

Oracle® Contracts

Implementation and Administration Guide

Release 11i

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Oracle Contracts Implementation and Administration Guide, Release 11*i*

Part No. B13893-03

Oracle welcomes your comments and suggestions on the quality and usefulness of this publication. Your input is an important part of the information used for revision.

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Preface

Intended Audience

Welcome to Release 11i of the *Oracle Contracts Implementation and Administration Guide*.

This guide is intended for implementers, administrators, and users of Oracle Contracts.

See Related Documents on page x for more Oracle Applications product information.

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Structure

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- 5 Setting Up Contract Terms Library**
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Related Documents

The following documents provide information about Oracle Contracts and integration with other applications in the Oracle E-Business Suite:

- Oracle Procurement Implementation and Administration Guide
- Oracle Order Management Users Guide
- Oracle Sales Contracts Implementation Guide
- Oracle Service Contracts Concepts and Procedures Guide
- Oracle XML Publisher Users Guide
- Oracle Workflow Administrator's Guide

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 an Oracle Applications form 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.

Introduction to Oracle Contracts

This chapter covers the following topics:

- Overview
- Oracle Contracts Overview
- Oracle Contracts Key Features

Overview

This chapter provides an overview of Oracle Contracts and its key features. The sections in this chapter include:

- Oracle Contracts Overview, page 1-1
- Oracle Contracts Key Features, page 1-1

Oracle Contracts Overview

Contracts play a critical role in all businesses. In fact, contracts govern most business transactions. Companies rely on contracts to define:

- Specific products or services that they sell and buy.
- Terms and conditions governing their price, shipment, payment, quality, and other mutual obligations of the involved parties.

Oracle's contract management solution includes Oracle Sales Contracts, Oracle Procurement Contracts, Oracle Service Contracts, and Oracle Project Contracts. Oracle Contracts provides the common infrastructure components that other contracts modules need. The common components are:

- Contract Terms Library
- Contract Terms Authoring and Printing
- Contract Document Management

Oracle Contracts Key Features

The key features of Oracle Contracts are:

- Contracts Term Library, page 1-2
- Authoring Contract Terms, page 1-2

- Contract Deliverables Management, page 1-3
- Contract Document Management, page 1-3
- Contracts Workbench, page 1-3
- Contract Repository, page 1-3

Contract Terms Library

In an organization, contract administrators and legal personnel may negotiate and author a vast number of complex contracts each year. Maintaining corporate control on the terms for each contract can be a time consuming and daunting task. Oracle Contracts simplifies this process by providing a centralized contract terms library.

Organizations that operate globally can use the library to establish company-wide standards and enforce them on a global basis. To accommodate local or country specific regulations, they can give the local library administrators the flexibility of tailoring these global standards.

With access to the library, you can:

- **Manage standard clauses:** Contract administrators and legal department users can create clauses that contain standard business language for use in contracts. They can create clauses based on business and legal requirements, route them for approvals, and publish them for use across the organization. Users can modify published clauses by creating new versions of the clause while retaining the older versions for reference and comparison. Local organizations can localize clauses, created by the global organization, or adopt them as-is.
- **Manage contract templates:** Companies implement best practices by creating standard contract boilerplates (templates) based on their unique contracting requirements. Contract templates enable rapid assembly and creation of contracts and minimize the overhead involved in legal review and approval. The use of standard language in templates ensures that all contracts comply with company and regulatory policies.
- **Setup Contract Expert rules:** Contract Expert is a rule-based contracts authoring tool that helps organizations define policy rules to determine when additional clauses need to be brought into a contract. Users can set up the Contract Expert rules in the Contract Terms Library and assign the rules to one or many contract templates. Based on the contract template applied and any additional information in the document, and on answering some additional questions, Contract Expert evaluates the policy rules and recommends additional clauses to be included in the business document.

Authoring Contract Terms

Oracle Contracts provides comprehensive contract authoring capabilities embedded in the procurement and sales business flows. For instance, with Oracle Procurement Contracts, you can author contract terms in the Oracle Sourcing and Oracle Purchasing applications.

Using Oracle Sourcing or Oracle iSupplierPortal, you can negotiate contract terms with your suppliers. Similarly, with Oracle Sales Contracts, contract terms authoring capabilities are available through Oracle Quoting and Oracle Order Management. You can also publish contract terms to the storefront using Oracle iStore.

You can author standard contracts using the following features:

- Use pre-approved templates, defined in the library, to quickly author the initial drafts.
- Use the Contract Expert feature to bring in additional clauses into the document based on pre-defined business policy rules.
- Add standard clauses from the contract terms library.
- Add non-standard clauses.
- Select alternate clauses.
- Change the layout of contract sections and clauses.
- Define contractual or internal deliverables.
- Validate contract terms.
- Review contract deviations to understand how the contract terms deviate from pre-defined standards. The contract approvers can review the deviations to help in the decision making process of the contract approval.
- Preview and print contract terms.

Oracle Contracts also provides support for creating and maintaining contract terms in Microsoft Word. While authoring, reviewing, negotiating and approving contracts, you can download the contract terms to Microsoft Word and edit them offline. The updated terms can then be uploaded as the contract of record and integrated into the contract PDF document.

Contract Document Management

Storing and retrieving paper-based or electronic versions of a contract across multiple sites and geographies can be cumbersome. Oracle Contracts provides a central document repository to store all contract documents that users can access globally.

Users can upload images of signed paper contracts and other supporting documents into the repository, and easily retrieve the documents for the latest version of any contract. Users can also retrieve documents for prior versions of a contract, eliminating the need to track contract documents and amendments in filing cabinets.

Contract Deliverables Management

Businesses enter into contractual agreements with their trading partners, and as part of the contractual agreement will have commitments to fulfill. The commitments on the business documents, besides products and services bought or sold, are classified as deliverables, under the Terms and Conditions of the business document. In addition to the contractual commitments that businesses need to fulfill, they might define other internal tasks that contribute to the overall execution of the business document.

You can define deliverables as part of the contract template creation process. If a business document refers to a contract template, all deliverables associated to that contract template are copied to the business document.

Contracts Workbench

A single view of all enterprise contracts is essential for effective management of contract activities, and for reporting and analysis of outstanding supplier and customer

commitments. Oracle Contracts provides a centralized Contracts Workbench that gives you access and visibility to all contractual agreements in the enterprise.

Contracts Workbench allows contract administrators to see which contracts require attention, provides extensive search capabilities, and has links to common tasks such as creating or approving a contract. Legal and financial managers can use Contracts Workbench as a research tool. A flexible security model ensures that contracts can only be viewed or updated by authorized users.

Contract Repository

Since the Oracle E-Business Suite 11i.10 release, Oracle Contracts has provided the ability to author and maintain contract terms in buy-side and sell-side Oracle applications. For example, contract terms can be added to purchase agreements created in Oracle Purchasing, or to quotes created in Oracle Quoting.

Oracle Contracts also enables you to create miscellaneous contracts, such as license agreements, non-disclosure agreements, and merger agreements, which are not specifically related to the functionality of other Oracle applications. You can also create purchase or sales agreements for miscellaneous items that are outside the normal purchasing or sales flows, for which full execution capabilities are not required.

Before You Begin

This chapter covers the following topics:

- Overview
- Related Documentation
- Installation Verification
- Oracle Contracts Dependencies
- Dependency Verification

Overview

This chapter describes resources and dependencies that you must be familiar with before you implement Oracle Contracts. Topics include:

- Related Documentation, page 2-1
- Installation Verification, page 2-2
- Oracle Contracts Dependencies, page 2-2
- Dependency Verification, page 2-2

Related Documentation

The following documents provide information about Oracle Contracts and integration with other applications in the Oracle E-Business Suite:

- *Oracle Procurement Implementation and Administration Guide*
- *Oracle Order Management Users Guide*
- *Oracle Sales Contracts Implementation Guide*
- *Oracle Service Contracts Concepts and Procedures Guide*
- *Oracle XML Publisher Users Guide*
- *Oracle Workflow Administrator's Guide*

Installation Verification

Before proceeding with implementation of Oracle Contracts and its dependencies, you must verify that you have installed Oracle Applications correctly. For more information, see *Oracle Applications Installing Oracle Applications Guide*.

Oracle Contracts Dependencies

Oracle Contracts depends on other Oracle modules and applications to provide additional functionality. Mandatory dependencies are required for Oracle Contracts to function properly. Conditional dependencies, when integrated, provide additional capabilities.

This section describes mandatory and optional dependencies for Oracle Contracts.

Mandatory Dependencies

For all the features to function properly, Oracle Contracts requires installation and implementation of the following Oracle modules:

- **Oracle General Ledger:** Enables set up of ledgers and books. For complete setup information, see the *Oracle General Ledger User Guide*. Set of Books are used as part of the setup for AutoNumbering of clauses. For more information, see the Setting Up AutoNumbering section.
- **Oracle Human Resources:** Provides organization setup information. Define or confirm the definitions of your employees in Oracle Human Resources Management System. For more information, see the *Implementing Oracle HRMS Guide*.
- **Oracle Workflow:** Provides notifications related to approvals of contract clauses and templates. For more information see the *Oracle Workflow Administrator's Guide*.
- **Oracle XML Publisher:** Provides information on setting up and using RTF and PDF templates that are used to preview and print contracts and contract templates. For more information, see the *Oracle XML Publisher Users Guide*.

Conditional Dependencies

The following conditional dependencies provide additional functionality but are not required for Oracle Contracts to function:

- **Oracle Procurement Contracts:** Needed to implement procurement contracts
- **Oracle Sales Contracts:** Needed to implement sales contracts

Dependency Verification

Refer to the Oracle Contracts About documentation, available on *OracleMetalink* to ensure correct installation, implementation, and setup of dependencies.

Implementation Overview

This chapter covers the following topics:

- Overview
- Process Description
- Implementation Task Sequence

Overview

Mandatory implementation steps are required for Oracle Contracts to function properly. Topics include:

- Process Description, page 3-1
- Implementation Task Sequence, page 3-2

Process Description

In an organization, the business practices group and legal professionals can use Oracle Contracts to create and manage a contract terms library that contains:

- All the standard business and legal language as well as company-standard contract boilerplates (templates).
- Contract Expert rules that define the policy rules based on which additional clauses should be added to a business document.

To effectively implement Oracle Contracts, you must perform the following mandatory tasks:

- Set up profile options
- Set up organizations for global and local implementation.
- Set up lookup codes.
- Migrate clauses from previous versions to contract terms library

Additional setup is required to use the following features:

- Complex Workflow Approvals. For information on setting up workflow for approvals, see *Oracle Workflow Administrator's Guide*.
- Keyword search in the contract terms library. For more information, see the Enabling Keyword Search section.

Implementation Task Sequence

The following table describes the implementation process for Oracle Contracts:

Implementation Process

Step	Description	Mandatory	Performed by Seeded Responsibility
1	Set up organizations, page 4-2	Yes	Contract Terms Library Administrator
2	Set up profile option, page 4-3	Yes	System Administrator
3	Set up approvers and workflows, page 4-4	Yes	Contract Terms Library Administrator
4	Set up lookup codes, page 4-5	Yes	Contract Terms Library Administrator
5	Enable keyword search, page 4-8	Yes	System Administrator
6	Set up layout templates, page 4-8	Yes	Systems Administrator
7	Set up descriptive flexfields, page 4-11	No	Contract Terms Library Administrator
8	Set up AutoNumbering, page 4-12	No	Contract Terms Library Administrator
9	Set up value sets, page 4-13	Yes	System Administrator
10	Set up numbering schemes, page 4-8	No	Contract Terms Library Administrator
11	Set up function security, page 4-15	No	System Administrator
12	Migrate clauses to contract terms library, page 4-17	Yes	Contract Terms Library Administrator
13	Import clauses from external resource, page 5-18	No	Contract Terms Library Administrator

Setting Up Oracle Contracts

This chapter covers the following topics:

- Overview
- Setting Up Organizations
- Setting Up Profile Options
- Setting Up Approvers and Approval Workflow
- Setting Up Lookup Codes
- Enabling Keyword Search
- Setting Up Layout Templates
- Creating a Layout Template
- Customizing the Contract Terms XSL-FO Stylesheet
- Using Descriptive Flexfields
- Setting Up AutoNumbering
- Setting Up Value Sets
- Setting Up Numbering Schemes
- Managing Numbering Schemes
- Setting Up Function Security
- Migrating Clauses to Contract Terms Library
- Migration Process Overview
- Migration Steps
- Setting Up Contract Expert
- Setting Up Contract Repository
- Setting Up Contracts Workbench

Overview

Oracle Contracts requires the following setup processes:

- Setting Up Organizations, page 4-2
- Setting Up Profile Options, page 4-3

- Setting Up Approvers and Workflows, page 4-4
- Setting Up Lookup Codes, page 4-5
- Enabling Keyword Search, page 4-8
- Setting Up Layout Template, page 4-8
- Setting Up Descriptive Flexfields, page 4-11
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- Setting Up Function Security, page 4-15
- Migrating Clauses to Contract Terms Library, page 4-17
- Setting Up Contract Expert, page 4-22
- Setting Up Contract Repository, page 4-22
- Setting Up Contracts Workbench, page 4-25

Setting Up Organizations

To use Oracle Contracts, you must define organizations within the Oracle Human Resources application. For more information, see the *Oracle Applications System Administrator's Guide*. Before you proceed with setting up Organizations, it is recommended that you identify one global organization for your implementation and decide on the following:

- Do you have different approvers of clauses and templates in different organizations?
- Do you have different approvers on the buy-side and sell-side that would approve clauses and contract templates in the library?
- Do you have organizations that can adopt global causes as-is without localizations or formal reviews? Organizations that have similar business practices and use the same language for business transactions as the global organization, can choose to adopt global clauses automatically.
- Do you have different administrators that would be assigned the administration functions relating to buy-side and sell-side clauses and contract templates?

Note that a library administrator receives notifications in case of events including the following:

- System Failures: For instance, system generates error notifications, when concurrent processes have failed.
- FYI Notifications: For instance, in a local organization, this would be the person who receives notifications when global clauses have been approved.

Steps:

1. Login to the Human Resources responsibility.
2. Open the Find Organization window.

Navigation: Work Structures -> Organization -> Description.

3. Select the desired Operating Unit from the list of values.
4. Click the Find button.
5. In the Organization Classifications region, place the cursor Operating Unit name.
6. Click the Others button.
7. Select the Contract Terms Setup option from the list of values.
8. In the Contract Terms Setup window, enter values for the following options:
 - Auto Adopt Global Clauses: This enables automatic adoption of global clauses in a local organization. The clauses do not have to be approved separately in the local organization, if the Auto Adopt option is set to Yes.
 - Library Administrator for Sell Intent: Set a library administrator 'Sell' intent to receive notifications when a global clause is created and needs adoption in the local organization.
 - Library Administrator for Buy Intent: Set a library administrator 'Buy' intent to receive notifications when a global clause is created and needs adoption in the local organization
 - Library Approver for Sell intent: Set a library approver for Sell intent to route workflow approval notifications for clauses and templates.
 - Library Approver for Buy intent: Set a library approver for Buy intent to route workflow approval notifications for clauses and templates.

Note: Users defined as **FND_USERS**, using the System Administrator responsibility, can only be assigned the role of Library Administrators or Library Approvers. If the users are no longer valid, ensure that the contract terms setup is modified

Setting Up Profile Options

Set up the following profile options:

- Self service Accessibility Feature (User level): For all users that want to use the Rich Text feature in authoring clauses, set the User Level profile option to No.
- OKC: Clauses Library Intent (Responsibility or User level): Use this profile option at responsibility level to restrict library usage based on the intent for a particular responsibility. Setting this profile option is optional. You can set this profile option to:
 - Buy
 - Sell
 - All
- OKC: Clause Sequence Category (Responsibility level): Use this profile option to set up AutoNumbering for clauses. For more information, see the Setting Up AutoNumbering section, page 4-12.
- OKC: Global Operating Unit (Site level): Use this profile option to define your global organization. Changing the value of this profile option once it has been set is not recommended. This could cause data issues with clauses and templates in the Contract Terms Library.

- OKC: Generate Deviations Report for Approval (Application level): Use this profile option to control whether the deviations report will be attached to the approval workflow notification. If the profile option is set to No, the system will not attach the deviations report to the notification.

For Oracle Sourcing and Quoting, set the profile option to Not Applicable to remove this option from the Review Contract Deviations page.

- OKC: Layout Template for Contract Deviations Report (Application level): Use this profile option to control the format of the deviations report that will be attached to the approval workflow notification.
- OKC: Use Contract Expert (Site level): Use this profile option to determine whether Contract Expert can be used by an organization. If set to No, Contract Expert is not enabled in Oracle Contracts.
- Contract Repository Auto-Numbering Enabled (Site level): If this profile option is set to Yes, the system will assign numbers to the new contracts automatically. If you set the profile option to No, the application users must enter contract numbers manually. Contract numbers must be unique across all manually and automatically generated numbers.
- Contract Intent Access Control (Site, Responsibility, User levels): When you define a contract and indicate the Contract Type, the system derives the contract's Intent, which is an indication of whether the contract is buy-side, sell-side, or neither. Each Contract Type is associated with one Intent. The possible values for Intent are Buy, Sell, and Other. This profile option restricts the user when creating or viewing Repository contracts, and when using the Contracts Workbench. The possible values of the profile option are "Buy", "Sell", "Buy-Sell", "Other", "Buy-Other", "Sell-Other", "Buy-Sell-Other".

If this profile option is not set, the user will have access to all three intents.

Setting Up Approvers and Approval Workflow

This section covers the following topics:

- Setting Up Workflows for Clauses and Templates, page 4-4
- Setting Up Workflows for Contract Repository, page 4-4

Setting Up Workflows for Clauses and Templates

The system supports defining a single approver for each of the Buy and Sell intents as standard out-of-the-box functionality. Use the Organizations setup to identify approvers of clauses and templates in the global and local organizations. For more information, see the Setting Up Organization section, page 4-2.

You can customize the approval flows for clauses and templates to route it to multiple approvers or change approvers based on additional context using Oracle Workflow. For more information, see the *Oracle Workflow Administrator's Guide*.

Setting Up Workflows for Contract Repository

Define approval hierarchy and approval rules through the Oracle Approvals Manager. For more information, see *Implementing Oracle Approvals Manager Guide*

Approval Workflows can be defined based on rules around the following attributes of the contract:

- Contract Type (Technical Name: Contract_Type)
 - Note:** In this field, you need to enter the Contract Type Code. You can personalize the Setup page in order to locate the code.
- Intent (Technical Name: Contract_Intent)
- Authoring Party (Technical Name: Contract_Authoring_Party)
- Currency (Technical Name: Contract_Currency)
- Amount (Technical Name: Contract_Amount)
- Overall Risk Level (Technical Name: Contract_Overall_Risk)
- Party
- Organization (Technical Name: Contract_Organization)
- User who submits for approval (Technical Name: Transaction_Requester_User_ID)

Setting Up Lookup Codes

This section covers the following topics:

- Setting Up Lookup Codes for Clauses and Templates, page 4-5
- Setting Up Lookup codes for Contract Repository, page 4-8

Setting Up Lookup Codes for Clauses and Templates

The following tables provide a list of system, user, and extensible lookup codes. Use these tables to identify the lookup codes that you need to define for your implementation. Use the Application Object Library Lookups window to define the lookup codes. **OKC_SUBJECT** lookup type is the only extensible lookup code supported for Oracle Contracts. Use this lookup type to define Clause Types.

Note: Modifying seeded lookup values can corrupt data that were created using the lookup values.

The following table displays the only extensible lookup code for clauses and templates.

Extensible Lookup Code for Clauses and Templates

Type	Description
OKC_SUBJECT	Clause types

The following table displays the seeded lookup codes for clauses and templates.

Seeded Lookup Codes for Clauses and Templates

Type	Description
OKC_AMEND_OPN_CODE	Contract terms amendment operation codes
OKC_APP_MODE	Application modes for contract terms

Type	Description
OKC_ARTICLE_ADOPTION_TYPE	Clause adoption type
OKC_ARTICLE_DATE_PERIOD	Date search criteria
OKC_ARTICLE_INTENT	Clause intent
OKC_ARTICLE_PROVISION	Clause type (Provision or Clause)
OKC_ARTICLE_RELATIONSHIP_TYPE	Relationship type of the clause
OKC_ARTICLE_SECTION	System seeded default section
OKC_ARTICLE_STATUS	Clause statuses
OKC_ART_IMP_PROCESS_STATUS	Clause import statuses
OKC_ART_USER_ACTS	User actions allowed on clauses
OKC_ART_VAR_DATATYPE	User defined variable data types
OKC_ART_VAR_TYPE	Variable types
OKC_DELIVERABLE_STATUS	Deliverable statuses
OKC_DELIVERABLE_TIME_UNITS	Seeded time units used in contract deliverables
OKC_DELIVERABLE_TYPES	Deliverable types
OKC_DEL_BEF_AFT	Deliverable due dates before and after
OKC_DEL_INT_EXT	Deliverables internal and external organizations
OKC_DEL_DUE_DATE_RADIO_GRP	Deliverable due date radio group
OKC_DEL_PROMPTS	Deliverables UI prompts
OKC_DEL_REPEAT_FREQ	Deliverable repeat frequency
OKC_DEL_REPEAT_RADIO_GRP	Deliverable repeat radio group
OKC_DOCUMENT_TYPE_CLASS	Error type for validations
OKC_ERROR_RECORD_TYPE	QA error record type: Clause, Contract Expert, Deliverable, Document, and so on.
OKC_INVALID_ARTICLES	Deviation code for deviation category: Invalid Clauses (Clause Expired, Clause on hold, Clause not required per Contract Expert)
OKC_MISSING_STD_ARTICLES	Deviation code for deviation category: Standard Clauses Missing (Clause required per Contract Expert, Mandatory Clause removed, Optional Clause removed)
OKC_NON_STD_ARTICLES	Deviation code for deviation category: Non Standard Clauses (Non-standard clause added, Modified standard clause)
OKC_NUMBER_LEVEL	Contract numbering scheme levels
OKC_NUMBER_SEQUENCE	Contract terms document numbering sequence

Type	Description
OKC_QA_SEVERITY	Validation severity (Error or Warning)
OKC_REPO_ATTACH_DOC_FROM	Attach document using the following options: Add New Document or Add from Previous Version
OKC_SECTION_LOCATION	Contract terms section location (Before, After, or Within)
OKC_SECTION_SOURCE	Source of the section (From Library or New)
OKC_STD_ARTICLES_ADDED	Deviation code for the Deviation category: Standard Clauses Added (Standard clause added, Standard clause replaced with alternate)
OKC_TERMS_AUTH_ACTIONS_AMEND	Contract terms authoring actions in the Amend mode
OKC_TERMS_AUTH_ACTIONS_UPDATE	Contract terms authoring actions in the Update mode
OKC_TERMS_AUTH_ACTIONS_VIEW	Contract terms authoring actions in the View mode
OKC_TERMS_INTENT	Contract terms intent
OKC_TERMS_MOVE_LOCATION	Location to move contract terms (After, Before, or Within)
OKC_TERMS_QA_TYPE	Contract terms QA type
OKC_TERMS_TEMPLATE_ACTIONS	Contract template actions supported
OKC_TERMS_TMPL_DATE_PERIODS	Contract template date search criteria
OKC_TERMS_TMPL_STATUS	Contract template statuses supported
OKC_TERM_QA_LIST	Contract terms validation issues listing
OKC_YN	Contract flags (Yes or No)
OKC_DEVIATIONS_AUTOGEN_PREF	The preference for generating the Deviations report can be Yes, No, or Not Applicable.
OKC_TERMS_DEVIATIONS_VIEWBY	Contract Terms Deviations View by Category (Default view) or Section
OKC_TERMS_DEVIATION_CATEGORIES	Terms Deviation Categories: Invalid Clauses, Standard Clauses Missing, Non-standard Clauses, Standard Clauses Added
OKC_CONTRACT_TERMS_SOURCES	Possible Sources for Contract Terms: Attached Document or Structured Terms
OKC_XPRT_CHAR_OPERATOR	Contract Expert rules' character operators: In, Not In, Is, Is Not
OKC_XPRT_COND_OBJECT_TYPE	Contract Expert condition object types
OKC_XPRT_COND_VALUE_TYPE	Contract Expert Condition Value Types
OKC_XPRT_NUMBER_OPERATOR	Contract Expert rules' numeric operators

Type	Description
OKC_XPRT_QUESTION_DATATYPE	Contract Expert question data types
OKC_XPRT_QUESTION_TYPE	Contract Expert question entity type
OKC_XPRT_RULES_QA_LIST	Contract Expert rules quality assurance check list
OKC_XPRT_RULE_RECORD_TYPE	Contract Expert rule condition types
OKC_XPRT_RULE_STATUS	Contract Expert rule statuses
OKC_XPRT_VIEW_RULE_ACTIONS	Rule Actions in View mode

Setting Up Lookup codes for Contract Repository

The following tables provide the list lookup codes for Contract Repository. Use this table to identify the lookup codes that you need to define for your implementation. Use the Application Object Library Lookups window to define the lookup codes.

