programs

After setting up the profile options and the setup date, the concurrent program for extracting summary data and denormalized data should be run before using bins and reports. To ensure that the users have up-to-date information for their bins and reports, the following request set should be run periodically.

2.4.1 Update Base Contracts Intelligence Information

The following concurrent programs are included in the request set:

- Load Daily Rates, Contracts Intelligence
- Load Performance Measures, Contracts Intelligence
- Load Sales Contract Headers, Contracts Intelligence
- Load Addresses, Contracts Intelligence
- Load Sold Item Lines, Contracts Intelligence
- Load Covered Product Lines, Contracts Intelligence
- Load Contract Salesreps, Contracts Intelligence
- Load Expired Lines, Contracts Intelligence
- Load Forecast by Organizations, Contracts Intelligence
- Load WIP by Customers, Contracts Intelligence
- Load Renew By Statuses, Contracts Intelligence

2.5 Performing Post Install Tasks

This section outlines the steps you must take after you have installed Oracle Contracts Intelligence.

2.5.1 Discoverer

In Oracle contracts, security is enforced using the contract category and responsibility combined. The access levels are Read Only or Modify. In OKI, the contracts data is accessed by Contracts Intelligence Workbook Admin responsibility; therefore, a Read Only access needs to be provided to that responsibility for all contract categories.

Steps

1. From the navigator, select Service contracts manager > Setup > Contract > Category.
2. Query the category for which you want to give access.
3. In the responsibility tab, add the responsibility "Contracts Intelligence Workbook Administrator."
4. Click Save.
5. Repeat 2 to 4 for all categories.

2.5.2 Define Component Security Bins

The following steps show you how to define Component Security to manage security assignments.

Steps

1. Go to the menu option Design > Declarative Components > Component security.
2. Select the Responsibility to Components radio button and click Next.
3. Select "Oracle Contracts Intelligence - OKI" Responsibility App code, "CRM HTML Administration" as Responsibility, and click Next.
4. From the Available Components box, move the following components into the Selected Components box.
 - OKI_EXP_NOT_RNW_BIN

- OKI_FCST_BY_ORG_BIN
 - OKI_PERF_MEASURES_BIN
 - OKI_RENEW_BY_STATUS_BIN
 - OKI_RNWL_AGING_RPT
 - OKI_WIP_BY_CUST_RPT
 - OKI_RNWL_CMP_GRP
 - OKI_EXP_LINES_RPT
 - OKI_RAG_ORG_AG1_RPT
 - OKI_RAG_ORG_AG2_RPT
 - OKI_RAG_ORG_AG3_RPT
 - OKI_RAG_ORG_AG4_RPT
 - OKI_RENEW_BY_STATUS_RPT
 - OKI_WBC_BOOK_RPT
 - OKI_WBC_FCST_RPT
 - OKI_WBC_LOST_RPT
5. Click Update.

Using Oracle Contracts Intelligence

3.1 Introduction to Using Oracle Contracts Intelligence

This topic group covers the following topics and procedures concerning contracts intelligence.

- ["Refreshing the Data"](#) on page 3-1
- ["Understanding Oracle Contracts Intelligence Bins"](#) on page 3-3
- ["Understanding Oracle Discoverer"](#) on page 3-16

3.2 Refreshing the Data

The concurrent manager request set, "Update All Contracts Intelligence Information", refreshes both the base-level and aggregate data.

All contract information is loaded into base-level tables. During the refresh process, base-level tables are generally truncated before the new data is loaded. Aggregate data is summarized for the period by the period set name, period type, and summary build date. Since the aggregate tables are not truncated during the refresh process, they contain historical summary data. For information on how to load the tables, see ["Loading the tables"](#) on page 3-2.

The tables are loaded in the following stages:

1. Load Daily Rates: Loads the oki_daily_rates table.
2. Load Contract Headers: Loads the oki_sales_k_hdrs table.
3. Load Sold Item Lines: Loads the oki_sold_itm_lines table.
4. Load Covered Product Lines: Loads the oki_cov_prd_lines table.

5. Load Related Information: Loads the oki_k_salesreps, oki_addresses and oki_expired_lines table.
6. Load Aggregates: Loads the oki_forecast_by_orgs, oki_perf_measures, oki_wip_by_customers, oki_renew_by_statuses, oki_exp_not_renewed, oki_renewal_aging, and oki_yoy_renewal_amt tables.

3.2.1 Loading the tables

Steps

1. Select Control.
2. Select Requests.
3. Select Run.
4. Select Request Set.
5. Click OK.
6. Locate the request set Update All Contracts Intelligence Information.
7. Click Schedule.
8. Select the option that defines how the tables should be loaded and follow the corresponding steps as listed in the table.

