Oracle® Contracts Core

User Guide

Release 11*i*

Part No. B10677-01

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Oracle Contracts Core User Guide, Release 11*i*

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Preface

Welcome to the **Oracle Contracts Core User Guide, Release 11*i***. This guide provides information and instructions to help you work effectively with Oracle Contracts Core.

This preface explains how this user guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Contract Administrators
- Contract Managers
- Technical Service Representatives (TSR)
- Customer Service Representatives (CSR)
- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility.

This guide assumes you have the following pre-requisites:

1. Understanding of the company business processes.
2. Knowledge of products and services as defined by your marketing policies.

Documentation Accessibility

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

Structure

This manual contains the following chapters:

Chapter 1 Introduction to Contracts Core

This chapter provides an overview of the application and its key features, as well as the application's relationships to other Oracle applications.

Chapter 2 Overview of Using Contracts Core

This chapter provides procedures for accessing the application along with an overview of the top-level main components of the UI.

Chapter 3 Contract Authoring

This chapter provides the procedures for creating a contract, defining the contract, and contract approval.

Chapter 4 Contract Execution

This chapter provides the insight into monitoring contractual items which affect execution.

Chapter 5 Contract Administration

This chapter provides procedures for contract change requests, subcontracts, renew/extend/terminate contracts, and so on. Running contracts reports are also covered in this chapter.

Chapter 6 Using Contracts Online

This chapter explains the concepts and procedures for using this web based feature of Contracts Core.

Chapter 7 Using Opportunity Integration

This chapter explains how an Opportunity can be created in contracts.

Other Information Sources

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

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

Online Documentation

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

Related Documentation

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

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

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

Documents Related to All Products

Oracle Applications User's Guide

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

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

Documents Related to This Product

Oracle Contracts Core Implementation Guide

This implementation guide explains the tasks and considerations required to set up Oracle Contracts Core.

Oracle Sales Contracts Concepts and Procedures

Use this manual to learn more about using the Sales Contracts functionality in Oracle Contracts Core.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Supplemental CRM Installation Steps

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

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7

(NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Workflow Guide

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Manufacturing APIs and Open Interfaces Manual

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

Oracle Order Management Suite APIs and Open Interfaces Manual

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

Oracle Applications Message Reference Manual

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

Oracle CRM Application Foundation Implementation Guide

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

Training and Support

Training

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Contracts Core working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

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

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

1

Introduction to Oracle Contracts Core

This chapter provides overview of the application, key features, as well as the application's relationships to other Oracle applications. This chapter includes:

- Contracts Core Overview
- Contracts Core Features
- Relationship to Other Oracle Applications

1.1 Contracts Core Overview

Oracle Contracts Core is designed for any company in any business that requires contracts independent of or in support of buying and selling activities.Whether the organization is the buyer or the seller, whether it issues contracts or receives them, Oracle Contracts Core automates the full life cycle of a contract.

You can author, execute and control non-industry specific contracts with Contracts Core, for both buy and sell contracts. It helps companies manage internal and external obligations, control daily deliverables, and be focussed on contractual goals. To ensure that you receive everything you negotiated for and provide everything you committed to delivering, Oracle Contracts Core helps track "hidden" deliverables enforceable requirements that may not be listed as a line item in a contract, but are described in terms and conditions.

The Contracts Core module acts as a central repository for the collection and dissemination of contract information. It contains all data on terms and conditions, deliverables, and parties to the contracts. This repository is the key to provide a single source for all the information in any contract in your enterprise.

Contracts Core is the foundation for other contract modules in the Oracle Contracts Suite. This foundation includes the contract repository, contract events, changes to contracts, renew/ extend/terminate contracts, and so on. Contracts Core leverages

Oracle Workflow for alerting parties to upcoming and missed deliverables. Contracts Core functionality is extended through integration to other Oracle E-Business modules.

1.2 Contracts Core Features

Contracts Core offers the following features for automated contract management:

Launch Screens: The main entry points to Contracts Core are two launch screens. the Launchpad and the Contract Navigator, from which contract administrators can access notifications, alerts of upcoming deliverables, and the contracts repository.

Authoring: You can create a variety of contracts from templates, copy existing contracts or parts of them, or simply create new contracts. The authoring form allows for multi-party, multi-contracts by party, and multi-line contracts, and the lines can expand for the addition of unlimited levels of detail. Pricing can be set at either the main line or the sub-line levels. The query function enables you to search for contracts based on attributes such as contract number, category, start and end dates, status, parties, or contacts.

Attachments: This feature allows for attachment of required external documents, such as word processor documents, spreadsheets, and other documents required for reference purposes, that are not designed to be entered into the Contracts Core module. A feature of the attachments is the ability to link images, to support those contracts which have been optically scanned and stored. This will be of value to a company (even if the contracts are closed or terminated) as it will provide valuable reference information.

Library of Terms and Conditions: Contracts Core offers a library where you can define and maintain standard articles, the textual terms and conditions of any contract. Defined articles can be industry-standard regulations or terms that an internal legal staff has created and approved, for use in contracts. You can copy a standard article from the library and modify it for a specific contract, without affecting other contracts that use that standard article.

Contract Rules: Contracts Core has the ability to enforce terms and conditions (articles) via contract rules. These rules are real-life enterprise business-process rules (such as invoice terms, payment terms, and price lists) that automate the processes that refer to a contract. Contract rules offer a structured way of representing the contractual terms and conditions that drive the activities performed under a contract. Rules can be organized into rule groups that meet company-specific needs.

Quality Assurance: To ensure that published contracts meet quality guidelines, Contracts Core provides a quality-assurance (QA) checking capability. This check can include a list of items that need to be verified as complete or validated against other information before a contract is submitted for approval.

Subcontracting: Contracts Core offers subcontracting capability for those who need to establish contracts with third parties in order to provide some or all of the items (or materials, deliverables, and so on) required for fulfilling the obligations of an existing contract.

Contract Preview and Report: Contracts Core supports contract printing from the Authoring form. This functionality allows companies to tailor the look and feel of the contract, allowing for the formatting and previewing of a contract's details, including the contract header information, parties, lines, and articles. The contract previewing solution uses XML to output the data as an HTML file which can then be printed.

Discoverer Reports: There are two Discoverer reports available with Contracts Core:

- **Contracts Expired but not Renewed:** This report searches for missed opportunities (contracts that have expired but were not renewed).
- **Contract Listing:** This report allows the user to use the same search criteria as the Search Templates and Contracts Query window to identify contracts and view the list in Discoverer.

Tasks and Events: Used for managing and enforcing deliverables. Examples of contract deliverables include a status report due weekly, on Wednesday; or a report due 10 days after an injury accident occurs; or drug-free certification due within 30 days of signing the contract; or a sales representative must be notified 30 days before a contract expires. The system automatically alerts anyone involved in the contract process of upcoming events and pending deliverables and also provides multiple levels of escalation when there are no responses to an alert within some predetermined time.

Contract Management: Provides the complete functionality for managing and executing contracts, including such actions as approvals, extensions, renewals, and terminations. Furthermore, you can define your own contract statuses and indicate whether or not certain operations (for example, delete allowed, update online, update via change request) can be performed on a contract that has a given status.

Contract Execution: Contracts Core enables an integrated data view approach whereby you can gain an overview of the contract's execution. These features include summaries of the contract's scheduled deliverables, the contract's history with drill down capability, interactions related to the contract, and documents related to the contract.

1.3 Relationship to Other Oracle Applications

Contracts Core functionality is extended through integration with the following Oracle applications:

General Ledger: Integration points include currency definitions, daily rates, and conversions. This information is found in the contract header.

Human Resources: Integration points include employee definitions, locations, and organizations. This is used to access contracts and when entering party information for a contract.

Purchasing: Integration points include buyer definition and supplier information. This information is used when entering the party for a “Buy” contract.

Payables: Integration points include payment, tax, invoice, withholding, receiving rules, and so on. This information is used for entering rules of a buy contract in the contract summary.

Pricing: Integration points include pricelists, adjustments, discounts, promotions, and surcharges. This information is used for retrieving pricing information when authoring a “Sell” contract.

Configurator: Integration points include pricing, configured item numbers, parent item numbers, inventory item numbers, component BOM codes, item quantity, and UOM.

Inventory: Integration points include items, units of measure, units of measure conversions and classes. This integration enables the use of an inventory item as a contract line item.

Receivables: Integration points include parties, customers, sales representatives, tax exemptions, and terms. This is used when defining the Contract Party information.

Foundation Applications:

- **Interaction History:** Integration points include resources, actions, and outcomes. This integration enables the recording of customer interactions on the contract.
- **Task Manager:** Integration points include resources, roles, and task status. This integration enables you to assign tasks for specific contract deliverables.
- **Resource Manager:** Integration points include resources, roles, and categories. This integration enables the assignment of a task to a resource.

2

Overview of Using Contracts Core

This chapter provides procedures for accessing the application along with an overview of the top-level main components of the User Interface (UI).

The following topics are covered:

2.1 Accessing Contracts

This procedure is used for log on to a Contracts module.

Prerequisites

Before accessing Oracle Applications, you must have a User Name and Password. A contracts responsibility must be assigned to your User Name such as Contracts Manager, Service Contracts Manager, etc.

Steps

1. Navigate to the Oracle Applications window for log on.
2. Enter User Name.

3. Enter Password.
4. Click Connect. After successful log on the Responsibilities window appears.
5. Select a responsibility (for example Contracts Manager for access to Core Contracts).
6. Click OK. The Navigator - Contracts Manager window appears.
7. Select a component and click Open.

Guidelines

To change responsibilities, navigate to File > Switch Responsibility. The Responsibilities window appears. If you do not find a specific responsibility, contact your system administrator.

Contracts are launched from the Navigator window. This is the first window that appears after you have accessed the application. This window has a Functions tab and Documents tab. The Functions tab displays the major application functions such as Launch Contracts, Contract Groups, Setup, and so on. The Documents tab enables you to create and display a list of documents that are easily accessible.

The function "Launch Contracts" is selected as a default. When you click **Open** the Oracle Contracts window appears having the Launchpad and Contract Navigator tabs.

2.2 Using the Launchpad and Navigator

The main entry points to Contracts are the Launchpad and the Contract Navigator tabs. Contract administrators can access notifications, alerts of upcoming deliverables, and the contracts repository. This topic covers the following features:

Using the Contract Launchpad Tab

Using the Contract Navigator Tab

2.2.1 Using the Contract Launchpad Tab

The Launchpad tab is divided into three regions: Inbox, Recent Documents, and Bookmarked Documents.

The Inbox displays notifications for contracts that require action.

- **Find** searches for a contract by status or notification type.
- **Open** opens a contract selected in the Inbox.

- **Respond** invokes workflow functions such as approving, signing, or rejecting a contract.

The Recent Documents region displays and gives you access to the most recently modified documents.

Use the Bookmarked Documents region to maintain your own personal list of contracts.

2.2.1.1 Using the Inbox

When you press the right mouse button (within the Inbox) the following list of functions are displayed in a pop-up menu:

- Copy Cell
- Copy Selected Rows
- Copy All Rows
- Find in Table (Find Launch Inbox window)
- Refresh
- Sort

The copy functions enable you to paste the cells to an Excel spreadsheet or a Word document. It keeps the table format which means that you can copy the entire navigator to an Excel spreadsheet. Using the Sort window, you can sort contracts in any order you like such as Date, Priority, Status, and so on.

To find a contract in the Inbox, you can either scroll the list of contracts and select a contract or search contracts by status or notification type then execute a search using the Inbox Find window.

Steps

Finding a Contract with the Inbox Find Window

1. From the Navigator, choose Launch Contracts and click **Open**.
2. Click **Find**. The Inbox Find window appears.
3. Select Contract Status from the LOV.
4. Select Notification Type from the LOV.
5. Click **Find.** Contracts matching your search criteria appears in the Inbox.

Responding to a Contract

6. Select a contract in the Inbox.
7. Click **Respond**. This launches a Workflow window.
8. Perform the necessary Workflow functions. After updating in workflow the new contract status is shown in the Subject column.

Opening a Contract

9. If necessary, select **Refresh** by pressing the right mouse button from within the Inbox.
10. Select the contract in the Inbox.
11. Click **Open**. The Contracts Authoring window appears allowing you to browse or update the contract.

2.2.1.2 Opening a Contract in Recent Documents

When you do a mouse right-click (within Recent Documents) a list of functions appear in a pop-up menu. These are the same functions (See, Using the Inbox) as in the pop-up menu for the Inbox.

Steps

1. From the Navigator, choose Launch Contracts and click **Open**.
2. If necessary, select **Refresh** (within Recent Documents).
3. Select a contract or when there are many contracts, use **"Find in Table"**.
4. Click **Open.** The Contracts Authoring window appears allowing you to browse and update the contract.

2.2.1.3 Bookmarking a Contract

Steps

1. From the Contracts Authoring window, select Actions > Bookmark**.** A Note window appears with a message confirming the Bookmark.
2. Click **OK.**
3. Navigate to Oracle Contracts (T) Launchpad.
4. If necessary, select **Refresh** (within Bookmarked Documents).
5. Select (or use Find in Table) your contract in Bookmarked Documents.

6. Click **Open**.The Contracts Authoring window appears allowing you to browse and update the contract.
7. If you want to remove a contract from the list, select the contract and click **Remove**.

2.2.2 Using the Contract Navigator Tab

Use the Contract Navigator tab to view contracts by contract groups. This tab is divided into two sides. The left side displays the contract groups and the right side displays the contracts in a grid that belong to the group you select from the left.

From the grid you can right-click to invoke several contract administration functions, or you can double-click the contract to get a quick overview of the contract. In addition to the overview, double-clicking gives you access to the contract history, schedule, and communications.

Contract Groups

Contract groups provide a convenient way to organize contracts using any criteria you like. They are similar to folders.

Create as many contract groups as needed to help you and other users find related information about contracts and contract parties. You can use any number of groups to classify a single contract and you can nest groups within other groups.

Note: A very large number of contracts in a contract group will adversely impact performance. You can increase performance by adding subfolders and distributing the contract into more subcontracts.

The groups you create can be public or private. Use public groups to group your contracts in a structured way that follows your company or department organization structure or business procedures. Use private groups to allow users to group contracts by their personal preferences.

If the system administrator gives you the privilege, then you can also create public groups that are accessible to all users. Public groups can contain individual contracts as well as other public or private groups.

Groups do not permit or restrict access to contracts.

2.2.2.1 Accessing Pop-up Menu Functions

Within the Oracle Contracts window, you can use the Contract Navigator tab to access a variety of functions related to finding, creating, viewing, and managing contracts. From the Navigator tab (in the right pane) you can press the right mouse button and a pop-up menu appears showing these functions (you can also access these from Tools on the menu bar):

Function	Description
New	Before authoring a contract, you must create it first using the Create a New Contract window.
Open	Right-click a contract from the Contract Navigator to open the Contracts Authoring window.
Create New Version	You can create a new contract version by selecting a contract and pressing the right mouse button.
Create Change Request	Change Requests enable you to document changes to a contract and submit for approval.
Copy	You can copy a contract or parts of a contract using the Copy window.
Subcontract	You can copy a contract or parts of a contract to create a subcontract using the Subcontract window.
Renew	Using the Renew Contracts window, you can renew an existing contract.
Change Status	Using the Contract Status window, you can change the status of a contract.
Extend	Using the Extend Contracts window, you can extend the end date for a contract.
Terminate	An active or on hold contract can be terminated using the Terminate Contracts window.
Execution	Selecting Execution provides you with an overview of a selected contract and access to the History, Schedule, Communications, and Related Objects tabs.

2.3 Opening a Contract

Use this procedure to open an existing contract.

Prerequisites

None

Steps

1. From the Navigator, choose Launch Contracts, click **Open.** The Oracle Contracts window appears. Select the Contract Navigator tab**.**
2. Select a Contract Group folder and double click to open folder.
3. Right-click a contract and choose **Open.** The Contract Authoring window appears. You are now ready to browse or update the contract.

2.4 Finding a Contract

Follow this procedure to find a contract when you do not know which group the contract is associated with. Using the Search Templates and Contracts window you can enter search criteria and execute the search. When the search is completed, a list of contracts should appear in the Results region. Select a contract and right click to open the contract.

Steps

1. From the Navigator, choose **Launch Contracts.** The Oracle Contracts window appears.
2. From the View menu, select **Find**. The Search Templates and Contracts window appears.
3. Choose your search criteria using one or more of the following fields:
   - Contract Number (Modifier cannot be entered it is only populated from the LOV)
   - Category
   - Status
   - Start Date/End Date
   - Group (within the Select region)
   - Party Role: This field must be populated before using the following:
     – Intent
     – Party Name

- Contact Role
- Email
- Contract Name

4. Click Search.
5. Select your contract from the Results region and right click to open the contract.

Guidelines

To avoid a long query time, you should enter either a contract number, party name, or an end date range.