Type	Description
OKC_REP_CONTRACT_INTENTS	Contract intents
OKC_REP_CONTRACT_STATUSES	Contract statuses
OKC_REP_ACCESSIBLE_INTENTS	"Contracts Intent Access Control" values
OKC_REP_APPR_HIST_ACTIONS	Approval history actions

Enabling Keyword Search

The Contract Terms Library supports search using clause keyword for both clauses and templates. To enable and effectively use this search feature, you must run the following concurrent processes on a periodic basis:

- Synchronize Clauses Text Index: This program synchronizes the clauses text index.
- Optimize Clause Text Index: This program optimizes the clauses text index.
- Synchronize Template Text Index: This program synchronizes the contract templates text index.
- Optimize Template Text Index: This program optimizes the contract templates text index.

Note: The recommended approach would be to run the Synchronize and Optimize concurrent programs together. The implementation teams need to determine the frequency of running these programs, depending on the specific business needs. If the clauses and templates are frequently updated, run these programs more often to obtain accurate search results.

Setting Up Layout Templates

For formatting and publishing documents, Oracle Contracts leverages the functionality that Oracle XML Publisher provides.

Oracle XML Publisher is delivered with Oracle E-Business Suite. Using Oracle XML Publisher, you can register new layout templates created using XSL-FO and generate PDF documents. Layout templates represent the format and layout of business documents and are registered in Oracle XML Publisher in the Template Manager repository. For more information, see the *Oracle XML Publisher User's Guide*.

Oracle Contracts includes seeded layout templates, along with a XML Schema document that represents the XML structure of the contract data that is used to generate the contract document. A sample XML document with sample contract data is also seeded to enable users to preview the customized or new layout templates during the time of registration.

The seeded layout templates cannot be modified. However, you can download a copy of the layout template to your desktop, modify it, and register it as a new layout template in Oracle XML Publisher.

You can use the seeded layout templates to print the:

- Contract document
- Deviations report

Contract Terms Layout Template

Oracle Contract Terms Template is the seeded layout template for printing contract terms. The attributes and seeded values for Oracle Contract Terms Template include the following:

- Application: Oracle Contracts Core
- Data Source Name: Contract Terms Data Definition
- Sub Template: No
- Template Type: XSL-FO

Deviations Report Layout Templates

The following table displays the seeded layout templates for Deviations report.

Seeded Layout Templates for Deviations Report

Name	Type	Description
Contract Deviations Sourcing Template	RTF	The main Rich Text Format template for Sourcing.
Contract Deviations Order Management Template	RTF	The main Rich Text Format template for Order Management.
Contract Deviations Template for Quoting	RTF	The main Rich Text Format template for Quoting.
Contract Deviations Purchasing Template	RTF	The main Rich Text Format template for Purchasing.
Contract Deviations Report Template	RTF	Sub template for contract deviations summary details.
Contracts RTE Handler Template	XSL-FO	Sub template for handling HTML tags used in Rich Text Editor for contracts.
Contract Deviations Constants Template	XSL-FO	Sub template containing all context information.
Contract Deviations Variable Resolution Template	XSL-FO	Sub template for variables resolution.
Contract Deviations Table Variable Resolution for Sell Side	XSL-FO	Sub template for resolving the table type variables in sell side documents.

This section describes basic steps required to customize layout templates using Oracle XML Publisher. The layout template that you select defines how its format and layout appears when you choose the Preview option. If the contract template is applied to a business document, a different layout template may be used to format the document. For example, to learn which layout template is applied to the contract terms added to a quote, see the *Oracle Quoting Users Guide*.

Creating a Layout Template

To change the layout, you need to create a new layout template in Oracle XML Publisher.

Example

To create a new template, it is recommended that you start with a copy of one the seeded templates, for example Oracle Contract Terms Template.

The parameters that Oracle Contract Terms template should use are Application, Data Source Name, Sub Template, and Template Type.

In addition, define the effective date range (start date and end date) of the layout template such that it allows you to preview the contracts and contract templates. If you leave the End Date field blank, you can use the layout template indefinitely.

Prerequisites

You must be familiar with Oracle XML Publisher and have access to Oracle XML Publisher Administrator Responsibility.

Steps

1. Login to the XML Publisher Administrator responsibility.
2. Click the Templates link. The Templates Search page opens.
3. In the Application field, enter Oracle Contracts Core.
4. Click Go to view the search results.
5. Click the Duplicate icon for the Oracle Contract Terms Template. The system copies the template as a new template.
6. In the Code field, enter a new code for the template.
7. In the Name field, enter a new name.
8. Click Apply to save the new template.
9. In the Template Files region, click the Download icon for the OKCTERM_en.XSL file.
10. Save the template to your desktop.
11. Open the template with a text or XSL editor.
12. Modify the layout or boilerplate to suit your needs.
13. Save the template with a new name, for example, MyTemplate_en.xml.
14. In the Template Files region, click the Update icon for the OKCTERMS_en.xml file.
15. Click the Browse button to locate and select your customized XSL-FO stylesheet (MyTemplate_en.xml).
16. Click Apply. The system uploads the file and associates it with your layout template.
17. Click the Preview button to preview a sample document using your new layout template.

Customizing the Contract Terms XSL-FO Stylesheet

To create a stylesheet for a contract template, you need to know the structure of the contract XML document that is transformed by the XSL stylesheet. The XSL-FO stylesheet, in the layout template, is applied to the contract XML document representing a contract template to create a PDF document. For a description of the contract XML format, see the Contract Terms XML Reference appendix, page E-1.

Using Descriptive Flexfields

Oracle Contracts supports the use of descriptive flexfields for users to enter additional information in:

- Standard Clauses
- Contract Templates
- Variables
- Contract Template Deliverables

- Folders

The following table displays the information for descriptive flexfields:

Descriptive Flexfields

Component	Name	Title	Description	Table
Standard Clause	OKC_CLAUSES_DESCFLEX	Clause Versions DF	Descriptive flexfield for clause versions	OKC_CLAUSE_VERSIONS
Contract Templates	OKC_TERMS_TMPL_DFF	Contracts Template DFF	Contracts Template DFF	OKC_TERMS_TEMPLATES_ALL
Variables	OKC_VARIABLES_DESCFLEX	OKC User Defined Variables Flexfield	Oracle Contracts user-defined variables flexfield	OKC_BUS_VARIABLES_B
Contract Template Deliverables	DELIVERABLES_FLEX	Additional Attributes	Additional attributes on deliverables	OKC_DELIVERABLES
Folder	OKC_ART_DF	OKC Clause Folders DF	Descriptive flexfield for folders	OKC_FOLDERS_ALL_B

Setting Up AutoNumbering

This section covers the following topics:

- Setting Up AutoNumbering for Contract Terms Library, page 4-12
- Setting Up AutoNumbering for Contract Repository, page 4-12

Setting Up AutoNumbering for Contract Terms Library

Use this setup to number clauses automatically during creation:

- In the System Administrator responsibility:
 - Define a document sequence. Navigation: Document > Define
 - Define a sequence category. Navigation: Document > Categories. Define the category using OKC_ARTICLES_ALL as the table to be associated.
 - Assign the category to a set of books. Navigation: Document > Assign. Associate the category defined with the set of books and sequence.
 - Set the OKC: Clause Sequence Category profile option with the sequence created above.
- In all responsibilities that create clauses, set the Sequence Numbering profile option to Yes.

For more information on setting up AutoNumbering feature, see the *Oracle Applications System Administrator's Guide*.

Setting Up AutoNumbering for Contract Repository

Use the Contract Repository Auto-Numbering Enabled profile option to set the numbering option for Contract Repository. For more information, see the Setting Up Profile Options section, page 4-3.

Setting Up Value Sets

In Oracle Contracts Value sets are used in:

- User-defined variables
- Contract Expert

For more information, see the Defining Value Sets section of the *Oracle Applications Developer's Guide*.

For all user-defined variables, value sets are supported subject to the following conditions:

- **Format Types:** The supported format types are Number, Character, and Standard Date. You must only use the supported format types when defining value sets for user-defined variables.
- **Validation Types:** The supported validation types are None, Independent, and Table. You must only use the supported validation types when defining value sets for user-defined variables.

The value sets that are supported for Contract Expert are subject to the following conditions:

- **Format Types:** The only supported format type is Character. You must only use the supported format type when defining value sets for Contract Expert.
- **Validation Types:** The supported validation types are Independent, Table, Translatable Independent. You must only use the supported validation types when defining value sets for Contract Expert.

Based on the value set definition, the system displays the list of values in the following formats:

- **Table:** A drop-down list or a list of values
- **Independent:** A drop-down list or a list of values
- **None:** an input field in the authoring, based on the following format types:
 - For the Character (CHAR) format type, the system displays an input field.
 - For the Number format type, the system displays an input field. However, users can only enter numeric values in this field.
 - For the Standard Date format type, the system displays a Date type field.

Note: Deleting the value from a value set or deleting the value set could cause data issues that impact:

- Contract templates containing clauses that use user-defined variables
- Business documents that use user-defined variables in standard and non-standard clauses

Values sets used in defining Contract Expert rules operate with slightly varied business rules. Refer to the Contract Expert chapter, page 7-1 for more details on the restrictions in using value sets while defining Contract Expert rules.

Setting Up Numbering Schemes

When creating contract templates, you can apply a numbering scheme to the sections and clauses structure. This numbering scheme is applied to business documents in which the contract template is used.

- You can only delete a numbering scheme that is not assigned to a contract.
- If you define a numbering scheme with the "a,b,c," numbering type and a specific level with more than 26 entries, the system does not create further alphabets. Instead, the system uses symbols (such as aa, bb) for all entries beyond 26. Preview the template or contract, as applicable, and make sure the numbering scheme used is changed to use some other type.

Use the Contract Terms Library to set up and manage numbering schemes.

Steps:

1. Navigate to the Numbering Schemes page.
Navigation: Library > Numbering Schemes tab > Create Numbering Scheme button
2. Enter the Scheme Name.
3. Optionally, enter a Description for the scheme
4. Optionally, select the Number Clauses check box to automatically number the clauses in the business document.
5. Click the Add Another Level button to define the first numbering level.
6. Enter the following information for the numbering level:
 - In the Sequence field, choose a sequence from the list of values.
 - Optionally, enter an End Character. For example, ()).
 - Optionally, select the Concatenate with Child check box to ensure that the child level includes the numbering of its parent during previewing and printing of the business document.

For instance, you would set up the numbering scheme as:

First level:

- a,b,c
- end character is "."
- Concatenate with Child check box selected

Second level:

- I,II,III
- end character is ")"

The document will be numbered as:

- First Level = a.
 - Second Level = a.I)
7. Click the Refresh button to preview the layout.
 8. Optionally, add additional numbering levels.
 9. Click Apply to save and close the Numbering Scheme page.

Managing Numbering Schemes

You can make changes to your existing numbering schemes. You can also delete any numbering scheme that is not assigned to a contract template. If the numbering scheme has been updated in the Contract Terms Library, the next time a contract template using that numbering scheme is used to create a new contract, the latest numbering scheme updates are applied. For contracts that already use the numbering scheme, you must manually renumber by applying the numbering scheme to reflect the updates onto the contract

Steps

1. Navigate to the Numbering Schemes tab. (N) Library (T) Numbering Schemes. The system displays the list of available numbering schemes.
2. To make changes to a numbering scheme, click the Update icon.
3. To delete a numbering scheme click the Delete icon. You can only delete the numbering schemes that are not used in contract templates.

Setting Up Function Security

This section covers the following topics:

- Setting Up Function Security for Business Documents, page 4-15
- Setting Up Function Security for Contract Repository, page 4-16

Setting Up Function Security for Business Documents

Oracle Contracts allows organizations to control levels of access to authoring contract terms on a business document. Many businesses have multiple roles involved in the contract negotiation process, including contract negotiators, contract administrators, and contract approvers.

- Contract users with restricted authoring privileges. Users with this level of security can apply a contract template but cannot use any other contract terms negotiation capabilities.
- Contract negotiators may have standard authoring privileges that allow them access to standard clauses and pre-approved alternates from the library.
- Contract administrators may have additional privileges that allow them to author non-standard clauses or remove contract terms.
- Contract approvers or super users may have privileges that allow them to override standard authoring controls. For instance, with override authoring privileges, users can delete a mandatory clause from a business document or edit a protected clause.

Oracle Contracts provides the following security levels of authoring access to business documents:

- Restricted Authoring Privileges
 - You can apply a contract template.
 - You can change the contract template, but cannot change the Contract Source to Attached Document.
 - You can run Contract Expert.
 - To set up the Restricted Authoring Security level, an administrator must remove the Author Standard Terms function from the default menu of functions.
- Standard Authoring Privileges
 - You have all the abilities of the Restricted Authoring Privileges level.
 - You can add or remove standard clauses, update variable values, and change the contract template.
 - To set up the Standard Authoring Privileges security level, an administrator must remove the Author Non-Standard Terms function from the default menu of functions.
- Non-Standard Authoring Privileges
 - Note:** This is the default access level, if you use the seeded menus.
 - You have all the abilities of the Standard Authoring Privileges level.
 - You can modify standard clauses.
 - You can create non-standard clauses and remove all the contract terms on a business document.
- Override Authoring Controls Privileges
 - You have all the abilities of the Non-Standard Authoring Privileges level.
 - You can delete mandatory clauses and edit clause text on protected clauses.
 - To set up the Override Authoring Controls Privileges security level, an administrator must add the Override Authoring Controls function to the default menu of functions.

Setting Up Function Security for Contract Repository

Functional security provides control over the user's access to certain functions in the repository. A user can have View-Only, Authoring, or Administrator responsibility. The following table displays the functions that each responsibility has access to:

Function	View-Only Responsibility	Authoring Responsibility	Administrator Responsibility
View contract	Yes	Yes	Yes
Create and update contract	No	Yes	Yes
Change status from Approved to Signed	No	Yes	Yes
Manage deliverables	No	Yes	Yes
Manage risk	No	Yes	Yes
Terminate contract	No	Yes	Yes
Update contract administrator of a contract	No	No	Yes
Change status from Draft directly to Signed	No	No	Yes
Import contracts	No	No	Yes
Use Repository Setup tab	No	No	Yes

Setting Up and Customizing Responsibilities

If you want to set up your own responsibility, you can then attach menus to the responsibility, typically by copying existing menus. Subsequently, you can grant or revoke specific functions from the menus, such as the Override Authoring Controls function.

For more information, see the *Oracle Applications System Administrator's Guide*

Migrating Clauses to Contract Terms Library

To support the new features of Oracle Contracts 11.5.10 (see, Oracle Contracts Key Features, page 1-1), the Articles schema has changed significantly.

Note: In release 11.5.10, articles are referred to as clauses. Articles and clauses may be considered synonyms from a product feature perspective. However, in this document we refer to **articles** as **clauses**.

Prior to release 11.5.10, clauses did not belong to any specific organization. Hence, clauses created in the library were accessible to all organizations.

This release contains the following changes:

- Every clause belongs to a specific organization and can only be used to author contracts in that organization.
- Only one organization can be designated as the global organization. All others are referred to as local organizations.
- Local organizations can adopt global clauses that the global organization creates.

Therefore, as part of the 11.5.10 upgrade, all clauses will be assigned to an organization. If multiple organizations are currently using the same clause, the Migration program assigns the clauses to the global organization and automatically adopts the clauses for all local organizations. This enables all organizations to view and use the clauses in authoring documents exactly as they existed prior to 11.5.10.

In prior releases, you could have a single clause in a base language and then translate it to multiple languages. In 11.5.10, each clause is for a single language. As part of the 11.5.10 upgrade, a translated clause is split into one individual clause for each language.

Migration Process Overview

The following figures illustrate the migration of clause data in the 11.5.10 release. Figure 4-1, page 4-18 represents the important clause attributes in a pre-11.5.10 environment. The articles and versions existed in OKC_STD_ARTICLES_B/_TL and OKC_STD_ART_VERSIONS_B/_TL. The Article Name and the Article Text were translatable columns in OKC_STD_ARTICLES_TL and OKC_STD_ART_VERSIONS_TL respectively.

- This example assumes that:
 - There are two languages installed in the database:
 - US English (the base language)
 - French
 - The user has translated the:
 - Clause "Termination" to "Annulation"
 - Text "This is English" to "C'est Francais"
 - As part of the migration process, the user has set up:
 - Vision Corporation as the Global Operating Unit
 - Vision Operations as the only local organization

Standard Clauses Prior to 11.5.10 Release

OKC_STD_ARTICLES_B/_TL		
Article ID	Translated Language	Article Name
1	US	Termination
1	FR	Annulation
2	US	Renewal

OKC_STD_ART_VERSIONS_B/_TL			
Article ID	Release	Article Text	Translated Language
1	1.0	This is English	US
1	1.0	C'est Francais	FR
2	1.0	This is a Renewal Clause	US

Figure 4-2, page 4-20 represents how the clauses look after migration. There are now three clauses created in the new clause tables:

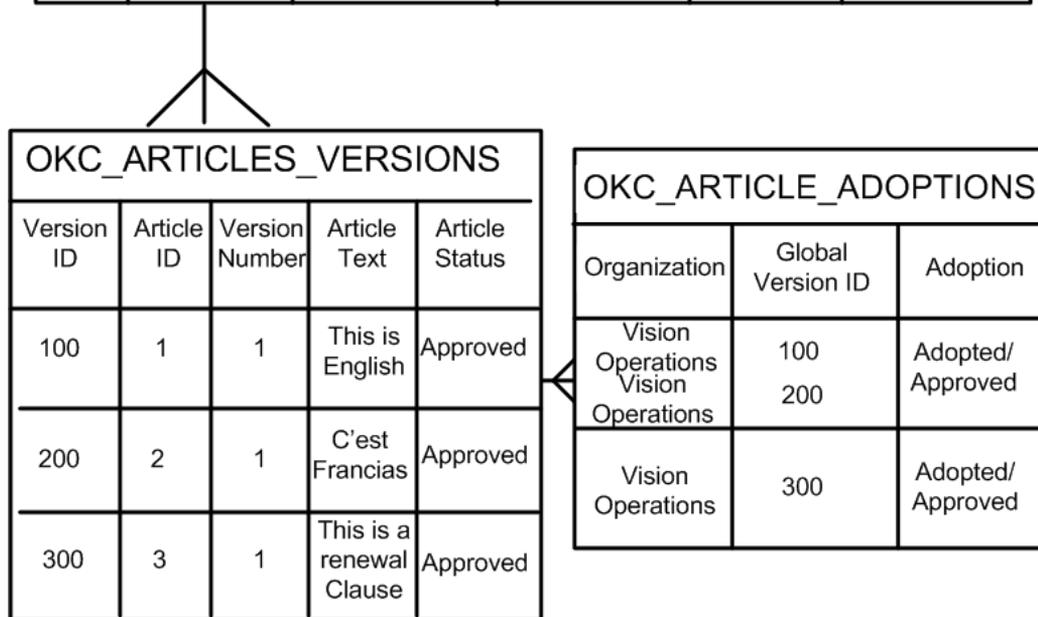
- OKC_ARTICLES_ALL
- OKC_ARTICLE_VERSIONS
- The translated clause Annulation is now a new clause in Vision Corporation.

These clauses are of Sell intent and have versions with Approved status. The original reference ID stores the old article ID. Adoption rows are created for each of the three clause versions in the OKC_ARTICLE_ADOPTIONS table. These rows are automatically created for all organizations that are set up to use the Contract Terms Library.

In this example, these rows are created for the local operating unit, Vision Operations, and have an adoption type of Adopted and the adoption status of Approved. Users that belong to these two organizations are now able to view the clauses exactly as they did in the earlier releases. Only the Global organization, however, can make any updates to these clauses. For more details, see the Migration Steps section, page 4-20.

Standard Clauses After 11.5.10 Migration

OKC_ARTICLES_ALL					
ID	Article Number	Article Title	Organization	Org. Ref. ID	Article Language
1	10000	Termination	Vision Corp.	1	US
2	10001	Annulation (FR)	Vision Corp.	1	FR
3	10002	Renewal	Vision Corp.	2	US



Migration Steps

To migrate standard clauses to release 11.5.10, you need to perform several post-upgrade steps. These steps must be performed after the 11.5.10 upgrade is completed.

Steps

1. Define organizations that use contracts. In 11.5.10 release, clauses are migrated to a global organization and automatically adopted by all the local organizations. This requires each organization to be set up for contract terms by defining additional information for the organization. For more information, see the Setting Up Organization section, page 4-2. Note that the system will only migrate clauses in those organizations that have used clauses in their contracts. If an organization has used clauses in authoring contracts, but has not been set up to use the Contract Terms Library in 11.5.10, the concurrent process will not continue until the setup is completed. You must ensure that all relevant organizations have completed the required setup step in order to use the Contract Terms Library in 11.5.10 release.

2. Define the global organization. After the organizations are created, you must define a global organization using the site level OKC: Global Operating Unit profile option. For more information, see the Setting Up Organization section, page 4-2.
3. Migrate standard clauses: To migrate standard clauses to the new 11.5.10 schema, run the **Migrate Standard Clauses to 11.5.10** concurrent program. The concurrent program performs the following tasks:
 - In the global operating unit, it creates global clauses in Approved status.
 - For each local operating unit, the clauses are migrated with adoption type as **Adopted as is**. All clause relationships are migrated to the local operating units as well.
 - The New Clause Versions table supports descriptive flexfields of size VARCHAR2(150) according to the current Oracle E-business Suite development standards. Note that this is a change from earlier releases where these columns were of size VARCHAR2(450). The Migration program considers up to 150 bytes during the data conversion.
 - Clauses (including all versions) are migrated to the new schema using the following defaults:
 - Org id: Global operating unit
 - Status: Approved
 - Intent: Sell
 - Version Number: System generated
 - Clause Language: Translated language
 - Clause Number: Autonumbered
 - Protect Text: No
 - Insert By Reference: No
 - Provision: No
 - Translated articles (including all versions) are created as new clauses with the translated text.
 - Article sets are migrated to folders. All existing FND_LOOKUPS of type **ARTICLE_SET** are migrated to clause folders and the existing associations are migrated to folder contents.
 - Folders are created for each of the operating units that have been set up under the classification of Contract Terms Library Details. Hence, one article set in pre-11.5.10 release will now have the same number of folders as the number of operating units you have set up. Folder associations (contents) also will have multiple entries for all the migrated Article Sets and Article Set Members.
 - All incompatibilities are migrated as clause relationships of type **Incompatible** for every operating unit that have been set up under the Contract Terms Library Details classification. Hence, every incompatibility in a pre-11.5.10 release will now have the same number of relationships as the number of operating units you have set up.
 - All existing associations between the clause version and contract documents are updated to reflect the newly generated clause version ID.

Note: Prior to this release, users could attach supporting documents while creating clauses in the library. This feature is not supported in 11.5.10 but, all attachments that already have been created are migrated to the new schema for backward compatibility reasons. However, in 11.5.10 release, users cannot access these attachments from the Contract Terms Library.

Setting Up Contract Expert

Prerequisites

- Set up the Contract Terms Library.
- Set the Use Contract Expert profile option to Yes at the site level.

For more information, see the Setting Up Profile Options section, page 4-3.

To use Contract Expert on business documents, you need to set up Contract Expert rules in the Contract Terms Library. To set up Contract Expert rules:

- Create and approve clauses, page 5-2
- Create and approve contract templates, page 5-20
- Define value sets, page 4-13
- Create Constants, page 7-5
- Create Questions, page 7-2
- Create and activate a library of rules and assign them to appropriate contract templates, page 7-6
- Enable Contract Expert on contract templates , page 5-20
- Determine the sequence of display of questions when Contract Expert is used on a business document, page 7-12

Note: A Contract Expert enabled contract template can also contain standard clauses and sections. As with all contract templates, its constituent clauses and sections are automatically added to a business document when the contract template is applied to the business document.

Note: Clauses or deliverables are not mandatory for Contract Expert enabled templates. However, they are mandatory for other templates.