Option	Steps
As Soon as Possible	<ul style="list-style-type: none"> ■ Click OK.
Once	<ol style="list-style-type: none"> 1. Enter the date and time to run the job. 2. Click OK.
Periodically	<ol style="list-style-type: none"> 1. Enter the date and time for the job to start. 2. Enter the date and time for the job to stop; leave blank to run indefinitely. 3. Enter the job run interval. 4. Select when to apply the interval. 5. Select Save this schedule. 6. Click OK.

Option	Steps
On Specific Days	<ol style="list-style-type: none"> 1. Enter the date and time at which you want the job to start. 2. Enter date and time at which you want the job to stop. 3. Select the date that the job should run. 4. Click Save this schedule. 5. Click OK.

9. Click Submit.

10. When prompted to submit another request, click No.

3.3 Understanding Oracle Contracts Intelligence Bins

The four Oracle Contracts Intelligence bins are:

- [Renewal Performance Bin](#)
- [Expired, Not Renewed Bin](#)
- [Renewals by Status Bin](#)
- [Forecast by Organization Bin](#)

3.3.1 Renewal Performance Bin

The Renewal Performance bin shows key performance indicators (for the contract renewal process) for any given period. The default period is Current Fiscal Quarter.

3.3.1.1 Design

Renewal Performance		Edit
Measure	Value	
Days Outstanding	37	
Achievement %	79%	
Consolidated	840	

Last Refresh On: October 11, 2001 12:45

3.3.1.2 Performance Measures

The performance measures of this bin are:

- [Days Outstanding](#)
- [Achievement %](#)
- [Consolidated](#)

Days Outstanding

The Days Outstanding performance:

- Measures the average number of days a renewal contract has been open among all those that are open.
- Provides an indication of how long it takes to close a renewal.

The Days Outstanding selection criteria are:

- It is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- The status type of the contract is "ENTERED".
- Days Renewal Outstanding = Σ .

$$\frac{[\Sigma (\text{Current Date} - \text{Contract Creation Date}) \text{ for all contracts}]}{\text{Number of Contracts}}$$

Achievement %

The Achievement % performance measures how well one is doing against the forecast, based on value. Achievement is measured by contracts that have been signed or activated.

The forecast value is determined by the sum of the forecast amount for contracts expected to close in the given period. The achievement is measured by the sum of the contracts that have been signed or activated in the period. Only forecasted contracts are considered.

The Achievement % selection criteria are:

- It is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.

- There is a win percentage and an expected close date entered.
- The period of the close date is the period in which the contract is counted.
- The status type of the achievement contracts is either "SIGNED" or "ACTIVE," and the status type of the forecast contracts is either "SIGNED," "ACTIVE," or "ENTERED".
- Forecast Achievement% =
$$\left[\frac{\sum (\text{Contract Amount}) \text{ for all achievement contracts, such as date signed in period}}{\sum (\text{forecast amount}) \text{ for all contracts with expected close date in period}} \right] * 100$$

Consolidated

The Consolidated performance measures how much value has been pulled forward through contract consolidation by summing lines that have been consolidated into a renewal.

The Consolidated selection criteria are:

- It is of the "sell" intent.
- The contract lines are the targets of a processed renewal consolidation.
- The status type of the contract is either "SIGNED" or "ACTIVE".
- The period of the date signed is the period in which the contract is counted.
- Contracts Consolidated = \sum (contract line amount) for all priced lines that are the target of contract consolidation.

3.3.2 Expired, Not Renewed Bin

The Expired, Not Renewed bin displays the top customers for whom the renewal could not be closed, such as the old contract expired but the renewed contract was not signed, or the old contract expired and no renewal contract was created.

These customers are important as they represent the lost opportunities, and the business may want to identify the reasons for the failure to renew.

3.3.2.1 Design

Expired, Not Renewed		Edit
Customer	Amount	Count
British Electricals Company	13,024	2,500
Schumen & Norling Company	5,882	1,000
Europe-Matrix	4,201	1,935
Lycos Hongkong	4,201	1,935

Last Refresh On: October 11, 2001 12:45

3.3.2.2 Selection Criteria

A contract is included in the bin if:

- The contract is of the "sell" intent.
- The original contract line is in the "EXPIRED" status type and the renewal contract line is not in the "ACTIVE" status type.
- The expiration date for the renewed contract falls within the period.
- It is grouped by Customer and ordered by the descending order of Amount.
- Amount = $[\sum (\text{contract line amount}) \text{ for contract lines that have expired without renewal}]$
- The count of is the count of contract headers that include such lines.