The Email address is available for both sell and buy contracts. It will be enabled only if you enter a value in Contact Role otherwise it will remain disabled.

2.5 Contract Index

You can find and examine various components of a contract by using the Contract Index, a tree-style structured navigator. By using the contract index, you can follow, access, and understand the relationship of contract parts and better understand the context for the contract as a whole.

You can select any part of the contract index tree structure and navigate to any appropriate tab, row, or column that has the information that you are looking for.

The Contract Index has five display options, or views. With these views of the various contract components, you can see some of the hierarchical relationships and certain characteristics of the contract such as parties, line items, articles, and rules. The default displays the contract view.

For example, you could choose to view the contract rules as the root node. Oracle Contracts Core would then show all of the rules for that particular contract. You could then choose to see the association that the rule has to the parties, line items, terms, or events of the contract.

2.6 Attachments

The attachment functionality is accessible via a toolbar icon. For more information regarding attachments see, *Working with Attachments*, *Oracle Applications User's Guide*.

Contracts enables you to attach documents to a contract at the following:

- Contract Header
- Contract Line
- Standard Articles
- Communications

These attachments are supported when a contract:

- Or contract line is copied to a new contract
- Is renewed
- Is versioned

When a contract is versioned the attachments history can also be maintained. Maintaining different versions of attachments provides an audit trail which could be useful during negotiation.

A contract is linked to an attachment by Contract ID (ID is the surrogate key for a Contract Number and Contract Number Modifier). With this feature, attachments are linked to the Contract ID and the major version for the contract. As a result, when a contract is versioned, the new version will have attachments that are a copy of the attachments attached to the previous version. All the subsequent changes to existing attachments or addition of new attachments will be relevant to the current version of the contract.

2.7 Contracts Core Functional Components

The components which enable the application are as follows:

2.7.1 Authoring Components Overview

Within the Contracts Authoring window is where the contract is defined. The following tabs are used to define the contract:

Header: Displays contract number, version, net price, and so on.

Summary: Provides a quick overview of a contract, including description, class, effectivity, and other administrative items.

Parties: A contract can have many parties. Each party is assigned a role such as customer or supplier and each role can have a contact.

Rules: Rules manage various contract processes such as you can use a billing rule to determine when a bill should be sent or notification rules regarding a deliverable.

Adjustments: Enables you to assign a price list to a contract or contract line and to make pricing adjustments as needed. Contains all pricing information for the contract, at the header and lines / sublines levels. This tab appears only when the integration to Pricing is set up.

Line Items: A contract line can be of a certain type, for example, product, license, service, and so on.

Articles: Represent the Terms and Conditions for a contract. These may come from the library (or repository) of articles, where they can be created and maintained.

Sections: This tab is for supporting organizing articles for the contract preview (print) and for viewing articles (terms and conditions via iStore).

2.7.2 Execution Components Overview

After authoring the contract you can find additional information regarding versions, history, sales orders, and so on by accessing the Execution tabs:

Overview: Provides a quick overview of contract details such as status, amount, category, and so on.

History: Displays history of previous contract versions.

Schedule: Shows scheduled tasks and owners.

Communications: Is used to create and maintain related communications.

Related Objects: (For Sales Contracts) Displays sales order details when a sales order has been created from a contract. When a contract has been created from a quote, it displays quote information.

3 Contract Authoring

This chapter provides the information and procedures from contract creation through contract approval. The following topics are covered:

- Creating a Contract
- Authoring a Contract
- Submitting Contract for Approval

3.1 Creating a Contract

This topic group covers the following:

- Creating New contract
- Creating a Contract From a Template

3.1.1 Creating New Contract

Follow this procedure for creating a new contract.

Prerequisites

You must have modify access to create a new contract.

Steps

1. From the Navigator - Contracts Manager window, choose **Launch Contracts.** The Oracle Contracts window appears.
2. From the Action Menu, choose **New.** The Create a New Contract window appears.

3. Select **Create a new Contract Manually.**
4. Select a Category from the LOV. A category is a contract type associated to a contract class. A contract class determines the authoring form used. For example, when the class is "Corporate" the Contracts Core authoring form is used. Contract categories are seeded.
5. Click **Create**. The Contract Authoring window appears. You are now ready to author the contract. Proceed to Authoring Contracts.

3.1.2 Creating a Contract From a Template

Use this procedure to create a contract from a template.

Prerequisites

A contract template must be created.

Steps

1. From the Navigator, choose **Launch Contracts.** The Oracle Contracts window appears.
2. From the Action Menu, choose **New.** The Create a New Contract window appears.
3. Select Create a Contract from a Template.
4. Select a template from the LOV. If you need to search for a template then:
   a. Click **Find.**
   b. In the Search Templates window enter the search criteria.
   c. Select a template.
   d. Click **Open**.
5. Click **Create**. The Contract Authoring window appears. You are now ready to author the contract.

3.2 Authoring a Contract

The Contracts Authoring window is where you define and modify contracts. You can perform the following operations while defining or maintaining a contract:

- Entering General Information

- Entering Parties
- Choosing Rules
- Selecting a Pricelist
- Selecting Line Items
- Entering Articles
- Entering a Condition
- Running the Quality Assurance Check
- Submitting for Approval

3.3 Entering General Information

Before you can save a contract a minimal amount of general information must be entered. Following Steps 1-9 will enable you to save a contract having minimal information.

Prerequisites

You must create a contract, see Creating a New Contract Manually.

Steps

1. Navigate to the Contracts Authoring window.
2. Enter the contract number. If Autonumbering is set up, then do **not** enter a contract number. This field populates when you save the record.
3. Select Buy or Sell for Intent.
4. Enter an End Date (if not perpetual) **or** Duration and Period (End Date will populate when Duration and Period are entered). See Perpetual Contracts for more information.
5. Select Perspective (or accept default).
6. Select the **Details** subtab.
7. If you want to set the contract to renew automatically, select the Auto Renew check box and enter a number in the Number of Days Before Expiration field. Note: To renew the contract, you need to run the Contracts Auto Renewal concurrent program.
8. Select at least one group name.

9. If you want the QA run through Concurrent Request instead of online, select Submit QA as Concurrent Request?
10. Save your work.
11. Select the **Text** tab.
12. Enter a Short Description to help you identify the contract in the repository.
13. Select the **Administration** subtab.
14. Select Workflow Type, such as "Approve".
15. Select Workflow Name, such as "APPROVAL PROCESS".
16. If you want the approval through a concurrent request, select Submit as Concurrent Request. When submitting for approval with the check box selected, an alert is displayed so that you can decide whether the contract can be submitted for approval despite QA warnings.

You can give assign access to groups or individual users from the **Access** region.

17. Select Type of access (User or Group).
18. Select Group or User Name.
19. Select Level of access (Read or Modify).
20. Save your work.

Guidelines

Perpetual Contracts Contracts enables users to create contracts with end dates and without end dates. A contract not having an end date is referred to as a “Perpetual Contract”. As such a perpetual contract cannot be extended or renewed, however they can be terminated. Under certain conditions, business requirements may provide the need for a perpetual contract.

For example, a company managing customer software licenses may require perpetual contract functionality. Because software license agreements last indefinitely, there is no reason to apply end dates. Rather the contract effective date is open ended with no end date.

If you want to make the contract perpetual, simply leave the end date field blank.The following business rules apply to perpetual contracts:

- If a non-perpetual contract (“Entered” status) is made perpetual (end date updated), effective dates on lines will not be updated.

- If a perpetual contract is made non-perpetual (end date updated), effective dates on lines will not be updated.
- If a non-perpetual contract is renewed/extended as a perpetual contract, lines will be made perpetual.
- If the contract is non-perpetual, contract line(s) cannot be extended as perpetual.

Attachments You can also use attachments with the Summary tab. For more information regarding attachments see, *Oracle Applications User's Guide, Working with Attachments*.

Using Save As Template At any time you can save an incomplete contract as a template, using Save as Template from the Actions menu.

QA Check You can enter condition types and actions, quality check a contract or submit it for approval using the buttons at the bottom of the window. At any time, you can check if your contract passes Quality Assurance. The result of the on-line Quality Assurance check is displayed as soon as it completes. There is no need to run the Quality Assurance before you submit the contract for approval, since the Quality Assurance is automatically run before submitting for approval.

3.4 Entering Parties

From the Parties tab, you can identify the legal parties for the contract. You can also enter individuals involved with the creation and management of the contract as contacts for the parties. Sales contacts can also be entered. The information you can enter depends on the category and intent. This section covers the following topics:

- Roles and Contact Sources
- New Roles
- Party and Customer Account Merge Overview
- Entering a Party and Contact

3.4.1 Roles and Contact Sources

A contract is an agreement between at least two parties. Each party assumes a role in relation to the contract, such as the vendor or the customer. The setup of roles differentiates between sell and buy contracts. You can add two or more parties when authoring a contract and you can define the party roles and define the sources from within Oracle Applications for validating parties.

For example, if you sell goods or services, then you are the vendor and your customer may already exist in your customer database (source) as a regular customer.

If you buy goods and services, then you are the customer and your vendor may already exist in your vendor database (source). Even though you are the customer in this contract, you don't want to register as a customer in your customer database just to be available as the customer in the contract.

In both contracts you have a customer and a vendor each. In one contract you are the customer, in the other you are the vendor.

3.4.2 New Roles

In a contract, a role can only be selected if the following conditions are met:

- The category you choose permits the use of that role.
- The role has a valid source. Make sure that the source has a valid date range, the intent (sell or buy) matches your contract, and that the source has values.

Once you have defined a new party role or contact role using Define Categories, you can select them in the Sources window, where you can assign the sources.

A new party role or contact role will only appear in your contract, if the following conditions are all met:

- The role or contact role is defined as a lookup code with a current effective date.
- The role or contact role has a current effective date in the Sources window.
- The role or contact role has a source assigned with a current effective date and the right intent (buy or sell).
- The source for the role and intent contains at least one value.
- The party role may be needed (for Rules) as well.

3.4.3 Party and Customer Account Merge Overview

Oracle Contracts subscribes to the Trading Community Architecture (TCA) engine in order to utilize the party merge functionality. The Trading Community Architecture enables the requirement to merge one party into another when duplicate parties have been identified.

The Party Merge functionality within the TCA is specifically designed to eliminate duplicate data in the Registry layer in order to keep the database accurate. Party information is merged to provide a consolidated view.

Oracle Contracts registration of the entities that reference parties and defining the merge procedure allow users to utilize the merge functionality. A batch program runs to determine the duplicate party records and merge them accordingly.

3.4.4 Entering a Party and Contact

Prerequisites

You cannot enter new customers from the Authoring window. When you need to add a new customer or a supplier, these must be defined in Oracle Applications.

Steps

1. Navigate to the Contracts Authoring window and select the **Parties** tab.
2. Select a Role, such as Customer or Vendor.
3. Select a Name.
4. If you want to add "Party Known As" as another identifier for the party, enter that name.
5. If you want to add "Contract Alias" enter the alias the party uses for the contract.
6. From the **Party Contacts** region, select a Contact.
7. Enter a sequence. The sequence determines the order the contacts should appear.
8. Select a Name for the contact.
9. Repeat this procedure for adding other party to contract.
10. Save your work.

3.5 Choosing Rules

This topic group explains rules and how they are used in a contract. Since rules trigger many functional processes within contracts, it is essential that they be clearly understood. This section covers the following topics:

- What a Rule Does

- Rule Groups
- Tracking Deliverables with Rules
- Renewal Rules
- Conditions and Rules
- Object and Subject
- Quality Assurance and Rules
- Choosing Rules for a Contract Line

3.5.1 What a Rule Does

When you enter an article in a contract, that article represents the terms and conditions expressed as text. Rules can also be considered as contract terms and conditions with the **addition** of computer-readable formatting that cause Oracle Contracts Core to take action based on the information. When you enter a rule for an article you can initiate functions within the application.

For example, an article states that a confirmation letter must be sent within three days of contract signing. When this information is entered as a rule, a notification for the confirmation letter is generated.

Oracle Contracts Core contains seeded rules. Rules can be put into use in three different places:

- Contract header
- Contract line
- Article sets

Only the seeded rules are supported. You should not create your segments using the OKC Rule Developer DF development tool. If you are able to create new rules and make it work, subsequent patches could wipe them out.

3.5.2 Rule Groups

A rule group contains one or many rules. Rules collect one or many related pieces of information. Rules are stored in a formatted way as opposed to free text like articles.

Your company can choose to assemble rule groups and make some rules optional. Once you have selected a rule group, you can see if the rules contained are optional. Assign rule groups to your contracts according to your business procedures.Rules with similar characteristics are grouped so that you can easily reference and access them. For example, create a rule group for billing which would group together rule types such as Bill-To, Schedule Billing, and Payment Terms.

You can save incomplete data, but all required rules have to be complete to pass quality assurance.

3.5.3 Tracking Deliverables with Rules

Rules capture additional information you want to store for a contract. You can group rules into rule groups that help to enforce business processes and company standards.

3.5.3.1 Notify Rules

Notify rules are a part of the "Notify Rule Group". Notify rules indicate that some deliverable is due at a future date or time that is not known at the time of authoring the contract. For example, "product" documentation must be provided within 30 days of contract "signing." Rule groups that contain notify rules also contain a notification rule so that you can create tasks for the notify rules. You can view notify rules in the task manager.

You can use the following types of time in a notify rule:

- Absolute: The point in time is defined by absolute values and is expressed as a date and time value. An example is January 15 at 9 a.m.
- Conditional: The point in time is when something happens or after something happens. Examples include "10 days after contract signing" and "upon contract expiration." A notify rule can also be based upon contingent events, such as "injury accident" or "earthquake."
- Generic: The point in time is a day of the month or day of the week. Examples include "every first Monday at 10:00 a.m." and "the third Wednesday of June."
- Recurring: The point in time that reoccurs at intervals, such as every 6 months or every 30 days.

You can view scheduled events for a contract in the contract navigator. If you created tasks, then you can also use the administration windows in the Task Manager.

3.5.4 Renewal Rules

You can use the Renewal rule group to determine the behavior of contracts and lines when a contract is renewed.

At the contract level you can choose between the following options:

- Active contract: The renewed contract is automatically approved.
- Do not renew: The contract cannot be renewed.
- Notify Salesrep: The renewed contract is in entered status and the salesrep is notified, to review the contract and negotiate the terms and conditions before submitting for approval. To find a Renew Contract notification in your Inbox, click the Find button in the Inbox region of the Launchpad tab window. Select "Open" for Status and for the Notification Type select "Contract Alert" for notifications identifying renewed contracts.
- Submit for Approval: The renewed contract is in entered status, the contract is automatically submitted for approval and the salesrep is notified.

At the contract line you can choose between the following options:

- Do not renew: The renewal process does not renew this line when renewing the contract.
- Keep duration: The renewal process does not adjust the effective date range of the line if the renewed contract has a longer duration than the originating contract.
- Full duration: The renewal process adjusts the line duration to the duration specified in the contract header.

For each line you can override the renewal rule type. For example, while the entire contract may specify that all lines are adjusted to full duration, a rule on the line level may specify to exclude a certain line from the renewal process.

3.5.5 Conditions and Rules

You can use conditions and rules together or you can use each component individually.

A condition is part of the events concept:

- An event is the combination of actions, condition lines and outcomes.
- When combined with a rule, a condition does not require an outcome.
- Condition lines are always optional.

With conditions you can capture contract events, like the signing or expiration of a contract. You can use condition lines to filter, if an outcome is executed. For example, you can define that a quote is automatically created 5 days prior to the expiration of a contract, if the contract total does not exceed $50,000.00.

With the notification rule, you can schedule a generic notification, that does not use a condition like the expiration or the initiation of a change request. For example, You can define that the project leader is notified every other week to schedule a status meeting for the following Friday.

Using rules and conditions together, you can base the notification on conditions. For example, You can send a notification to the project manager, each time a change request is initiated. The notification is not sent, if it was initiated by the project manager. In this example, you would integrate a contract specific condition in the notification rule. The condition would identify the change request initiation and filter, if the requester of the change request is the project manager herself.

Note: If the condition lines do not offer you the attributes you need for filtering, then you can use the process definition to register a PL/SQL function to return true or false. For more information on registering a function, see *Oracle Contracts Core Implementation Guide, Defining a Process*.

3.5.6 Object and Subject

When you define categories or create a contract, you may encounter situations, where the role of a contract party may be obvious. However, the system may not be able to identify which of the parties or party roles should be displayed in a list of values.

For example where you have:

- Multiple parties for a specific role (more than one customer in a syndication agreement)
- Multiple roles, that only have slight differences (customer and customer agent)

The subject is the acting party, the object is the party being acted upon. For example, the billing rule would need to know who (the subject) bills whom (the object).