Setting Up Contract Repository

Since the Oracle E-Business Suite 11i10 release, Oracle Contracts has provided the ability to author and maintain contract terms in buy-side and sell-side Oracle applications. For example, contract terms can be added to purchase agreements created in Oracle Purchasing, or to quotes created in Oracle Quoting.

Oracle Contracts now enables you to create miscellaneous contracts, such as license agreements, non-disclosure agreements, and merger agreements, which are not specifically related to the functionality of other Oracle applications. You can also create

purchase or sales agreements for miscellaneous items that are outside the normal purchasing or sales flows, for which full execution capabilities are not required.

These types of contracts are stored in a new Contract Repository, and are called Repository contracts. Each Repository contract will have a user-defined contract type, unlike the contracts created in other Oracle applications, which have system-defined contract types. A Repository contract can include supporting documents and amendments, deliverables with notification capabilities, and risk information. Repository contracts support a flexible approval and signature process, and a bulk import process is available for loading legacy contracts into the system.

This section covers the following topics:

- Setting Up Profile Options, page 4-23
- Defining Approval Workflows, page 4-23
- Setting Up Contract Types, page 4-23
- Setting Up Risks, page 4-24
- Setting Up Contact Roles, page 4-24

Setting Up Profile Options

Define the following profile options:

- Contract Repository Auto-Numbering Enabled
- Contracts Intent Access Control

For more information, see the Setting Up Profile Options section, page 4-3.

Defining Approval Workflows

Define approval hierarchy and approval rules through the Oracle Approvals Manager. For more information, see the Setting Up Approvers and Approval Workflow section, page 4-4.

Setting Up Contract Types

When users create Repository contracts in Oracle Contracts, they must select and assign one of the user-defined contract types, such as Non-Disclosure Agreement and Partnership Agreement, to the contract. You must define the contract types in advance.

Steps

1. Log in to the Contracts Workbench Administrator responsibility.
2. Click the Contract Types link. The contract types you define should be unique across all organizations within the company. Note: For your reference, the Contract Types page displays the list of seeded and current user-defined contract types.
3. Click the Create Contract Type button. The system displays the Create Contract Type page.
4. In the Name field, enter a unique identifier for the contract type.
5. Enter a Description for the contract type.
6. Select an Intent from the list of values. Depending on the nature (Intent) of a contract, the contract could be buy-side, sell-side, or neither. Each Contract Type

should be associated with one Intent. The possible values for Intent are Buy, Sell, and Other. If the Contracts Intent Access Control profile option is used, this selection will limit which users will be able to select this Contract Type.

7. Select a Start Date. This is the date that the contract type becomes available.
8. Optionally, select an End Date for the contract type. After the End Date has passed, when creating new contracts, users will not be able to select this type.
9. Click the Apply button.

Setting Up Risks

When users create Repository contracts in Oracle Contracts, they may select multiple risks associated with these contracts. For example: partner bankruptcy, non-performance of a deliverable, non-compliance with non-disclosure terms, loss or infringement of intellectual property, and damage to property or humans. This risks must be defined in advance.

Steps

1. Log in to the Contracts Workbench Administrator responsibility.
2. Click the Risks link.
Note: For your reference, the Risks page displays the list of all user-defined risks. Oracle Contracts does not provide seeded risks.
3. The risks you define should be unique across all organizations within the company.
4. Click the Create Risk button. The system displays the Create Risk page.
5. In the Name field, enter a unique identifier for the risk.
6. Enter a Description for the risk.
7. Select a Start Date.
8. Optionally, select an End Date for the risk. After the End Date has passed, the risk cannot be selected on a contract.
9. Click Apply to save the risk.

Setting Up Contact Roles

The contact role indicates the responsibility or function of different people in a contract. For example, an employee (internal contact) can be assigned the role of "Purchasing Manager" in a contract. There are no seeded contact roles. You can define an unlimited number of contact roles. These roles will be available to users when adding internal or external contacts to a party on a Repository contract.

Steps

1. Login to the Contracts Workbench Administrator responsibility.
2. Click the Contact Roles. For your reference, the Contact Roles page displays the list of all user-defined roles. The roles you define should be unique across all organizations within the company.
3. Click the Create Contact Role button. The system displays the Create Contact Role page.

4. In the Name field, enter a unique identifier for the role.
5. Enter a Description for the role.
6. Select a Start Date.
7. Optionally, select an End Date for the role. After the End Date has passed, the role cannot be selected on a contract.
8. Click Apply to save the role.

Setting Up Contracts Workbench

A single view of all enterprise contracts is essential for effective management of contract activities, and for reporting and analysis of outstanding supplier and customer commitments. Oracle Contracts provides a centralized Contracts Workbench that gives you access and visibility to all contractual agreements in the enterprise.

Contracts Workbench allows contract administrators to see which contracts require attention, provides extensive search capabilities, and has links to common tasks such as creating or approving a contract. Legal and financial managers can use Contracts Workbench as a research tool. A flexible security model ensures that contracts can only be viewed or updated by authorized users.

Contracts Workbench provides a single view of the following types of contracts:

- Contracts created in buy-side and sell-side Oracle applications: purchase orders, purchase agreements, negotiations, orders, quotes and sales agreements.
- Repository contracts: For information, see Contract Repository, page 4-22.

All of these contracts are automatically visible in the Contracts Workbench, as long as they include contract terms.

This section covers the following topics:

- Setting Up Profile Options, page 4-25
- Personalizing Contracts Workbench, page 4-25

Setting Up Profile Options

You can use the Contracts Intent Access Control profile option to restrict the access to Contracts. For more information, see the Setting Up Profile Options section, page 4-3.

Personalizing Contracts Workbench

Oracle Framework includes the OA Personalization Framework, which enables you to personalize the appearance of Contracts Workbench without modifying any underlying code.

The following are the most common ways to personalize Contracts Workbench:

1. The default bins for the Contracts Workbench are:
 - Notifications
 - Recent Contracts
 - Expiring Contracts
 - Contract Deliverables

- Contracts at Risk

You can use the personalization option to add the Bookmarks bin,, remove one of the above bins, or change the order the bins are displayed.

2. The default columns for the Advanced Search Results page are:

- Contracts Number
- Contract Name
- Organization
- Party Name
- Contract Type
- Intent
- Status
- Effective Date

You can use the personalization option to remove one of the above columns, change the order the columns are displayed, or add any of the following columns:

- Contract Administrator
- Overall Risk
- Version
- Expiration Date
- Termination Date
- Amount
- Currency
- Authoring Party

The personalization also impacts the Export option. After performing a search, the user can export the search results to a Comma Separated (CSV) file. The exported file will include only the columns shown on the screen. After personalization, columns that are available for personalization but not selected will not be included in the CSV file.

For more information on personalization, see:

- *Oracle Applications Framework Personalization Guide Release 11i*(Metalink Note 268969.1)
- *Oracle Applications Component Reference Release 11i* (Metalink Note 269136.1)

Setting Up Contract Terms Library

This chapter covers the following topics:

- Contract Terms Library
- Managing Standard Clauses
- Creating Standard Clauses
- Defining Related Clauses
- Assigning Clauses to Folders
- Approving Clauses
- Managing Clauses Across Organizations
- Searching for Clauses
- Managing Changes to Standard Clauses
- Importing Clauses
- Managing Contract Templates
- Creating Contract Templates
- Adding Sections and Clauses
- Creating Contract Template Deliverables
- Validating Templates
- Preview Templates
- Approving Templates
- Searching for Templates
- Viewing Template Clauses
- Managing Changes to Contract Templates
- Defining Global Templates
- Viewing Contract Expert Rules
- Managing Variables
- Creating Variables
- Searching for Variables
- Displaying Clauses Using a Variable

- Managing Changes to Variables
- Managing Sections
- Creating Sections
- Searching for Sections
- Updating Sections
- Managing Folders
- Creating Folders
- Searching for Folders
- Managing Changes to Folders

Contract Terms Library

Contract Terms Library is the central library of all pre-approved clauses, contract templates, and Contract Expert rules that can be used to create contracts across the enterprise.

The library gives the legal department and business organizations a powerful tool to create reusable clauses. Clauses can be grouped into sections and stored as reusable contract templates to codify best practices. Templates provide a framework for rapid assembly and creation of contracts. These capabilities provide the foundation for contract process standardization and control across the enterprise. Another key feature of the Contract Terms Library is the ability to establish global standards and enforce these standards enterprise-wide. Organizations can manage clauses and templates centrally in a global organization. Local organizations can then use or duplicate these clauses and templates and customize them to meet their own specific local requirements.

You can use the Contract Expert feature of Oracle Contracts to create rules that represent the business policies of the organization. These rules can be applied on a business document to bring in additional clauses based on the information in the business document. For more information, see the Contract Expert chapter, page 7-1.

In addition to the Library features described previously in this section, the Contract Terms Library supports the creation and maintenance of a library of folders, sections, and variables.

Managing Standard Clauses

A standard clause is the text that describes the legal or business language used to author a contract. Clauses are drafted based on both business and statutory requirements.

This section covers the following topics:

- Creating Standard Clauses, page 5-3
- Defining Related Clauses, page 5-6
- Assigning Clauses to Folders, page 5-7
- Approving Clauses, page 5-7
- Managing Clauses Across Organizations, page 5-8
- Searching for Clauses, page 5-13

- Managing Changes to Standard Clauses, page 5-15
- Importing Clauses, page 5-18

Creating Standard Clauses

You can create standard clauses in the following ways:

- Creating a New Clause, page 5-3
- Duplicating an Existing Clause, page 5-6

Creating a New Clause

Use these procedures to create a new clause.

Steps

1. Navigate to the Create Clauses page.

Navigation: Library > Clauses tab > Create Clause button

2. Enter the following attributes:

- **Number:** This field can be manually entered or automatically generated. To automatically generate the number, see the Setting Up AutoNumbering section, page 4-8.
- **Clause Title:** Enter a title for the clause. The clause title is unique within an organization.
- **Display Name:** Optionally, enter the display name for the clause. The display name does not have to be a unique name. Your organization could have alternate clauses with the same display name. The system uses the Display Name on a printed contract field. If you leave this field blank, the Clause Title is used as the display name.
- **Intent:** Select the intent of the contracts that can use the clause. Select the Buy or Sell option from the list of values.

Note: Based on the OKC: Clause Intent profile option setup, you can create clauses for buy, sell, or both intents. If you set the profile option to either Buy or Sell, the system provides read-only access to the Intent field. This profile option also governs other features in the Contract Terms Library, including contract templates and variables.

- **Type:** Use the Type field to classify the clause according to the business purpose (for example, General or Payment terms). Select a clause type from the list of values. For more information, see the Setting Up Lookup Codes section, page 4-5.
- **Default Section:** Optionally, select the default section from the list of values. You can use sections as headings to format contracts. For more information, see Managing Sections, page 5-43. The Default Section is primarily used in Contract Expert. When you run Contract Expert, each clause that the system selects is placed into the Default Section provided for the clause. If a default section is not provided for the clause, the system will place it into the Default Section provided for the contract template.

- Description: Optionally, enter a description for the clause.
3. Status: The system controls this field. During the creation process, the clause is in Draft status.
 4. Version: The system generates the version number.
 5. Start date: Accept the default or change the start date.
 6. End date: Optionally, enter an expiration date for the clause. The expiration date cannot be earlier than the current system date.
 7. Provision: Provisions are used in negotiation documents in Oracle Sourcing only. If applicable, select the Provision check box. If the first version of a clause is a Provision, all subsequent versions of the clause will retain this attribute. You cannot update this attribute on subsequent versions.
 8. Protect Text: To prevent modification to the clause text in documents, select the Protect Text check box. On subsequent versions, you can update this attribute. This will not impact business documents that already contain these clauses.
 9. Global: To make the clause available to all organizations, select the Global check box. This field is only available in the Global operating unit and cannot be updated on future versions of the clause. For more information, see the Managing Clauses Across Organizations section, page 5-8.
 10. Text: Enter the necessary text for the clause. Clause texts can include business variables. For more information on embedding variables, see the Managing Variables section, page 5-38. In the Text area you can choose one of following modes:
 - Rich Text: The Rich Text editor provides special formatting of the text that is driven by business and legal requirements. The Rich Text editor provides a Tool bar and a Text area. You can format the text by choosing one of the following icons on the Tool bar:
 - Cut
 - Copy
 - Paste
 - **Bold**
 - *Italic*
 - Underline
 - Align Left
 - Align Center
 - Align Right
 - Number Order List
 - Bulleted List
 - Decrease Indent
 - Increase Indent
 - Text: The Text mode provides a plain text area only. If you use the Rich Text mode to enter the clause text and then toggle to the Text mode, the system displays the HTML source for the text you have entered. However, the system

prints the clause using the Rich Text features even if you have toggled to the Text mode.

11. Add Variables: Click the Add Variables button to search for available variables. The Add Variables page appears. From this page you can search for available variables, then click the Insert icon to add the variable that you want into your text, at the location of the cursor within the text area. In the clause text, variables are displayed as tags in the format <@Variable Name@>.

Note: If you do not use the Rich Text editor to author clause text, the system inserts the variables at the end of the text instead of where the cursor is located. You can use the Cut and Paste operation to move a variable tag, within the clause text, to the appropriate location.

Note: You can use the Rich Text feature to format variable values. For example, the Payment Terms variable tag can be formatted to Bold mode, so on a printed document the Net30 value appears in bold within the clause text.

12. Instructions: Optionally, enter instructions on how and when to use the clause in a contract template or business document. Users can view these instructions when they add the clause to a contract template or business document.
13. Allow Include by Reference: Select the check box to replace the clause text with the Reference text when the clause is used in a contract. Optionally, enter the following information:

- Reference Source: Provide the source of the clause that may not be printed in full text.
- Reference Text: Enter the reference text. The system prints the reference text instead of the clause text, on a printed contract.

Note: If you select the Allow Include by Reference check box, the Reference Text field becomes mandatory.

14. If applicable, select one of the following buttons:
 - Submit: To submit the clause for approval, click this button.
 - Apply and Add Details: Click this button to save your work and move to the Update Clause page. The Update Clause page includes the following subtabs:
 - General: Use this subtab to update general information discussed in the previous steps.
 - Related Clauses: For detailed information, see the Defining Related Clauses section, page 5-6.
 - Clause Folders: For detailed information, see the Assigning Clauses to Folders section, page 5-7.
 - Version History: Use this subtab to display the history of the clause versions.
 - Apply: Click the Apply button to save the clause and close the Create Clauses page.

- **Cancel:** Click the Cancel button to close the Create Clauses page without saving the clause.

Duplicating an Existing Clause

You can use the Duplicate feature to create new clauses from existing ones. The Duplicate feature is available from the Search and View Clause pages.

Steps

1. Navigate to the Search Clauses page.
Navigation: Contract Terms Library > Clauses tab
2. Search and select a clause.
For more information, see the Searching for Clauses section, page 5-13.
3. Click the Duplicate button.
4. In the New Clause Title field, enter a unique title.
5. Optionally, choose to copy folders and related clauses.
6. Click the Save and Continue button.
7. Enter or change the information as described in the Defining Clauses section, page 5-3.

Defining Related Clauses

For any given clause, you can define alternate and incompatible clauses. You can use alternate clauses as a substitute for the main clause on a contract. You can define clauses as mutually incompatible to prevent them from being used on the same contract.

Note: You can add alternate and incompatible clauses to an approved clause without requiring the creation of a new version. Clause relationships are defined at the clause level and not at the version level. So, if the relationship is defined in one version, it will continue to apply to all future versions. The system will use the latest valid versions of these clauses on a business document when establishing the relationships.

Steps

1. Navigate to the Create Clauses or Update Clauses page.
Navigation: Library > Clauses tab > Create Clause button
2. Open the Related Clauses subtab.
3. Click the Add Another Row button.
4. In the Relationship field, select one of the following options:
 - Alternate
 - Incompatible
5. In the Clause Title field, enter the clause title. You can also use the List of Values icon to search and select the clause.

6. Click Save.
7. Click the Compare button to compare related clauses. Select the two clauses that you want to compare and then click the button.
8. Click the Compare with Current button to compare the related clause with the current clause. Select only one clause from the list and click the button.
9. Click the Remove button to delete a clause relationship.

Assigning Clauses to Folders

You can assign clauses to folders from the Update Clause page.

Prerequisites

Define folders.

Steps

1. Navigate to the Clauses page.
Navigation: Contract Terms Library > Clauses tab
2. Open a clause for update.
For more information, see the Updating Clauses section, page 5-15.
3. Open the Clause Folders subtab.
4. Click Add Another Row.
5. In the Name field, enter the folder name. You can also click the List of Values icon to search and select the folder name (see Searching for Folders, page 5-45).
6. Click Save or Apply.

Approving Clauses

To make standard clauses available for use in contracts, they must be approved first. You can:

- Approve one clause at a time.
- Select and submit more than one clause for approval at the same time.
- Respond to approval.
- Comment on either approval or rejection decision.

Prerequisites

Set up an approver. For more information, see the Setting Up Organizations section, page 4-2.

Note: The default workflow supports one approver per intent (Buy or Sell.) However, you can modify the workflow processes to include more approvers and route approvals based on additional business conditions.

Steps

1. Navigate to the Clauses page.
Navigation: Contract Terms Library > Clauses tab
2. Create a new clause or search and open a clause in Draft status.
For more information, see the Creating a New Clause , page 5-3, or Searching for Clauses section, page 5-13.
3. Click the Submit button to:
 - Change the clause status from Draft to Pending Approval.
 - Send a workflow notification to the approver.
4. The approver opens the notification and reviews the clause.
5. The approver can approve, reject, or reassign the clause.
The approver may reassign the clause for approval to another user. While reassigning, the approver may delegate the notification while retaining ownership on the notification or transfer the notification to the assignee.
As the result:
 - The clause status is changed to Approved or Rejected.
 - A workflow notification informs the author of the clause of the decision.

Managing Clauses Across Organizations

This section discusses how organizations with global operations can manage clauses across multiple organizations. This feature is useful for companies that contract with customers across the globe with operations in different countries and locations. Organizations are identified based on the operating unit assignments in the Define Organizations form. In this document, we refer to those operating units that have been set up to use the Contract Terms Library as organizations. For information on how to set up organizations, see the Setting Up Organizations section, page 4-2.

A central organization can define global clauses and make them available for use by local organizations. To define global clauses, you need to identify your global organization, usually the corporate headquarters. The designated global organization is responsible for the creation of clauses for business terms that need to be enforced globally. On approval, the clauses are made available to local organizations. A workflow notification is sent to the local organizations that need to review the clause.

In the local organizations, library administrators review the clause and decide if it needs to be modified to meet local requirements. If necessary, the clause is modified (localized) and routed for internal approvals. If not, the clause is adopted with no changes or modifications and routed internally for approvals. Alternatively, local organizations can be set up to automatically adopt all global clauses.

After approvals, the localized or adopted clause is available for use in contracts created locally.

Prerequisites

Prerequisites for creating global clauses are:

- Set up the OKC: Global Operating Unit profile option. This is a site level profile option to determine the operating unit that can create global clauses and templates. A check box to identify global type clauses and templates becomes available after you set up this profile option.
- Create global clauses, in the global organization. For more information, see the Creating Standard Clauses section, page 5-3.
- Approve global clauses to make them available in local organizations.

Adoption of Global Clauses by Local Organizations

You can set up your local organizations to adopt global clauses automatically or manually.

Auto adoption of global clauses: This feature provides automatic adoption of global clauses to operating units that do not require a manual review and approval process. For example, a company with more than one operating unit can define global clauses and make them available to all operating units. During the workflow approval for a global clause, when the clause is approved, the system verifies the operating units that are set to adopt clauses automatically. The system automatically adopts the global clause for these operating units with no manual intervention.

- **Manually adopting or localizing global clauses:** For operating units that require a review and approval process, this feature enables them to make the global clauses available for use in their own organization. The operating units can use one of the following options:
 - **Adopt Global Clause as-is:** Adopt the global clause without changes. The system records the user name and system date and time of adoption along with the adopting organization. The local operating unit can adopt multiple global clauses at the same time. After adoption and approval of global clauses, the local operating unit can use the clauses to author contracts.
 - **Localize Global Clauses:** Localize the global clause by making some changes to the clause or translating it to the language of the local organization. The system creates a copy of the clause in Draft status. During localizations, you can modify the clause text and add or delete variables from the text. You can then submit the local clause for approval. The system records the approver name and date as the adoption details for the clause.

Note: If you are not changing the intent of the clause text and only translating it into a local language, you can select the Translation Only check box. This is for informational purposes and can be used to report on why a clause was localized.

This section covers the following topics:

- Creating Global Clauses, page 5-10
- Notifying Local Organizations, page 5-10
- Reviewing Global Clauses for Adoption, page 5-10
- Approving Global Clauses in Local Organizations, page 5-11
- Viewing Adoption Status, page 5-12
- Adopting Global Clauses in a New Organization, page 5-12

Creating Global Clauses

Use these procedures to create a global clause.

Steps

1. Create a standard clause. For more information, see the Creating Standard Clauses section, page 5-3.
2. Select the Global check box. This check box is only available in the designated global organization.

Note: When a global clause is approved, it remains global on all subsequent versions. However, if an earlier version of a clause is not global, you can make the subsequent versions global.

Notifying Local Organizations

Prerequisites

Set up your library administrators. For more information, see the Setting Up Organizations section, page 4-2.

When a global clause is approved, the system sends a notification to the library administrators, in all local organizations, to consider the clause for adoption. In case a local organization is set to automatically adopt global clauses, a notification is sent to these organizations informing the local administrators that a new global clause has been automatically adopted for their organization.

Reviewing for Adoption

As the library administrator in a local organization, you can review and adopt Global clauses.

Steps

1. Navigate to the Clauses page.
Navigation: Contract Terms Library > Clauses tab
2. Search for Global clauses. For more information, see the Searching for Clauses section, page 5-13. Note that:
 - A global clause that is Approved (in the global organization), is available for adoption in local organizations. If a global clause is on hold or expired, although the clause is displayed in the search results, local organizations cannot adopt or localize it.
 - In a local organization, the first version of an adopted global clause must be manually assigned to a folder created in that organization. However, after adoption, the system assigns the subsequent versions of the global clause to the same folder.
 - Each time a new version is created and approved for a global clause, that version becomes available for adoption in the local organizations. Each version of a global clause must be adopted individually.

Note: For global clauses that are available for adoption, no status is displayed in the local organizations; for example, searching

on Status, such as Draft, does not display the global clauses. So, do not use the Status search parameter for global clauses that are available for adoption.

3. In the Adoption Type field, choose the Available for Adoption option from the list of values.

Note: Due to performance reasons, you cannot search for clauses by the Adoption Type alone. In searching for clauses that are available for adoption, you must enter additional search criteria such as Clause Type or Keyword.

4. Click Go to view the list of available clauses.
5. Review every clause on a case-by-case basis and decide whether to adopt the clause as-is or localize it.

Note: If a previous version of a global clause was adopted as-is, you must adopt subsequent versions of the clause in the same manner. You cannot change the adoption type on subsequent versions on a clause.

Note: If the first version of a global clause is localized and the next version is now available for adoption, when you choose to localize the second version, the Localize page displays the text from the localized version. Currently, the system does not provide a comparison of the current localized text and the second version of the global text. To view the text of the second version of the global clause, you must view the clause from the Search page.

6. Click Review for Adoption to view the full text and clause details. At this point, you can:
 - Adopt the clause as-is. In this case, you only need to submit this clause for local approval.
 - Localize the clause. When you localize a clause, you can modify the text and check the **Translation Only** check box to indicate that the changes were for translation purposes. Submit the localized clause for approval on completing the modifications.

Note: You can delete a clause that has been localized and is in Draft status. This makes the original global clause available again for adoption.

Approving Global Clauses in Local Organizations

At the time a Global clause is adopted and submitted for local approval, the library administrator receives a Workflow notification requesting approval for adoption of the clause.

The local administrator can approve or reject the clause. After approval, the Global clause (or the modified localized clause) becomes available for use in the local organization. If a clause is rejected, the local organization may choose to continue

modifying the clause, based on the rejection comments, or modify the adoption type. For instance, a clause that was previously adopted as-is can now be localized.

When local organizations adopt a Global clause, the system sends a notification to the global organization with details on date and type of adoption.

Viewing Adoption Status

Global organizations can monitor when and how global clauses are adopted across local organizations. The Adoption Status report provides an overview of the adoption status across multiple local organizations for a given global clause. This report is only available in the global organization and allows the global organization to analyze cases where the global clauses are not adopted in a timely manner.