3.3.3 Renewals by Status Bin

The Renewals by Status bin displays the synopsis of the renewal process for the selected process. The four main statuses used in this bin are:

- **Expiration:** Represents expired and not renewed contracts. This status maps to the "EXPIRED" status type.
- **WIP:** Represents the contracts which are being worked on for the renewal process. This status maps to the contract status type "ENTERED" providing that the contract is created as a result of the renewal process or renewal consolidation process.

- **Signed:** Represents the booked renewal contracts. This status maps to the "SIGNED" status type.
- **Forecast:** Represents the total forecast made for the given period.

These are important to track because they represent the renewal business process in its entirety.

3.3.3.1 Design

Renewals By Status		Edit
Status	Amount	Count
Expired	126,040	15
WIP	105,033	10
Signed	411,730	112
Forecast	75,624	8

Last Refresh On: October 11, 2001 12:45

3.3.3.2 Selection Criteria

Expiration

The Expiration status represents expired and not renewed contracts. This status maps to the "EXPIRED" status type.

The Expiration statuses are:

- Contract is of the "sell" intent.
- The original contract line is in the "EXPIRED" status type and the renewal contract line is not in the "ACTIVE" status type.
- The expiration date of the renewed contract must fall within the period.
- Amount = $[\sum (\text{contract line amount}) \text{ for all selected contracts}]$
- The count of is the count of contract headers that include such lines.

WIP

The WIP status represents the contracts which are being worked on for the renewal process. This status maps to the contract status type "ENTERED" providing that the contract is created as a result of the renewal process or renewal consolidation process.

The WIP statuses are:

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- The contract must be in the "ENTERED" status type.
- The expected close date must fall within the period.
- Amount = $[\Sigma (\text{contract amount}) \text{ for all selected contracts}]$
- The count of is the count of contract headers.

Signed

The Signed status represents the booked renewal contracts. This status maps to the "SIGNED" status type.

The Signed statuses are:

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- The contract must be in the "SIGNED" or "ACTIVE" status type.
- The lesser of the start date or date signed must fall within the period.
- Amount = $[\Sigma (\text{contract amount}) \text{ for all selected contracts}]$
- The count of is the count of contract headers.

Forecast

The Forecast status represents the total forecast made for the given period.

The Forecast statuses are:

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- There is a win percentage and expected close date entered.
- The expected close date of the contract must fall within the period.
- Amount = $[\Sigma (\text{contract forecast amount}) \text{ for all selected contracts}]$

- The count of is the count of contract headers.

3.3.4 Forecast by Organization Bin

The Forecast by Organization bin displays the following for all the organizations for the given period:

- **Forecast Amount:** The amount forecasted by the organization for the period.
- **Booked Amount:** The amount booked so far in the period.

3.3.4.1 Design

Forecast By Orgs		Edit
Organization	Forecast	Booked
Vision Worldwide	16,259	4,201
Vision North America	12,604	12,604

Last Refresh On: October 11, 2001 12:45

3.3.4.2 Selection Criteria

Forecast Amount

The Forecast is the amount forecasted by the organization for the period. The Forecast statuses are:

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- There is a win percentage and expected close date entered.
- The expected close date of the contract must fall within the period.
- Amount = $[\sum (\text{contract forecast amount}) \text{ for all selected contracts}]$
- It is grouped by Organization.

Booked Amount

Booked is the amount booked so far in the period. The Booked statuses are:

- Contract is of the "sell" intent.

- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- The renewal contract is in the "SIGNED" or "ACTIVE" status type.
- The lesser of the date signed or start date must fall within the period.
- Amount = $[\Sigma (\text{contract amount}) \text{ for all selected contracts}]$
- It is grouped by Organization.

3.3.5 Renewal Aging Report

Renewal Aging report displays the distribution of renewals among the different aging buckets. This information is displayed for each organization. The age range is determined by the user during the initial setup of the application. The user will be restricted to four aging buckets. If the user specifies an age range of 30, the aging bucket ranges are:

- [0-30 days](#)
- [31-60 days](#)
- [61-90 days](#)
- [More than 91 days](#)

3.3.5.1 Design

Renewal Aging				Edit
Organization				
Vision Worldwide	13,025	25,044	71,843	130,247
Vision North America	6,302	16,385	15,125	80,249

Last Refresh On: October 11, 2001 12:45

3.3.5.2 Selection Criteria

0-30 days

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- There is a win percentage and expected close date entered.