The concept of object/subject is considered in two situations:

- Defining a category
- When authoring a contract and adding/changing rules

Not all of the rules need the concept. When you enter a rule, where none of the parties is ever displayed in a list of values, the subject/object concept is irrelevant such as the currency rule group, notify rule group, renewal rule group, and so on. Therefore you cannot enter a object or subject in the fields for such rules.

When you assign rules to a category, you may have to add the roles to the setup, when the rule group requires it. If that setup step is missing, then the authoring form will notify you of the incomplete setup of the category, when you try to use the rule group in question.

For the example given above, when you add the billing rule to a category, you would have to identify that the customer role and not the customer agent role should be subject of the billing rule group.

When you author a contract, you may have more than one customer, for example when you record the contract for a syndicate. In that case, the party roles field allows you to identify, to which of the customers the invoice is sent. Once you have identified the right customer, then you can select from correct billing addresses.

Note: You need to identify the object and subject, even if there is only one eligible candidate.

3.5.7 Quality Assurance and Rules

Each rule can consist of one or more fields. One or more fields can be required entries. You can only add rule groups and not single rules to a contract. Quality assurance enforces required fields. The quality assurance checklist check a contract to help ensure specific items have been completed. You can create your own quality checks by defining a QA Checklist. See *Oracle Contracts Core Implementation Guide, Defining a Quality Assurance Checklist*.

The optional check box in the rule groups impacts the required fields of a rule in the following ways:

- If you make a rule in a rule group mandatory, then the required fields of a rule must be entered.
- If you make a rule in a rule group mandatory, but there are no required fields, then Quality Assurance passes.
- If you make a rule in a rule group optional, with all fields non-required, then Quality Assurance passes.

- If you make a rule in a rule group optional, then the required items are only enforced if at least one field of the rule was entered. If you don't enter anything for a rule, the mandatory fields are not enforced. You will experience this only in very exceptional cases.

In addition to rules with non-required fields, Quality Assurance can enforce dependencies or alternatives. For example, in a prepayment rule, you either have to enter an amount or you have to enter a percentage, but neither of the fields are mandatory. In this case, the Quality Assurance check will result in an explanation of why the rule did not pass.

3.5.8 Choosing Rules for a Contract Line

Use this procedure to add, edit, and delete rules at the contract header or line level while authoring a contract.

Prerequisites

To access a Rule Group from the Contracts Authoring window, it must be included the Rule Group in the category definition. More than one rule group can be included in a category.

Steps

1. Navigate to the Contracts Authoring window and select the Rules tab.
2. Select a Rule Group**.** Rules associated with a selected Rule Group appear in the Rule region (below Rule Group). To distinguish rule groups that have the same name, you can enter a comment or description for each rule group. Depending on the rule group, you may have to enter an object and/or subject. See Object and Subject**.**
3. Select a Rule. If the Required check box (read only) is selected, this indicates the rule is required for that Rule Group. If the Entered check box (read only) is selected, this indicates Rule Detail Values were entered for that rule.
4. Enter a Value for the Rule Detail when the Required check box (read only) is selected.
5. Enter values as needed for other Rule Details.
6. Repeat this procedure for adding other rule groups to a contract.
7. Save your work.

Guidelines

When you select a rule group in your contract all rules of that group are automatically copied into your contract. For some rules, sources are provided for each intent (buy or sell). You can modify the rule type source. You should not remove an existing source definition.

3.6 Selecting a Pricelist

This topic group covers the following:

- Integration Features
- Business Rules for Pricing
- Pricing Date
- Selecting a Pricelist for Contract

Note: If the Adjustments tab does not appear, then the integration is **not** enabled.

3.6.1 Integration Features

Integration with Oracle Pricing enhances Contracts pricing capabilities. Oracle Contracts can price contracts using various discounts and promotions that are offered for the items specified in the contract lines. Also, header level discounts available for orders can be made available through contracts as well.

Oracle Contracts can price contracts using the various discounts, promotions, and so on that may be offered for the items specified in the contract lines. Also, header level discounts available for orders should be made available through contracts as well.

Pricing Contract Lines

The price of all the items specified in contract lines for which prices have been specified in Oracle Pricing, can be obtained with this integration. This way, there is one source price list when using Order Management, Order Capture, or Oracle Contracts. You can specify the price lists for the items in a company's business and use them from all three applications. The prices for all the priced lines in contract can be calculated after application of all the discounts and surcharges defined in the system for the defined item on the unit price specified in the price list.

To achieve this, you are allowed to choose a price list at the line level. If nothing is specified, the price list, if any at the header level will be used, or Oracle Pricing will return the best price available if no price list is specified at any level. The discounts and surcharges will be qualified based on other information entered in the hierarchy of lines for the priced item line. The qualifying adjustments (discounts, surcharges, promotions, and so on) can be setup in Oracle Pricing as either automatic or manual. Adjustments can be applied automatically to the unit price.

Pricing Complete Contract

After a contract has been authored, you can get header level adjustments. The discounts and surcharges will be qualified based on information specified at header level in the contract. The qualifying adjustments (discounts, surcharges, promotions, and so on) can be setup in Oracle Pricing as either automatic or manual. Adjustments can be automatically applied to the unit price. Thus the final price shown at the header level will be a roll up of the prices at the line level, adjusted with header level adjustments

Viewing Pricing Information in Contracts

You can view price lists applied at various levels and also the adjustments that were used to reach at the final price at various levels. To accomplish this, the Adjustments tab is part of the contracts Authoring form. You can assign as well as view information related to pricing of the Contract at various levels.

Repricing Contract Lines and Headers

You can reprice a line or the whole contract if some qualifying attributes change and when changing attributes might affect the end price of the line or the header. This enables you to make use of all the new discounts and promotions that may have been added between the last pricing to this repricing. Also, if a priced line gets deleted from the contract, Pricing can recalculate its affect on Header level adjustments.

Repricing for a priced line will automatically occur if any line in the same hierarchy, above the priced line is updated. The roll up price at the header will reflect this change in price of line.

Support for Price Lists with Price Breaks

Oracle Contracts supports pricing of items that belong to a price list with price breaks. A Price Break is a pricing modifier type that applies a variable discount or surcharge to a Price request line based on meeting conditions of the price break. A Price break adjustment consists of a header and the corresponding child lines. A price break can be of Point or Range type and involve different adjustment calculation methods.

Oracle Contracts also supports price break adjustments. This allows manual override of automatic and manual price break adjustments. The Price Break Details (Related Lines) form allows users to view or override the current price break details.

Manual Adjustments

After pricing an item, based on unit price and adjustments defined in the system, you can manually update the final price of the item. You can still maintain control on what the final price should be for an item. This can be done by creating a manual adjustment to update the price.

Pricing During Copy and Renew

When you copy a contract, the pricing related information is also copied to the new contract. For renew, the contract is repriced.

3.6.2 Business Rules for Pricing

Line Styles

- The same line style cannot be both a Priced Item, and basis for another item's price.
- The same line style can be a Priced Item and 'Priced'.
- In a hierarchy of lines only one line can be the Priced Item.
- For a line style hierarchy to be priced, there should be a line style flagged as priced and one line style flagged as priced item.
- Priced line style should be below or same level as PI or BPI in the hierarchy of line styles.
- In case of recursive line style, the first occurrence of P,PI or BPI will hold this special meaning, in all further occurrences, the value of these flags will always be treated equal to 'N'.

Contracts Authoring Form

- Price lists and modifier selection in a contract will be limited to the currency specified in the contract.
- You will be able to assign only one price list to a Contract header.

- If a price list is present only at the header level, then Oracle Pricing will use it for pricing all the lines in the contract. If the header price list can't be used to price a contract line in question, based on profile option 'Allow Automatic Price List Assignment' setup, Pricing will use lowest precedence price list that qualifies for line or show a WARNING message, stating that the contract line could not be priced
- You will be able to manually update only those price adjustments and calculations which have been derived from veritable modifiers and overridable price lists.

3.6.3 Pricing Date

The Pricing Date is the effective date that forms the basis to price products and services contracted. The main business need is the flexibility to price products and services based on different dates depending on when the contract will be negotiated. For contracts with products and services scheduled for a future period, it is useful to provide a mechanism to revise the prices as appropriate based on the business policies and practices.

The Pricing Date field is found in the Adjustments tab for header level pricing and also in the Adjustments subtab for line level pricing. This field is intended for the contract administrator or sales representative to accurately price contracts.

Based on the date entered in this field, the application makes a call to Advanced Pricing to obtain the price for the product based on the Price List and the Date. If no price exists for the product for the given Price List on the specified date, the system returns an error message.

3.6.3.1 Business Scenario

A Sales contract was created with an effective of duration of one year starting 01-Jan-2002. At the end of the year, the contract will be renewed for another year starting 01-Jan-2003. Beginning 2003, the company will revise its price lists for all products and services. The contract does not specify the prices to be charged in case of renewals.

In this scenario, when the contract is renewed, the system prices the products and services as of the system date of renewal.

> **Note:** The "System Date" is the date on which the transaction is carried out in the Contracts Application, also known as "Current Date".

Assuming the renewal is carried out prior to the actual start date of the contract, the customer may potentially be overcharged or undercharged depending on the revised price directions.

The users may enter a Pricing Date for the products and services and to have them priced appropriately. So, in this scenario, the price for the renewed contract will be as of 01-Jan-2003. This provides a more accurate representation of the true value of the Contract.

3.6.3.2 Business Rules

The following business rules are applicable when using Pricing Date:

- Pricing Date is not mandatory. If no pricing date is provided, the system will use the "System date" to price the products and services. The system will update the Pricing Date at the Header with the System Date.
- Header date cascades to lines. If the Pricing Date is provided only at the Header level, the system will use this date to price all Line items.
- Line level Pricing Date overrides header. If you provide Pricing Date at the line level, the system will disregard the header level date and consider this for pricing the line.
- Pricing Date at a line level cannot exceed the End Date of the Line. Similarly the Pricing Date at the header cannot be greater than the End Date of the Contract. However, no restrictions apply with respect to Start Date of the Contract or the lines. A pricing date may be earlier than the Start Date of the Contract or the Line.
- Copy and Renew functions of a contract will nullify the pricing dates at both the header and line levels. You will have to provide pricing dates on the copied or renewed contracts manually to price the lines.

3.6.4 Selecting a Pricelist for a Contract

Prerequisites

Create and Define a contract.

Steps

1. From the Contracts Authoring window, select the Adjustments tab.
2. If a rule is tied to a modifier (during modifier setup), from the Contracts Authoring form, click the **Rules** tab.
3. Select Rule Group (e.g. Billing)
4. Enter Rule Details information.
5. Click Adjustments tab. This shows the whole contract in tree form on left hand side (LHS).
6. Perform one of the following:
   - If you want the header priced, select the header node on right hand side (RHS). This will bring up the corresponding pricing detail already defined for this contract header on RHS.
   - If you want the line priced, select the line node on RHS. This will bring up the corresponding pricing detail already defined for this contract line on RHS.
7. Choose a pricelist from the LOV and click OK. An LOV of active pricelists will show up. This will unassign any adjustments that the user might have previously applied to the header and clean up the modifier details.
8. If you need to adjust the price, Click the LOV in the Adjustment field. The Manual Adjustments window opens.
9. Select an adjustment and click OK.
10. Select a Reason from the LOV and click OK (optional).
11. Enter text as necessary (optional).
12. Click Calculate. The final list will be saved and the calculation details will be shown. Also when you navigate from this tab, the chosen price list will be applied automatically. The Calculate option should also be used when you have made changes to the quantity of a line item or deleted line items.

3.7 Selecting Line Items

A contract is composed of lines of text. Control the type of information that can be entered on a particular line by defining a line style. The line style sets input requirements and sets up the lists of values to choose from in a contract line during contract authoring.

This section covers the following information:

- Top Line
- Sublines
- Priced Line Styles
- Recursive Line Style
- Line Types and Item Source
- Priced Lines and the Pricing Rule
- Inventory Item Restriction
- Selecting a Line Item
- Using Oracle Configurator

3.7.1 Top Line

Each contract has one or more contract lines. A contract line can be a simple priced item line or can consist of several layers of lines and contract items. The most general and least detailed line in a contract is called the top line. You can break a top line into sublines and multiple contract items to provide a rich level of detail.

To include a top line and its details in a contract, you must include it in the category definition. For service contracts, you can define a top line style to be eligible for entitlement and invoicing. You define a new line style by selecting the plus sign on the top mode.

3.7.2 Sublines

Use lines and sublines to group and categorize goods and services. The specific goods and services are referenced from your inventory or product catalog as contract items. You can use sublines to provide additional detail about the delivery of the contract item. For example, a line for a service product includes a subline that defines the level of service contracted for that product. A line that represents a licensed product includes a subline that identifies where the product is deployed.

If the line style is a Covered Product, the list of values of Item Name field in the Subline tab shows only the products from Install Base for the party specified in your contract. To get the list of values of the Item Name you need to enter a value for the Customer Account rule of Billing rule group.

3.7.3 Priced Line Styles

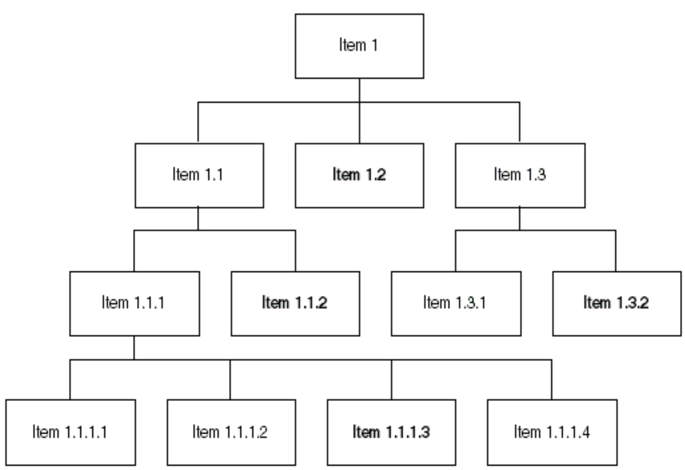
When creating a line style, you can define it as being a priced line style. You can enter a quantity, unit of measure, and unit price. The line automatically calculates the extended price and net price. You can enter adjustments to automatically decrease or increase the net price. This feature is found at both the line and subline levels. See the following table for examples:

Scenario	Extended Price	Adjustment%	Net Price
Initial value	$2,400.00	0	$2,400.00
Offer 10% discount	$2,400.00	10	$2,160.00
Add 10% surcharge	$2,400.00	-10	$2,640.00

For each hierarchical path in a line style, you can only price once. You can have multiple prices on the same level in a hierarchy.

For example, assume a line style hierarchy such as the following:

Figure 3–1 Line Style Hierarchy



1. You can mark Items 1.1.1.3, Item 1.1.2, Item 1.2 and item 1.3.2 as priced items. None of these priced items is a parent or child of another priced item.
2. When you mark the line style for Item 1 at the top line as a priced item, all other dependent lines have their price tag removed.
3. Both Item 1.3.2 and Item 1.3.1 can be priced in this example.

3.7.4 Recursive Line Style

Recursive line style allows users to define lines and sub-lines of the same type and with the same source. This is useful when the number of levels that will be needed in a contract are unknown.

For example a project with several tasks, these tasks can be a line style. Depending on the project there maybe several tasks and sub-tasks:

Top Level: Task 1 - Clean Area

  Sub-line Task 2 - Ship the Material

    Sub-line Task 3 - Prepare Installation

      Sub-line Task 4 - Install the Product

In the example each task depends on a previous task completion. The project may require tasks with 2 sub-tasks, or 3, or 4 and so on. Because the depth level of sub-lines is unknown the user can define the line style as recursive. In the contract authoring form many levels can be entered for each line of this style.

3.7.4.1 Pricing and Recursive Line Style

Due to the complexity of the recursive line, only one level can be priced. Only the top level can be priced. In the setup the user cannot specify which level within the recursive line to price. All the others are used to document the task dependencies only.

For example, if you define "Product" as a top line as priced and recursive, in the contract authoring form then the following names for the top line and sub-lines maybe displayed:

Top Line: PC Computer (inventory item) $2,000.00

Sub-line 1: Terminal (inventory item) not priced

Sub-line 2: Cables (inventory item) not priced

Sub-line 3: Mouse (inventory item) not priced

For information regarding defining price lists including their limitations to only work with inventory items, see the *Oracle Pricing User's Guide.*

3.7.5 Line Types and Item Source

For each level in the line style hierarchy, you select a line type and the item source. The item source defines the list of values available when authoring a contract that contains the line style.

The line styles that can be selected are based on the contract category and line style hierarchy.

One special line type is called "Free Format" and is used to enter any text description. It does not include an item source. The item source indicates, where you can add values to the selection. For example, the source Consulting refers to items in your inventory items with the item type Consulting. Similarly, you can add items for the source Media Pack, Self Serve Training or Training Line. The source System Item refers to all items in your inventory.

3.7.6 Priced Lines and the Pricing Rule

Before you enter priced lines in your contract, define the pricing rule group for the contract header or contract line. The pricing rule group identifies the price list to be used for your priced items.