Steps

1. Navigate to the Clauses page.
Navigation: Contract Terms Library > Clauses tab
2. In the global organization, search for Global clauses. For more information, see the Searching for Clauses section, page 5-13.
3. Click the clause title to view the clause detail.
4. Select the View Adoption Status option from the list.
5. Click Go.

The View Adoption Status report provides the following information:

- Organization Name
- Clause Title
- Version
- Adoption Type (indicates if the global clause was adopted as-is or localized)
- Translation Only (indicates if the global clause was only translated to the local language)
- Adoption Status (indicates if the clause was approved in the local organization or not)
- Adoption Date (the date the clause was adopted)

Adopting Global Clauses in a New Organization

For any new organization that is set up to adopt global clauses, Oracle Contracts provides a concurrent program to adopt all global clauses that were created before the new organization was created.

To adopt the global clauses, you must run the **Adopt Global Clauses for a New Organization** concurrent program. Select the organization for which this program must be run and provide a value for the parameter Commit Size for the Run.

It is not necessary to rerun the concurrent program for a given organization more than once, if all the migrated clauses and new global clauses have been created in the global organization at the time of running the concurrent program.

The clause status in the new organization could be one of the following:

- Adopted: If the organization is setup to automatically adopt clauses.
- Available for Adoption: If the organization is setup to manually adopt clauses.

Note: If the global organization contains clauses that have been migrated from 11.5.9 or earlier, these clauses would be automatically adopted in the new organization, even if the organization is setup to manually adopt clauses.

Searching for Clauses

You can search or browse to find clauses in the Clauses Library. This section covers the following topics:

- Searching for Clauses, page 5-13
- Using the Keyword Search Feature, page 5-14
- Browsing for a Clause, page 5-15

Searching for Clauses

Use these procedures to search for clause.

Steps

1. Navigate to the Clauses page.
Navigation: Contract Terms Library > Clauses tab
2. In the Search region, search for clauses by:
 - Keyword
 - Type
 - Title
 - Number
3. To access additional search options, click the Show More Search Options link. The options are:
 - Intent
 - Status
 - Start and end dates
 - Provisions only
 - Variables used in the clause
 - Used in templates
 - Default section
 - Show all versions check box
 - Adoption Type (available only in local organizations)

To perform your search, you must enter information in one of the following fields:

 - Number

- Title
 - Keyword
 - Type
 - Status
 - Start Date
 - End Date
 - Used in Templates
 - You cannot perform blind searches or start your search criteria with the wildcard character %.
 - If you do not select the Show All Versions check box, the system only displays the latest version of the clauses that match the search criteria.
 - Description does not work with leading searches. Also, the description will return only those clauses for which description begins with the search criteria you enter. For instance, if you enter A% in the Description field, only those clauses where description begins with the letter A will be returned.
4. Click Go to view the search results.
 5. In the Search Result section, select the check box for any clause and click one of the following buttons:
 - Submit: Submit the clause for approval.
 - Duplicate: Create a new clause by copying from an existing clause.
 - Create New Version: Create a new version
 - Review for Adoption: This button is available only to local organizations for adopting global clauses. For more information, see the Approving Global Clauses in Local Organizations section, page 5-11.

Using the Keyword Search Feature

You can search for clauses in the Contract Terms Library, using the Keyword Search feature. The system searches for clauses that contain the text you enter in the any of the following fields:

- Clause Title
- Display Name
- Clauses Description
- Clause Text

To perform the keyword search, you must run the following concurrent programs periodically:

- Synchronize Clauses Text Index
- Optimize Clauses Text Index

If you have not run the concurrent programs at regular intervals, the search will not provide accurate results. The frequency for running these programs must be decided on a case-by-case basis. You can schedule the concurrent programs to be run together automatically at pre-defined intervals.

Note: The above concurrent programs need not be run for each operating unit. Running the program will synchronize the data across the organizations that use the Contract Terms Library.

Browsing for a Clause

In addition to search, you can use the Browse feature to search for clauses using folders.

Steps

1. Navigate to the Clauses page.
Navigation: Library > Clauses tab
2. Click Browse to search through folders for the clause that you want to retrieve. The system displays the list of available folders.
3. To view all clauses assigned to a folder, select the check box for that folder.
4. Optionally, click the clause title to view clause details.
5. If applicable, select the check box for any clause and click one of the following buttons:
 - Submit: Submit the clause for approval.
 - Duplicate: Create a new clause by copying from an existing clause.
 - Create New Version: Create a new version
 - Review for Adoption: This button is available only to local organizations for adopting global clauses.
 - Update: Open the clause for update.

Managing Changes to Standard Clauses

This section covers the following topics:

- Updating Clauses, page 5-15
- Versioning Clauses, page 5-17
- Comparing Clauses, page 5-17
- Placing Clauses on Hold, page 5-17
- Deleting Clauses, page 5-18

Updating Clauses

You can modify clauses and their versions, subject to certain business rules. When updating a clause, you can:

- View and assign alternate clauses
- View and assign incompatible clauses

- Add the clause to folders
- View all versions of the clause
- Choose one version and compare with the one that is being updated
- Change the status to On hold (only if the clause is in Approved status)
- Submit the clause for approval
- Delete the clause (only if the clause is in Draft or Rejected status)

Note: A new version is required if:

- The clause is inactive
- The clause is in Approved status and the attributes that are controlled at the Clause Version level need to be updated

Steps

1. Navigate to the Clauses page.
Navigation: Contract Terms Library > Clauses tab
2. Search for the clause that you want to update. For more information, see the Searching for Clauses section, page 5-13.
3. Verify the clause status:
 - If the clause is in Draft status, all the fields are available for update
 - If the clause is in any other status, certain fields are protected and cannot be updated.
4. Click the Update icon. The system opens the clause for update.
5. Make the necessary changes:
 - Except for the first version of a clause in Draft status, you cannot change the clause number, title, and intent.
 - For clauses with the Approved status, you cannot make changes to the following fields: Display Name, Start Date, Provision and Global check boxes, Clause Text, Allow Include by Reference.
 - You cannot update the intent on a draft clause if the clause text contains an embedded variable tag, since variables are based on the intent.
6. Select one of the following actions:
 - Create new version (not available for clauses in Draft status)
 - Submit for approval (only available for clauses in Draft status)
 - Put on hold (not available for clauses in Draft status)
 - Delete (only available for clauses in Draft status)
 - Apply
 - Save
 - Cancel

Versioning Clause

The Versioning feature enables you to make changes to clauses that are already in use on contracts. You can modify clause details including clause text and description. New versions need to be approved before they can be used in contracts.

A new version is required if:

- The clause is not in Draft nor Rejected status.
- The clause is approved and the attributes controlled at the Clause Version level require to be updated.

Steps

1. Navigate to the Clauses page.
Navigation: Library > Clauses tab
2. In the Search region, enter the search criteria for the clause that you want.
3. Click Go. The system displays the search results.
4. Select the check box for the clause.
5. Click Create New Version. Fields from the previous version are copied to the new version. You cannot change clause title, number, and intent, when creating a new version.
6. Select one of the following options:
 - Apply
 - Save
 - Submit
 - Cancel

You can delete the new version of a clause, if it is in Draft status.

Comments

After the clause is approved, the latest version of the clause will be automatically used when a contract template containing the clause is applied to a business document. However existing business documents that already contain the clause are not impacted; you must manually apply the latest version to the existing business documents.

Comparing Clauses

You can compare any two versions of a clause. The system provides a redline comparison of the changes made to the clause text.

You can choose any two versions of a clause, and then click the Compare button available in the Version History subtab of Updating Clause page, page 5-15.

Placing Clauses on Hold

You can place clauses on hold to prevent them from being used in contract templates and contracts. You can also release the hold to make the clause available again.

Steps

1. Navigate to the Clauses page.
Navigation: Contract Terms Library > Clauses tab
2. Search for the clause that you want put on hold. For more information, see the Searching for Clauses section, page 5-13.
3. Verify the clause status.
4. Click the Update icon or the clause title link.
5. Click Put on Hold.
6. Click Yes to confirm.
7. To release the hold, open the clause for update. For more information, see the Update section, page 5-15.
8. Click Release Hold. The system confirms the release.

Deleting Clauses

You can only delete clauses that are in Draft or Rejected status.

Steps

1. Navigate to the Clauses page.
Navigation: Contract Terms Library > Clauses tab
2. Search for the clause that you want to delete. For more information, see the Searching for Clauses section, page 5-13.
3. Verify the clause status.
4. Click the Update icon or the clause title link.
5. Click Delete. The system asks you to confirm your request for deletion.
6. Click Yes.

Importing Clauses

You can use the Import Clauses program to import existing clauses used in your organization.

You also can use the Import Clauses program on an ongoing basis, where clause updates are continuously imported into the clause library to stay current with changes in business process or government regulations.

You can import clauses into the clause library as:

- New clauses
- New clause versions (not available if the earlier version is in Draft, Rejected, or Pending Approval status)
- Updates to existing clauses (available only to existing clauses in the library that are in Draft and Rejected statuses)

You must run the Import Clauses program to import clauses into the Contract Terms Library. You also need to provide a valid batch name to run the program; the program is

uniquely identified by the batch name you provide. You can run the concurrent program in the following modes:

- **Validation Only:** Use this mode to verify that data is free from errors before importing to the library.
- **Import:** Use this mode to perform validation and import at the same time.

You can view the concurrent process outputs to identify errors in the data imported. If you run the program in the Validation Only mode, you can correct the data as necessary and then import. By first running the program in the Validation Only mode, you can ensure that clauses are imported successfully into the Contract Terms Library without errors.

The Import Clauses program checks to ensure data imported is error free and verifies:

- Use of valid variables in the clause text. The system displays invalid variable tags as errors, that is, the variable tags have not been defined in the system or are not appropriate for the intent of the clause.
- Existence of mandatory information such as clause title, clause text, start date, and so on.
- AutoNumbering must be setup for the organization to run the import program in that organization. If AutoNumbering is not setup, an error is reported in the Import process.

Note: Any global clause in Approved status, once imported at the global organization, triggers auto-adoption for all operating units that are subscribed to the Auto-adoption option.

Note: Any clause imported in Pending Approval status, automatically launches the Clause Approval workflow.

The following steps provide a high-level description of importing clauses.

Prerequisites

All lookups and setup data including variables, sections, AutoNumbering and organization setup. For more information, see the Setting Up Oracle Contracts chapter of the *Oracle Contracts Implementation and Administration Guide*.

Steps

1. **Prepare data for loading into the interface table:** The first step in the Import Clauses process is to identify the data that you need to import. This step is outside the system, and you need to choose the formats to use to extract data from other systems. The data load must be in the format acceptable to the interface process, usually in a format with the "csv" file type.
2. **Load the data into the application interface tables:** At this stage, the data is loaded from the legacy system into the application interface tables. This process is also outside the system. You can use any tools (for example, SQL Loader) to load the data into the application interface tables.
3. **Run the Clause Import in validate mode and fix errors:** Run the Clause Import program in the Validation mode to identify invalid data. The Import program generates a report that lists the success and error messages. The errors at this stage

would primarily be related to data format or missing required data. Review the report and fix the errors outside the system and prepare the data for a reload. To import data into the Clause library, you must fix the data so that the validation process does not return any errors.

4. Reload the data into the interface table: After fixing the errors, you can import a fresh load from the source systems into the interface tables. Alternatively, you can use SQL*Plus to fix the data directly in the interface tables.
5. Run the Import Program to create clauses in the library: Run the Clauses Import program in the Import mode to move the records from the interface to the application base tables. If the program was run previously in the Validation mode with no errors, then the import should go through successfully. The Import program generates a report that lists the success and error messages. If necessary, you can run the program multiple times to ensure that all the clauses are imported. When the program is run, all fixed records are imported into the Clauses library. If the records with error are not fixed in the interface tables, these records will remain in the interface table until they are deleted or fixed.
6. Route Clauses for Approval (if necessary): After the program has successfully imported the clauses from the interface tables, if the clauses were not pre-approved, you must submit the clauses for approval, before they are made available for use. If the records in the interface table had the Pending Approval status, the system automatically routes the clauses for approval.
7. For best performance, you must repeatedly purge the interface rows from the interface table. This can be done using the Purge Clause Import Interface Table concurrent program. The rows can be purged based on batch number, start date, end date, or process status.

Technical Information on the Import Clauses Program

Refer to the Oracle eTechnical Reference Manuals (eTRM) for detailed technical information on the Import Clauses program.

Following is a brief overview of the tables that the Import Clauses program uses:

- OKC_ART_INTERFACE_ALL: This is the main interface table where the users load data from external systems as indicated earlier.
- OKC_ART_INT_BATPROCS_ALL: This is an internal system table that stores the batch run details. This includes the processing status as well as all the parameters being used for the run.
- OKC_ART_INT_ERRORS: This table stores the errors reported by the run in validation or import mode.

Managing Contract Templates

Oracle Contracts enables you to define a standard set of templates to easily default terms and conditions for contracts authored by your organization. You can create templates that include both clauses and deliverables. These templates can then be used to default clauses and deliverables on a contract.

Note that the Deliverables functionality is currently supported only on contract templates with the Buy intent.

This section covers the following topics:

- Creating Contract Templates, page 5-21
- Adding Sections and Clauses, page 5-24
- Adding Deliverables, page 5-25
- Validating Templates, page 5-27
- Preview Templates, page 5-29
- Approving Templates, page 5-30
- Searching for Templates, page 5-32
- Viewing Template Clauses, page 5-33
- Managing Changes to Contract Templates, page 5-34
- Defining Global Templates, page 5-37
- Viewing Contract Expert Rules, page 5-38

Creating Contract Templates

To create a contract template, you can either:

- Create a New Contract Template, page 5-21
- Duplicate from an Existing Template, page 5-23

Creating a New Contract Template

Use these procedures to create a new contract template.

Steps

1. Navigate to the Create Contract Template page.
Navigation: Library > Contracts Template tab > Create Template button
2. Enter a unique Name for the template. Note that the template name is unique within an organization.
3. Select the Intent for the template. The intent can be either Buy or Sell.
Note: You cannot change the intent on a template even if the template is in Draft status, if it contains clauses or deliverables or is associated to one or more document types. You must remove these if you want to change the intent on the template.
4. The default Start Date is the system date. You can accept the default or change the date.
5. Optionally, enter a Description for the template.
6. When you create a new template, the system sets the template Status to Draft. Except for the On Hold status, the system controls all statuses on a template. You can manually change the status of a template from Approved to On Hold.
7. Select a Layout Template from the list of values. The layout template is used by the system to prepare the template for preview. For more information, see the Setting Up Layout Templates section, page 4-8.

8. Optionally, enter any Instructions for using the template.
9. Optionally, select the Global check box to make the template available for duplication in all organizations. This is applicable only for global organizations. For more information, see the Global Templates section, page 5-37.
10. Select the Contract Expert Enabled check box to make the Contract Expert feature available on a business document to which the template is applied. By selecting the check box:
 - Contract Expert rules can be assigned to the template.
 - All existing Contract Expert rules with the 'Apply to All Templates' option selected are assigned to the template automatically. For more information about creating and assigning rules, see the Creating Rules section.
 - The system displays the Rules subtab (after the user has saved the template). From the Rules subtab you can view the Contract Expert rules applicable to the contract template. Also, you can view the sequence of questions used in the rules.
11. Select the Expert Clauses Mandatory check box if you want to make the clauses, brought in by Contract Expert, mandatory on the business documents. You can select the Expert Clauses Mandatory check box only if you select the Contract Expert Enabled check box first.
12. Select a Default Section if the template is Contract Expert enabled.

Contract Expert will place the clauses that it selects into the Default Section of the template if those clauses do not have a default section assigned to them in the library.

Note: If you want to make changes to the Contract Expert fields after a contract template has been approved, see the special considerations that apply when you change Contract Expert fields on contract template revision, page 5-36.

13. In the Document Types region you can assign the template to one or more business document types. This allows the users to select this template during authoring a contract of this document type.
14. To add a document type, click the Add Another Row button and enter the following information:
 - In the Document Type field, select the relevant contract type from the list of values. For example, Standard Purchase Order, and RFQ.
 - Optionally, select the Default Template check box to set the template as a default for all business documents that are authored using that document type. For each document type, you can only set one contract template as the default template.
15. Click Apply and Add Details.
16. Add sections and clauses to the template. For more information see the Adding Sections and Clauses section, page 5-24.
17. Add deliverables to the template. For more information see the Adding Deliverables section, page 5-25.

18. If Contract Expert is enabled on the contract template, you can click the Rules tab to view the list of rules assigned to the template. From the Rules table, you can click a rule link to view the rule details.

You can also view the question sequence in the Questions table.

You can change the question sequence for the contract template, in the Contract Expert tab. For more information, see the Managing Question Sequence section, page 7-12.

19. From the Actions menu, choose:
 - **Submit:** Submit the template for approval. A contract template created with no clauses or deliverables cannot be submitted for approval.
 - **Validate:** Run the QA check process to validate that the template is correct. If the validation returns errors, you cannot submit the template for approval until the errors are corrected.
 - **Preview:** Preview the contract template to ensure that the format and layout of the template is according to the organization's contract printing standards.
 - **Delete:** Delete the contract template. You can only delete templates in Draft or Rejected status.

Duplicate from an Existing Template

You can create new templates by copying the existing templates. Templates can be copied within the same organization, regardless of the template status. The system copies all the information, including clauses, deliverables, and Contract Expert rules, from the original template to the new template, except for rules with the Disabled status.

You can also duplicate a global template in the local organization.

When a global template is copied to a local organization, the system will not copy the Contract Expert rules from the global organization. Any rules that have been marked "Apply to All Templates" in the local organization will be copied to the local template automatically.

For more information, see the Global Templates section, page 5-37.

Steps

1. Navigate to the Contract Templates page.
Navigation: Library > Contract Templates tab
2. Search for the source template. For more information, see the Searching for Templates section, page 5-32.
3. In the Results section, select the source template.
4. Click the Duplicate button to open the Duplicate Contract Template page.
5. In the Name field, enter a new name for the template. The system copies the entire content of the source template along with the section, subsections, layout, and formatting details to the new template. The new template's status is Draft.
6. Make other necessary changes to the new template.
7. Save the template.
8. From the Actions menu, choose:

- **Submit:** Submit the template for approval.
- **Validate:** Run the QA check process to validate that the template is correct.
- **Preview:** Preview the contract template.
- **Delete:** Delete the contract template.

Adding Sections and Clauses

Use these procedures to add sections and clauses to a template.

Steps

1. Navigate to the Create Contract Template page.
Navigation: Library > Contracts Template tab > Create Template button
2. Enter the general information for the template.
3. Click Apply and Add Details.
4. Navigate to the Clauses subtab. In the Clauses subtab, you can define the structure and layout of the template consisting of sections, subsections and clauses. This is the component that contains all the contract terms. From the Clauses subtab, you have access to the following options:
 - **Add Sections:** You can build a hierarchy of sections and subsections and insert clauses into this hierarchy. You can create a new section or select from a pre-defined library of sections. If you pick a section from the library, you cannot override the section name. To add clauses, you need to define at least one section on the template.
 - **Add Clauses:** To add a clause, select a location for the clause in the hierarchy and then click the Add Clause button. You can insert clauses only in the context of a section or subsection. You can perform a blind search or begin your search with % to add clauses to the template. You can also search for clauses by browsing through folders, or based on:
 - Keyword
 - Number
 - Clause Type
 - Title
 - Default Section
 - **Provisions Only:** Select the check box only if you want to search for Provision type clauses (this field is available for templates with the Buy intent only)
5. To make a clause mandatory in the template, select the Mandatory check box. This prevents the clause from being deleted from the business document, except through special privileges.
6. If a clause has alternate relationships defined, the Select Alternate icon is enabled. Click Select Alternate to view all the alternates for the clause on the template. If you select an alternate clause, it replaces the original clause on the template.

Note: If the alternate clauses are inactive when the contract template is applied to a business document, the Select Alternate icon will not be displayed on the business document.

7. After creating the necessary sections and subsections and inserting clauses, you can use the Move button to change the order of clauses and sections in the template. Select the sections or clauses that you want to move and click the Move button. Select the location in the hierarchy where you want to move the selections to. Then, for sections, use the Location field to indicate whether you want to move before, after, or within the selected location.
8. You can apply a numbering scheme to the sections and clauses structure. Use the Renumber button to renumber the terms.

Note: If you have used the Move feature to reorganize sections or clauses, or added or removed sections or clauses, the system will not automatically renumber the sections and clauses. You need to use the Renumber feature and reapply the numbering scheme.

Creating Contract Template Deliverables

Businesses enter into contractual agreements with their trading partners, and as part of the contractual agreement will have commitments to fulfill. The commitments on the contracts, besides products and services bought or sold, are classified as deliverables, under the Terms and Conditions of the contract. In addition to the contractual commitments that businesses need to fulfill, they might define other internal tasks that contribute to the overall execution of the contract.

You can define deliverables as part of the contract template creation process. If a contract refers to a contract template, all deliverables associated to that template are copied to the contract.

Note: You can only define deliverables for templates with the Buy intent.

Steps

1. Navigate to the Create Contract Template page.
Navigation: Library > Contracts Template tab > Create Template button
2. In the Deliverable subtab select the Create Deliverable button.
3. Enter the Deliverable Name. This is the name of the task being requested.
4. Select the Deliverable Type. You can define the following type of deliverables:
 - Contractual Deliverable: A deliverable on a contractual document (for example, Purchase Orders, Blanket Purchase Agreement).
 - Negotiation Deliverable: A deliverable on a negotiation document (for example, Request for Quote (RFQ), Request for Information, Response).
 - Internal Purchasing Deliverable: Internal Purchasing deliverables are used to track internal schedules and commitments relevant to a contract. They are not part of the contractual terms of a contract, and hence do not directly represent a formal commitment between the parties.

5. Select the Responsible Party. The responsible party is specified as the party that fulfills the deliverable. You can select Buyer or Supplier Organization from the list.
6. Optionally, enter the Description of the task and how to perform it.
7. Optionally, select the Buyer Contact. The buyer contact is the person responsible for performing the deliverable, if you select the Buyer Organization in the Responsible Party field. In case the supplier company is responsible for performing the deliverable, the buyer contact is responsible to accept the fulfilment of the deliverable.
8. Optionally, select the Requester. This is the name of the person who has requested the deliverable. The requester usually verifies if the deliverable was completed satisfactorily.
9. Optionally, enter any Comments. These comments are visible only to the internal users of buying organization.
10. Use the Due Date region to define one-time or recurring deliverables.

A one-time deliverable can have a fixed due date or due date relative to a lifecycle event on the document.

With a relative due date, you can identify a date that is based on a period of time before or after a certain business document event. For example, 5 days after the contract signed or 2 weeks after the RFQ published. In this case, you need to specify both the period of time and the event. For deliverables that have a relative due date, for example 30 days after award, the actual due date will be calculated when the contract on which the template is applied, is approved, or is signed.

You are not required to provide a fixed due date for a deliverable on a contract template. However, you are required to provide complete due date information, if the deliverable is a one-time deliverable with a relative due date or a recurring deliverable.

All events related to business documents with the same intent as the template, are available for users to choose while defining a relative due date. Selecting a particular business document event for due date on a deliverable would also make deliverable specific to that given business document for execution (for instance, 5 days after the blanket purchase agreement is closed). This deliverable is copied over and executed only on a Blanket Purchase Agreement. If the contract template containing this deliverable is applied on a Purchase Order document, the deliverable is dropped. If the same contract template is applied on a negotiation document, for example RFQ, which concludes in a Blanket Purchase Agreement award, then the deliverables related to the Blanket Purchase Agreement is retained on the negotiation document and carried forward to the Blanket Purchase Agreement.

Deliverables can also be of a recurring nature. For example, a progress report is due every first Monday of the month. You can define a Recurring deliverable by selecting the repeating due date type. The repeating deliverable instances are created upon approval or signing of the contract it is on. You can track and update the status of each instance like a one-time deliverable. To create a recurring deliverable, you need to enter the following:

- Start Date: This is specified through a fixed date or a date relative to a certain event.
- Repeating Type: For example Daily, Weekly, or Monthly.

- Frequency: In combination with the Repeating Type, this gives the frequency of the repeating deliverable, such as every 6 weeks, or every 3 months.
- Day of the week to repeat on, in case of the Weekly frequency type.
- Day of the month to repeat on, in case of the Monthly frequency type.