- The renewal contract is in the "ENTERED" status type.
- The duration between the current date and the contract creation date is less than 31 days.
- Amount = $[\Sigma$ (contract forecast amount) for all selected contracts]
- It is grouped by Organization.

31-60 days

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- There is a win percentage and expected close date entered.
- The renewal contract is in the "ENTERED" status type.
- The duration between the current date and the contract creation date is more than 30 days but less than or equal to 60 days.
- Amount = $[\Sigma$ (contract forecast amount) for all selected contracts]
- It is grouped by Organization.

61-90 days

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- There is a win percentage and expected close date entered.
- The renewal contract is in the "ENTERED" status type.
- The duration between the current date and the contract creation date is more than 60 days but less than or equal to 90 days.
- Amount = $[\Sigma$ (contract forecast amount) for all selected contracts]
- It is grouped by Organization.

More than 91 days

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.

- There is a win percentage and expected close date entered.
- The renewal contract is in the "ENTERED" status type.
- The duration between the current date and the contract creation date is more than 90 days.
- Amount = [Σ (contract forecast amount) for all selected contracts]
- It is grouped by Organization.

3.3.5.3 Drill down

The drill down on "Organization" shows customer information for the renewal aging report.

3.3.6 WIP by Customers Report

The WIP by Customers report displays the top "n" customers considered during the renewal forecasting process, based on forecast renewal revenue. The displayed data are:

- [Forecast Amount](#)
- [Booked Amount](#)
- [Lost Amount](#)

The number of displayed rows is a user preference. The information is ordered by forecast amount.

3.3.6.1 Design

WIP By Customers				Edit
Customer	Forecast	Booked	Lost	
Schumen & Norling Company	6,302	16,385	15,125	
British Electricals Company	6,302	16,385	15,125	
IndoAsian SwitchGear	1,008	7,983	4,201	
Europe-Matrix	840	10,083	12,604	
Lycos Hongkong	12,604	1,681	1,134	
MC Square, Inc.	8,403	2,101	13,024	

Last Refresh On: October 11, 2001 12:45

3.3.6.2 Selection Criteria

Forecast Amount

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- There is a win percentage and expected close date entered.
- The expected close date of the contract must fall within the period.
- Amount = $[\Sigma (\text{contract forecast amount}) \text{ for all selected contracts}]$
- It is grouped by Customer.

Booked Amount

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- The renewal contract is in either the "SIGNED" or "ACTIVE" status type.
- The lesser of the date signed or start date must fall within the period.
- Amount = $[\Sigma (\text{contract amount}) \text{ for all selected contracts}]$
- It is grouped by Customer.

Lost Amount

- Contract is of the "sell" intent.
- The original contract line is in the "EXPIRED" status type and the renewal contract line is not in the "ACTIVE" status type.
- The expiration date of the contract must fall within the period.
- Amount = $[\Sigma (\text{contract line amount}) \text{ for all selected contract lines}]$
- It is grouped by Customer.

3.3.6.3 Drill down

There is a drill down for each "Customer" to show category information for the forecast by organization report.