Note: If the integration to Oracle Advanced Pricing is set up, then the Pricing Rule is not used.

After you identify the price list and when you add priced lines to your contract; the list price of the item is retrieved. Based on the quantity you enter on the line, the extended price is calculated. This extended price can be overridden in the negotiated price column to account for contractual agreements.

3.7.7 Inventory Item Restriction

The inventory items list of values is restricted by the organization that is available to the contract. When a contract is entered, the organization ID is obtained from the multi-organization profile option value. The inventory organization value is obtained from the Oracle Order Entry system parameters.

You cannot enter a new item into the individual inventory organizations directly. To enter a new item in Oracle Inventory, you enter the item into the master organization. Then you copy the item to the individual inventory organizations.

3.7.8 Selecting a Line Item

From the Line Items tab, you can detail all the contract line items, which are the contract deliverables and relevant items. The Line Items tab has three subtabs: Sublines, Rules, and, Parties. You can use the subtabs to add and exclude data specific to a line. Use this procedure to enter details for a line.

Steps

1. Navigate to the Contracts Authoring window and select the **Line Items** tab.
2. Select the line style.
3. Enter a number for the display sequence.
4. Depending on the line style definition, you may enter the Name or select a name from the list of values.

> **Note:** If your line item is priced at the top level, you can enter quantity, unit of measure and price information. You can override the contract level price list by choosing a price list in the Rules subtab.

5. Enter a quantity.
6. Enter the unit of measure.
7. If a list price is defined for the item in the price list, then the unit price is retrieved and displayed. Otherwise, you can enter the unit price. The extended price is automatically calculated from the quantity times the unit price. The calculated value also populates the Net Price field.
8. If you want to adjust the net price enter a value in the Adj% field. Entering a positive value results in a decrease in the net price (i.e for a discount). Entering a negative value results in an increase in the net price (i.e. for a surcharge).

Note: The Action menu has a menu item "Update Negotiated Price". When the menu item displays Update Negotiated Price ON, the negotiated price will default to the extended price and any further changes in the extended price will reflect in the negotiated price. The user can override the negotiated price later. When the menu item shows Update Negotiated Price OFF the negotiated price will not change if the extended price changes. This menu item is disabled when integration with Oracle Pricing is used.

---

9. Optionally, depending on the line type you selected, use the **Sublines** tab to enter more detail in the sublines.

   You can enter sublines for those lines defined to contain sublines in the line style hierarchy. This window allows you to view and edit the hierarchy at any level. Navigate through levels by using the Drill Up and Drill Down buttons.

10. Enter rules on lines the same way rules are entered on the contract.
11. Use the **Parties** tab to add line specific information that is not valid for the entire contract. Entering a party in a subline is similar to entering party information for the contract.
12. Repeat this procedure for adding additional line items to a contract.

Guidelines

Attachments You can also use attachments with the Line Items tab. For more information regarding attachments see, *Oracle Applications User's Guide, Working with Attachments*.

3.7.9 Using Oracle Configurator

This section contains the following topics:

- Oracle Configurator Overview
- Functional Flow with Oracle Configurator
- Invoking Oracle Configurator

3.7.9.1 Oracle Configurator Overview

Configurator helps you to configure custom items. A configured item corresponds to a base model and a specific list of options. The following terms and definitions are associated with Configurator:

- **Configuration** is a specific set of specifications for a product, resulting from selections made in an Oracle runtime configurator.
- **Model** refers to the entire hierarchal tree view of all the data required for configurations, including model structure variables such as resources and totals, and elements in support of intermediary rules. May consist of BOM items.
- **Option Class** refers to a group of related items.
- **Option Item** is a non-mandatory item component in an option class or model bill of material.
- **Bill of Materials (BOM)** is a list of component items associated with a parent item (assembly) and information about how each item relates to the parent item.

An example of a Configuration:

Model - Envoy Laptop Computer 8100

Option Class - Memory

Option Item - 128 MB RAM

Option Item - 256 MB RAM

Option Class - Hard Drive

Option Item - 12GB Hard Drive

Option Item - 18 GB Hard Drive

Option Item - 25 GB Hard Drive

Option Class - Software

Option Item - Word processing

Option Item - Spreadsheet

In Oracle applications configurable items can be:

- Assemble to Order (ATO)/Bill of Material (BOM) models: The selected configuration is assembled and shipped to a customer. For example a PC is built and shipped as per configuration of 25 MB RAM and 10GB of disk space.
- Pick to Order (PTO)/BOM models: The selected configuration is picked and shipped to the customer. For example a PC, monitor, keyboard, and mouse are picked and shipped to the customer.

Configurable items leverage ATO/PTO data that exists in Oracle Inventory and BOM imported into Configurator. ATO/PTO BOM models are created in Bill of Material using items created in Inventory.

References

Oracle Configurator Developer User's Guide

3.7.9.2 Functional Flow with Oracle Configurator

From the Contracts Authoring form you enter the base model from the Lines tab. A recursive, priced line style must be selected before entering the model item. The line style must be set as Recursive, Priced, and Item to Price using the Line Styles window. This line style enables you to price at every level, e.g. both top line and subline. The Contracts Authoring form recognizes this and enables "Configure Item" from the Action menu. The "Configure Item" menu item is only enabled in the Lines tab for model items. When you select "Configure Item", the Oracle Configurator window appears.

The options are selected from the Oracle Configurator window. When the selection of options is complete, you can click "Done" or "Cancel" and return back to the Contracts Authoring form.

The Line Items tab displays the configured items along with prices based on a specific price list. You can use the "Drill Down" features to view the items and options from the Line Items tab. If you need to make changes, then navigate to the top line and select Configure Item from the Action menu.

3.7.9.3 Invoking Oracle Configurator

Prerequisites

- From the Line Styles window set up a line style having Recursive, Priced, and Item to Price selected from the appropriate check boxes.
- From the Define Category window associate the line style to the Category required for the contract.

- When a price list is set up for a model item, all items under available options must be priced first. If not, the Pricing system returns an error.

Steps

1. From the Oracle Contracts window, navigate to Tools > New. The Create a New Contract window appears.
2. Select a Category which enables you to configure a model item.
3. Click Create.
4. Enter Summary information.
5. If a specific pricelist is required before configuration, select Adjustments tab.
6. Select the Pricelist.
7. Click the Line Items tab.
8. Select a Line Style. (See Prerequisites for setup)
9. Enter the Sequence.
10. Select the Name for the model item that has been configured in the Configurator module.
11. Enter Quantity and select UOM. The system will populate the pricing fields.
12. Navigate to Actions > Configure Item. The Oracle Configurator window appears.
13. Select an Option Class from the Left Side of the window.
14. Select one or more options from the Option Class.
15. Repeat steps 13 and 14 for additional options.
16. Click the button in the lower left to calculate the Total Price.
17. Select Done. A new contract line is created as the top line. This new line stores the roll-up price for the contract. If you select Cancel, the configuration is cancelled.
18. Select Sublines tab.
19. Click Drill Down to view the sublines for the configuration.
20. Click Drill Down to view the Option classes and options for the configuration.
21. If you need to add more model items, select the model item in a new top line.

22. Repeat this procedure for additional items.

3.8 Entering Articles

A contract article is the text that describes and details the terms and conditions that are attached to a contract. The following topics are covered:

- Library of Articles
- Entering a Standard Article
- Entering a Non-Standard Article by copying a Standard Article
- Entering a Non-Standard Article

3.8.1 Library of Articles

The library of articles contains standard articles that can be referenced or copied into contracts. There are two different types of articles:

- Standard articles are referenced from a library of articles. The text of standard articles cannot be changed. You still may add variation to an article in a contract. You can assign releases to articles. When you insert an article into a contract, the application chooses the current release. If you assign incompatibilities to a standard article, then the Quality Assurance check detects any incompatible articles in your contract.
- Nonstandard articles are specific to the individual contract. They are either written by the author of the contract or copied from the library of articles and modified.

The standard articles are organized into article sets. Use article sets to organize articles logically and make them easier to include in contracts. You can then drill down to articles from the sets. You can assign price types and categories to article sets. When you author a contract, the list of values for the standard articles are filtered by the assigned price types and categories. You can translate article sets into rules. When an article set is referenced or copied into a contract, the associated rules are also copied into the contract.

Whenever you use a standard article within a contract, all rules that have been associated with that article are copied (compatible to your contract category) into that contract where they can be modified. You can define rule groups during the initial setup of the standard article set. Rule groups are not copied when individual articles are selected for reference or copy.

3.8.2 Entering a Standard Article

Use this procedure to reference a standard article or article set while authoring a contract.

Reference

Oracle Contracts Core Implementation Guide, Defining the Library of Articles: Article Comparison, Creating a New Article, Editing an Article, and Modifying an Article Set

Prerequisites

An Article Set should be created containing the standard article you want to reference.

Steps

1. Navigate to the Contracts Authoring window.
2. In the **Articles** tab, leave the Standard check box selected.
3. In the Name field, select an article set.
4. Select the article. Optionally, double-click the article set to select only one article. If you know your article, then you can type in fragments of the article to reduce the list of values matching your search criteria. This second method bypasses the navigation through article sets.
5. Click **Reference.**
6. Optionally, click **Show Text** to modify the text.
7. Save your work.

Guidelines

When selecting an article set, the rule groups defined for that set are copied into the contract. When selecting an individual article, rules are not copied.

Attachments You can also use attachments with the Articles tab. For more information regarding attachments see, *Oracle Applications User's Guide, Working with Attachments*.

3.8.3 Entering a Non-Standard Article by Copying a Standard Article

Use this procedure to copy an existing standard article and modify it.

Steps

1. Navigate to the Contracts Authoring window.
2. In the **Articles** tab, leave the Standard check box selected.
3. In the Name field, select an article set.
4. Select the article. Optionally, double-click the article set to select only one article. If you know your article, then you can type in fragments of the article to reduce the list of values matching your search criteria. This second method bypasses the navigation through article sets.
5. Click **Copy.** The standard flag is automatically unchecked when you choose to copy an article instead of referencing it.
6. Optionally, click **Show Text** to modify the text.
7. Save your work.

3.8.4 Entering a Non-Standard Article

Use this procedure to create a nonstandard article.

Prerequisites

A contract must be created, even if it is only in its initial authoring stages.

Steps

1. Navigate to the Contracts Authoring window.
2. In the **Articles** tab, clear the Standard check box.
3. Enter a name to describe your non-standard article.
4. Select the Subject.
5. Click **Show Text** and enter the article text.
6. Save your work.

3.9 Entering a Condition

This section covers the following topics:

- Contract Events
- Query a Condition

- Copying a Condition template
- Creating a Contract-Specific Condition

3.9.1 Contract Events

Use events to automatically initiate actions such as creating a service request, sending a notification, and creating a task. Events occur as a result of something happening or before an upcoming event.

In other words, an event acts upon phrases such as:

- When this happens, do something
- At a certain point in time, something happens

The "when something happens" or "at a certain point in time" are *actions,* and "do something" is an *outcome*. The action can be qualified by conditions. For example, it may not be whenever something happens, but whenever something happens and some conditions are met. In summary, events are composed of actions, conditions, and outcomes.

Events allows synchronous and asynchronous processing. The asynchronous processing takes advantage of the advanced queuing method. That is, you do not have to wait until an event is evaluated and all the outcomes are executed to continue with your activities. On the other hand, due to the type of business, some applications such as Relationship Plan require an immediate event evaluation while you are using the application.

This topic covers the following:

- Types of Events
- Conditions
- Types of Condition Lines
- Types of Conditions
- Outcomes

3.9.1.1 Types of Events

Contracts offers action-based events and date-based events.

- Action-based events are predefined actions that occur in the application. Examples of action-based events are contract signed, contract terminated, counter updated, and change request initiated.

- Date-based events are dates of significance within the application. For example, the contract expiration date.

You define action-based events and date-based events using the Actions window. In this window you also define action attributes that can be used further in conditions and outcomes. See *Oracle Contracts Core Implementation Guide, Setting up Actions.*

3.9.1.2 Conditions

You use conditions to define additional criteria for an action-based event or for a date-based event. The conditions also specify the outcomes that need to be initiated when the condition evaluates to true.

Condition lines qualify action and date-based events. They are used to specify that an outcome is to be initiated not only when the action happens, but also when the action happens and certain conditions are satisfied. For example: “when the contract is signed and the amount of the contract is greater than $100,000,” or “30 days before contract expiration and when the contract category is network license agreement.” It is not required to define condition lines for a condition.

3.9.1.3 Types of Condition Lines

There are three types of condition lines: expressions, counters, and functions.

Using expressions, you can define simple comparisons using the operators such as <, >, =. Expressions are always based on action attributes.

Counter condition lines are applicable for Oracle Contracts for Service and Installed Base. You define conditions for a particular counter reaching a value. Counters can be defined for a product or for a service. For example “when the number of photocopies for a photocopier is greater than 1,000,” or “when the number of calls made by a customer in a gold service agreement is over 10."

Functions can be used for more sophisticated criteria that can be addressed using PL*SQL procedures. A function accepts one or more parameters and returns true or false after its evaluation. Functions don’t need to be based on action attributes.

3.9.1.4 Types of Conditions

There are two types of conditions:

- Independent conditions
- Conditions attached to contracts

Using condition templates, you can define multiple samples of conditions. From a template you can define either an independent condition or a condition to be attached to a contract.

Independent conditions are not owned by any object. Whenever an action occurs, regardless of the contract, the outcome is initiated if the condition evaluates to true. For example, “whenever any contract is signed; create a task to notify the Contracts administrator.”

Conditions can be specific to contracts. Depending on the action, a condition can be related to a contract line or to a contract as a whole. For example “when the contract is signed” relates to the entire contract, and “when the contract line is terminated” relates to a line of the contract.

3.9.1.5 Outcomes

An outcome is an automated process that performs a task such as initiating a service request workflow or sending a notification. When the condition is true, the outcomes associated with that condition are performed.

An outcome is initiated using Oracle Workflow. For versions prior to 11.5.3 the profile option "OKC: Success Message Recipient" is setup to notify a recipient of a successful outcome. Oracle Workflow has the capability of notifying a recipient of the success or failure of an outcome. The recipient can be the same person for success and failure or you can select a different person for both. For example a Contracts administrator maybe selected as the success recipient and a system administrator is selected as the failure recipient.

Before an outcome can be associated with a condition, it must be defined using the Process Definition window. There are four types of outcomes: workflow, PL/SQL procedure, alert, and script. Workflow and PL/SQL procedure are outcomes. Alerts are synchronous outcomes.

You cannot use script for outcomes. Script is not referring to a SQL script. Script is only valid for the type of "outcome" to support Relationship Plan functionality as a synchronous event.

3.9.2 Query a Condition

You can query a condition using the Query Condition form. From this form you can also display the Condition Occurrence Details window. This window shows the details for a condition occurrence.

Steps

1. From the Contracts Manager responsibility, choose Contract Events > Query Condition**.** The Query Condition window appears.
2. Enter your search criteria and execute.
3. If the Last Occurrence field is populated with a date, then click **Last Occurrence**. The Occurrence Details window appears. This "view only" window displays the following attributes:
   - Occurrence Date: The date that the condition evaluated to true.
   - Condition Name: Name of the condition.
   - Action Name: Shows the action that was triggered for the condition to evaluate to true.
   - Action Attributes
     - Action Attribute: Shows the attributes of the action used in the condition.
     - Attribute Value: Shows the value of the action attributes when the condition was evaluated true.

3.9.3 Copying a Condition Template

Use this procedure to copy a condition template into your contract.

Steps

1. Navigate to the Contracts Authoring window.
2. Click the **Conditions button.**
3. Select **Copy From Template** from the Actions menu.
4. Use the Condition Template list of values (LOV) to enter the condition template name.
5. Modify or amend the condition for the current contract.

3.9.4 Creating a Contract-Specific Condition

Use this procedure to create a contract-specific condition for your contract.

Steps

1. From the Navigator, choose Contract Events > Define Independent Conditio**n.** The Independent Condition window appears.
2. Enter a name and a description.
3. Select the **Create a Task** check box if you want to create a task. You have access to the tasks through the CRM Task Manager as well. Creating a task requires entering a task owner.
4. Select the condition type. For the Action you must select an action from the Action Based Conditions LOV. For the Date you must enter the number of days, qualify before or after, and the triggering date.
5. For condition of type action choose if the event is evaluated only once or each time the condition is met. For example: Select the Evaluate Once Only check box if you want to evaluate the condition to true only if the counter exceeds 1,000 for the first time. Do not select the check box, if you want the condition to evaluate to true each time the counter reaches 1,000.
6. Enter information to create condition lines.
7. Display the condition lines and check validity.