For example, a report needs to be sent on the 5th day of the month every three months (every Quarter) after the purchase agreement is signed. In this case:

The Event = Signing of the Purchase Agreement

Frequency = Monthly

Interval = 3

Day of the month to repeat on = 5

11. Use the Notifications region to inform the contacts about the progress of deliverables. Notifications are sent during the lifecycle of the deliverable, after the contract has been signed. Note that you can only define recipient for escalation notification here, all others are sent to contacts on the deliverables. The notifications have a subject, a message body, and buttons to take certain actions, a notes area, and attached documents. Notifications can be sent for a deliverable in the following scenarios:

- Prior to Due Date: You can specify how many days, weeks, or months to send the notification before the due date. Recipient of this notification is the Buyer Contact and Supplier Contact.
- Status Change: Send notifications for any status change of the deliverable. Statuses could be any of the following: Completed, Submitted, Rejected, Canceled, or Failed to Perform.
- Overdue: Send notifications when the due date of the deliverable is passed.
- Escalate after Due Date: You can specify how many days after the due date to send an escalation notification. You can also specify the recipient of the notification.

12. In the Attachments region, attach additional documents as part of the deliverable creation that you want your trading partner to see. For example, you might want the supplier to use a standard Progress Report Template for this contract. You must provide a description for the attachment to identify the nature, context, and purpose of the attachment on the deliverable. In addition, you need to specify a name for the attachment.

Click Add Attachments, and define your attachment as one of the following types:

- File: you can attach a file from your local desktop.
- URL: you can specify a URL where the document is available.
- Text: You can enter information in the Text field.

13. Click Apply.

Validating Templates

Prior to submitting a contract template for approvals, you can validate the template to identify potential errors and warnings. In addition, the system automatically runs the validation process when you submit a template for approval. If any error conditions are

found, the template is not submitted for approval. You must fix the error conditions and resubmit the template for approval.

The table below displays the type of validations that the system performs, when you run the Validation process.

Type of Validations

Validation Type	Condition	Description
Inactive Clauses	Error	This validation checks for clauses in On Hold and Expired status. Templates with clauses in these statuses cannot be submitted for approval. Note that this error is enforced only for those clauses that do not have any approved, previous versions.
Alternate Clauses	Warning	This validation checks for the presence of two alternate clauses on the same template.
Incompatible Clauses	Warning	This validation checks for the presence of incompatible clauses on the template.
Layout Template not Defined	Warning	This validation checks if the contract template has a layout template assigned to it.
Invalid Variable for Document Type	Warning	This validation checks if the system variables embedded within clauses, used in the template, are supported for the document types in which the contract template is used.
Duplicate Clauses	Warning	This validation checks if the contract template contains duplicate clauses.
Inactive Rules	Warning	This template validation checks if the contract template has one or more rules that are not active.
Expired Clause	Error	This rule validation checks for an Expired clause used in the rule.
Invalid Clause	Error	This rule validation checks for an On-Hold clause used in the rule.
Draft Clause	Error	This rule validation checks for a Draft clause used in the rule.
Invalid Question Valueset Query	Error	This rule validation checks for an invalid value set query used in a question in the rule.

Validation Type	Condition	Description
Invalid Variable Valueset Query	Error	This validation checks for an invalid value set query used in a variable in the rule.
Missing Value Set value in Question	Error	This rule validation checks for a missing value set value used in a question in the rule.
Missing Value Set value in Variable	Error	This rule validation checks for a missing value set value used in a variable in the rule.
Invalid Value Set in Question	Error	This rule validation checks for a deleted value set used in a question in the rule.
Invalid Value Set in Variable	Error	This rule validation checks for a deleted value set used in a variable in the rule.
Invalid Question	Error	This rule validation checks for a disabled question in the rule.
Missing Template Association	Error	This rule validation checks for missing template associations in non-organization-wide rules.

You can run the QA process at any stage during the template creation. The system also runs the QA process when a template is submitted for approval. For more information, see the Approving Templates section, page 5-30.

Steps

1. Navigate to the Contract Templates page.
Navigation: Library >Contract Templates tab
2. Open the template for update. For more information, see the Updating Templates section, page 5-34.
3. Select the Validate option from the list.
4. Click Go. The system performs the validation and displays the results along with the suggested fixes.
5. Click the Printable Page button, if you want to print the list of validations.
6. If applicable, fix the error conditions and resubmit the template for validation.

Preview Templates

Oracle Contracts uses the Layout template, assigned to the contract template, to prepare the template for preview. For more information, see the Setting Up Layout Templates section, page 4-8.

Steps

1. Navigate to the Contract Templates page.
Navigation: Library >Contract Templates tab
2. Search for the template that you want to preview. For more information, see the Searching for Templates section, page 5-32.
3. Click Go. The system displays the search results.
4. Select the Update icon for the template.
5. Select the Preview option from the Actions list of values.
6. Click Go. System displays the template in the Portable Document Format (PDF).

Approving Templates

You can use a standard workflow process to submit the templates for approval. You need to request approval in the following cases:

- When a new template is created.
- After making updates to a rejected template.
- When a template revision is created.

Note: You can approve a Contract Expert enabled template with no clauses or deliverables. Templates that are not Contract Expert enabled must contain at least one clause or one deliverable in order to be approved. In the Contract Expert enabled template, it is recommended that you include at least the sections that you want on the printed business document.

Approving Draft Clauses with Contract Templates

There are special considerations for contract templates that include unapproved clauses, that is, clauses whose status is either Draft or Rejected.

One factor that determines which clauses are to be submitted for approval along with the contract template is the *contract template effective date*.

The contract template effective date is the contract template start date or the current date, whichever is later.

When the contract template is submitted for approval, the contract template is first validated. If no errors occur during validation, the application presents you with a list of the draft clauses used in the contract template that are effective on the contract template effective date.

Draft clauses can belong to one of the following categories:

1. There is no approved previous version, or the previous version of the clause is not valid.

The previous version may be invalid, for either or both of the following reasons:

- The version expires before the contract template effective date
- The clause is On Hold

In this case you must submit the clause with the contract template for approval.

2. A previously approved version of the clause is valid for the contract template effective date.

In this case, approval of the clause is not necessary for the contract template to be valid, and you can choose whether to submit the draft clause for approval.

The clauses in category 1 and the clauses that you select in category 2 become the final list of clauses submitted for approval with the contract template.

Note: If a template contained a 'Draft' clause and during approval, you deselect this clause and submit the template with the previous approved version of the clause, in a new revision of the template, the latest 'Draft' clause is displayed and will be submitted again when the revision is submitted for approval.

Approving Contract Templates

The approval notification includes a list of any unapproved clauses in the contract template.

Note: If a draft clause that has been added to a contract template is submitted for approval independent of the template, the contract template validation report displays an error indicating that a template with a clause in the Pending Approval status cannot be submitted for approval.

Approvers can approve or reject the template. When a template is rejected, the system sends a workflow notification to the author of the contract template. The reason for rejection is also included in the workflow notification. The submitter can update the template based on the comments and resubmit the template for approval.

Approving or rejecting a contract template also approves or rejects all the draft clauses submitted with the contract template.

The approver may reassign the contract template for approval to another user. While reassigning, the approver may delegate the notification while retaining ownership on the notification or transfer the notification to the assignee

Steps

1. Navigate to the Contract Templates page.
Navigation: Library >Contract Templates tab
2. Open the contract template and select the Submit option from the Actions list of values. Alternatively, from the search results, query the contract template and click the Submit button.

If there are errors, the Validation Results report appears. You must correct the errors before you resubmit the contract template for approval.

If there are no errors, and no draft clauses in the contract template, the contract template is submitted for approval.

Approving Draft Clauses

If there are no errors, but draft clauses exist in the contract template, the Submit for Approval page appears for the contract template. This displays a list of the clauses to be submitted with the contract template for approval.

Two types of clause may exist in the list:

- Clauses that must be submitted for approval; you cannot deselect these clauses.
- Clauses that may be submitted for approval; you can select or deselect these clauses.

3. In the Submit for Approval page, optionally click View Warnings.

The Validation Results report lists the warnings.

If you want to submit the contract template for approval, you must click the link to return to the Submit for Approval page.

4. In the Submit for Approval page, click Submit.

If there are no warnings or errors, the contract template is submitted for approval.

5. If there are warnings or errors, the Validation Results report appears, listing the warnings. Click Finish to submit the contract template for approval, or Cancel to cancel the Submit for Approval process.

Searching for Templates

To find a template in the Contract Terms Library, choose one of the following options:

- Searching for Templates, page 5-32
- Using the Keyword Search Feature, page 5-33

Searching for Templates

Use these procedures to search for contract templates.

Steps

1. Navigate to the Contract Templates page.
Navigation: Library > Contract Templates tab
2. To access the Advanced search options, click the Show More Search Options link.
3. Search for the template using the following criteria:
 - Template Name
 - Keyword: Keyword searches on the Template Name, Description, and Instructions fields.
 - Status: Search on Approved, Draft, Rejected, Revision, On Hold, and Pending Approval templates.
 - Template Intent: Search on Buy, Sell, or All.
 - Contains Clause: Search for a specific clause that is used in a template.
Note: the version of the clause is not considered in this search. If a clause has multiple versions, the system retrieves the templates that use any of those versions.
 - Used in Document Type: Search on the document type usage for the template.
 - Template Effectivity: Search for templates based on Start and End dates.

- **Owning Organization (only available for local organizations):** Search for template used in the local organization or the global organization. Note that the search is set by default to local organization. Also, if the owning organization is set to Global, the only applicable status value is Approved. You cannot search for global templates in other statuses in a local organization.
- **Default Templates Only:** Search for any templates that are used as the default for document types.
- **Global Only (only available for global organizations):** Search for global templates in the global organization.
- **Contract Expert Enabled:** Search for any templates that use the Contract Expert feature.

You need to enter search criteria for at least one of the following fields: Template Name, Keyword, Status, Contains Clause, Start Date, End Date, or Default Templates Only.

4. Click Go. The system displays the templates that match your criteria.

Using the Keyword Search Feature

You can search for templates in the Contract Terms Library, using the Keyword Search feature. The system searches for templates that contain the text that you enter in any of the following fields:

- Template Name
- Description
- Instructions

To perform the keyword search, you must run the following concurrent programs periodically:

- Synchronize Template Text Index
- Optimize Template Text Index

If the concurrent programs have not been run, the search will not provide accurate results. The frequency for running these programs must be decided on a case-by-case basis. You can schedule the concurrent programs to be run together automatically at pre-defined intervals.

Viewing Template Clauses

When you assign a clause to a template, the system does not associate a specific version of the clause.

Note: The latest version of the clause is always displayed if that is the only available version of the clause in the Library.

For display purposes, the system uses the latest version of the clause subject to the following exceptions.

- **Latest Version is On Hold.** In this case, the system displays the previous approved version of the clause if exists.

- Latest version is Pending Approval. When the latest version of the clause has status Pending Approval, the following extra condition is evaluated:
If a previous version of the clause is Expired, the latest version of the clause is displayed, else the previous approved version of the clause is displayed.
- Approved Clause with a later Draft version. If a later version exists in Draft status, the clause text from the Draft version is displayed.
- Approved Clause with future Draft version. The system displays the latest approved version of a clause when the latest Draft version of a clause has a Start Date later than the current system date.

Managing Changes to Contract Templates

This section covers the following topics:

- Updating Templates, page 5-34
- Reordering Deliverables, page 5-35
- Creating Template Revisions, page 5-35
- Placing Templates on Hold, page 5-36
- Deleting Templates, page 5-37

Updating Templates

You can update general information about an approved template including description, instruction, document type assignments, and layout template. However, you must create a revision to update any of the sections, clauses, or deliverables. You can update templates in any of the following statuses:

- Draft: The Template Name, Intent, and Start Date fields can be updated only in the first version of the template in Draft status. You can update all other fields and attributes of templates including:
 - General information (Including Layout Template, and Description).
 - Sections and Clauses: You can add, modify, or delete Sections, Subsections and Clauses. You can also reorganize the layout of clauses including numbering.
 - Deliverables: Update deliverables information or create new deliverables.
 - Contract Expert: You can modify the fields in the Contract Expert region, including the check box that enables and disables Contract Expert for the template.
 - Document Type Association: You can add or delete contract document types.
- Approved: To update an approved template for its layout and content, first you need to create a revision. Then, you can make modifications to the revision, approve it, and replace the original template.
- Pending Approval: You cannot update templates in Pending Approval status.

You can also perform the following updates to contract templates:

- Place on hold
- Release the Hold

- End Date

Steps

1. Navigate to the Contract Templates page.
Navigation: Library > Contract Templates tab
2. Enter the search criteria for the template. For more information, see the Search for the Templates section, page 5-32.
3. Click Go. The system displays the search results.
4. Select the Update icon for the template you want to update. You can perform the following actions while updating a template:
 - Add, update or delete sections and clauses.
 - Add, update, or delete deliverables (only available for templates in Draft, Rejected and Revision status).
 - Submit for approval (only available for templates in Draft, Rejected and Revision status).
 - Place on hold (not available for templates in Draft, Rejected and Revision status)
 - Delete (only available for templates in Draft, Rejected and Revision status)
 - Validate (all statuses of the template)
 - Create revision (only available for templates in Approved status)
 - Preview

Reordering Deliverables

You can change the sequence in which the deliverables are displayed and printed on business documents.

Steps

1. Navigate to the Contract Templates page.
Navigation: Library > Contract Templates tab
2. Enter the search criteria for the template. For more information, see the Search for the Templates section, page 5-32.
3. Open the template for update. For more information, see the Updating Templates section.
4. Click the Deliverables tab.
5. Click Reorder. The Reorder Deliverables page opens.
6. For each deliverable that you want to re-sequence, click the deliverable, and then click the Up or Down arrow. Deliverables are printed in the order that you specified.
7. Click Apply.

Creating Template Revisions

You can create revisions to approved contract templates. However, you cannot change the following fields:

- Template Name
- Intent
- Start Date

Revisions need to be approved before they can be made available for use in authoring business documents. After a template revision has been approved, it completely replaces the original approved template. Template history of previous approved versions is not currently supported.

Changing Contract Expert Fields on Contract Template Revisions

- You must create a contract template revision to update any of the Contract Expert fields. If you update the Expert Clauses Mandatory check box or the Default Section field by creating a revision, the changes take effect on all new and existing business documents the next time Contract Expert is used on a business document. Even though the template may not have been reapplied on the business document, the updates to the Contract Expert fields still take effect on the business document.
- If you disable Contract Expert on a contract template revision, this will not impact existing business documents that have already run Contract Expert using the original version of the contract template, unless the contract template is reapplied on a business document. In other words, you can continue to run Contract Expert on the business document until you explicitly reapply the contract template.

Steps

1. Navigate to the Contract Templates page.
Navigation: Library > Contract Templates tab
2. Enter the search criteria for the template. For more information, see the Search for the Templates section, page 5-32.
3. Open the template for update. The template must be in Approved status.
4. Choose the Create Revision option from the Actions list of values.
5. Click Go. The status of the template changes to Revision.
6. Make the necessary changes.
7. Submit the template for approval.

Placing Templates on Hold

You can place templates on hold to prevent usage on contracts. You can also release the hold and make templates available again. You can only place templates that are in Approved status on hold.

Steps

1. Navigate to the Contract Templates page.
Navigation: Library > Contract Templates tab
2. Search for the template that you want to place on hold. For more information, see the Search for the Templates section, page 5-32.
3. Click Go. The system displays the search results.

4. Select the Update icon for the template.
5. Choose the Place on Hold option from the Actions list of values.
6. Click Go.

Deleting Templates

You can delete templates that are in Draft or Rejected status.

Steps

1. Navigate to the Contract Templates page.
Navigation: Library > Contract Templates tab
2. Search for the template that you want to delete. For more information, see the Search for the Templates section, page 5-32.
3. Click Go. The system displays the search results.
4. Select the Update icon for the template.
5. Choose the Delete option from the Actions list of values.
6. Click Go.
7. Click Yes to confirm.

Defining Global Templates

To define a global template, you need to identify your global organization, usually the corporate headquarters. The designated global organization is responsible for the creation of templates that local organizations can use. On approval, the global templates are available for local organizations to duplicate.

The global templates feature is different from the global clauses. Unlike a global clause, the system does not track adoption of the global templates. It is up to the local organizations to determine if they want to duplicate a global template. The system allows a local organization to duplicate the global template subject to the following conditions:

- If the global template has clauses that are not global, these clauses are not copied over during copy.
- If a local organization has adopted clauses manually, only those clauses that have been adopted and approved in the local organization will be copied over.
- If the local organization has localized clauses, the global clauses will be replaced by approved localized clauses during copy.
- None of the Contract Expert rules from a global template are copied over. The system will automatically associate any Contract Expert rules defined in the local organization with the "Assign to All Templates" property.

The process of creating and using global templates includes:

- Global Operating Unit profile option: Users must set this site level profile option to determine global operating unit. You use the same profile option to create global clauses.

- Global check box in the contract template: To create a global template, users must select the Global check box. Once the template is approved, it becomes available in local organizations for copy.
- Duplicate Global Templates: Local organizations can search for global templates using the search field **Owning Organization** and selecting the **Global** radio button. Note that users can preview the global template first to ensure that the contract terms meet their requirements. Users in local organizations cannot modify or delete global templates.

Note: You can view contract terms in global templates subject to the following exceptions:

- Clauses that are local to the global organization cannot be viewed by the local organization.
- Global clauses that have not been adopted or localized cannot be viewed by the local organization.
- All contract rules in the global organization can be viewed by the local organization.

Note: Contract Expert rules are not copied over when a global template is duplicated in a local organization.

Viewing Contract Expert Rules

You can use the Contract Expert feature of Oracle Contracts to create rules that represent the business policies of the organization. These rules can be applied on business documents to bring in additional clauses.

You can view the rules from the Contract Expert enabled templates.

Steps

1. Navigate to the Contract Templates page.
Navigation: Library > Contract Templates tab
2. Enter the search criteria for the template. For more information, see the Search for the Templates section, page 5-32.
3. Click Go. The system displays the search results.
4. Click the Name link for the template you want. The system displays the Contract Template page.
5. Open the Rules tab to view the rules. For more information, see Contract Expert Chapter, page 7-1.

Managing Variables

Oracle Contracts supports the use of business variables (tokens) in clause text. During authoring, values from the business document replace the variables. Oracle Contracts supports the following types of variables:

- System-defined variables: Represent contract document attributes such as, payment terms, customer name, and supplier name. You can embed system variables in the

clause text, which will automatically be substituted with values when the clause is used in a contract. System variables are also available to be used in defining Contract Expert rules.

- Table variables: Attach Table type variables to clause text to display product and pricing information as part of contract terms. The actual products and prices are sourced from the business document during contract authoring. Note that table variables are currently supported only for Sell intent contracts. Oracle Contracts supports the following seeded table variables:
 - Lines
 - Modifiers
 - Price Lists
- Deliverable variables: Attach Deliverable type variables to clause text to display deliverable information as part of contract terms. Note that deliverable variables are currently supported only for Buy intent contracts. Oracle Contracts supports the following seeded deliverable variables:
 - Supplier Contractual Deliverable
 - Buyer Contractual Deliverable
 - All Contractual Deliverables
 - Supplier Negotiation Deliverables
 - All Negotiation Deliverables
- User-defined variables: User-defined variables are tokens that the business defines over and above the system variables. Users must provide values for these variables, as part of the contract authoring process.

Note: Only system variables are available for use in Contract Expert.

Variable Identification

The application can only identify a variable if the variable is enclosed within the following special characters:

[@VARIABLE_NAME@]

For instance, the Payment Terms system variable needs to be captured with the following tags:

[@Payment Terms@]

Value Sets for Variables

When defining value sets in the FND Value Sets for Variables and you set the Validation Type to Independent, you need to set the List Type to:

- Poplist: if you need to define less than 200 values for that Value Set in FND.
- List of Values: If you need to provide more than 200 values for that Value Set in FND.

The Managing Variables section covers the following topics:

- Creating Variables , page 5-40
- Searching for Variables, page 5-41

- Displaying Clauses Using a Variable, page 5-41
- Managing Changes to Variables, page 5-42

Creating Variables

Oracle Contracts provides seeded and user-defined variables:

- Seeded variables cannot be deleted or modified. Seeded variables include:
 - System Variables: These variables represent contract document attributes.
 - Deliverables Variables: These variables capture deliverable information on a contract.
 - Table Variables: These variables capture structure information, such as items and price lists that map to multiple rows.
- User-Defined variables are based on the needs of the organization's contractual documents. These variables are replaced with values during contract authoring. In most cases, you can update or delete these variables.

Prerequisite

Define the corresponding Value Sets. For more information, see the Setting Up Value Sets section, page 4-13.

Steps

1. Navigate to the Create Variable page.
Navigation Library > Variables tab > Create Variable button
2. In the Variable Name field, enter the name that you want the system to display in clauses.
3. Optionally, enter a Description for the variable.
4. In the Value Set field, choose a value set from the list of values.

Note: You must assign the appropriate value set when creating a variable. The system does not verify that the appropriate value set has been attached. For more information, see the Setting Up Value Sets, page 4-13section.
5. In the Intent field, choose the intent for the variable. You can choose the Buy or Sell option from the list of values. Only clauses with the same intent can use the variable for embedding.
6. Optionally, select the External Party Updateable check box to allow updates to the variable by external users. Note that currently the system supports this feature only for authoring contracts with the Buy intent. Suppliers can be required to provide values for user-defined variables during the negotiation process. By selecting the External Party Updateable check box, the variables are displayed in the iSupplier portal for supplier inputs. Suppliers using the iSupplier Portal, to respond to Purchase Orders or Blanket Agreements, can update variable values in their responses.
7. Click Apply to save the variable.

Searching for Variables

You can search for both user-defined and system variables.

For performance reasons:

- You must search on, at least, one of the following criteria
 - Name
 - Description
 - Type
- The system does not support blind searches or searches beginning with the wildcard character %.

Steps

1. Navigate to the Variables page.

Navigation: Library > Variables tab

2. In the Variables Search region, you can perform searches on variables by:

- Name
- Description
- Type
- Intent

You must enter your search criteria in one of the following fields: Name, Description, or Type.

3. Click Go. The system displays the list of variables that match your search criteria.
4. To view a variable, click the Variable Name link.

Displaying Clauses Using a Variable

You can obtain the list of clauses that use a specific variable.

Steps

1. Navigate to the Variables page.

Navigation: Library > Variables tab

2. Search for the variable that you want. For more information see the Searching for Variables section, page 5-41.
3. In the Results section, select the variable's check box.
4. Click Display Clauses to view clauses that use the variable. The system displays all versions of a clause that use the specific variable.

Note: Clauses are displayed only for the current organization. Even though the variables can be used across multiple organizations, the users can only view clauses and other details for the organization they are currently in.

Managing Changes to Variables

You can only change or delete user-defined variables.

This section covers the following topics:

- Updating User-Defined Variables, page 5-42
- Deleting User-Defined Variables, page 5-42

Updating User-Defined Variables

You can update user-defined variables. However, you cannot change the value set in a variable that is used in a contract.

Steps

1. Navigate to the Variables page.
Navigation: Library > Variables tab
2. Search for the variable that you want to update. For more information, see the Searching for Variables section, page 5-41.
3. Click the Update button to open the variable for update. You cannot update the variable name or intent. Also, once the variable has been used in a clause, you can only update the variable description and select the Disable check box. You must create a new variable if you want to change value set assigned to a user-defined variable, after the variable has been used in a clause.

Note: If the value set that was used on a variable is deleted, the variable cannot be used in Oracle Contracts. You must create a new variable with a valid value set, and then update all the clauses, templates, and business documents impacted by this change.

4. Make the necessary changes. For more information, see the Creating Variables section, page 5-40.
5. Select the Disable check box, if you want to prevent further use.
6. Click Apply to save the variable.

Deleting Variables

You can only delete user-defined variables that are not used in any clause.

Steps

1. Navigate to the Variables page.
Navigation: Library > Variables tab
2. Search for the variable that you want to delete. For more information, see the Searching for Variables section, page 5-41.
3. Click Go to view the search results.
4. Select the check box for the variable that you want to delete.
5. Click the Delete icon. The system displays the Warning page.

6. Click Yes to confirm.

Managing Sections

Sections are headings under which you organize contract clauses. The headings provide structure and organization to a printed contract document. You can define sections that can be used in authoring templates and contracts. Previously defined sections are not required for creating contract templates, since you can also define template-specific sections when creating a template.