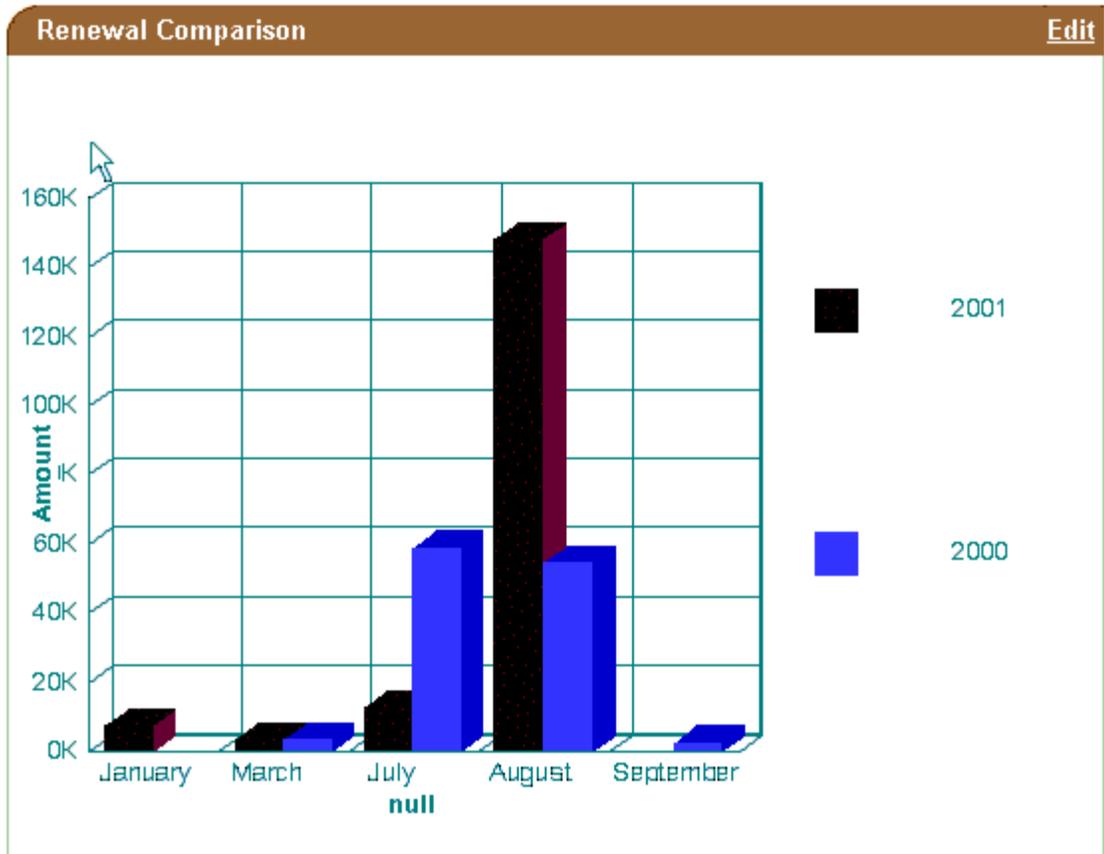
3.3.7 Renewal Comparison Graph

The Renewal Comparison graph displays a comparison of renewal contract amount for the current year and that of the previous year. The data is aggregated and displayed for months. The display starts with the current month and goes back for 24 previous months. The displayed data are:

- Renewal contract amount for the current year.
- Renewal contract amount for the previous year.

The JTF framework allows you to define the type of graph to be used to display the information, so while the type used is illustrative, you can select the actual graph type.

3.3.7.1 Design



Last Refresh On: October 11, 2001 12:33

3.3.7.2 Selection Criteria

- Contract is of the "sell" intent.
- It is a renewal of an existing contract or it is the target of a renewal consolidation.
- The lesser of the date signed or the start date of the contract is used to determine the year for which the contract is placed.
- The lesser of the date signed or the start date of the contract is used to determine the month for which the contract is placed.

- The lesser of the date signed or start date of the contract must fall within the period (month and year) or the 23 months prior to the period.
- Amount = $[\Sigma (\text{contract amount}) \text{ for all selected contracts}]$

3.3.7.3 Drill down

No drill down capability is available for this graph.

3.4 Understanding Oracle Discoverer

This section explains the:

- [Discoverer End User Layer \(EUL\)](#)
- [Discoverer Workbooks](#)

3.4.1 Discoverer End User Layer (EUL)

Using Discoverer's Administration Edition, you can tailor the grouping of data to provide users with access to the precise data they need for ad hoc query, decision support, and presentation of results.

Using the Discoverer's Administration Edition Oracle Contracts, the Sales Contracts business area was created. This is a set of folders containing related information with a common business purpose. It contains the following folders:

- Sales Contract Headers
This folder has all contract headers of intent to "sell" all statuses. Denormalized customer names and numbers appear in this folder.
- Renewal Contract Headers
This folder has all contracts that are renewals. A contract that is the target of renewal consolidation are also renewal contracts.
- Non - Renewal Contract Headers
This folder has all contracts that are not renewals.
- Expired Lines
This folder has all contract lines that have expired without renewal.
- Contract Parties

This folder has a listing of all the parties to the contract, including the party name and contract role.

- **Contacts**

This folder has a listing of all the contacts for the contract, including the contact name and role, and the party for which they are a contact.

- **Contact Points**

This folder has a listing of the contact points for a contact, such as email, phone, or fax.

- **Contract Salesreps**

This folder has the salesreps for contracts, which is a subset of the contacts. Variations in the contact role defining a salesrep are accounted for. If multiple salesreps are assigned to a contract, multiple records appear in this folder for that contract.

- **Bill To Information**

This folder has billing information for a contract, such as billing address, contact, phone, and email.

- **Ship To Information**

This folder has shipping information for a contract, such as shipping address, contact, phone, and email.

- **Billing History**

This folder has information such as what has been billed for the contract, applicable to Service (OKS) contracts only. Billing is done at the line level.

- **Sold Item Lines**

This folder has the information in a sales contracts. The item sold is represented by the top line in a line hierarchy. This folder will include all such lines from contracts of the sell intent.