   Select the **Show Condition** button to display all condition lines and check their syntactical validity on-line. The Valid field is displayed only and gives you a quick overview if the condition has validated successfully.
8. Select Outcomes previously defined in the Process Definitions window.
9. Select the **Parameter** button to assign fixed values or action attribute values to the outcome parameters.
10. Save your work.

3.10 Running the Quality Assurance Check

Use this procedure at any time to check if your contract passes Quality Assurance (QA). The results are displayed as soon as the check completes. The levels of Severity are:

- Success
- Warning
- Error

For any Process Name that receives an "Error", it means the contract has failed QA. The contract **cannot** be submitted for approval until errors have been resolved within the contract. This procedure is not required before submitting a contract for approval because a check is automatically made during the approval process. You can use this check to verify the completeness of your contract.

Steps

1. Navigate to the Contracts Authoring window.
2. Click **Check Contract.** The Quality Assurance Results window appears.
3. Review the results.
4. If contract passed QA, then click **Continue Approval.**
5. If Contract failed QA, then review causes.
6. Click **OK** to close the Quality Assurance Results window.
7. Revise contract as needed, and repeat this procedure.

3.11 Submitting Contract for Approval

You can submit contracts for approval from the Contracts Authoring form or use the QA report.

3.11.1 Submitting From Authoring Form

This procedure would be used by a contract administrator for submitting the contract for approval. The contract manager or approver follows this procedure for locating the contract and approving, rejecting, or reassigning the contract.

Prerequisites

This procedure requires Oracle Workflow for contract approval and signature.

Steps

1. Navigate to the Contracts Authoring window.
2. From the **Actions** menu, choose **Submit for Approval,** or select the **Submit for Approval** from the Contracts Authoring window. The Quality Assurance check executes automatically. The contract can only be submitted for approval only if it **passes** Quality Assurance.

3. Click **Continue Approval**. A Note window appears with a message "Process started successfully". Click **OK**. Another Note window appears with a message "The process APPROVAL PROCESS is active for this contract. You cannot change this contract." Click **OK.**

> **Note:** The Active Process field within the header automatically populates with "APPROVAL PROCESS".

4. Navigate to Oracle Contracts window > Launchpad tab.
5. Click **Find.** The Inbox Find window appears.
6. Select "Open" for Select Status.
7. Select "Contract Approvals" for Select Notification Type.
8. Click **Find.**
9. Select the contract from the Inbox.
10. Click **Respond.** The Worklist window appears.
11. From the Subject column, click the title (Contract XXX - requires your approval). The Notification Details window appears.
12. Perform one of the following operations: Approve, Reject, or Reassign.

Approve

1. If you want to approve the contract, click **Approve.** The Worklist window appears.
2. Refresh your browser. The Subject column contains a message "Contract XXX - has been approved by........". You are now ready to have contract signed.

Reject

1. If you reject the contract, enter the reason in the Note region.
2. Click **Reject.** The Worklist window appears.
3. Refresh your browser. The Subject column contains a message "Contract XXX - has been rejected by ...."

4. From the Subject column, click the title (Contract XXX - has been rejected by....). The Notification Details window appears. At this point the contract has to be revised and submitted for approval again.

Reassign

1. If you want to Reassign, click **Reassign**.The Notification Details window appears.
2. Select a name from the LOV for Reassign to.
3. Select one of the following:
   - Delegate authority for responding to this notification
   - Transfer ownership of this notification
4. Click **OK.**

3.11.2 Submitting Through QA Report

The Contracts QA Report is a concurrent program which enables submission of contracts for approval through a batch process. The parameters for this program include:

Parameter	Description
From Contract Number	The first contract number for a batch.
To Contract Number	The last contract number for a batch.
From Start Date	The first start date of a contract for a batch.
To Start Date	The last start date of a contract for a batch.
Contract Status	Enables you to select a status, i.e., "entered" from an LOV.
Level of Details	Enables you to select one of three reports: ▪ Complete Report ▪ Contracts with QA Errors or Warnings ▪ Contracts with QA success
Submit for Approval	Setting the parameter to yes, submits contracts for approval after the successful QA check.
Ignore QA Warning	Setting to yes causes contract to be submitted for approval despite QA warnings.

Steps

1. From the Contracts Manager Responsibility, (N) Control > Requests > Run.
2. Select Contracts QA Report for Request Name.
3. Enter a contract number for From Contract Number.
4. Enter a contract number for To Contract Number (Optional).
5. Enter a From Start Date or accept default.
6. Enter a To Start Date (Optional).
7. Select a Contract Status from the LOV (Optional).
8. Select Level of Details report type.
9. Select Yes or No for Submit for Approval.
10. Select Yes or No for Ignore QA Warning.
11. Click OK.
12. Click Submit.
13. View your request. This can be done by clicking View Output from View Requests. The Contract Submission report appears.

3.11.3 Signing the Contract

The contract is signed by a person having the proper authority level to do so. In many cases signing the contract enables it to become active.

Prerequisites

The contract must be approved first.

Steps

1. Navigate to Oracle Contracts window > Launchpad tab.
2. Click **Find.** The Inbox Find window appears.
3. Select "Open" for Select Status.
4. Select "Contracts Requiring Signature" for Select Notification Type.
5. Click **Find.**
6. Select the contract from the Inbox.

7. Click **Respond.** The Worklist window appears.
8. From the Subject column, click the title "Contract XXX - requires your signature". The Notification Details window appears.
9. Click **Yes.** The Worklist window appears.
10. Refresh your browser**.** From the Subject column, the title should say "Contract XXX - has been signed".
11. Close Worklist.
12. Navigate to View > Find. The Search Templates and Contracts window appears.
13. Enter the Contract Number for the recently signed contract.
14. Click **Search.**
15. View the Status of the contract from the Results region. The Status is either "Active" or "Signed".

Guidelines

Contract Start Date When the start date of the contract is the same as the date contract is signed, then the status becomes "Active". When the start date of the contract is beyond the date the contract is signed, then the status becomes "Signed". In this case, a concurrent program will change the status to "Active" at the contract start date.

4
Contract Execution

This chapter provides the information and procedures related to executing a contract. The following topics are covered:

- Executing a Contract
- Accessing Execution
- Updating a Contract From the Overview Tab
- Viewing the History of a Contract
- Updating the Schedule
- Recording Communications
- Viewing Related Objects

4.1 Executing a Contract

During the lifecycle of a contract there are situations that may affect and change a contract. There maybe assigned tasks that need to be tracked. Certainly more than one person may have a need to monitor a contract. These individuals monitoring a contract may have unique needs. For example:

- Senior Management: Senior managers would like to have an overview and current status of the contract. They need to know all the tasks that are due or overdue in the contracts that they manage.
- Middle Management: Contract mangers and project administrators primarily focus on when the events occur, the accomplishment of deliverables, and also look for notes and comments logged about the contract. They need to know all the deliverables that are due or overdue within their groups.

- Contract Administration: Contract administrators need to keep track of their upcoming obligations and events in a contract lifecycle and also monitor change requests and modifications. They need to enter information about completing their tasks and recording occurrence of any events.
- Telesales and Teleservice Agents: Agents using the eBusiness Center have the ability to access and view contract information. Through the eBusiness Center they have a wide variety of roles and may access several contract types, including Sales Contracts and Contracts Core. This feature requires Oracle Telesales integration. For more information on accessing the eBusiness Center and viewing contracts see, *Oracle TeleSales User Guide.*

The Contract Execution component provides visibility to all the contractual items that affect contract execution.

4.2 Accessing Execution

Follow this procedure for accessing the execution component.

Prerequisites

You must have access to a previously saved contract.

Steps

1. Using the Contracts Manager responsibility, navigate from Navigator - Contracts Manager > Launch Contracts, click Open. The Oracle Contracts window appears. Select the Contract Navigator tab.
2. Open a Contract Group and select a contract.
3. Either double-click the selected contract or right click mouse to access pop-up menu. From the pop-up menu, select Execution. A window appears having the contract number as the window name.

4.2.1 Updating a Contract from the Overview Tab

The Overview tab enables you to view the contract, update the contract, extend or terminate a contract line.

Steps

1. From the Contract Navigator tab, open a Contract Group and select a contract.
2. Double click the contract. The execution window opens.

3. Select a contract line.
4. Right click the contract line and select Open. The Contracts Authoring window appears.
5. Click Open for Update. Contract Status changes to QA Hold.
6. Enter your updates.
7. Click Check Contract.
8. Review QA Results.

4.2.2 Viewing the History of a Contract

The status of a contract changes during its life cycle from the time it is created to the time it is expired or terminated.

Use this procedure to view status change history or older versions of a contract.

Steps

1. From the Contract Navigator tab, open a Contract Group and select a contract.
2. Double click the contract. The Execution window opens.
3. Select the History tab.
4. To view the status change history, in the Select field, choose the Status Change option. You can view the following information about status change:

- Date
- Contract version number
- Current status and status prior to change
- The person who initiated the change
- Manual or automatic change
- Reason
- User comments (when the change is manual)

5. To review versions, in the Select field, choose the Contract Versions option. All major versions are displayed.
6. Select the version you want to review.
7. Click Open.

4.2.3 Updating the Schedule

Use this procedure to view scheduled events, update completed events, and record contingent events.

Steps

1. From the Contract Navigator tab, open a Contract Group and select a contract.
2. Double-click a contract. The execution window opens.
3. Select the Schedule tab.

Viewing Events

4. Select a Start Date (or you can leave it blank) from the LOV.
5. Select a View from the LOV (such as All Tasks, Completed Tasks, and so on).
6. Click Refresh.

Changing Event Status to Complete

7. Repeat steps 4-6.
8. Select Event.
9. Click Complete. The Record Task Completion window appears.
10. Select the Actual Date from LOV.
11. Click OK.
12. Click Refresh. The Status for the selected event should indicate Closed.

Recording a Contingent Task

13. Select a Start Date from the LOV.
14. Select for View “Contingent Tasks” from LOV.
15. Click Contingent. The Record Contingent Task Event window appears.
16. Select Event Type from LOV.
17. Select Occurrence Date from LOV.
18. Select Task Owner from LOV.
19. Click OK.
20. Click Refresh. The task appears.

4.2.4 Recording Communications

The Communications tab allows you to record and view communications between any two parties... not necessarily the contract parties. The following party roles can be involved:

- Party Contacts and Employees (Sell contract)
- Employees and Employees (Both)
- Supplier Contacts and Employees (Buy contract)

Any resource can be involved in the communication. These interactions should be possible irrespective of the status of a contract. Such communications can range from phone calls and e-mails to formal letters sent. You can use the attachments feature to attach files or e-mails to communications.

Prerequisites

Action Items and Outcomes must be setup in Interaction History. From the file menu, select Switch Responsibility > CRM Administrator > Interaction History Administration.

Resources involved in the communication have to be registered in Resource Manager. From the file menu, select Switch Responsibility > CRM Administrator > Resource Manager > Maintain Resources > Import Resources.

Steps

1. From the Contract Navigator tab, open a Contract Group and select a contract.
2. Double-click a contract. The execution window opens.
3. Select the Communications tab.
4. Click Create. The Communication Details for XXXX (Contract Number) opens.
5. Select a Communication Type.
6. Select a Start Date.
7. Select an Agent Name.
8. Select a Party Role.
9. Select an Action Item.
10. Select an Outcome.
11. Enter a Subject.

12. Enter additional information in Details.
13. Click **OK**.

4.2.5 Viewing Related Objects

This tab enables you to view contact quote information within Oracle Quoting or order details within Oracle Order Management. This information is viewed when a contract has been created from a quote or a sales order has been created from a contract.

Note: This tab is only accessible when the integration to Oracle Quoting or Oracle Order Management has been set up.

Steps

1. Select Related Objects tab.
2. Select contract details to review.
3. Click Details.

5 Contract Administration

This chapter contains the following topics as they relate to administering or managing contracts:

- Maintaining Contract Groups
- Creating a Contract Template
- Copying a Contract
- Creating a Subcontract
- Creating a New Version
- Changing Status of a Contract
- Creating a Change Request
- Running Contract Reports
- Using Discoverer Reports
- Running an XML Report
- Renewing a Contract
- Extending a Contract
- Terminating a Contract

5.1 Maintaining Contract Groups

Once you create a contract group you need to maintain its membership. You can manage and oversee the groups that were created by the group definition.

This topic consists of the following:

- Contract Groups Overview
- Creating Contract Groups
- Assigning Contracts

5.1.1 Contract Groups Overview

Contract groups provide a convenient way to organize contracts using any criteria you like. They are similar to folders.

Create as many contract groups as needed to help you and other users find related information about contracts and contract parties. You can use any number of groups to classify a single contract and you can nest groups within other groups.

Note: A very large number of contracts in a contract group will adversely impact performance. You can increase performance by adding subfolders and distributing the contract into more subcontracts.

The groups you create can be public or private. Use public groups to group your contracts in a structured way that follows your company or department organization structure or business procedures. Use private groups to allow users to group contracts by their personal preferences.

If the system administrator gives you the privilege, then you can also create public groups that are accessible to all users. Public groups can contain individual contracts as well as other public or private groups.

Groups do not permit or restrict access to contracts.

Once you create a contract group, you need to maintain its membership. You can manage and oversee the groups that were created by the group definition.

5.1.2 Creating Contract Groups

You can create, modify, or delete contract group folders using the Contract Groups form. During group creation you can enter the group name, short description, and specify whether the group is public or private. A group can be specified as public only if the user has the proper authority to do so otherwise the group is designated as private.

Seeded Groups

Contracts is seeded with the following groups:

- Contracts: This group is available to you when a contract is created for the first time.
- Template: This group has template contracts seeded with Oracle Contracts.

Public Group Guidelines

- A public group name must be unique across all public groups.
- A public group cannot have a private group as its member.
- Recursive relationship is not allowed. For example, if group A is a member of group B and group B is a member of group C, then group C (or group B) cannot be a member of group A.
- If a user, who is not authorized to create a public group wants to assign a contract to a public group, they may be able to do so only if they have appropriate security access (modify) for that contract.

Private Group Guidelines

- A private group name is always unique for user, across all private groups owned by that user.
- A private group owned by one user can have that same name as that of another private group owned by another user.
- A private group name can be the same as a public group name.
- A private group can have a public or a private group as its member.
- A private group cannot have a private group owned by another user as its member.
- A private group cannot be a member of itself.
- Recursive relationship is not allowed.
- Users can assign contracts to their own private groups if they have appropriate security access (read-only or modify) to those contracts.
- A user can switch a private group to a public group only if currently there is no other public group with the same name and the user has proper authority to create a public group.

- The group being switched to public cannot not have any private group as its member.
- A user can switch a public group to a private group only if currently there is no other private group with the same name for that user and the user has proper authority to modify a public group.
- The group being switched to private cannot have any public group as its parent group.
- A private group can only be deleted by the owner of that group.
- A public group can be deleted only by those users who have been grated public group creator privilege.
- If the group to be deleted has any member (group or contract) in it or belongs to any parent group, the users will be asked to confirm before deletion. If confirmed, the group will be deleted along with the association with its member.

The following table shows the fields and descriptions for the Contract Groups form:

Field	Description
Name	The name of the contract group.
Short Description	Contains a short description of the group.
Public	If selected this group is defined as a public group otherwise it remains private. The default value for this check box is deselected. If you do not have authority to define a public group, this check box will remain disabled.

Prerequisites

If you want to create public groups, you must set the Profile Option OKC: Public Group Creator. This can be set at the responsibility and user levels.

5.1.2.1 Create Contract Groups

Steps

1. From the Contracts Manager responsibility, **(N) Contract Groups > Define Contract Groups.**
2. Enter a name for Contract Group.
3. Enter a description.

4. If this group is Public, then select Public check box.
5. Close the form and save your work.

5.1.2.2 Delete Contract Groups

Steps

1. From the Contracts Manager responsibility, **(N) Contract Groups > Define Contract Groups.**
2. Select the contract group you want to delete.
3. (M) Edit > Delete. You may receive a note warning you that the group may either have contracts or is a subgroup to another group.
4. Click OK.

5.1.3 Assigning Contracts

Use the Contract Groupings form to maintain group hierarchies or to assign contracts to groups. Grouping of contracts is for organizational purposes only.

You can use the Contract Grouping form to change the group that a contract is associated with, without opening the contract for update. Contracts with any status (including Active status) can be added or moved from one folder to another.

You can assign a contract to one or more groups. This can be done while authoring a contract or later by accessing the relevant contract group.

The following table shows the fields and descriptions for the Contracts tab of the Contracts Groupings form:

Field	Description
Currently Assigned Contracts	This is the list of contracts that are currently assigned to the selected group.
Available Contracts	This panel displays all the contracts that are currently available for assignment. Only those contracts for which you have the Read or Modify access are displayed.
Find	To open the Search Templates and Contracts form, click the Find button.