This section covers the following topics:

- Creating Sections, page 5-43
- Searching for Sections, page 5-43
- Updating Sections, page 5-44

Creating Sections

Steps

1. Navigate to the Create Section page.

Navigation: Library > Sections tab > Create Section button

2. Enter the following parameters:

- Code
- Name
- Description (Optional)
- Effective From
- Effective To (Optional)

3. Click Apply to save the new section and close the Create Section page.

Note: If you end date a section, it will not impact existing contract templates or business documents. However, the inactive section cannot be used to author new contract templates or business documents.

Searching for Sections

Use these procedures to search for sections.

Steps

1. Navigate to the Sections page.

Navigation: Library > Sections tab

2. Enter your search criteria for section:

- Name
- Code

3. Click Go. The system displays the sections that match your search criteria.

Updating Sections

You cannot update a section name after it has been saved. End dating a section only impacts clauses, contract templates, and contracts authored in the future. The system continues to use the end-dated sections if sections have already been used in a contract template or contract. However, in the case of contract templates in Draft status, the system provides an error message, when users view the section details from the template.

Steps

1. Navigate to the Sections page.
Navigation: Library > Sections tab
2. Search for the section that you want to update. For more information, see the Searching for Sections, page 5-43.
3. Click the Update icon for the section that you want to change.
4. Make the necessary changes. You can change the following fields:
 - Description
 - Effective to Date
5. Click Apply to save your changes and close the page.

Note: You must manage Sections using the Create and Update Sections pages in Oracle Contracts. Sections should not be created or modified using the Oracle Application Foundation Lookups module.

Managing Folders

You can organize clauses under different folders for easier retrieval. After creating folders, you can use the Update Folders feature to organize clauses in different folders. For more information see the following sections:

- Creating Folders, page 5-44
- Updating Folders, page 5-45

You can assign a clause to more than one folder.

This section covers the following topics:

- Creating Folders, page 5-44
- Searching for Folders, page 5-45
- Managing Changes to Folders, page 5-42

Creating Folders

Folders are unique within an organization. Organizations that use the Contract Terms Library must create their own folders. When reviewing the clauses for adoption, folders that are created in a global organization are not copied over or created in the local organization.

Steps

1. Navigate to the Create Folder page.
Navigation: Library > Folders > Create Folder button
2. Enter a Name for the folder.
3. Optionally, enter a Description for the folder.
4. Click Save or Apply.

Searching for Folders

For performance reasons:

- You must search on at least one of the following criteria:
 - Name
 - Description
- The system does not support wildcard searches. Wildcard searches include searching with a string % or blank field.

Steps

1. Navigate to the Folders page.
Navigation: Library > Folders tab
2. Enter at least one of the following search criteria:
 - Folder Name
 - Description
3. Click Go. The system displays the folders that match your search criteria.

Managing Changes to Folders

This section covers the following topics:

- Updating Folders, page 5-45
- Adding Clauses to Folders, page 5-46
- Removing Clauses from Folders, page 5-46
- Deleting Folders, page 5-47

Updating Folders

You can update folders. During the update, you can:

- Change folder name and description
- Add clauses
- Remove clauses

Steps

1. Navigate to the Folder page.

Navigation: Library > Folders tab

2. Search for the folder that you want to update. For more information, see the Searching for Folders section, page 5-45.
3. In the Result section, click the Update icon for the folder that you want to change. The system opens the folder for update. You can:
 - Change the name and description
 - Add clauses
 - Remove clauses

Adding Clauses to Folders

You can assign one clause to more than one folder.

Steps

1. Navigate to the Folder page.
Navigation: Library > Folders tab
2. Search for the folder that you want to update. For more information, see the Searching for Folders section, page 5-45.
3. In the Result section, click the Update icon for the folder that you want to add clauses.
4. Click Add Clauses to open the Search Clause page.
5. Enter the search criteria for the clause. Note that you can add clauses of any status to the folder. The system does not maintain references to a specific version of a clause when it is added to a folder. When you browse a folder to select clauses on a contract template or contract, the appropriate version will be selected on the template or the contract.
6. Click Go to view the search results.
7. Select the clauses that you want to add.
8. Click Apply to add the clauses to the folder.
9. Click Save or Apply to save your changes.

Removing Clauses from Folders

Use these procedures to remove a clause from a folder.

Steps

1. Navigate to the Folder page.
Navigation: Library > Folders tab
2. Search for the folder that you want to update. For more information, see the Searching for Folders section, page 5-45.
3. In the Result section, click the Update icon for the folder that you want.
4. In the Clauses section, select the check box for the clause that you want to remove.
5. Click Remove.
6. Click Save or Apply to save your changes.

Deleting Folders

You can delete any folder from the Folders library.

Steps

1. Navigate to the Folder page.
Navigation: Library > Folders tab
2. Search for the folder that you want to delete. For more information, see the Searching for Folders section, page 5-45.
3. In the Results section, click the Delete icon for the folder that you want to remove.
4. Click Yes to confirm.

This chapter covers the following topics:

- Integration Overview
- Integration with other Oracle Applications

Integration Overview

In release 11.5.10, Oracle Sales Contracts and Oracle Procurement Contracts are not stand-alone applications. They are options that enhance the existing core sales and procurement applications. Contract management capabilities of Oracle Sales Contracts and Oracle Procurement Contracts are now embedded within the Procure-to-Pay and Quote-to-Cash flows. Thus, Oracle Sales Contracts requires either Oracle Quoting or Order Management, and Oracle Procurement Contracts requires Oracle Sourcing or Oracle Purchasing.

On the sell-side, you can author sales contracts in Oracle Quoting or Order Management, and execute them in the Order Fulfillment system. You can author and manage sales agreements (with price-holds) for future orders, or contracts for a one-time sale. On the buy-side, procurement contracts can be authored in Oracle Sourcing or Oracle Purchasing and executed in the Purchasing system. The Contract functionality is integrated into any organization's existing business processes for procurement, sales and service. Negotiated terms are automatically enforced during order execution without the need for additional integration, enabling streamlined contract management processes and focus on building profitable supplier and customer relationships.

Integration with other Oracle Applications

Oracle Contracts integrates with the following Oracle Applications:

Oracle Procurement Contracts

Oracle Procurement Contracts enables you to:

- Negotiate and capture long-term purchase agreements.
- Track volume commitments.
- Identify agreements up for renewal.
- Manage supplier performance.
- Analyze internal contract utilizations and leakages.

If you need to negotiate long term purchase agreements and individual purchases, consider deploying Oracle Sourcing.

Oracle Contracts extends the Oracle Purchasing and Oracle Sourcing functionality by offering embedded terms and conditions based on a standard terms library, contract deliverable tracking, and formal contract change management capability. Using the Contract Expert feature, companies can define their business policy rules that govern the contract clauses to be included in purchasing or sourcing documents. While authoring, reviewing, negotiating, and approving contracts, contract terms can be downloaded to Microsoft Word and edited offline. The Deviations report enables companies to streamline the approval process and improve internal control by highlighting nonstandard terms and conditions for approvers.

Oracle Purchasing

Oracle Purchasing provides the contract terms authoring capabilities. You can author contract terms directly on a purchasing document, such as a purchase order, blanket purchase order, global purchase agreement, or contract purchase agreement. The buyer can apply a contract template, add additional clauses and specify contract deliverables. For more information, see the *Oracle Purchasing Users Guide*.

Oracle Sourcing

Contract negotiation is enabled through Oracle Sourcing, a global negotiation platform that allows buyers to source for best value. Buyers can author contract terms directly on a sourcing document that may be a solicitation, tender, request for quotation, auction, and so on. The buyer can apply a standard contract template containing appropriate standard clauses to the sourcing document. If necessary, the buyer can add additional standard clauses from the library, or create non-standard clauses that apply to a particular transaction. The buyer can also specify deliverables to a sourcing document (for example, an RFQ) to track and manage supplier milestones during the negotiation. On contract award, a purchasing document is created with the negotiated contract terms. For more information, see the *Oracle Sourcing Implementation and Administration Guide*.

Oracle iSupplier

Oracle iSupplier Portal is a collaborative application that facilitates the transparent and structured exchange of business transactions between a buying organization and their suppliers in a secure self-service environment through the Internet. Suppliers play a key role in the procurement contract management processes and require information to ensure that they are meeting commitments or deliverables. By using Oracle iSupplier Portal in conjunction with Oracle Procurement Contracts, suppliers can:

- Review and print contract clauses.
- Sign purchasing contracts electronically.
- Submit and manage contract deliverables.
- Change requests to contract terms.

Oracle Sales Contracts

Oracle Sales Contracts extends Oracle Quoting and Oracle Order Management by offering embedded terms and conditions authoring and negotiation capabilities. Contracts functionality is integrated into the quote-to-cash process for seamless integration into your existing business processes. Negotiated terms are automatically enforced during

order execution without the need for additional integration, allowing companies to streamline their contract management processes.

Oracle Contracts extends the Oracle Sales Contracts functionality by offering the following features:

- **Contracts Expert:** Contract Expert is a rule-based contract creation tool that assists companies in authoring complex contracts. Using Contract Expert, companies can define their business policy rules that govern the contract clauses to be included in business documents.
- **Integration with Microsoft Word:** The integration allows the contract terms to be downloaded, edited off-line in Microsoft Word, uploaded as the contract of record, and then integrated into the contract Adobe PDF document.
- **Deviations Report:** The report streamlines the approval process and improves internal control by highlighting nonstandard terms and conditions for approvers.

Oracle Quoting

When the contract authoring process starts in Oracle Quoting, contract terms can be added and negotiated directly on the quote document. Upon approval and customer acceptance of the quote, including the products, prices, and contract terms, the fulfillment phase of the ordering process may begin. For more information, see the *Oracle Quoting User Guide*.

Oracle Order Management

With Oracle Order Management and Oracle Sales Contracts, sales representatives and contract administrators can create a long-term sales agreement or one-time sales order including terms and conditions. For more information, see the *Oracle Order Management User's Guide*. Oracle Order Management business documents support the sales contract flows for:

- Quoted orders
- Sales orders
- Sales order releases
- Blanket sales agreements

Oracle iStore

Customers shopping on the Web store can review the standard terms and conditions for their shopping cart during checkout when Oracle Sales Contracts is implemented. If customers disagree with the terms, a sales representative can facilitate the negotiation of the contract terms through Oracle Quoting and Oracle iStore. This contract functionality has the following major features:

- Customers can review Standard Terms and Conditions in the specialty store when they proceed to checkout. Oracle iStore retrieves the standard terms and conditions from a contract template.
- Customers can accept or reject the contract terms in the specialty store. If customers disagree with the standard terms, they can request sales representative assistance. Using Oracle Quoting, the sales representative can access the shopping cart (which is a quote), modify the terms, obtain appropriate internal approvals, and publish the new quote to the Web store for customer review and acceptance.

Oracle Service Contracts

Oracle Service Contracts uses the Contract Terms Management functionality provided by Oracle Contracts. You can use this functionality to author service contracts by applying standard contract templates containing standard clauses. You can also author non-standard clauses, modify standard clauses, or add standard clauses from the contract terms library. For more information, see the *Oracle Service Contracts Concepts and Procedures Guide*.

Oracle Configurator

The Contract Expert feature uses Oracle Configurator to process and evaluate the Contract Expert rules that bring in additional clauses into a business document. Oracle Contracts needs to run certain concurrent processes periodically to import data into Oracle Configurator. The data that is imported from the Contract Expert setup, in Oracle Contracts, to Oracle Configurator includes::

- Contract Expert rules
- Contract template information (Only Contract Expert enabled templates)
- Value sets in questions that are used to define Contract Expert rules

Contract Expert Administration

This chapter covers the following topics:

- Overview
- Managing Questions
- Creating User Questions
- Searching for Questions
- Updating Questions
- Managing Constants
- Creating Constants
- Searching for Constants
- Updating Constants
- Managing Rules
- Creating Rules
- Searching for Rules
- Activating Rules
- Disabling Rules
- Updating Rules
- Managing Question Sequence
- Creating Dependencies Between Questions
- Using Contract Expert on Business Documents

Overview

Contract Expert is a rule-based contract creation tool that assists users in authoring complex contracts with minimal legal supervision. Using Contract Expert, companies can centrally define and enforce their business policy rules that govern the contract clauses to be included in a contract document.

Contract Expert rules are defined in the contract terms library. Rules can be applicable to specific templates or applied globally for all contracts authored in the organization.

Once rules are defined, Contract Expert can be invoked while authoring a business document like Blanket Sales Agreement, Sales Order, Blanket Purchase Agreement, or

Purchase Order. Contract Expert leads you through a contract creation questionnaire and automatically adds required clauses based on the responses that you provided.

In addition to the responses to these questions, policy rules can also be based on the terms negotiated on a business document such as payment or shipment terms, item category etc. For example, contracting organizations may require additional clauses in contracts involving hazardous materials, or contracts for which the supplier or customer is located in a specific foreign country.

Contract administrators can choose to remove the clauses brought in by Contract Expert or select alternates during negotiation. However, these changes are flagged as deviations during the approval process, ensuring proper scrutiny of all non-standard terms.

The sections in this chapter include:

- Managing Questions, page 7-2
- Managing Constants, page 7-5
- Managing Rules, page 7-6
- Managing Question Sequence, page 7-12
- Creating Dependencies Between Questions, page 7-13
- Using Contract Expert on Business Documents, page 7-15

Managing Questions

In Oracle Contracts you can define questions that drive clause selection rules for business documents. You can define the response type appropriate for different questions.

When you author a business document, Contract Expert displays the list of questions for which responses are required and the appropriate set of responses for you to select from.

This section covers the following topics:

- Creating User Questions, page 7-2
- Searching for Questions, page 7-3
- Updating Questions, page 7-4

Creating User Questions

You can create three types of question, which are distinguished by the type of response: Yes/No, Numeric, or List of Values.

You must provide the intent for the question, that is, Buy or Sell; a question name must be unique for a given intent.

Once defined, questions are available across all organizations that use the Contract Terms library.

Prerequisites

If the Response Type to a question is Numeric, you must set up constants.

If the Response Type to a question is List of Values, you must set up value sets with the following properties:

- Format Type = Char

- Validation Type = Independent, Translatable Independent, or Table.

For more information, see the *Oracle Applications Flexfields Guide*.

Steps

1. Navigate to the Create Questions page.
Navigation: Contract Expert > Questions tab > Create Question button
2. Enter a short Name for the question. The name must be unique for a given intent and across all organizations.
3. In the Description field describe the purpose of the question.
4. Select the Intent for the question. The intent can be either Buy or Sell.
5. In the Question Prompt field enter the question that will be displayed at runtime for the users to respond.
6. Use the Disable check box to disable the question to prevent it from being used in a rule. The Disable check box is only available in the Update mode.
7. Select a Response Type from the list of values. The system supports the following response types:
 - Yes and No: At runtime, the response is displayed as a drop list with two values, Yes and No; users must select the appropriate response.
 - Numeric: The response is a numeric value provided by users at runtime.
 - List of Values: This option provides an enumerated list of values as its response. For example, the Contract Type question could include Fixed Price, Cost Plus Pricing, and Services only Pricing as possible responses.
8. If in the Response Type field you selected the List of Values option, the system displays the Value Set field.

Enter a value set or use the Search for Value Set icon to search and select a value set.

Note: You must set up value sets as described in the prerequisites section, page 7-2.

For example, if your question checked that a Contract Type should include the values Fixed Price, Cost Plus Pricing, and Services only Pricing, you would first need to define these three values in a value set. Then, when creating the question, select Response Type = List of Values, and Value Set = the name of your defined value set.

9. Click Apply to activate and save the question.

Note: Contract Expert does not in general currently support default responses on user questions. However, a question with response type Numeric always defaults to 0 in the business document. Users must be careful to change this default value when answering numeric questions.

Searching for Questions

Use these procedures to search for questions.

Steps

1. Navigate to the Questions page.
Navigation: Contract Expert > Questions tab
2. Enter your search criteria for the question.
You must enter a value for at least one of the search criteria to perform the search; you cannot perform a blind search nor begin the search with the wildcard character (%).
The following fields are available as search criteria:
 - Name
 - Description
 - Question Prompt
 - IntentYou can also search on the following fields:
 - Value Set
 - Note:** The Value Set search only provides the value sets that have been used in the questions, not all the value sets created in the system.
 - Response Type
 - Enabled check box
3. Click Go. The system displays the questions that match your search criteria.

Updating Questions

You can make changes to the existing questions, however Name, Intent, Response Type, and Value Set cannot be updated if the question is used in a rule. Description and Question Prompt can be updated even if the question is used in a rule. For the prompt changes to take effect on a business document, you need to run the Contract Expert: Synchronize Templates concurrent program.

Steps

1. Navigate to the Questions page.
Navigation: Contract Expert > Questions tab
2. Search for the question that you want to update. For more information, see the Searching for Questions section, page 7-3. The system displays the questions that match your search criteria. From this page you can select one of the following options:
 - Update: To make changes to a question, click the Update icon. The system displays the Update Question page. You can use the Disable check box to prevent the question from being used in a new rule. This will not impact existing rules that use this question.
 - Delete: A Question cannot be deleted if it is used in a rule. To delete a question click the Delete icon. The system displays the Warning page. Click Yes to confirm.

Managing Constants

You can define numeric constants in Oracle Contracts. Numeric constants can be used in Contract Expert rules that use numeric conditions.

For instance, you may wish to define a rule as follows:

- Condition: All contracts where the contract amount is greater than \$1,000,000
- Result: Add the clause Special Payment Terms

Define a constant called Contract Amount Threshold. In the constant, provide a value of \$1,000,000.

Then, when you create the rule, you simply use the Contract Amount Threshold constant instead of entering the amount \$1,000,000 on the rule. This way, if the threshold is increased later to \$2,000,000, you only need to update the constant definition instead of every rule that uses this condition.

This section covers the following topics:

- Creating Constants, page 7-5
- Searching for Constants, page 7-5
- Updating Constants, page 7-6

Creating Constants

You must provide the intent for the constant, that is, Buy or Sell; a constant name must be unique for a given intent.

Once defined, constants are available across all organizations that use the Contract Terms Library.

Steps

1. Navigate to the Create Constant page.
Navigation: Contract Expert > Constants tab > Create Constant button
2. Enter a short Name for the constant.
3. In the Description field describe the purpose of the constant.
4. Select the Intent for the constant. The intent can be either Buy or Sell.
5. In the Value field enter a numeric value for the constant.
6. Click Apply to save the constant.

Searching for Constants

Use these procedures to search for constants.

Steps

1. Navigate to the Constants page.
Navigation: Contract Expert > Constants tab
2. Optionally enter your search criteria:

- Name
- Description
- Intent

Note: You can perform a blind search; you can also enter the single wildcard character % as your search parameter.

3. Click Go. The system displays the constants that match your search criteria.

Updating Constants

The name and intent of a constant cannot be changed if the constant is used in a rule. Use the following steps to update a constant:

Steps

1. Navigate to the Constants page.

Navigation: Contract Expert > Questions tab

2. Search for the constant that you want to update. For more information, see the Searching for the Constants section, page 7-5. The system displays the constants that match your search criteria. From this page you can select one of the following options:
 - **Update:** To make changes to a constant, click the Update icon. The system displays the Update Constant page. You can make changes to the name, description, intent, and value of the constant if the constant is not used in any rules. If the constant is included in a rule, you can only change its value and description.
 - **Delete:** You can delete a constant if it is not used in a rule. To delete a constant click the Delete icon. The system displays the Warning page. Click Yes to confirm.

Managing Rules

Contract Expert rules use questions and constants along with clauses and system variables to bring clauses into business documents. Contract Expert rules are created based on Buy or Sell intent for a specific organization. These rules can be applicable to all templates of one organization or can be associated with specific templates.

Rules can be created based on contract system variables, clauses, and questions. This section covers the following topics:

- Creating Rules, page 7-7
- Searching for Rules, page 7-9
- Activating Rules, page 7-10
- Disabling Rules, page 7-11
- Updating Rules, page 7-12

Creating Rules

To define a rule, you can enter multiple values for a single condition. The system displays a search page so you can select multiple values and add to the rule. Use the following steps to create a Rule:

Steps

1. Navigate to the Create Rule page.
Navigation: Contract Expert > Rule tab > Create Rule button
2. Enter a unique Name for the rule to identify the rule.
3. Enter a Description explaining the nature and purpose of the rule.
4. Select the Intent for the rule. The intent can be either Buy or Sell.
5. The Status field is a read-only field. Contract Expert supports the following statuses for a rule:
 - Draft: When you can create and update a rule, the rule is the Draft status.
 - Active (in Progress): When the rule is submitted for activation, the status of the rule is changed from Draft to Active (in Progress).
 - Active: The status of the rule is changed to Active when it is available for use in Contract Expert.
 - Disabled (in Progress): The status of the rule while Contract Expert is performing the process of disabling the rule (when the disabled rule is exported to Oracle Configurator).
 - Disabled - The status of a rule is changed to Disabled when it is no longer available for use in Contract Expert.
 - Revision: When you update an Active rule, its status is changed to Revision.
6. To add a condition click the Add Another Row button.
7. Select the Match All or Match Any condition option. If the conditions must all be true to select the results, select the Match All radio button. Select the Match Any radio button, if any condition can be true to select the results.
8. In the Type field select one of the following condition types:
 - Clause: Use this type if the rule requires a Contract Expert selected clause to be present in the business document. For instance, select the Clause type to create a rule to bring in Clause B if Clause A, which was selected by Contract Expert, is present in the document.
 - System Variable: Use this type if a system variable drives the clause selection on a business document. For instance, bring Clause A, if system variable Payment terms = Net 30 is in the document.
 - Question: Use this type if a user question drives the clause selection on a business document. For instance, bring Clause A if the answer to Question B is Yes.
9. The available options in the Name field are based on the condition type you selected in the Type field:
 - Clause: The Name field is not available for this option.

- System Variable: System provides access to a search page for the seeded system variables.
 - Question: System provides access to a search page for questions defined in the Contract Expert.
10. Select an Operator from the list of values. Operators provide the logic in defining a condition. For instance, Payment terms **IS** Net 30. To create a rule, Oracle Contracts supports the following operators:
- Logic Condition operators:
 - IS
 - IS NOT
 - IN (allows selection of multiple values)
 - NOT IN (allows selection of multiple values)
 - Numeric Condition operators:
 - >=: Greater than or equal to
 - <=: Lesser than or equal to
 - =: Equal to
 - Not equal to
 - >: Greater than
 - <: Lesser than
11. Depending on the Type and other options, you must select one or more values in either the Value or Update Values field. For example:
- For condition Type = Clause, use the Update Values field.
 - For condition Type = Question and if the response type is "Yes or No" or the question uses a value set of type Independent, use the Value field.
 - For condition Type = Question with response type of Numeric or List of Values, use the Update Values field.

You can click the Show Details link to view the selected values for Question and System Variable conditions, and clause name for Clause conditions.

Note: If you select multiple values in a condition, the system will display "Multiple values" in the Value field. Click the Show/Hide icon in the Details field to view all the value selections.

12. Use the Remove icon to delete a condition from a rule.
13. Use the Results regions to define the results if the defined conditions are met. In the Results region, you can select clauses that need to be brought in and ask the user additional questions on a business document.
14. In the Results - Clauses region, click the Add Clauses button to add another Result row to the rule.

The Results - Clauses Table displays the Clause Title and Description for the clauses that you have chosen.

15. In the Results - Clauses Table, you have access to the following:
 - Show Details: The system provides a hide or show option to display general information about one clause or all the clauses.
 - Remove icon: You can use the icon to delete a result row from the rule.
16. Use the Question Table of the Results region to select one or more additional questions that should be asked at runtime if the conditions are met.

Note: This is one of the steps required to set up dependencies between questions. For more details, see *Creating Dependencies Between Questions*, page 7-5.

The Question table includes:

- Question: You can select from the list of questions already defined during Contract Expert setup.
 - Question Prompt: The system displays the question prompt details from the library.
 - Delete icon: You can delete a question row from the rule.
 - Add Questions button: Click the button if you want to add another question to the result row of the rule.
17. Use the Contract Template Assignments region to assign the rule to one, many, or all contract templates.

You can assign contract templates in Draft or Approved status to a rule. Only contract templates that are Contract Expert enabled and belong to the same intent as the rule will be available to be assigned to the rule.