- **Covered Product Lines**

This folder has Covered product lines in a Service contracts and links the contracted service to the products in the install base covered by the service.

- **Oki Addresses**

This folder has all addresses related to the contract.

- **Oki Daily Rates**

This folder has the latest currency conversion rates.

- Oki Forecast By Orgs

This folder has the following for all the organizations for the given period:

- Forecast amount: Amount forecasted by the organization for the period.
- Booked amount: Amount booked so far in the period.

- Oki Exp Not Renewed

This folder has information about the top customers for whom the renewal could not be closed, i.e., the old contract expired, but the renewed contract was not signed or the old contract expired and no renewal contract was created.

- Oki Perf Measures

This folder shows key performance indicators for the contract renewal process such as Days Renewal Outstanding, Forecast Achievement% etc.

- Oki Renew By Statuses

This folder has the synopsis of the renewal process for the selected process.

- Oki Renewal Aging

This folder has the distribution of renewals among the different aging buckets. This information is displayed for each organization. The user determines the age range during the initial setup of the application. The user is restricted to four aging buckets.

- Oki Role Maps
- Oki Rule Maps
- Oki WIP By Customers

This folder has information of the top customers considered during the renewal forecasting process, based on forecast renewal revenue.

- Oki Yoy Renewal Amt

- Gl Periods

This folder has the GL periods information for each organization.

3.4.2 Discoverer Workbooks

The following workbooks are shipped with the product in 11.5.6.

3.4.2.1 Renewal Status Workbook

This workbook provides information about renewal contracts. It will take organization, year and quarter as parameters. This workbook contains four worksheets:

- Expired, not Renewed
- WIP Renewals
- Invoiced Renewals
- Problem Renewals

3.4.2.1.1 Expired, Not Renewed

This tab shows contracts that have expired without renewal in the specified year and quarter.

Selection Criteria

Select all expired contract lines.

Parameters

- Sales Contract headers. Organization. Organization
- Expired line. end date : year. Fiscal Year
- Expired line. end date : quarter. Fiscal Quarter
- Sales Contract headers. Category Meaning. Contract Category

Table 3-1 Selected Items

Column	Heading
Sales Contract headers. Organization name	Organization
Sales Contract headers. Customer name	Customer
Sales Contract headers. Complete contract number	Contract Number
Sales Contract headers. Category Meaning	Category

Table 3-1 Selected Items (Cont.)

Column	Heading
Sales Contract headers. Status meaning	Status
Sales Contract headers. contract start date	Contract start date
Sales Contract headers. Contract end date	Contract end date
Contract Sales reps. Salesrep name	Sales rep
Expired lines. Line number	Line number
Expired lines. Start date	Line start date
Expired lines. End adte	Line end date
Expired lines. Base Currency	Base Currency
Expired lines. Price negotiated in Base Currency	Base Price negotiated
Expired lines. Contracts Currency	Contract Currency
Expired lines. Price negotiated	Price negotiated
Expired lines. Set of books currency code	SOB Currency
Expired lines. Price negotiated, in set of books currency	SOB Price negotiated

3.4.2.1.2 WIP Renewals

This tab shows in process renewals due to start in the specified period. The user may enter an additional parameter to filter by status.

Selection Criteria

Select all contracts which are in 'ENTERED' status type.

Parameters

- Renewal Contract headers. Organization. Organization
- Renewal Contract headers. start date: year. Fiscal Year
- Renewal Contract headers. start date:quarter. Fiscal Quarter
- Sales Contract headers. Category Meaning. Contract Category

Table 3–2 Selected Items

Column	Heading
Renewal Contract headers. Organization name	Organization
Renewal Contract headers. Customer name	Customer
Renewal Contract headers. Complete Contract number	Contract Number
Renewal Contract headers. Category Meaning	Category
Renewal Contract headers. Status Meaning	Status
Renewal Contract headers. Contract Start Date	Contract start date
Renewal Contract headers. Contract End Date	Contract end date
Contract Salesreps. Salesrep name	Sales rep
Renewal Contract headers. Base Currency	Base Currency
Renewal Contract headers. Contract amount in Base Currency	Base Price negotiated
Renewal Contract headers. Contract currency code	Contract Currency
Renewal Contract headers. Contract Amount	Contract Amount
Renewal Contract headers. Set of books currency code	SOB Currency
Renewal Contract headers. Contract amount, in set of books currency	SOB Contract Amount

3.4.2.1.3 Invoiced Renewals

This tab shows renewals due to start in the specified period that have been invoiced.