The following table shows the fields and descriptions for the Groups tab of the Contracts Groupings form:

Field	Description
Currently Assigned Subgroups	This is the list of groups that are currently assigned to a selected group.
Available Subgroups	This panel displays all groups that are currently available for assignment.
View	This LOV has two options: Unassigned and Show All. It allows you to view either unassigned groups (not belonging to any group) or all groups belonging to other groups and unassigned ones in the Available Contracts panel.

5.1.3.1 Assign a Contract Group to a Group

Steps

1. From the Corporate Contracts Manager, choose **Contract Groups > Assign Contract Groups (T) Groups.**
2. Select a contract group from the Contract Navigation tree. The available groups for assignment are displayed.
3. Select an available subgroup.
4. Click the left arrow to assign the subgroup. The subgroup appears in the left pane.
5. Close the form and save changes.

5.1.3.2 Assign a Contract to a Group

Steps

1. From the Corporate Contracts Manager, choose **Contract Groups > Assign Contract Groups (T) Contracts.**
2. Click **(B) Find.** The Search Templates window appears.
3. Enter your search criteria.
4. Click **Search**.
5. Navigate to the **Contract Groupings** window. The contract number should appear in the Available Contracts region.

6. Select the contract number and click the left arrow.
7. Save your changes and close the Contract Groupings window. The contract should be assigned to a new contract group.

5.1.3.3 Assign a Contract to a Group Using the Authoring Form

Steps

1. From the Corporate Contracts Manager, choose **Launch Contracts (B) Open.**
2. If this is a new contract, **(N) (T) Contract Navigator (M) Tools > New**.
3. If this is an existing contract, select the Contract from the Contract Navigator tab and right click. From the pop up menu, select Open.
4. **(N) (T) Summary (T) Details.**
5. Select the Name from the Groups region
6. Save changes.

5.2 Creating a Contract Template

Use this procedure to create a contract template.

Steps

1. Navigate to the Contracts Authoring window.
2. Enter a contract number to identify the template.
3. Select the Buy or Sell option for intent.
4. Enter an end date.
5. In the Details subtab, enter at least one group name.
6. Navigate to **Actions > Save as Template**.
7. Enter the Template Name and optionally the Adjustment.
8. Click **OK.**

Guidelines

In some situations you may open an existing contract and save it as a template.

When you open a template within the Contract Authoring window you see Template Name as a field instead of Contract Number.

5.3 Copying a Contract

There are several ways to copy a contract, parts of a contract, or multiple contracts.

Steps

1. Navigate to the Copy window using one of the following ways:
   - In the **Contract Navigator**, select a contract group, right-click the contract, and choose **Copy.**
   - Open an existing contract. In the Authoring window, choose the **Copy from Contract/Template** option from the Action menu.
2. In the Copy window, enter the new contract name, and optionally, a contract adjustment.
3. From the left side, select the contract or part of the contract you want to copy.
4. Click the double right-arrow button to move the existing contract or parts on the left side to the right side. Anything on the right side is considered part of the new contract.
5. Optionally, click the double left arrow button to move a new contract or parts of a contract back to the existing contract area on the left side.
6. Click **Create**.

   Your new contract with copied contract information is now saved. You can then make changes to the newly created contract in the same way that you would when authoring a contract.

5.4 Creating a Subcontract

In order to fulfill the obligations of an existing contract, a party may need to establish a new contract with a third party to provide some or all of the items, such as materials or deliverables, required in the original contract. This is called creating a subcontract. These subcontracts need to maintain relationships between the components, such as terms and lines, of the parent agreement and those of the new contract. You can create a subcontract and further specify those articles or rules from the prime contract or master agreement that are to flow down to, and be incorporated into a subcontract.

Also, you can create task orders from a master agreement, with the terms and conditions of each task order linked from the master agreement. Alternatively, you can simply reference other contracts (and by inference, the terms and conditions of those other contracts) without specifying any particular details.

Using subcontracts, you can:

- Subcontract the components into an existing contract or a new contract.
- Maintain data consistency for the subcontracted contract. For example, a subcontract would not contain your customer as a customer in the subcontract.
- Select multiple lines or sublines for subcontracting.
- Inherit terms and conditions from higher levels in the hierarchy for the subcontracted lines or sublines.
- Reference terms and conditions.
- Modify the copied components.

You can select the lines or sublines and also the components such as parties, articles, and rules at the contract header level for subcontracting. After selecting the components, click the right arrow button to move them to the right navigator window.

When you create a subcontract, all selected components are copied into the subcontract. You can modify the components. You can also select parties to copy to the subcontract, but normally this is not useful because the roles change for a subcontract.

Prerequisites

An active contract must be in place.

Steps

1. From the Navigator, choose **Launch Contracts.**
2. In the Contract Navigator tab, select a contract group.
3. Right-click a contract and choose **Subcontract.**
4. On the right side, enter the name and optionally a modifier for the new contract.
5. Select a category for the new subcontract.
6. Select the Intent.
7. Select the Perspective.
8. If you want to reference to the subcontracting contract instead of copying components, then select Keep References. You cannot change referenced components in the new subcontracted contract.
9. Highlight the desired components in left navigator, click the forward arrow button and click the Create option in the Subcontract Components Selection pop-up menu.

You can make changes to the new subcontract in the Contract Authoring window.

5.5 Creating a New Version

Use this procedure to create a new version of a contract. Subsequent versions can be viewed from the History tab within the Contract Execution window.

Steps

1. From the Navigator, choose **Launch Contracts.** The Oracle Contracts window appears.
2. In the left window of the Contract Navigator tab, select a contract group.
3. Right-click a contract and choose **Create New Version.** This creates a new version of your contract.

Guidelines

When you create a new version, the digit in front of the period (the main version) is increased by one. The minor version is reset to zero.

5.5.1 Contract Versioning Without Revert Option

Creating historical version for contracts with huge amounts of data can be a time consuming process. To improve the performance, the following profile options are now available:

- Default Contract Revert Option: Use this option to indicate whether to automatically create a backup version when active contracts are opened for update or change requests are applied. If the profile is set to Allow Revert, when you open a contract for update and save the changes, the system will allow you to disregard the changes by selecting the Revert option from the Action menu. If the profile is set to "Do Not Allow Revert", the system will not create a backup version of the contract, and therefore, you cannot reverse the changes made to the contract.
- Warn/Confirm Default Contract Revert Option: If this option is enabled, when an active contract is opened for update or a change request is applied, the system displays the Warning/Confirmation window. You can use this window to confirm or skip the contract version creation. In the Warning/Confirmation window, you also have the option to override the Default Contract Revert profile value.

5.6 Changing the Status of a Contract

Use this procedure to change the status or status type of a contract. The contract status determines the operations allowed in the contract and status type.

In the following table, *auto* means that the Status Change concurrent program automatically changes the status when the conditions for a status change are met.

Status to From	Entered	Signed	Active	Hold	Expired	Terminated	Canceled
Entered	Yes	Yes/ through approval	Yes/ through approval	No	No	No	Yes
Signed	No	Yes	Yes/auto	Yes	Yes/ auto	Yes	No
Active	No	No	Yes	Yes	Yes/ auto	Yes	No
Hold	No	Yes	Yes	Yes	Yes	No	No

Status to From	Entered	Signed	Active	Hold	Expired	Terminated	Canceled
Expired	No	No	Yes	No	Yes	No	No
Terminated	No	No	No	No	No	Yes	No
Canceled	Yes	No	No	No	No	No	Yes

5.6.1 Changing Status Manually

This procedure is used when the status transitions allow a manual change.

Steps

1. From the Navigator, choose **Launch Contracts.**
2. In the **Contract Navigator** tab, select a contract group.
3. Right-click a contract and choose **Change Status.** The Contract Status window appears.
4. Select the New Status from the list of values.
5. Select a Reason from the list of values. If you need to add more reasons for the status change, your system administrator can add more options in the Lookup Codes.
6. Use the Comments field to enter any additional information (optional).
7. Close the Contract Status window and save your changes.
8. In the **Contract Navigator** tab, right click and select Refresh from the pop up menu. The contract shows the new status that you assigned.

5.6.2 Changing the Status of a Contact Automatically

There are two concurrent programs used to automatically change the status of a contract:

- Contract Status Change by Range
- Contract Status Change by Contract

These programs are used when the status transitions are not manual. Certain status transitions are made based upon the start date or end date on a contract or on a contract line. For example, a contract gets expired when an end date is reached. A contract becomes active from the signed status when the start date is reached. This is achieved through the concurrent program.

5.6.2.1 Contract Status Change by Range

This concurrent program may have already been scheduled to run as part of the setup for Contracts Core.

Steps

1. From the Contracts Manager responsibility, (N) Control > Requests > Run.
2. Select the Contracts Status Change by Range option for the name.
3. Enter the following optional parameters:
   - Category
   - From Number
   - To Number
   - From Modifier
   - To Modifier
4. Click OK.
5. Click Submit.

5.6.2.2 Contract Status Change by Contract

This program works for a specific contract.

Steps

1. From the Contracts Manager responsibility, (N) Control > Requests > Run.
2. Select the Contracts Status Change by Contract option for the name.
3. Enter the following parameters:
   - Contract Number (Required)
   - Contract Number Modifier (Optional)
4. Click OK.
5. Click Submit.

5.6.3 Status Change History

The status of a contract changes during its life cycle from the time it is created to the time it is expired or terminated.In Oracle Contracts any new contract is created with the Entered status. You can use the Status Change History feature to review the history of status change for a contract. The History tab of Execution window displays the following information about status change:

- Date
- Contract version number
- Current status and the status prior to change
- The person who initiated the change
- Manual or automatic change
- Reason
- User comments

5.7 Creating a Change Request

Change Request is a formal way to document changes to a contract. A request is approved by the approver defined in the workflow selected and submitted for the change request. Once your change request is approved, the administrator assigned in the change request receives a notification that the contract can be changed.

An internal key gives the change request administrator Update access to the contract. When the administrator changes, it is locked for other change requests until the change request is closed.

Prerequisites

The status and operations must allow changes for that category and status.

Steps

1. From the Navigator, choose **Launch Contracts.**
2. In the Contract Navigator tab, select the contract you want to change.
3. Right-click the contract and choose the **Create Change Request** option. The Create a Change Requests window opens.
4. Enter the request name and a description.
5. Enter the requester's name. This person will receive a workflow notification when changes are approved and can be applied to the contract.
6. Enter the request date and effective dates.
7. If you want to version the changed contract, then select Version.
8. If you want to have a signature required, then select Signature Required.
9. Record the lines where you are requesting a change and the exact nature of the change.
10. Select the **Admin** tab.
11. Select the Approval workflow.
12. Select an Administrator.
13. Select Party Approvals (optional).
14. Save record. If not done, you receive the "Please create/save the change request before submitting for approval." error message.

15. Click **Submit for Approval.** You should receive the Note message "Submitted for approval." Click OK.

5.7.1 Approving, Applying, and Closing Change Requests

The change request must first be approved before the contract can be changed. After the change request has been approved, you can open the contract and apply the changes as described in the change request notification. Once you start editing the contract, you automatically lock the contract for other users with an approved change request.

Prerequisites

In order to apply changes, the change request notification must be open in your inbox and no other change request can be in process.

Steps

Approving a Change Request

1. From the Navigator, choose **Launch Contracts.**
2. From the Launchpad, find the Change Request Approval (assuming the approval workflow routed the change request approval to you, otherwise switch users).
3. Select the contract from the Inbox and click **Respond.**
4. Click **Approve**.
5. Requery the Inbox to ensure the Change Requests is Approved for the specific contract.

Applying Changes

6. In the Launchpad tab, select the approved change request notice in your inbox and click Open. The Contract Authoring window appears (the status of the contract should be QA Hold).
7. Edit the contract according to the approved changes.
8. Save and close the contract.

Closing a Change Request

9. In the **Contract Navigator** tab of the Oracle Contracts window, select the contract that you changed (make sure you have refreshed the window).

10. Double-click the contract. The Contract window appears.
11. **(N) (T) Overview.** Select the contract, right click and select the Open option from the pop up menu.
12. Click **Check Contract**. If QA is successful you should receive the "QA completed successfully!" note.
13. Click OK. If the contract passes the QA, the status returns to "Active".

5.7.2 Updating Contracts Online

You can also update a contract (after the contract has gone through the approval process) through the Update Online operation. Once the changes are entered and saved, a QA check is run for the contract. If you are unable to resolve QA issues, there is a "Revert" option that allows you to recover the original contract before the changes. If the contract passes the QA then the status returns to "Active".

Prerequisites

- Set the OKC: Global Update Privileges profile option to "Yes".
- Applies only to Contracts with Active, Signed, and QA Hold status.
- Grant the Update Online function to the user responsibility
- User must have, at least, Read Only access to the contracts.
- Other users should not have the Change Request lock on the contract.

Steps

1. Open the Contracts Authoring window for a contract.
2. Click the Open for Update button. The Contract Status should change from "Active" to "QA Hold". This locks the contract.
3. Make the necessary changes to the contract.
4. Save changes.
5. Click Check Contract.
6. Review the quality assurance results.
7. If QA is passed, the Contract Status changes from "QA Hold" to "Active".
8. If QA fails, the status will remain "QA Hold". You can recover the original contract by selecting the Revert option from the Actions menu.

5.8 Running Contracts Reports

Oracle Contracts provides the following reports:

- Contracts Details Report: This report provides key data such as Contract Number, Parties, Articles, Rules and so on for a contract.
- Contracts QA Report: You can select to have this report show: QA errors, QA success, or both QA errors and QA success.
- List of Contracts by Contract Group: These reports are run using their concurrent programs.You cannot change the format of these reports.

5.8.1 Contract Details Report

Prerequisites

Contracts Details Report requires a printer set up for printing the report.

Steps

1. From the Contracts Navigator, select **Control > Requests > Run (B) Open**. The Submit Request window appears.
2. Select Single Request.
3. Click OK.
4. In the Name field, select the Contract Details report. The Parameters window appears.
5. Select or enter the following based on your requirements:
   - Contract Number: The contract number for which you want the detailed report.
   - Party Role: The name of the parties to a contract (i.e. Customer or Vendor Name).
   - Print Articles: Select Yes or No, depending on if you want the articles to be printed.
   - Print Article Text: Yes or No
   - Print Sections: Yes or No
   - Print Rules at Header Level: Yes or No
   - Print Rules at Line Level: Yes or No

6. Click Submit.
7. Click Schedule.
8. Select when to run the Job.
9. Click OK.
10. Click Submit.
11. Review the results.

5.8.2 Contracts QA Report

The Contracts QA Report can be generated after you submit a contract for QA check.

Steps

1. From the Contracts Navigator, select **Control > Requests > Run (B) Open**. The Submit Request window opens.
2. Select the Single Request option.
3. Click OK.
4. In the Name field, select the Contract QA report. The Parameters window appears.
5. Select or enter the following based on your requirements:
   - From Contract Number: Enter the contract number range from where to start.
   - To Contract Number: Enter the contract number range from where to end.
   - From Start Date: Start Date from which you want the QA reports of the contract
   - To End Date: End Date to which you want the QA reports of the contract
   - Contract Status: Status of a contract. You can select Active, Cancelled, Entered, Expired, QA Hold, Terminated etc.
   - Level of Details: Complete Report, Contract with QA Errors, Contract with QA Success.
6. Click OK.
7. Click Schedule.

8. Select when to run the Job.
9. Click OK.
10. Click Submit
11. Switch Responsibilities to System Administrator to view the results.
12. From System Administrator Navigator > Requests > View. The Find Requests window appears.
13. Click Find. The Requests window appears.
14. Review the results.

5.8.3 List of Contracts by Contract Group

Steps

1. From the Contracts Navigator, select **Control > Requests > Run (B) Open**. The Submit Request window appears.
2. Select the Single Request option.
3. Click OK.
4. In the Name field, select the List of Contracts by Contract Group report. The Parameters window appears.
5. Select or enter the following based on your requirements:
   - Group: The Contract Group containing the contracts
   - Role: The Customer Role such as Buyer, Contractor, and so on
   - Category: The contract categories
   - Start Date From: The contract start date
   - Start Date To: The contract end date
   - Contract Status: Status of a contract. For example, Active, Cancelled, Entered, Expired, QA Hold, Terminated etc.
   - Currency: The currency type.
   - Order by Amount: Yes or No
6. Click OK.
7. Click Schedule.

8. Select when to run the Job.
9. Click OK.
10. Click Submit
11. Switch Responsibilities to System Administrator to view the results.
12. From System Administrator Navigator > Requests > View. The Find Requests window appears.
13. Click Find. The Requests window appears.
14. Review the results.

5.9 Using Discoverer Reports

Discoverer Reports is a reporting feature which allows you to search for desired contract data and export this data to a customizable report such as HTML, MS Excel spreadsheet, or other type of output. There are two seeded reports with Contracts Core: Contracts Expired but not Renewed and Contract Listing. For procedures on how to run these reports see Running Discoverer Reports.