 - To assign a rule to all contract templates in an organization, select the Apply to All Templates check box.
 - To select and assign one or more contract templates, click the Add Template button.
 18. Select one of the following options:
 - Cancel: The system closes the Create Rule page without saving any changes.
 - Save: The system validates the rule but does not close the page. If the rule fails validation, the system provides an error message.
 - Apply: the system validates the rule and displays the Rules Summary page. If the rule fails validation, the system displays an error message.
 - Apply and Add Another: The system validates the rule created and opens a new Create Rule page. If the rule fails validation, the system remains in the page and provides an error message.

Searching for Rules

Use these procedures to search for existing rules.

Steps

1. Navigate to the Rule page.

Navigation: Contract Expert > Rules tab

2. Enter your search criteria for the Rule.

You must enter a value for at least one of the following search criteria (you cannot perform a blind search nor begin your search with the wildcard character %):

- Name
- Intent
- Status
- Contains Clause (search for a rule that uses a specific clause)
This only searches for clauses that are currently used in rules.
- Contains Variable (search for a rule that uses a specific system variable)
The list of values only displays those variables that have been used on rules.
- Contains Question (search for a rule that uses a specific question)
The list of values only displays those questions that have been used on rules.
- Assigned to Template (search for a rule that is assigned to a contract template)
The list of values only displays the templates that are Contract Expert enabled.

3. Click Go. The system displays the rules that match your search criteria.

Activating Rules

You can activate draft rules and make them available for use in Contract Expert.

Prerequisites

You must assign at least one contract template to the rule, but the contract template need not be in the Approved status.

Steps

1. Navigate to the Rules page.
Navigation: Contract Expert > Questions tab
2. Search for the rule that you want to activate. For more information, see Searching for Rules. The system displays the rules that match your search criteria.
3. Click Activate. The active Rules: Confirmation page appears.

This page provides validation information on rules that are eligible to be published and those rules that cannot be published due to validation problems.

The validations include the following:

- The rule contains invalid clauses (in other words, clauses not in the Approved status) in conditions or results.
- The rule contains questions with invalid value sets; that is, the value set is not valid either because it was set up incorrectly or because a value set has been removed. For details of setting up value sets, see the Prerequisites in the Creating User Questions section, page 7-2.

- The rule contains no contract template assignments.
 - The rule contains inactive questions.
 - Values used in rules are invalid; for instance, the values used in a value set are no longer valid.
4. If there are validation errors, you cannot complete rule activation: you must correct the errors first, and then restart the rule activation process.
 5. When the Activate Rules: Confirmation page shows only rules ready to be activated, click Finish.

This generates the following processes:

- The system submits the Contract Expert: Activate Rules concurrent program and the status of the rule is changed to Active (in Progress).
- If the program completes successfully, the status of the rule changes to Active.
- If any system errors are encountered during the activation process, the system aborts the concurrent program and the status of the rule remains Active (in Progress). The rule will be picked up for disabling the next time you select other rules to be activated.
- Alternatively, you can run the Contract Expert: Activate Rules concurrent program manually from the Contract Terms Library Administrator responsibility.

On successful completion of the rule activation process, the system makes the rule available for use in Contract Expert.

Note: To avoid any performance issues, run the following Configurator programs periodically:

- Purge Configurator Tables
- Purge to Date Configurator Import Tables

The above programs eliminate unnecessary data from the Configurator Import tables. The Metalink note 216205.1 provides the recommended setting for the database init.ora file.

Disabling Rules

You can disable active rules and make them unavailable for use in Contract Expert.

Steps

1. Navigate to the Rules page.
Navigation: Contract Expert > Questions tab
2. Search for the rule that you want to disable or activate. For more information, see the Searching for Rules section, page 7-9. The system displays the rules that match your search criteria.
3. Click Disable. When you choose to disable a rule:
 - The system submits the Contract Expert: Disable Rules concurrent program and the status of the rule is changed to Disabled (in Progress).
 - If the program completes successfully, the status of the rule changes to Disabled.

- If any system errors are encountered during the disabling process, the system will abort the concurrent program and the status of the rule remain in the Disabled (in Progress). The rule will be picked up for disabling the next time you select other rules to be disabled.
- Alternatively, you can run the Contract Expert: Disable Rules concurrent program manually from the Contract Terms Library Administrator responsibility.

Updating Rules

You can update active Rules.

Steps

1. Navigate to the Rules page.
Navigation: Contract Expert > Questions tab
2. Search for the rule that you want to update. For more information, see the Searching for Rules section, page 7-9. The system displays the rules that match your search criteria. From this page you choose to Update, Duplicate, or Delete rules.
3. Update Rules: If you click the Update icon, the system changes the status of an active rule to Revision; if you update a draft rule, the status remains Draft. The system allows updates to the Conditions, Results or Template Assignments. However, you cannot update the following fields:
 - Name
 - Intent
 - Apply to
4. Delete Rules: You can delete only rules in the Draft status.
5. Duplicate Rules: You can duplicate rules within your organization. The system creates a new rule. You must provide a new name and description for the rule. The system will validate the rule when you click the Save, Apply, or Apply and Add Another button. The contract template assignments will also be copied during the duplicate process

Managing Question Sequence

You can view the default sequence of questions used in a contract template and update the ordering sequence. The sequence controls the order the questions are displayed during document authoring. Use the following steps to view and reorder the sequence of questions.

Steps:

1. Navigate to the Rules page.
Navigation: Contract Expert > Rules tab
2. To view or reorder the question sequence, you must first select a contract template for which to view or update the sequence. Click the View Question Sequence button to open the View Question Sequence page.

3. Use the Contract Template field to search and select a template. The system displays the default sequence of questions for the selected template.

In the Questions area of the View Question Sequence page, the column Displayed During Authoring, when checked, indicates the availability of questions during document authoring. The unchecked questions belong to inactive rules; to enable these questions, you must activate the rules.

4. To change the question sequence, click the Reorder button. The system displays the Reorder Question page. To indicate a dependant question, the system shows a character ('-') next to the question. Organize the dependent questions in the desired order within the main question.
5. Use the Up and Down arrows to change the question sequence.

Note: During authoring, a dependent, lower-level question appears only if a higher-level question is answered. If the dependent question is not properly organized under the higher-level question, the dependent question will appear out of sequence in the questionnaire during document authoring. For more information on question dependencies, see *Creating Dependencies Between Questions*, page 7-13.

6. Click Apply to save and close the page.
7. Run the Contract Expert: Synchronize Templates concurrent program to publish the updates to question sequence. You must run this concurrent program manually in order to enable the changes at runtime for document authoring. The concurrent program can complete with either of two statuses:
 - Completed / Normal
 - Completed / Error: If the program fails due to system errors, a notification is sent to the Contract Expert Administrator.

Creating Dependencies Between Questions

This section describes how to set up independent and dependent questions for a Contract Expert session.

Overview

When you use Contract Expert, in the processing of authoring a business document, you typically are asked a series of questions.

Your answers to the first-level questions may cause further questions to appear in the Contract Expert session; these extra questions are dependent questions. In turn, answering these dependent questions can cause lower-level dependent questions to appear, up to a maximum of 5 levels.

Ultimately, the objective of the questions is to specify which clauses are to be added to the business document.

Setting Up Independent Questions

The following describes the general principle of defining a first-level, or independent, question in a rule:

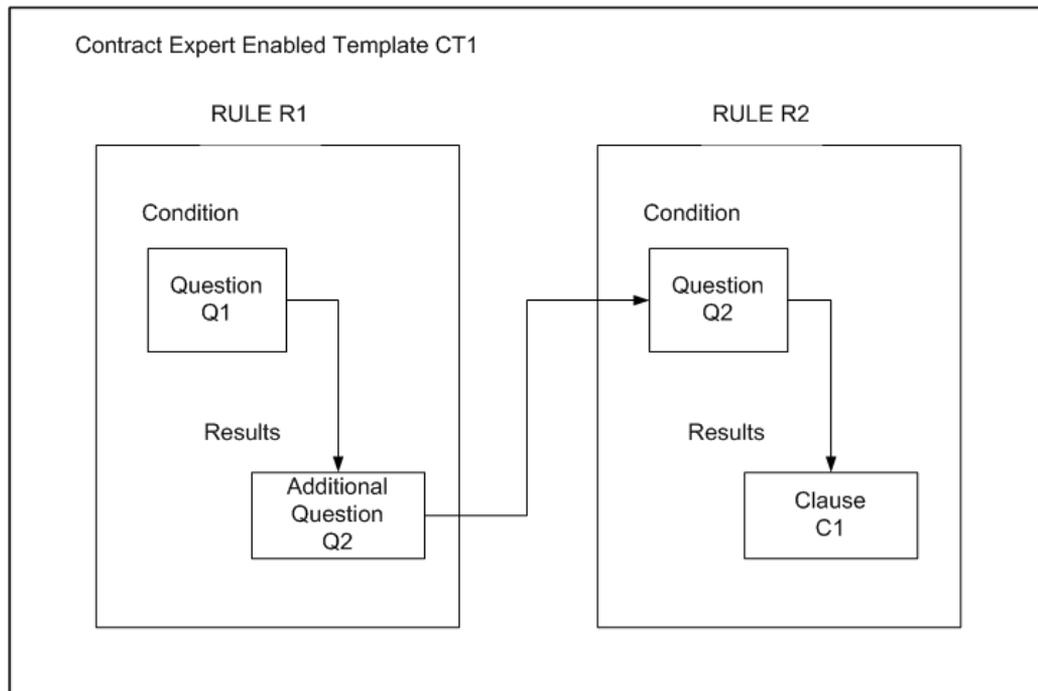
- In the Conditions region, specify a Question type condition.
- In the Results region, specify one or more clauses, but no additional questions.
- Associate the rule with a Contract Expert enabled contract template.

When you answer the question in a Contract Expert session during contract authoring, Contract Expert may add the clauses specified in the rule results, but *no further questions will appear*.

Setting Up Dependent Questions

You can set up to 5 levels of dependency for questions.

The method of setting up dependent questions is illustrated in the following diagram that shows the simplest case of dependent question setup.



The following are the general principles involved in the setup of all the elements to produce a dependent question:

- Create the questions first.
- Create the rules; it does not matter which rule is created first.
- Add the questions to the rules, as shown in the diagram.
- Associate both rules with a Contract Expert enabled contract template.

Note: If Rule R2 is the only rule associated with a contract template, then Q2 becomes an independent - that is, first-level - question in a Contract Expert session for any business document that uses that contract template.

Using Contract Expert on Business Documents

You can utilize the Contract Expert functionality to author contract terms and conditions based on the corporate standards and policies. The process of using Contract Expert includes:

- Start with a standard contract template that may contain some standard clauses.
- Use Contract Expert on the business document to bring in additional clauses, based on criteria including items, item categories, payment terms, and other business terms in the document.
- You may need to provide additional responses in Contract Expert to drive further clause selection.
- All the Contract Expert recommended clauses are brought into the business document and organized under appropriate sections.
- Contract expert may be run periodically on the business document to ensure the document contains all the appropriate clauses based on the latest set of business rules.

For more information on using Contract Expert on business documents, see the online help topics in Oracle Contracts, Oracle Procurement Contracts, and Oracle Sales Contracts.

Validations

This appendix covers the following topics:

- List of Validations

List of Validations

The appendix lists all validations provided by the system during validation of contract templates and business documents.

Contract Templates Validations

The following is a list of all errors and warnings that are used in Oracle Contracts as part of the validation process for Contract Templates.

Validation Type	Condition	Description
Inactive Clause	Error	This will check the template for the presence of invalid clauses. A clause is invalid if its status is either 'Expired' or 'On Hold'.
Alternate Clause	Warning	This will check for the presence of alternate clauses on the same template.
Incompatible Clauses	Warning	This will check for the presence of incompatible clauses on the template.
Layout Template not Defined	Warning	This will check if a layout template has been associated with the template.
Invalid Variable for Document Type	Warning	This will check if the system variables embedded within clauses, used in the template, are supported for the document types in which the template is used.
Duplicate Clauses	Warning	This will check the template for presence of duplicate clauses.
Empty Section	Warning	This will check the template for the presence of sections with no clauses.

Validation Type	Condition	Description
Template with no Active Rule	Warning	This will check if the template has no active rules attached, but is Contract Expert enabled.
Template has no Rules	Warning	This will check if the template has no rules attached, but is Contract Expert enabled.
Clause Default Section Invalid	Error	This will check if the default section used to bring in Contract Expert clauses is invalid. A section is invalid if it has been end dated.
Clauses Exist	Error	This will check if clauses exist on the contract template. A contract template that is not Contract Expert enabled must contain at least one clause in order to be submitted for approval.
Clause Invalid Status Change	Error	This will check for clauses that were originally in the Draft status, and were included in the template for approval, and are now in a different status. Only clauses in the Draft status can be submitted for approval with a contract template.
Clause Type Invalid	Error	This will check if the clause type associated with a draft clause is valid.
Invalid value for Clause	Error	This will check if the draft clause contains a user-defined variable.
Clause variable Inactive	Error	This will check if the draft clause contains an inactive variable.

Validating Contract Expert Rules

The following is a list of all errors and warnings that are used in Oracle Contracts as part of the validation process for Contract Expert rules.

Validation Type	Condition	Description
Expired Clause	Error	Expired Clause Error This will check for any expired clause that is used in the rule.
Invalid Clause	Error	This will check for any On Hold clause that is used in the rule.
Draft Clause	Error	This will check for any Draft clause that is used in the rule.
Circular Dependency	Error	This will check for questions with circular dependencies on other rules.
Invalid Question Valueset Query	Error	This will check for an invalid valueset query in a question that is used on a rule.
Invalid Variable Valueset Query	Error	This will check for an invalid valueset query in a variable that is used in a rule
Missing Valueset Value in Question	Error	This will check for any missing valueset values for a question that is used in a rule.
Missing Valueset Value in Variable	Error	This will check for missing valueset value for a variable that is used in a rule.
Invalid Valueset in Question	Error	This will check for deleted valueset for a question that is used in a rule.
Invalid Valueset in Variable	Error	This will check for deleted valueset for a variable that is used in a rule.
Invalid Question	Error	This will check for disabled questions in the rule.
Missing Template Association	Error	This will check for missing template associations in non-organization-wide rules.

Validating Business Documents

The following is a list of all errors and warnings that are used in Oracle Contracts, during authoring, as part of the validation process for contract documents.

Note: The Error and Warning conditions may have been defined differently based on the individual application. Refer to the relevant documentation within Procurement Contracts and Sales Contracts for the exact condition used in the relevant applications.

Validation Type	Condition	Description
Inactive Clauses	Warning	This will check the document for the presence of invalid clauses. A clause is invalid if it is either in 'Expired' or 'On Hold' statuses.
Alternate Clauses	Warning	This will check for the presence of alternate clauses on the document.
Incompatible Clauses	Warning	This will check for the presence of incompatible clauses on a document.
Invalid Variable for Document Type	Warning	This will check if the system variables embedded within clauses, are supported for the document type of the contract.
Duplicate Clauses	Warning	This will check if the contract contains duplicate clauses.
Primary Contract Document not Found	Error	The Contract Source is an Attached Document, but no Primary Contract Document has been uploaded. To correct this, upload a Primary Contract Document using the Update Contract Source section.
Expert not Run	Warning	This will check if Contract Expert has been run on the document and provide a warning if the user has never run Contract Expert even once.
Expert Clauses to Be Removed	Warning	This will check for Contract Expert clauses in the document that are no longer required.
Expert Clauses to Be Added	Warning	This will check if Contract Expert returns a clause that is not in the document but needs to be included.
Invalid Expert Configuration	Warning	This will check for an invalid Contract Expert configuration based on current document information. For instance, users have provided responses that may no longer be valid.
Incomplete Expert Configuration	Warning	This will check for an incomplete Contract Expert configuration based on current document information. For instance, users have not provided responses to all questions in the document.

Validation Type	Condition	Description
No Clause Amendment Description	Warning	This will check for presence of amended clauses without a corresponding amendment description.
Empty Section	Warning	This will check for the presence of sections in the contract without any clauses.
Unresolved External Variables	Warning	This will check for the External type variables that have not been provided values in the document.
Old Version of Clause Used	Warning	This will check if an older version of a clause is used in the document, when a newer version is available in the library.
No Section Amend Description	Warning	This will validate section information that has been updated in a contract but no amendment description has been provided.
Inactive Template	Warning	This will report a warning if the contract template that was used to author the document is no longer in active status.
Unassigned Clause	Warning	This will check for clauses that are in the Unassigned section of the document.
Unresolved System Variable	Warning	This will check for system variables with no values in the document.

The following table lists the validation codes for Repository.

Validation Type	Condition	Description
Validate Effective Date	Error	This will check if the contract has a valid effective date.
Validate Partner	Warning	This will check if the contract has a valid partner.
Validate Supplier	Warning	This will check if the contract has a valid supplier.
Validate Customer	Warning	This will check if the contract has a valid customer.
Contract Type Active	Warning	This will check if the contract has a valid contract type.
Contact Role Active	Warning	This will check the contract for presence of invalid contract roles.
Risk Active	Warning	This will check if the contract was assigned an invalid risk.
External Party Active	Warning	This will check for presence of invalid external parties in a contract.
Contact Active	Warning	This will check for presence of invalid contacts in a contract.

The table below lists the validation codes and their descriptions for Deliverables.

Type	QA Code	Description
Deliverable	CHECK_BUYER_CONTACT (Buyer Contact)	Verifies if a buyer contact is not provided or not a valid contact. Buyer contact is a required field on a deliverable, hence this check is qualified as an error.
Deliverable	CHECK_BUYER_CONTACT_VALID	Error message to indicate that the buyer contact must be a current employee.
Deliverable	CHECK_REQUESTER_CONTACT_VALID	Error message to indicate that the requester must be a current employee.
Deliverable	CHECK_ESCALATION_CONTACT_VALID	Error message to indicate that the escalation assignee must be a current employee.
Deliverable	CHECK_NOTIFICATIONS	Error message to indicate that the Escalation notification details must not be blank if the Escalation notification is checked.
Deliverable	CHECK_SUPPLIER_CONTACT (Supplier Contact)	Verifies if provided supplier contact is a valid contact for given supplier ID and is only an error if supplier contact is provided on a deliverable.
Deliverable	CHECK_DUE_DATES (Due Date)	Verifies the following deliverable due date details: <ul style="list-style-type: none"> • If deliverable is defined for a fixed due date, date must be provided. • If deliverable is defined relative to an event, date must be specified on given business document.
Deliverable	CHECK_AMENDMENT (Deliverable Amendment)	Verifies the deliverable's amendment details. A warning message will be shown if amendment description is not provided when a deliverable is amended.
Deliverable	CHECK_DELIVERABLES_VAR_USAGE (Deliverable variable usage)	Verifies if the deliverable variables are used in a clause when there are no deliverables on the document.
Deliverable	CHECK_RESP_PARTY	Verifies if the responsible party is incompatible with the deliverable type.

B

Workflows

This appendix covers the following topics:

- List of Workflows

List of Workflows

The following table lists the new workflows in Oracle Contracts.

New Workflows

Workflow Name	Technical Name	Description
Deliverables Notification	OKCDELWF (Item Type)	This workflow handles sending out overdue notifications, prior to due date notifications, and all status change notifications for all deliverables in the system. This workflow is only related to the Contract Terms Library.
Contract Clause Approval	OKCARTAP	<p>This workflow routes contract clauses for approval. If applicable, it also notifies the:</p> <ul style="list-style-type: none">• Approver that a clause requires approval.• Contract administrator, when a clause is approved or rejected.• Local organizations, when a global clause becomes available for adoption or is automatically adopted. <p>This workflow is only related to the Contract Terms Library.</p>
Contract Template Approval	OKCTPAPP	<p>This workflow routes contract templates for approval. It also notifies the:</p> <ul style="list-style-type: none">• Approver that a template requires approval.• Contract administrator, when the template is approved or rejected. <p>This workflow is only related to the Contract Terms Library.</p>
Contract Repository Approval	OKCREPAP	This workflow routes the Repository Contracts for approval.

Concurrent Programs

This appendix covers the following topics:

- List of Concurrent Program

List of Concurrent Program

The following table lists the new concurrent programs in Oracle Contracts:

Concurrent Programs

Concurrent Program	Technical Name	Description
Synchronize Clauses Text Index	ARTSYNCCTX	Use this program to synchronize the clauses text index and enable searching for clauses using the Clause Keyword field. The keyword will search the clause name, clause display Name, clause description, and clause text fields.
Optimize Clause Text Index	ARTOPTCTX	Use this program to optimize the clauses text index for improved performance when users search for clauses using clause keyword.
Synchronize Contract Template Text Index	OKCTMPLSYNCCTX	Use this program to synchronize the contract templates text index to search for templates using the template keyword field. The keyword will search the template name and description.
Optimize Contract Template Text Index	OKCTMPLOPTCTX	Use this program to optimize the contract templates text index for improved performance when users search for templates using the template keyword.

Concurrent Program	Technical Name	Description
Adopt Global Clauses for a New Organization	OKCADPNEWORG	Use this program to automatically adopt approved global clauses for a new local organization.
Import Clauses	OKCARTIMPORT	Use this program to import external clauses into the Clause Library. This program will validate data in the open interface table, and import the valid clauses into the contract terms library.
Migrate Standard Clauses to 11.5.10	OKCSTDARTMIG	Use this program to migrate standard clauses to multiple organizations. This program is used for upgrades from earlier releases.
Purge Clause Import Interface Table	OKCPURARTINF	Use this program to purge data from the Clause Interface table after the clause import has been completed.
Overdue Deliverable Notifier	OKCOVERDUEDELMGR	Use this program to periodically send out notifications or email messages to the concerned parties for all overdue deliverables.
Deliverable Due Date Notifier	OKCBEFOREDUEDELMGR	Use this program to periodically send out reminder notifications or email messages for all deliverables that are about to become due.
Deliverable Escalation Notifier	OKCESCALATEDELMGR	Use this program to periodically send notifications to the escalation assignee for all overdue deliverables.
Contract Expert: Activate Rules	OKC_XPRT_PUBLISH_RULES	Use this program to manually activate rules when the concurrent program run automatically fails due to system or functional errors.
Contract Expert: Disable Rules	OKC_XPRT_DISABLE_RULES	Use this program to manually disable rules when the concurrent program run automatically fails due to system or functional errors.
Contract Expert: Synchronize Templates	OKC_XPRT_REBUILD_TEMPLATES	Use this program to synchronize Question Prompt information (users can update the question prompt in Contract Expert) in the Contract Expert setup and Oracle Configurator.

Concurrent Program	Technical Name	Description
Contract Expert: Synchronize Templates	OKC_XPRT_REBUILD_TEMPLATES	Use this program to synchronize Question Prompt information (users can update the question prompt in Contract Expert) in the Contract Expert setup and Oracle Configurator.
Oracle Contracts Purge Routines	OKCPURGE	<p>Use this program to purge data used in Oracle Contracts. Currently, purge of the following data is allowed through this program:</p> <ul style="list-style-type: none"> • QA Validation Errors: Purges all validation results (errors or warnings) generated during contract template or business document approvals. • Standard Deviations Date: Purges all deviations data generated when the contract deviations report is run (either by the system or by the user) on a business document. • Contracts Workbench: Purges the oldest items in the Recent Contracts bin.
Contract Repository Expiry Notifications	OKC_REP_CONTRACT_EXPIRY_NTF	Use this program to send expiry notification to the Contract Administrator prior to contract expiration.
Contract Repository Import	OKC_REP_IMPORT	Use this program to import Repository Contracts and upload their associated documents using the import template.
Contract Repository Update Text Index	OKC_REP_TXT_INDEX_UPDATE	Use this program to synchronize the text index that provides keyword search on Repository Contracts.
Contract Repository Optimize Text Index	OKC_REP_TXT_INDEX_OPTIMIZE	Use this program to optimize the text index that provides keyword search on Repository Contracts.
Contract Repository Update Contract Status	OKC_REP_STATUS_UPDATE	Use this program to update contract status based on various events in the lifecycle of contracts.

Seeded Data

This appendix covers the following topics:

- Seeded Data
- Responsibility
- Deliverables
- Document Types
- Layout Template
- Notifications

Seeded Data

Seeded data for Oracle Contracts include:

- Responsibility, page D-1
- Deliverables, page D-2
- Document Types, page D-2
- Layout Template, page D-3
- Notifications, page D-4

Responsibility

The seeded responsibility provided by Oracle Contracts are:

- Contracts Workbench Administrator
- Contracts Workbench User
- Contract Terms Library Administrator. This responsibility can only be used if the profile option MO:Operating Unit has a value assigned at either the site level or for this responsibility.