Selection Criteria

Select renewal contracts in status type 'SIGNED,' 'ACTIVE' which are invoiced.

Parameters

- Renewal Contract headers. Organization. Organization
- Billing History. Date billed: year. Fiscal Year
- Billing History. Date billed:quarter. Fiscal Quarter
- Sales Contract headers. Category Meaning. Contract Category

Table 3–3 Selected Items

Column	Heading
Renewal Contract headers. Organization name	Organization
Renewal Contract headers. Customer name	Customer
Renewal Contract headers. Complete contract number	Contract Number
Renewal Contract headers. Category Meaning	Category
Renewal Contract headers. Status meaning	Status
Renewal Contract headers. Contract start date	Contract start date
Renewal Contract headers. Contract end date	Contract end date
Contract Salesreps. Salesrep name	Sales rep
Sold Item Lines. Line number	Line number
Sold Item Lines. Referenced item description	Item
Billing History. Invoice number	Invoice number
Billing History. Date billed	date billed
Billing History. Currency code	Currency
Billing History. Amount billed	Amount billed
Billing History. Date billed from	date billed from
Billing History. Date billed to	date billed to
Renewal Contract headers. Base currency	Base Currency
Renewal Contract headers. Contract amount in Base currency	Contract amount in Base currency
Renewal Contract headers. Contract currency code	Contract Currency
Renewal Contract headers. Contract Amount	Contract Amount
Renewal Contract headers. Set of books currency code	SOB Currency
Renewal Contract headers. Contract amount, in set of books currency	SOB Contract Amount

3.4.2.1.4 Problem Renewals

This tab shows renewals that probably have had problems with pricing. It will include contracts with a negative amount or contracts with an amount in excess of

90,999,999. This will catch contracts where Advanced Pricing has returned an error price.

Selection Criteria

Select all renewal contracts with a negative contract amount or contract amount greater than 90,999,999.

Parameters

- Renewal Contract headers. Organization
- Renewal Contract headers. Start date: year. Fiscal Year
- Renewal Contract headers. Start date:quarter. Fiscal Quarter
- Sales Contract headers. Category Meaning. Contract Category

Table 3–4 Selected Items

Column	Heading
Renewal Contract headers. Organization name	Organization
Renewal Contract headers. Customer name	Customer
Renewal Contract headers. Complete Contract number	Contract Number
Renewal Contract headers. Category Meaning	Category
Renewal Contract headers. Status Meaning	Status
Renewal Contract headers. Contract Start Date	start date
Renewal Contract headers. Contract End Date	end date
Contract Salesreps. Salesrep name	Sales rep
Renewal Contract headers. Base currency	Base currency
Renewal Contract headers. Contract Amount in base currency	Contract amount in base currency
Renewal Contract headers. Contract currency code	Contract Currency
Renewal Contract headers. Contract Amount	Contract Amount
Renewal Contract headers. Set of books currency code	SOB Currency
Renewal Contract headers. Contract amount, in set of books currency	SOB Contract Amount

3.4.2.2 Contract Renewals Due Workbook

This workbook provides information about contracts that are due for renewal within a specified number of days. It accepts organization, sales rep name, and number of days as parameters. This workbook contains three worksheets:

- By Sales Rep
- All Sales Reps
- Unassigned

3.4.2.2.1 By Sales Rep

This tab shows renewals due that were assigned to a particular sales representative.

Selection Criteria

Select all work in progress renewal contracts i.e renewal contracts that are in status type 'ENTERED,' for the given sales rep and which were expected to be closed within specified number of days.

Parameters

- Renewal Contract headers. Organization. Organization
- Contract Salesreps. Salesrep name. Sales Rep
- NVL(Expected Close Date,(Contract start date-1))-SYSDATE. Lead Days
- Sales Contract headers. Category Meaning. Contract Category

Table 3–5 Selected Items

Column	Heading
Contract Salesreps. Salesrep name	Sales rep
Renewal Contract headers. Customer name	Customer
Renewal Contract headers. Complete Contract number	Contract Number
Renewal Contract headers. Category Meaning	Category
Renewal Contract headers. Contract Start Date	Start Date
Renewal Contract headers. Contract End Date	End Date
Renewal Contract headers. Record last update date	Updated Date
Renewal Contract headers. Base currency	Base currency

Table 3–5 Selected Items (Cont.)