5.9.1 Contracts Expired but not Renewed Report

This report searches for missed opportunities such as contracts that have expired. It will show a list of expired contracts but not renewed only if:

- Party role is a customer on the contract.
- Contract role is a Support Sales
- Contact person is in a sales territory.

This report displays the following fields:

Fields Included in Report		
Contract Number	Status	Amount
Currency	Start Date	End Date
Customer	Sales Person	Territory
Report ID	Last Updated Date	

Prerequisites

To determine which expired contracts to be included in this report, the following profile must be set up:

- OKC: Expired Past days

5.9.2 Contract Listing

This report allows you to use the same search criteria as the Search Templates and Contracts Query window to identify contracts and view the list in Discoverer.

Fields Included in Report		
Contract Number	Modifier	Version
Category	Description	Start Date
End Date	Status	Approved Date
Signed Date	Terminated Date	Renewed Date
Canceled Date	Last Update Date	Currency
Amount	Known As	

With these reports, contract administrators and managers can analyze which contracts expired but were not renewed and they can view a list of contracts defined by a custom query using their own search criteria.

5.9.3 Running Discoverer Reports

Follow this procedure for running Discoverer Reports.

Reference

Oracle Contracts Core Implementation Guide

Prerequisites

The User Name selected for login must have assigned privileges.

Steps

1. Login to the Contracts Manager responsibility.
2. Select Launch Contracts.

3. From the menu bar, navigate to Tools > Reports. The Contract Reports pop-up window appears.
4. Select the Contracts Listing option from LOV.
5. Click OK. The Contracts Reports window appears.
6. Enter your search criteria.
7. Click Print. The Contracts Listing page appears.
8. Select the Export Data link. The window refreshes showing an LOV for "What export format do you want?".
9. Select Export Format from LOV, such as Microsoft Excel Workbook.
10. Click Export Data. An Excel spreadsheet appears displaying Contract Listing data.
11. Optionally, save to local drive.
12. Close Discoverer browser windows.
13. Repeat above steps for running the "Expired Contracts but not renewed" report.

5.10 Running an XML Report

Follow this procedure when initiating contract preview from the Contracts Authoring form. You can use this procedure for a contract of any status that has Line Items and Articles defined. Selecting from the main menu **Tools > HTML Preview** or **Tools > MS Word Preview** a validation will automatically run which checks that all articles of the contract have been added to the Sections tab. You can choose the report type and file format that need to be generated and displayed in your browser. The report can then be printed or saved from the browser.

Reference

Oracle Contracts Core Implementation Guide, Setting Up XML Reports

Prerequisites

A contract must be created for preview.

Steps

1. Navigate to the Contracts Authoring form and select the Articles tab.

2. Review and update articles including any Keywords (tags) in the articles. For example, <CUSTOMER_NAME/> may terminate any program license at any time; however, termination shall not relieve obligations due to <CUSTOMER_NAME/> specified in Section 4.4. The keywords that have already been defined in the XML file can be inserted directly into article text, either in the article library or in the article for a specific contract.
3. Click the Sections tab.
4. Select the sections and sequence from the tree located to the left of the window.
5. Select the articles and sequence you wish to print. If articles are not included in the Sections tab they will not be printed. When the number of articles on the Sections tab is different then the number of articles listed in the Articles tab a warning message appears. The message alerts you that articles not included in the Sections tab will not be printed.
6. Save your work.
7. Navigate to **Tools** menu and select one of the following:
   - **HTML Preview** - The contract format is based on the XML stylesheet chosen and previewed in HTML.
   - **MS Word Preview** - The contract format is based on the XML stylesheet chosen and previewed in MS Word.
8. Select a report from the Report Types window. If an article is not included in the Sections tab, it will not be printed. A warning message appears alerting you that the number of articles listed in the Articles tab is different than the number of articles in the Sections tab.
9. Review the file generated.
10. To print the report select: (N) File > Print
11. If you have Adobe Acrobat installed, you can save the report as a pdf file. For example:
    - (N) Save As
    - Enter the file name. For example, Myreport.pdf.

5.11 Renewing a Contract

Renewing a contract does not affect the current contract. It creates a new contract by copying the current contract. You can renew a contract only once.

For example: You can renew contract A100-2001 and create the renewed contract A100-2002. Then you cannot renew the contract A100-2001 again, but you can renew contract A100-2002 into contract A100-2003.

Prerequisites

The contract must be in active, signed, or expired status.

Steps

1. From the Navigator, choose **Launch Contracts.**
2. In the **Contract Navigator** tab, select a contract group.
3. Select one or more contracts, right-click, and choose **Renew.**
4. To keep the new contract distinguishable, the modifier is defaulted to the value you set in the profile option OKC: Renewed Contract Identifier, with the current date appended. You can change the modifier to another value.
5. If the renewal is for a non-perpetual contract, the new start date is defaulted to the date following the end date of the current contract. Either select an end date for the renewed contract or enter values for duration and period. For example, to renew a contract for six months, enter `6` in the Duration field and select Month in the Period field.
6. If the renewal is for a perpetual contract, select the Perpetual check box.
7. To launch the Renewal process as a concurrent request, select the Submit Request checkbox. If you select the checkbox and click the Renew button, a concurrent request is launched and the request ID is displayed. If the Submit Request checkbox is unchecked, the Renewal will be online.
8. Click **Renew.** A copy of the current contract is saved.

5.12 Extending a Contract

Use this procedure to extend a contract. Extending a contract changes only the date a contract is scheduled to expire and possibly changes the status of the contract and lines from expired to active. You can also extend a contract line, see Extending a Contract Line

Prerequisites

The contract must have a status of Active or Expired.

Steps

1. From the Navigator, choose **Launch Contracts.**
2. In the **Contract Navigator** tab, select a contract group.
3. Select one or more contracts, right-click, and choose **Extend.** The Extend window appears.
4. If the extended contract is non-perpetual, either select a new end date for the contract or enter values for duration and period. For example, to extent a contract for a further six months, enter 6 in the duration field and select Month in the Period field.
5. If the extended contract is to be perpetual, select the Perpetual check box. The lines will also be perpetual.
6. Click **Extend**.

5.12.1 Extending a Contract Line

Use this procedure to extend a line on an active contract. Extending a line may change the end date of a contract. When the extended line is scheduled to expire on the new end date and if applicable, adjusts the end date of the contract.

Prerequisites

The contract line must have a status of Active or Expired.

Steps

1. From the Navigator, choose **Launch Contracts.**
2. In the **Contract Navigator** tab, select a contract group.
3. Double-click a contract to see the overview.
4. Select the line or lines you want to extend.
5. Right-click and choose **Extend.** The Extend window opens.
6. Either select a new end date for the line or enter values for the duration and period. For example, to extent a contract line for further six months, enter `6` in the Duration field and select Month in the Period field.

7. Click **Extend.**

Guidelines

If you extend a contract line beyond the end date of a contract, the end date of the contract is automatically updated to the end date of the extended line.

5.13 Terminating a Contract

Use this procedure to terminate a contract that is active or effective and on hold. You can also terminate a contract line, see Terminating Contract Lines.

Note: For most terminations the Contracts Core Termination form is used. However when using Contracts for Service with the contract class “Service”, a Contracts for Service “Terminate Contracts” form is used. This form displays the amount to be credited with an option to override this. After performing the processing for credits, Contracts for Service will call the Contracts Core terminate API.

Prerequisites

The contract must have a status of Signed, Active, or Hold.

Steps

1. From the Navigator, choose **Launch Contracts.**
2. In the **Contract Navigator** tab, select a contract group.
3. Select one or more contracts, right-click, and choose **Terminate.** The **Terminate** window appears.
4. Enter a termination date and a termination reason.
5. Click **Terminate.**

Guidelines

If you want to add more reasons for a termination, your system administrator can add more options in the Lookup Codes.

5.13.1 Terminating Contract Lines

Use this procedure to terminate a contract line in an active contract. If you want to add more reasons for a termination, your system administrator can add more options in the Lookup Codes.

Note: For most contract line terminations the Contracts Core Termination Line form is used. However when using Contracts for Service with the contract class “Service”, a Contracts for Service “Terminate Contract Lines” form is used. This form displays the amount to be credited with an option to override this.

Prerequisites

The contract status is Active and the contract lines have a status of Active or Hold.

Steps

1. From the Navigator, choose **Launch Contracts.**
2. In the **Contract Navigator** tab, select a contract group.
3. Double-click a contract to see the Overview.
4. Select the line or lines you want to terminate.
5. Right-click and choose **Terminate.** The Terminate window appears.
6. Enter a termination date and a termination reason.
7. Click **Terminate.**

6 Using Contracts Online

This chapter presents the following topics and processes as they apply to Contracts Online:

- Overview
- Key Features
- Accessing Contracts Online
- Searching Contracts
- Importing Contracts
- Authoring a Contract
- Updating Library of Articles

6.1 Overview

Contracts Online is a web based feature of Oracle Contracts Core. It enables companies to automate and manage their contracts more effectively. Contracts online provides access to an enterprise's global repository for the collection and dissemination of contract information. It provides users a solution to quickly upload images and files of existing hard copy contracts and referenced documents into an automated system This allows them to have a better control of their business while providing secured visibility to contracts information.

Contracts Online provides a quick and easy transition step toward automating and integrating contract information into an enterprise's e-business solution. The key benefits of Contracts Online include:

- Global visibility:
  - Internal and external party access

  - Secured access based on role and function with visibility across organizations
  - Images and document attachments with download capability
- Quick and easy way for customers to upload authored contracts (e.g. file cabinet, word, etc.).
- Light authoring process that helps the transition to sales and procurement contracts.

6.2 Key Features

The key features of Contracts Online are:

Search Contracts

The Search Contracts function enables you to quickly find contracts or templates by using a single search criteria such as Contract Number, Attachment Name, Known As, and Primary Party name. The Search Results window displays a table listing some contract attributes such as Contract Number, Primary Party, Party Role, Status, Category, Amount, and Attachments.

Create and Update Contracts

You can create contracts with minimum required information. You can also create a contract and save it as a template for future contracts. You can update contracts and templates. After a contact is created, you can search for the contract and update information such as, status, dates, and description.

Save as Contract

The "Save as Contract" feature allows you to create a new contract by simply copying from either a contract or from a template.

Create Template

You can create a template by either copying from a contract, copying from a template, or creating a template from scratch.

Attach Documents to Contracts

Contracts Online provides users the ability to attach any type of file or web page related to a contract. You can view the list of attachments related to a contract.

Library of Articles

Contracts Online provides you the ability to define the contract terms and conditions (which are the articles of a contract). You can create a central repository of articles by using the Library of Articles functionality. In the Library of Articles you can define new standard articles, create new article releases, and view and edit existing articles.

Import Contract

You can upload contracts that are stored in a local file and migrate them to Contracts Online. The import feature enables you to easily create multiple contracts based on a template or a contract.

External Party Interface

External parties to a contract can access Contracts Online to view their contracts. To be able to access the External Party Interface, the party is required to register with Oracle eBusiness Suite (Please refer to *Oracle CRM Foundation Concepts & Procedures for* registration details).

After the party is registered and given access to Contracts, he/she will be able to preview only contracts in which his/her company is one of the parties to the contract.

Preview Contract

The Preview feature enables you to review an entire contract before printing. The contract is displayed in the layout that would be printed.

Secure Access to Contracts

This feature provides the ability to grant access to individual contracts. You are able to define the users or group of users that can access a specific contract and their access level such as read only or modify.

6.3 Accessing Contracts Online

The following list represents users that would typically access Contracts Online:

- Internal: Contract administrators, legal, and sales representatives.
- External: Customers and suppliers

Note: For internal users, the "OKC: Contracts Online" responsibility is seeded. For external users, see the JTF User registration. Also make sure that the seeded "Contracts Online Party Access Enrollment" (OKC_KOL_PARTY_ACCESS key) is active and available for the chosen user type.

6.3.1 Internal Party

You can access Contracts Online through the JTF login from the Oracle Business Portal.

Steps

1. Navigate to the Oracle Business Portal.
2. Enter your User Id.
3. Enter your Password. After authentication the Contracts Online Home page appears.

Guidelines

In the CRM portal there is a link to access Contracts Online Home Page. You may be assigned a default responsibility after login from JTF. If Contracts Online is your default responsibility, then the Contracts Online Home Page appears.

Users can grant access to individual contracts. Users can define who can access a specific contract and the level of access: Modify or Read.

See Also

Granting Access to a Contract

6.3.2 External Party

External users can search for contracts on which they are one of the parties on the the contract.

Steps

1. Navigate to the Oracle Business Portal.
2. Enter your User Id.

3. Enter your Password. After authentication, the Contracts Search window appears.
4. Search for a contract by querying one of the following:
   - Contract Number
   - Known As
   - Document Name

6.4 Home Tab Overview

After logging on to Contracts Online the Home page tab appears. The purpose of the Contracts Online Home page is to provide useful information about contracts. This page is the starting point for Contracts Online product. The following bins are provided:

- Bookmarked Contracts - Displays the bookmarked contracts.
- Recent Contracts - Displays the most recent contracts being negotiated.
- Expiring Contracts - Displays the contracts that already expired or are to be expired.

You can access the contracts from any of these bins by clicking a number from the Contract column.

From the left side of the page, the following functionality and shortcuts are available:

- Create Contract - Opens the Create Contract page to enable you to create a contract.
- Advanced Import - Enables you to create multiple contracts based on what you specify in comma separated file (i.e. contract number, category, intent, attachments, etc.).

6.5 Contracts Tab Overview

The Contracts tab provides you with the ability to search and view contracts information as well as create new contracts, update existing ones, bookmark contracts, delete contracts, create templates, copy contracts, copy templates and import contracts.

When you click on the Contracts tab, the following links are available:

- Searching Contracts:
  - Add to Bookmark
  - Delete
  - Import
  - Save as Contract
  - Save as Template
  - Create Contract
- Authoring Contracts: A side navigation menu appears showing the following links:
  - General Information
  - Parties
  - Attachments
  - Articles
  - Security
  - Summary

6.5.1 Searching Contracts

The Search Contracts function enables you to quickly find contracts or templates by using one the following search criteria:

- Attachment Name: Name of the document that was attached to a contract.
- Contract Number: Number assigned to a contract.
- Known As: Name the user has entered for a given contract.
- Primary Party: Name related to a contract.

These search criteria can be used to search templates as well. You can click the Search by templates only check box to restrict your search to only look for templates.

Prerequisites:

The user has to have at least read access to the contracts that are displayed in the Search Results page.

Steps

You can search contracts from two different screens: Home Page and Contracts tabs.

1. Navigate to the Contracts tab (you can also search contracts from the Home page).
2. Select the search criteria from the drop-down menu (such as Primary Party Name).
3. Enter a value related to search criterion (such as %Vision%).
4. Click Go. The Search Results page appears.
5. Select a contract from the Select column.
6. Select one of the following from the Action drop-down menu:
   - Add to Bookmark
   - Delete
   - Import
   - Save as Contract
   - Save as Template
   - Import
7. Click Go.
8. Click the Contract Number to view the contract.

Guidelines

A user must have at least read only access to view a contract.

A user with **Read only** access will **not** be able to perform the following Actions: Delete, Save as Contract, Save as Template, and Import Contracts.

Use the Add to Bookmark to maintain your personal list of contracts available in the Home Page.

Only contracts created using Contracts Online and if the status is Entered or Cancelled can be deleted.

Use the Save as Contract to create a **new contract** by simply copying from either an existing contract or from a template.

Use the Save as Template to create a **template** by simply copying from either an existing contract or from a template.

6.5.2 Importing Contracts

There are two methods for import: Basic and Advanced.

Prerequisites

A zip file must be created containing the documents that you want to import.

6.5.2.1 Basic Import

The Basic Import function is a simple way to create multiple contracts based on a template or a contract. You can choose a template or contract and enter the location and name of a zip file which contains all documents to create a contract. For each file available in the zip file a new contract will be created and the file will be attached to the contract created.

Steps

1. From the Search Results page, select a contract or template from the Select column.
2. Select Import from the Action drop-down menu.
3. Click Go. The Import page appears.
4. Click Browse to locate and select the zip file.
5. Click Submit.

6.5.2.2 Advanced Import

The Advanced Import function enables you to create multiple contracts based on what you specify in comma-separated value (CSV) file (i.e. contract number, category, intent, attachments, etc.). The Advanced Import feature is only available from the Home Page tab.

Steps

1. From the Home Page tab, choose the **Advanced Import** shortcut**.** The Advanced Import page appears.
2. Click the Browse button to locate the Contract File Name.
3. If attachments are specified within the Contract File Name, click the Browse button to enter the Attachment File Name.
4. If you want to specify how many contracts you want to save during the import process, select the Save check box.

5. Enter the number of contracts to be saved.
6. Click Submit to start the import. If you want to delete all information, click Cancel.