To create new responsibilities for the Contract Terms Library, use the following:

- Root Menu: OKC Contracts Application HTML Root Menu
- Data Group: Standard
- Request Group: Contract Terms Request Group

To create new responsibilities for the Contracts Workbench, use the following:

- Root Menu: OKC Contract Repository Root Menu
- Request Group: Contract Repository Requests (available to the Contracts Workbench Administrator responsibility)

Note: Changing the seeded menu structure is not recommended. You must first customize the standard menus, and then create responsibilities.

Deliverables

The following table displays the seeded deliverables:

Seeded Deliverables	
Name	Description
All Contractual Deliverables	All contractual deliverables.
All Negotiation Deliverables	All negotiation deliverables.
Buyer Contractual Deliverables	Contractual deliverables where the buyer is the responsible party.
Supplier Contractual Deliverables	Contractual deliverables where the supplier is the responsible party
Supplier Negotiation Deliverables	Negotiation deliverables where the supplier is the responsible party.

Document Types

The following table displays the seeded document types:

Seeded Document Types

Name	Description	Document Class	Application
AUCTION	Auction	SOURCING	Oracle Sourcing
AUCTION_RESPONSE	Bid	SOURCING	Oracle Sourcing
B	Blanket Sales Agreement	BSA	Oracle Order Management
ISP_PO_REF	iSupplier view of PO documents	PO	Oracle Internet Supplier Portal
O	Sales Order	SO	Oracle Order Management
PA_BLANKET	Blanket Purchase Agreement	PO	Oracle Purchasing
PA_CONTRACT	Contract Purchase Agreement	PO	Oracle Purchasing
PO_STANDARD	Standard Purchase Order	PO	Oracle Purchasing
QUOTE	Quote	QUOTE	Oracle Order Capture
RFI	RFI	SOURCING	Oracle Sourcing
RFI_RESPONSE	RFI Response	SOURCING	Oracle Sourcing
RFQ	RFQ	SOURCING	Oracle Sourcing
RFI_RESPONSE	Sourcing Quote	SOURCING	Oracle Sourcing

Layout Template

To print contract documents and the Deviations reports, Oracle Contracts provides seeded layout templates in Oracle XML Publisher.

The layout templates are stored in the XML Publisher Layout Template repository.

Oracle Contract Terms Template is the seeded layout template for printing contract terms.

The seeded layout templates for the Deviations report are:

- Contract Deviations Sourcing Template
- Contract Deviations Order Management Template
- Contract Deviations Template for Quoting
- Contract Deviations Purchasing Template
- Contract Deviations Report Template
- Contracts RTE Handler Template
- Contract Deviations Constants Template
- Contract Deviations Variable Resolution Template

- Contract Deviations Table Variable Resolution for Sell Side

Notifications

The following table lists the different types of notifications seeded in Oracle Contracts:

Seeded Notifications

Type	Business Context	Description
Clauses	Clause submitted for approval	Notifies the global or local organization approvers when a global or local clause requires approval.
Clauses	Global Clause approved	When a global clause is approved, sends a notification to the requestor and library administrators of local organizations.
Clauses	Clause rejected	When a clause is rejected, sends a notification to the requestor in a global or local organization.
Clauses	Auto-adoption of global clause	Sends a notification to the library administrator of a local organization when a global clause is automatically adopted in that organization.
Clauses	Global clause available for adoption	Notifies the library administrator of a local organization when a global clause is available for adoption.
Clauses	Clause requiring approval for adoption	Sends a notification that a global clause was adopted in a local organization and submitted for approval.
Clauses	Clause adoption approved	Sends a notification that a global clause was approved for adoption in a local organization.
Clauses	Clause adoption rejected	Sends a notification that a global clause was rejected for adoption in a local organization.
Contract Templates	Contract template submitted for approval	Notifies global or local organization approvers when a global or local template requires approval.
Contract Templates	Contract template approved	Sends a notification to requestor when a contract template is approved.

Type	Business Context	Description
Contract Templates	Contract template rejected	Sends a notification to requestor in a global or local organization when a contract template is rejected.
Contract Deliverables	Overdue notification	Sends a notification for overdue status on the due date of the deliverable.
Contract Deliverables	Before due notification	Sends a notification prior to the due date of a deliverable.
Contract Deliverables	Escalation notification	Sends a status notification to escalation assignee after the due date, if the deliverable was performed.
Contract Deliverables	Status change notification	Sends a notification when either party changes the status of the deliverable.
Repository	Approval request notification	Notifies the contract approver when a contract requires approval.
Repository	Contract approved notification	Notifies the contract approval requester that the contract has been approved.
Repository	Contract rejected notification	Notifies the contract approval requester that the contract has been rejected.
Repository	Contract expiration notification	Notifies the contract administrator that a contract is about to expire.

XML Reference

This appendix covers the following topics:

- Contract Terms XML Reference

Contract Terms XML Reference

The complete definition of the contract terms XML is provided as an XML schema seeded with Oracle Contracts. You can find the XML schema file in the XML Publisher data definition **Contract Terms Data Definition**. The XML defined in this section represent contract templates. However, the contract XML is also included in sourcing documents, procurement contracts, sales contracts, quotes and other contracts to represent contract terms.

Contract Terms XML

The complete definition of the XML format is provided as an XML schema. The XML schema file can be found in the XML Publisher data definition **Contract Terms Data Definition**. The ContractTermsAM element is the top-level node of the XML document for a contract template. Other XML documents, such as sales contracts XML, include the ContractTermsAM element as a child node.

The ContractTermsAM XML element has the following structure:

```
ContractTermsAM
```

```
VariablesMetaDataVO (1)
```

```
VariablesMetaDataVORow (0 or more)
```

```
ParametersVO (1)
```

```
ParametesVORow (1)
```

```
SectionsArticlesToPrintVO (1)
```

```
SectionsArticlesToPrintVORow (0 or more)
```

DeliverablesAM (1)

DeliverablesAllForBusinessDocExpVO (0 or 1)

DeliverablesAllForBusinessDocExpVORow (0 or more)

DeliverablesForAllSourcingExpVO (0 or 1)

DeliverablesForAllSourcingExpVORow (0 or more)

DeliverablesForInternalContractualExpVO (0 or 1)

DeliverablesForInternalContractualExpVORow (0 or more)

DeliverablesForExternalSourcingExpVO (0 or 1)

DeliverablesForExternalSourcingExpVORow (0 or more)

DeliverablesForExternalContractualExpVO (0 or 1)

DeliverablesForExternalContractualExpVORow (0 or more)

DeliverablesForInternalSourcingExpVO (0 or 1)

DeliverablesForInternalSourcingExpVORow (0 or more)

The following is an example of a contract terms XML document. This XML document is a shortened version of the preview XML document that is also available in the Contract Terms Data Definition.

```
<?xml version="1.0" encoding="UTF-8" ?>
```

```
<ContractTermsAM type="AM" name="ContractTermsAM1">
```

```
<VariablesMetadataVO type="VO" name="VariablesMetadataVO">
```

```
<VariablesMetadataVORow>
```

```
<ArticleVersionId>6319</ArticleVersionId>

<VariableCode>EXTERNAL_CONTRACTUAL_DEL</VariableCode>

<VariableType>D</VariableType>

<DocType>TEMPLATE</DocType>

<ViewObjectName>DeliverablesForExternalContractualExpVO</ViewObject
Name>

<ExternalYn>N</ExternalYn>

</VariablesMetadataVORow>

<VariablesMetadataVORow>

<ArticleVersionId>6313</ArticleVersionId>

<VariableCode>1022</VariableCode>

<VariableType>U</VariableType>

<ExternalYn>N</ExternalYn>

</VariablesMetadataVORow>

</VariablesMetadataVO>

<ParametersVO type="VO" name="ParametersVO">

<ParametersVORow>

<PrintAmendments>0</PrintAmendments>

<DocumentName>Example Contract Template</DocumentName>
```

```
</ParametersVORow>

</ParametersVO>

<SectionsArticlesToPrintVO type="VO" name="SectionsArticlesToPrintVO">

<SectionsArticlesToPrintVORow>

<UniqueId>SECTION14394</UniqueId>

<StructureLevel>1</StructureLevel>

<ObjectType>SECTION</ObjectType>

<DocumentId>3941</DocumentId>

<DocumentType>TEMPLATE</DocumentType>

<DisplaySequence>10</DisplaySequence>

<Label>I.</Label>

<Title>Contract Terms and Conditions</Title>

<ArticleText />

<CatId>14394</CatId>

</SectionsArticlesToPrintVORow>

<SectionsArticlesToPrintVORow>

<UniqueId>ARTICLE36293</UniqueId>

<StructureLevel>2</StructureLevel>
```

```
<ObjectType>ARTICLE</ObjectType>

<ParentId>14394</ParentId>

<DocumentId>3941</DocumentId>

<DocumentType>TEMPLATE</DocumentType>

<DisplaySequence>10</DisplaySequence>

<Label>1.</Label>

<Title>Limitation of Government Liability</Title>

<ArticleNumber>10415</ArticleNumber>

<ArticleText>

<P>a) A <var name="1022" type="U" meaning="Contract Type"/>

<EM>[insert specific type of contract]</EM>

definitive contract is contemplated. </P>

<P>(b) In performing this contract, the Contractor is not authorized to make expenditures or incur obligations exceeding

<var name="OKC$B_AGREEMENT_AMOUNT_TXN" type="S" meaning="Agreement Amount (Transaction Currency)" />

<var name="OKC$B_TXN_CURRENCY" type="S" meaning="Transaction Currency" />. </P>

</ArticleText>

<ArticleVersionId>6312</ArticleVersionId>

<ArticleId>6006</ArticleId>
```

```

<CatId>36293</CatId>

<InsertByReference>N</InsertByReference>

</SectionsArticlesToPrintVORow>

</SectionsArticlesToPrintVO>

<DeliverablesAM type="AM" name="DeliverablesAM1">

  <DeliverablesForExternalContractualExpVO type="VO" name="DeliverablesForExternalContractualExpVO">

    <DeliverablesForExternalContractualExpVORow>

      <DeliverableId>29101</DeliverableId>

      <DeliverableName>Prototype</DeliverableName>

      <ResponsiblePartyName>Supplier Organization</ResponsiblePartyName>
    >

    <PrintDueDate>01/03/2004</PrintDueDate>

  </DeliverablesForExternalContractualExpVORow>

</DeliverablesForExternalContractualExpVO>

</DeliverablesAM>

</ContractTermsAM>

```

ContractTermsAM

The ContractTermsAM element is the top-level node (root node) of the Contract Terms XML for contract templates.

The following table displays the nodes for the ContractTermsAM element:

Nodes for ContractTermsAM

Element/Attribute	Set to Null	Type	Comments
VariablesMetaDataVO	Yes	Complex	The definition and values for variables. Contract templates do not contain variable values.
ParametersVO	Yes	Complex	Parameters that describe how the document should be printed.
SectionsArticlesToPrintVO	Yes	Complex	Sections and articles of the contract terms.
DeliverablesAM	Yes	Complex	Deliverables included in the contract template.

ContractTermsAM Components

The following sections describe the components of the ContractTermsAM:

SectionsArticlesToPrintVO

This XML element contains the text of sections and clauses for the contract terms. The SectionsArticlesToPrintVO is a child element of the ContractTermsAM element. It only contains SectionsArticlesToPrintVORow elements. Each of these elements contains either a section or a clause.

The following table displays the child elements for the SectionsArticlesToPrintVORow element:

Child Elements for SectionArticleToPrintVORow

Element/Attribute	Set to Null	Type	Comments
Uniqueld	No	String	The unique identifier for this element. The unique identifier is composed of the prefix "SECTION" or "ARTICLE" and the CatId.
StructureLevel	No	Integer	The indentation level of the section or clause. For example, sections with StructureLevel=2 are subsections.
ObjectType	No	Enumeration	The object type is either SECTION or ARTICLE.

Element/Attribute	Set to Null	Type	Comments
ParentID	No	Long	The CatId of the parent element. For a subsection this would be the identifier of the section in which you find the subsection. Since only sections and not clauses can be parents, the CatId is unique.
DocumentID	No	Long	The identifier of the contract document.
DocumentType	No	String	The type of the contract document. For a contract template, the type is TEMPLATE.
DisplaySequence	No	Integer	The display or printing order for sections and clauses.
Label	No	String	The sequential number defined by the numbering scheme for sections and clauses.
Title	No	String	The title of a section or a clause.
ArticleNumber	No	String	The clause number.
ArticleText	No	String	The text of the clause. This text may contain selected HTML tags such as , or . Oracle Contracts ensures that all tags are closed and XML compliant.
ArticleId	No	Long	The unique clause identifier (may be identical to a section identifier).
ArticleVersionId	No	Long	The unique identifier for the clause version.

Element/Attribute	Set to Null	Type	Comments
CatId	No	Long	A document may contain the same clause more than once. Therefore, the ArticleId and the ArticleVersionId may not be unique for a document. However, the CatId is different, even if the same clause is twice in the same document.
InsertByReference	Yes	Enumeration	Especially in government contracts (FAR), clauses may be inserted by reference. If this clause should be inserted by reference, the value is "Y", otherwise "N".
ReferenceText	Yes	String	The text shown when a clause inserted by reference.
AmendDescription	Yes	String	The amendment description for the clause. If the clause has not been amended or no amendment description has been provided, the element is missing.
AmendmOperation Meaning	Yes	String	The translated description of the AmendmentOperationCode. For English language, the values are: Added, Updated, and Deleted. If the deliverable has not been amended, the element is missing.

Element/Attribute	Set to Null	Type	Comments
AmendmentOperationCode	Yes	Enumeration	The code for the amendment operation. The code can be set to: ADDED, UPDATE, or DELETED. If the deliverable has not been amended, the element is missing.
PrintTextYm	Yes	String	If the clause has been amended, the user chooses if the complete clause text should be displayed (PrintTextYn="Y") or not (PrintTextYn="N").

DeliverablesAM

This XML element contains the deliverables for the contract terms. The DeliverablesAM element is a child element of the ContractTermsAM and may contain the multiple child elements. The child elements correspond to the deliverable variables supported by Oracle Contracts.

The following table displays the child elements for the DeliverablesAM element:

Child Elements for DeliverablesAM

Element/Attribute	Set to Null	Type	Comments
DeliverablesAllForBusinessDocExpVO	Yes	Complex	All deliverables of the document.
DeliverablesForAllSourcingExpVO	Yes	Complex	All deliverables specific to the sourcing phase.
DeliverablesForInternalContractualExpVO	Yes	Complex	All internal or outbound contractual deliverables.
DeliverablesForExternalSourcingExpVO	Yes	Complex	All external or inbound deliverables during the sourcing phase. Deliverables that have to be fulfilled by the other party.
DeliverablesForExternalContractualExpVO	Yes	Complex	All external or inbound contractual deliverables. Deliverables that have to be fulfilled by the other party.
DeliverablesForInternalSourcingExpVO	Yes	Complex	All internal or outbound deliverables during the sourcing phase.

Each of these elements may have multiple child elements with the same name and the added suffix "Row". For example, the DeliverablesAllForBusinessDocExpVO element has DeliverablesAllForBusinessDocExpVORow child elements.

Each of these elements contains the data for one deliverable.

The following table displays the child elements for each of these DeliverablesRow elements:

Child Elements for DeliverablesRow

Element/Attribute	Set to Null	Type	Comments
DeliverableId	No	Long	The unique identifier of the deliverable.
DeliverableName	No	String	The name of the deliverable.
Description	Yes	String	The description of the deliverable.
Responsible PartyName	No	String	The name of the party that is responsible for fulfilling the deliverable. Either "Supplier Organization" or "Buyer Organization".
PrintDueDate	Yes	String	A string that describes the date when the deliverable is due. This may be a fixed date such as "03/10/06", or an expression such as "Due 30 days after Purchase Order Signed".
AmendmentNotes	Yes	String	The amendment description for the deliverable. If the deliverable has not been amended the element is missing.
AmendmentMeaning	Yes	String	The translated description of the AmendmentCode. For English the values are: "Added", "Updated" and "Deleted". If the deliverable has not been amended the element is missing.
AmendmentCode	Yes	Enumeration	The code for the amendment operation: ADDED, UPDATE or DELETED. If the deliverable has not been amended the element is missing.

VariablesMetaDataVO

The VariablesMeatDataVO contains variable values (for user variables) or the XPath to the element that contains the data for the variable. Typically contract templates do not contain variable values. The only exception is deliverable variables, since deliverables

can be associated with templates. The variable section is automatically resolved by the code in the stylesheet, and there should be little need to customize this code.

The VariablesMetaDataVO is a child element of the ContractTermsAM element. It may only contain multiple VariablesMetadataVORow elements. These child elements describe the variables that may be found in the contract template.

Child Elements

Element/Attribute	Set to Null	Type	Comments
ArticleVersionId	Yes	Long	This field is only important for user variables since user variables may have different values for different clauses. The identifier of the clause version that has this value.
VariableCode	No	String	The code of the variable: a unique identifier in the document.
VariableType	No	Enumeration	The variable type: <ul style="list-style-type: none">• D: Deliverable• S: System• U: User• T: Table
DocType	Yes	String	The type of the contract document. For a contract template the type is TEMPLATE.
Value	Yes	String	The value for a user variable
CatId	Yes	String	The CatId of the clause that contains this value for the user variable.
ViewObjectName	Yes	String	XPath of the data associated with system variable.
AttributeName	Yes	String	The name of the element that contains the variable. The element is relative to the XPath of the "ViewObjectName"
ExternalYn	Yes	Enumeration	Indicates if the variable is external (Y) or not (N). In a negotiation, this flag controls, if a variable should be communicated to an external party or not.

ParametersVO

The ParametersVO contains information about how to print the document. The ParametersVO element is a child of the ContractTermsAM and contains one ParametersVORow child element.

The following table displays the child elements that the ParametersVORow element contains:

Child Elements of ParametersVORow

Element/Attribute	Set to Null	Type	Comments
PrintAmendments	No	Enumeration	This parameter determines the print area. It can be set to: <ul style="list-style-type: none">• 0: Only the contract is printed.• 1: Only the amendment (change) is printed.• 2: Amendments and changes are printed.
DocumentName	Yes	String	The name of the contract document.
ContractStatus	Yes	String	Status of the Contract: <ul style="list-style-type: none">• Draft• Pending Approval• Approved• Rejected
WatermarkText	Yes	String	The text for the watermark.
OrganizationName	Yes	String	Name of the organization that owns the document.

Glossary

Adopt As-Is

An option that allows a local organization to adopt a global clause without modification. However, the clause still goes through formal approvals in the local organization.

Amendment

Any changes made to the terms and conditions of a signed contractual business document. These changes could be made to the contract language or to the deliverables.

Auto-Adoption

Allows organizations to use global clauses automatically, without formal approval processes.

Blanket Sales Agreement

A long-term agreement that governs individual sales transactions. Each transaction can leverage the agreement's negotiated terms, including volume pricing and commitments.

BSA

See: Blanket Sales Agreement , page Glossary-1

Business Document

A document generated in the procurement or sales contracting business flows. For example, Purchase Order, Quote, Sales Order, and Blanket Purchase Agreement.

Clause

Business or legal language that constitutes the terms and conditions of a contract. Note that in earlier releases of Oracle Contracts, **clauses** were referred to as **articles**.

Contract

A binding agreement between two or more individuals or organizations that describes the obligations and rights of the parties and is enforceable by law.

Contract Document

Any document that is used for the purpose of or incidental to a contractual negotiation or execution. Examples of contract documents include, signed contract image and supporting documents.

Contract Template

A document containing standard (boilerplate) terms and conditions that organizations use to rapidly create new contracts with pre-approved legal language.

Contract Terms

See: Terms and Conditions., page Glossary-4

Contract Terms Library

A centralized repository for approved Contract Templates., page Glossary-1

Contract XML

The XML document that represents a contract's terms and conditions. Oracle Contracts uses this document to generate the contract document in PDF using a layout template configured by the user.

Contractual Deliverable

A task that is part of the contract's terms and conditions, and that one of the parties needs to perform during the life of the contract.

Data Source Name

The name of the data definition for a layout template.

Deliverable

A task that needs to be performed as part of the execution of the contract, either once or in a repeating fashion. Deliverables are part of the terms and conditions of a contract.

Deliverable Variable

A variable that captures the list of deliverables applicable to a contract. The list appears in table format on a printed contract.

Document Type

A categorization of business documents, in the Contract Terms Library, to identify documents that are generated in procurement or sales contracting business flows.

Execute a Contract

Means to fulfill the commitments under the contract. Note that some organizations use this term to describe the act of signing of a contract.

External Party

Represents all business units or organizations with which a contract can be entered into. In the application. External Party specifically identifies suppliers or customers, as understood in the procurement or sales flows respectively.

Global Organization

An operating unit in an organization that sets contract standards for all operating units worldwide.

Insert by Reference

Allows users to print only a reference to the full clause text on a printed contract without printing the entire text. The text of a clause with this attribute is standard and publicly available. A reference to the location of the full text is sufficient on the printed document. This is typically used in procurement contracts of U.S. government agencies.

Intent

Determines the usage of contract.

Internal Deliverable

A task that the internal party needs to perform but is not part of the terms and conditions. Internal Deliverables typically are fulfilled to augment the contractual deliverables and stay compliant with contract terms.

Internal Party

Internal party represents a business unit or organization that has implemented and uses the Oracle Contracts solution.

Keyword Search

An easy method to search for clauses and contract templates in the Contract Terms Library. The search is performed across several attributes, such as Description, Title, and Clause Text.

Layout Template

A document that defines the layout of contract templates or contract terms on other business documents. The layout template is designed using the following file types:

- XSL-FO
- RTF (Rich Document Format)
- PDF (Portable Document Format)

Local Organization

An operating unit of a larger organization. Local organizations subscribe to global clauses approved by the global organization, and adopt or localize them for use in local contracts., page Glossary-3, page Glossary-1

Localization

The process by which a local organization uses Oracle Contracts to modify global clauses to enable the use of clauses in that organization.

Negotiation Deliverable

A deliverable that needs to be performed during the negotiation phase of the contract. It is authored and managed in Oracle Sourcing.

Numbering Scheme

A definition of the numbering format that numbers clauses and sections in a printed contract.

One-Time Order

A single sales transaction that results in fulfillment and invoicing of specified products or services at specified prices.

Order Release

A sales transaction referencing a blanket sales agreement. The Blanket Sales Agreement governs the terms and price of the release.

Party

Refers to any business unit or organization representing both sides of a contract, whether internal or external.

PDF

(Portable Document Format) An open printable-document standard that Adobe Systems, Incorporated developed and that Oracle Contracts uses as the format for printed contracts. Use the Adobe Acrobat application to view and print PDF documents.

Provision

Used in the Federal Government contracting. A provision is a type of clause that is used only in negotiations and is dropped when the negotiation is converted to a contract.

Redline Comparisons

Compares and highlights the differences between two pieces of clause text. Oracle Contracts offers redline comparisons between two versions of a standard clause, between a non-standard clause and its original standard clause, and more.

Rich Text Editor

An online editing tool used to format clause text on a business document or in the Contract Terms Library. The rich text editor supports font effects (bold, italic, underline), alignment, indentation, and bulleted or numbered lists.

RTF

The Rich Text Format (RTF) specification provides a format for text and graphics interchange that can be used with different applications, output devices, operating environments, and operating systems.

Section

Section is a categorization that helps group clauses under a logical common heading.

System Variable

A variable whose value is set by Oracle Contracts and represents an attribute of the business document. For example in a:

- Purchase Order: PO Amount, Payment Terms, and PO Number
- Sales Contract: Customer Name, Ship-To Address, and Payment Terms.

Table Variable

One of several variables that capture certain types of structured information, such as items and price lists, in sales contracting flows.

Template

See: Contract Templates or Layout Template, page Glossary-3, page Glossary-1

Terms and Conditions

The set of clauses and deliverables that together constitute the terms and conditions of a contract. Also known as the legal language of the contract.

User-Defined Variable

Variables that an organization defines over and above the system variables. Users must provide values for these variables as part of the contract authoring process.

Variable

A piece of information that is generated by the system or filled in by the user, and can appear inside a clause. Variables often represent a negotiated term or a field from the business document.

XML

(eXtensible Markup Language) An industry standard for formatting data to allow easy exchange and processing of business documents. Oracle Contracts uses Contract XML documents to format contracts for previewing and printing.

XSL-FO Stylesheet

(eXtensible Stylesheet Language - Formatting Objects) An industry standard for formatting XML documents. Oracle Contracts uses XSL-FO stylesheets to format XML data documents for printing.