Column	Heading
Renewal Contract headers. Contract Amount in Base currency	Contract Amount in Base currency
Renewal Contract headers. Contract amount renewed in Base Currency	Amount Renewed in Base currency
SYSDATE-NVL(Expected Close Date,(Contract start date-1))	Days to Close
Renewal Contract headers. Contract currency code	Contract Currency
Renewal Contract headers. Contract Amount	Contract Amount
Renewal Contract headers. Set of books currency code	SOB Currency
Renewal Contract headers. Contract amount, in set of books currency	SOB Contract Amount

3.4.2.2.2 All Sales Reps

This tab shows renewals due that were assigned to a sales representative for the given organization.

Selection Criteria

Select all work in progress renewal contracts, that is, renewal contracts that are in status type 'ENTERED,' for all sales reps and which were expected to be closed within a specified number of days.

- Renewal Contract headers. Organization. Organization
- NVL(Expected Close Date,(Contract start date-1))-SYSDATE. Lead Days
- Sales Contract headers. Category Meaning. Contract Category

Table 3–6 Selected Items

Column	Heading
Contract Salesreps. Salesrep name	Sales rep
Renewal Contract headers. Customer name	Customer
Renewal Contract headers. Complete Contract number	Contract Number
Renewal Contract headers. Category Meaning	Category

Table 3-6 Selected Items (Cont.)

Column	Heading
Renewal Contract headers. Contract Start Date	Start Date
Renewal Contract headers. Contract End Date	End Date
Renewal Contract headers. Record last update date	Updated Date
Renewal Contract headers. Base currency	Base currency
Renewal Contract headers. Contract Amount in Base currency	Contract amount in base currency
Renewal Contract headers. Contract amount renewed in Base currency	Amount Renewed in Base currency
SYSDATE-NVL(Expected Close Date,(Contract start date-1))	Days to Close
Renewal Contract headers. Contract currency code	Contract Currency
Renewal Contract headers. Contract Amount	Contract Amount
Renewal Contract headers. Set of books currency code	SOB Currency
Renewal Contract headers. Contract amount, in set of books currency	SOB Contract Amount

3.4.2.2.3 Unassigned

This tab will show renewals due that were not assigned to a particular sales representative.

Selection Criteria

Select all work in progress renewal contracts, i.e., renewal contracts that are in status type 'ENTERED,' and are not assigned to a specific sales rep and which were expected to be closed with in specified number of days.

Parameters

- Renewal Contract headers. Organization. Organization
- NVL(Expected Close Date,(Contract start date-1))-SYSDATE. Lead Days
- Sales Contract headers. Category Meaning. Contract Category

Table 3-7 Selected Items

Column	Heading
Contract Salesreps. Salesrep name	Sales rep
Renewal Contract headers. Customer name	Customer
Renewal Contract headers. Complete Contract number	Contract Number
Renewal Contract headers. Category Meaning	Category
Renewal Contract headers. Contract Start Date	Start Date
Renewal Contract headers. Contract End Date	End Date
Renewal Contract headers. Record last update date	Updated Date
Renewal Contract headers. Base currency	Base currency
Renewal Contract headers. Contract Amount in Base currency	Contract Amount in Base currency
Renewal Contract headers. Contract amount renewed in Base Currency	Contract amount renewed in Base Currency
SYSDATE-NVL(Expected Close Date,(Contract start date-1))	Days to Close
Renewal Contract headers. Contract currency code	Contract Currency
Renewal Contract headers. Contract Amount	Contract Amount
Renewal Contract headers. Set of books currency code	SOB Currency
Renewal Contract headers. Contract amount, in set of books currency	SOB Contract Amount

3.4.2.3 Expired, not Renewed Workbook

This workbook provide statistical analysis on expired contracts (contracts expired without renewals). This workbook contains one worksheet:

- Date Drills

3.4.2.3.1 Date Drills

This workbook allows you to view information about the expired lines. It also allows you to drill up or down from year, quarter, and period.

Selection Criteria

Select all expired contract lines.

Parameters

- Sales Contract headers .Organization. Organization
- Expired line. end date : year. Fiscal Year
- Expired line. end date : quarter. Fiscal Quarter
- Sales Contract headers. Category Meaning. Contract Category

Table 3–8 Selected Items

Column	Heading
Sales Contract headers. Organization name	Organization
Sales Contract headers. Category Meaning	Category
expired line. end date : year	Year
expired line. end date : Quarter	Quarter
expired line. end date : Period	Period
Expired lines. Base currency	Base currency
Expired lines. Price negotiated in Base currency	Price negotiated in Base currency
Expired lines. Contracts Currency	Contract Currency
Expired lines. Price negotiated	Price negotiated
Expired lines. Set of books currency code	SOB Currency
Expired lines. Price negotiated, in set of books currency	SOB Price negotiated