Guidelines

Contract File Name

Contract File Name is a Comma-separated value (CSV) file. The CSV file must have a first line that is exactly the same (i.e., word for word, case, and space sensitive), as that specified in the Advanced Import screen. To see this header, click on the "see sample" link in the first page of import. The header is:

CONTRACTNUMBER,CATEGORY,INTENT,PERSPECTIVE,TEMPLATE,CURRENCY,AMOUNT,START DATE,END DATE,DATE SIGNED,DATE TERMINATED,TERMINATED REASON,SHORT DESCRIPTION,DESCRIPTION,PARTY1 ROLE,PARTY1 NAME,PRIMARY PARTY,PARTY1 CONTACT1 ROLE,PARTY1 CONTACT1 NAME,PARTY1 PRIMARY CONTACT1,PARTY1 CONTACT2 ROLE,PARTY1 CONTACT2 NAME,PARTY2 ROLE,PARTY2 NAME,PARTY2 CONTACT1 ROLE,PARTY2 CONTACT1 NAME,PARTY2 PRIMARY CONTACT1,PARTY2 CONTACT2 ROLE,PARTY2 CONTACT2 NAME,PARTY3 ROLE,PARTY3 NAME,PARTY3 CONTACT1 ROLE,PARTY3 CONTACT1 NAME,PARTY3 PRIMARY CONTACT1,PARTY3 CONTACT2 ROLE,PARTY3 CONTACT2 NAME,PARTY4 ROLE,PARTY4 NAME,PARTY4 CONTACT1 ROLE,PARTY4 CONTACT1 NAME,PARTY4 PRIMARY CONTACT1,PARTY4 CONTACT2 ROLE,PARTY4 CONTACT2 NAME,ATTACHDOCUMENT1 NAME,ATTACH DOCUMENT2 NAME,ATTACH DOCUMENT3 NAME,ATTACH DOCUMENT4 NAME,ATTACH DOCUMENT5 NAME

CSV File

Each subsequent line after the header represents a contract. It should have contract data in the same order as the header. Here are some important formatting rules for CSV files:

- Each item in the header must have a corresponding item in data lines with no leading or trailing spaces. If the data is null, it should still have an ending comma. Note that data is case-sensitive. Example excerpt from CSV with null AMOUNT and null END DATE:
  - 1234,Contracts For Sales,Sell,Issue,N,USD,11/02/2001, (…etc.)

- It is valid to end the line before including data for the last element. Any non specified element at the end of a line will be assumed to be null. Example valid line from CSV with null parties and attachments:
  - 1234,Contracts For Sales, Sell, Issue, N, USD,112.13,11/02/2001,,,,,,some short description, some description
- Data with commas should be enclosed in quotes: Example valid excerpt from CSV:
  - …… ……,some short description, some description, Customer, AT&T Universal Card, No, Buyer, "Bachschmidt, Nicole"

Attachments File Name

To supplement the CSV File, users can specify a zip file containing attachments. Any data in the CSV under the "ATTACH DOCUMENT * NAME" (where * is 1-5) must be in the zip file (if no contract in the CSV has attachments, it is not necessary to specify a zip file). The name should be the full name of the file, including the extension (e.g. MyContract.doc). Note that each contract in the CSV is limited to a maximum of five attachments. Extra files in the zip file, that are not referred to by any CSV contract, will be ignored.

6.6 Authoring a Contract

The main purpose of the Create Contract page is to allow users to author a contract or create a template that can be used to create contracts, this page is the starting point to author a contract. A contract in Contracts Online can get created with minimum required information:

- Entering General Information
- Adding Parties and Selecting Contacts
- Adding Attachments
- Adding Articles
  - Standard Articles
  - Non Standard Articles
- Previewing Contract
- Granting Access to a Contract

Prerequisites

The following applies to all pages when **creating** or **updating** contracts:

- All fields containing asterisk (*) are required.
- Status and operations must be setup to allow changes online.
- An active process should **not** be running.
- Only contracts created via Contract Online can be updated, except attachments that can update a Contract created via forms.
- To save changes click Apply.

References

Oracle Contracts Core Implementation Guide, Setting up Status and Operations

6.6.1 Entering General Information

The Create Contract page allows you to author a contract or create a template that can be used to create contracts based on a template, this page is the starting point for authoring a contract. The type of general information entered for a contract includes: Contract Number, Category, Intent, Description, Start Date, End Date, and so on. After the information is saved, it is displayed in the Contract Summary page. In addition to general information, parties and attachments information are also displayed in the Contract Summary page.

Prerequisites:

The user has to have modify access to the contracts category for the given responsibility.

Steps

1. Navigate to the Create Contract page by one of the following:
   - From the Home Page tab, click the **Create Contract** link.
   - From the Contracts tab, click the **Create Contract** button.
2. Enter a Contract Number. If you leave it blank the system may automatically generate the Contract Number (if autonumber is setup).
3. Choose a Category from the drop-down menu. Categories are seeded and do **not** need to be setup.
4. Enter a name for Known As that can be used to further identify the contract.

5. Select an Intent from the drop-down menu.
6. Choose a Perspective from the drop-down menu.
7. Select the Entered option for Status.
8. Select Currency. The field is conditionally required. If there is an amount, then the Currency field is mandatory.
9. Enter the Amount for the contract.
10. Select the contract Start Date.
11. Select the contract End Date.
12. Select the Save as Template check box, if you want to save as a template.
13. Enter a Short Description that will enable the contract to be recognized from the Summary window.
14. Enter a Description.
15. Enter Comments as appropriate.
16. Click **Apply** to create a contract. The **Apply** button saves the contract and opens the Contract Summary. If you want to delete all information, click **Cancel.**

Guidelines

Updating General Information

The Update General Information page is accessible from the Contracts tab by clicking the **General Information** link:

- The following fields cannot be updated:
  - Category
  - Intent
  - Renewal Number
  - Amount
- Amount cannot be changed in case there are lines assigned to a contract, this can occur for users that are running both Forms and HTML applications. The user could go to Forms and define lines to a contract that was created in Contracts Online. In this case the user will not be able to change the amount of the contract in Contracts Online.

- Contract must have Entered as its status. Status can only be changed from Entered to Cancelled, Signed, or Active.
- To change status from Entered to Signed or Active, click **Activate.** This will run the Default QA checklist to validate the contract.

6.6.2 Adding Parties and Selecting Contacts

Parties and Contacts are used to define the legal parties involved in a contract, which one is the primary party, and what their roles are in the contract. After defining the parties for a given contract, you can define the contacts assigned to each party and specify their roles.

One party can have more than one contact and for each contact role the user can define one Primary Contact in a certain period of time. The same contact role can have multiple Primary Contacts in different periods of time but not at the same time.

Steps

1. Navigate to the Parties page from the Contracts tab by clicking the **Parties** link from the side navigation menu.
2. Click **Add Parties.** The Add Party page appears.
3. Select a Party Role.
4. Select Party Name to define the party in the contract.
5. Enter a special name in the Known As field to uniquely identify the party.
6. Select the Primary Party check box if the party you are defining is the primary party.
7. Click Apply.
8. To **Assign Contacts to a Party,** select a party.
9. Click **Show Contacts.** The Contacts Summary page appears.
10. Click **Add Contact.** The Add Contact page appears.
11. Choose a Contact Role from the drop-down menu.
12. Select a Contact name from the drop-down menu. The Contact Name identifies the name of the Contact Role.
13. If this Contact Role is the primary contact, select the Primary Contact check box.

14. Select Start and End dates as appropriate for the contact.
15. Click Apply.
16. Repeat procedure for adding additional parties and contacts.

6.6.3 Using Attachments

The Attachments Summary page allows you to list and access all attachments for a specific contract. This page also serves as starting point for other pages like Attach Files, Attach Web Pages, Update Attachments, and Delete Attachments.

Prerequisites

A user has to have "Read" access to view a contract attachment. Modify access is required for Attach Files, Attach Web Pages, Update Attachments, and Delete Attachments.

Before using attachments check to ensure that there are **no** active processes running for the contract.

The operation (i.e. update online) has to be allowed in the status and operations setup, (irrespective of the current status) before using attachments.

6.6.3.1 Attaching Files

Steps

1. From the side navigation menu, select the **Attachments** link. The Attachments page opens.
2. If you want to attach a file, click **Attach Files.** The Attach Files page appears.
3. Enter the Attachment Name.
4. Select the Attachment Type such as Contract Document, email, or note.
5. Click **Browse** or enter the path where the file will be copied.
6. Enter a Description.
7. Click Apply.
8. Repeat these steps for attaching additional files.

6.6.3.2 Attaching Web Pages

Steps

1. From the side navigation menu, select the **Attachments** link. The Attachments page opens.
2. If you want to attach a URL, click **Attach Web Pages.** The Attach Web Pages screen appears.
3. Enter the Attachment Name.
4. Select the Attachment Type such as Contract Document, email, or note.
5. Enter the URL for the Web Page Address.
6. Enter a Description.
7. Click Apply.
8. Repeat these steps for attaching additional Web Pages.

6.6.3.3 Updating Attachments

Steps

1. From the side navigation menu, select the **Attachments** link. The Attachments page opens.
2. If you want to **Update an Attachment**, select the attachment row from the Attachments page. The update attachment is used only to change **attachment name, description and type**, this is **not** intended to allow changes in the attached document itself. In case you need to change the attached document, you can open the document using an editor, change it and attach the **new** document into the contract.
3. Click the icon in the Update column. The Update Attachment page appears.
4. Enter the necessary changes.
5. Click Apply.
6. If you want to **Delete an Attachment**, select the attachment row from the Attachments page. You can delete a single or multiple attachments.
7. Click **Delete.** A message appears asking for confirmation for deletion of selected attachments.
8. Click OK.

6.6.4 Adding Articles

The Contract Articles Summary page lists the articles that are defined for a contract. This page is the starting point to the add standard article and create non standard articles to the individual contract, these pages allow the user to assign standard articles from the Library of Articles and/or define non standard articles to the individual contract. From the Articles page you can do the following:

- Add standard articles to the contract
- Create non standard articles
- Delete articles
- Update articles
- View articles

When adding an article, you can search from the Library of Articles by name. You can select the articles to add to the contract from the Search Results page.

Prerequisites:

A user with Read access can only view articles.

A user will be able to define, update and delete articles according to the following rules:

- User access level: Modify Access is required based on the setup of Category and Responsibility. In case that the Responsibility has READ access but the user is given MODIFY access to the specific contract then the user will be allowed to update the contract.
- Contract needs to have status type of Entered.
- There should not be any active processes for the contract that is considered for an update.
- Status and Operations needs to be setup to allow changes online.

6.6.4.1 Standard Articles

Steps

1. From the side navigation menu, click the Articles link from the menu on the left side. The Articles page appears. For a new contract you will not see any Article Name listed.

2. Click **Add Standard Article**. The Add Standard Articles page appears.
3. From the Find Articles region, enter a name or "%" to find all articles.
4. Click Go.
5. From the Search Results page, select the articles you want for the contract.
6. Click **Add to Contract**. A Confirmation appears and the page shows the articles that were added to the contract.
7. If you want to **Update** an article, select an article.
8. Click Update. The Update Article page appears.
9. Within the Text box, enter revised text.
10. If you want to compare articles, Click Compare. The Comparison Results page appears showing changes necessary to convert the original text to the modified text.
11. Click Close.
12. From the Update Article page, click Apply. You will receive a confirmation that changes have been saved successfully.
13. If you need to **Delete** an article, select the article from the Articles page.
14. Click Delete. You receive a warning message confirming the selected article deletion.
15. Click Yes to delete.

Guidelines

When you update a standard article, the identifier for the Standard column changes from Yes to No.

6.6.4.2 Non Standard Articles

The non standard articles can be either written as a new article or copied from a standard article in the library and modified.

Steps

1. From the Articles page, click **Create Non Standard Article.** The Create Non Standard Article page appears.
2. Select one of the following:

- Create Non Standard Article from Standard Article (See Guidelines)
- Create Non Standard Article from Scratch

3. Click Next. The Create Non Standard Article page appears.
4. Enter Article Name.
5. Enter Comments.
6. Enter Article Text.
7. Click Apply. The Articles page appears showing a confirmation and the Article Name.
8. Click Article Name link to open article for viewing.
9. Click the Return to Articles link.
10. Repeat procedure for additional articles.

Guidelines

When you select the Create Non Standard Article from Standard Article option, the Create Non Standard Article page appears. Enter your changes in the New Text box. you can select **Apply** to associate the article to a contract or **Compare** to compare articles.

6.6.5 Previewing Contract

The Contract Summary page enables you to preview a contract before printing. This enables you to see the entire contract.

Steps

1. Navigate to the Contracts tab.
2. Enter criteria for contract search.
3. Click Go.
4. From the Search Results page, click the Contract Number link. The Contract Summary page appears.
5. Click Print Preview. The contract appears.

6.6.6 Granting Access to a Contract

The Security page enables you to list users and groups that have access to an individual contract. If this page does not show any data, it indicates a new contract.

From the Security page, you can do the following:

- Add users
- Add groups
- Delete user and groups of a contract.

Prerequisites:

Click the Contracts tab and search the contract that you want to assign privileges. Click the Security link to open a read only table that includes users and groups with their assigned privileges.

Steps

1. If you want to **Add Users,** click Add Users. The Add Users page appears.
2. Click Find icon to locate the Name for a User.
3. Select a Name.
4. Click Go.
5. Select one of the following Access Levels:
   - Modify
   - Read
6. Click Apply.
7. If you want to **Add Groups,** click Add Groups from the Security page. The Add Groups page appears.
8. Repeat steps 2-6 for adding groups.

6.7 Updating Library of Articles

The Articles tab provides you the ability to search and view articles in the library of articles as well as create new articles and update existing ones. The Articles tab is the starting point for the Library of Articles' information available in Contracts Online.

The library of articles is a central repository of standard articles. You can create new articles and reference them while creating a contract. Usually the library of articles is used to store articles that are common to many contracts, and those articles are known as standard articles in a contract.

Using Article Release, you can create a new article release for the same article name. This is useful when you need to update an article and the latest article release is being used for a contract. In this case you can make the updates and create a new article release.

The following options are available:

- Create article
- View article
- Update
- Add release
- Delete

Prerequisites

If the article is referenced in a contract, then the Add Release, Update, and Delete icons are disabled.

6.7.1 Creating an Article

Steps

1. From the Search Articles Library page, click Create Article button. The Create Article page appears.
2. Enter Article Name.
3. Enter Article Release.
4. Enter Release Description.
5. Enter Start Date
6. Enter Text.
7. Click Apply.

6.7.2 Viewing an Article

Steps

1. Click the Articles tab within Contracts Online. The Search Articles Library page appears.
2. Enter search query.
3. Click Go. The Search Articles Library page appears.
4. If you want to **view** an article, click the Article Name link.
5. Click the Return to Summary link to return to the Search Article Library page.

6.7.3 Updating an Article

Steps

1. From the Search Articles Library page, click the Update icon. The Update Article page appears.
2. Enter new or revised text in the Text box.
3. If you want to compare, Click Compare. The Comparison Results window appears.
4. Click Close after viewing.
5. Click Apply. The Search Articles Library page appears showing the updated Article Release number.

6.7.4 Adding a New Release

Steps

1. From the Search Articles Library page, click the **Add Release** icon. The Create Article Release page appears.
2. Enter Article Release number.
3. Save your work.
4. Enter Release Description.
5. Enter Start Date.
6. Enter new text in the Text box.

7. If you want to compare with the Previous Release, click Compare. The Comparison Results window appears.
8. Click Close after viewing.
9. Click Apply. The Search Articles Library page appears showing the new Article Release.

6.7.5 Deleting an Article

Steps

1. From the Search Articles Library page, click the **Delete** icon when you need to delete an article from the library. A Warning page appears confirming the article you are about to delete.
2. Choose one of the following:
   - Yes: To delete the article
   - No: Does not delete the article, you return to the Search Articles Library page.

7

Using Opportunity Integration

This chapter covers the following topics related to Opportunity Integration:

- Manual Opportunity Creation
- Automatic Opportunity Creation
- Opportunities Handled by Oracle Telesales

7.1 Using Opportunity Integration

Opportunity Integration enables forecast of Contracts revenue directly into Oracle Telesales. This creates revenue opportunities in Oracle Telesales from new contracts or contracts to be renewed. Opportunity Integration helps in generating an accurate sales revenue forecast. Opportunity Integration helps sales representatives track contract renewals and prevent loss of revenue.

Business Rules for Opportunity Creation

An opportunity can be created from the contract only if a category allows it. This is controlled by a checkbox in the Define Category form. The other conditions that apply on opportunity creation are:

- The contract has an Intent of "Sell". Buy contracts do not result in an opportunity.
- The contract has a customer.
- The contract has a salesperson assigned to it from the JTF Sales Group. The name of this sales representative should be specified in Contacts region of the Parties tab. This is possible only if the Vendor is selected from the Roles drop down list.

- Opportunity is created only when the category of a Contract is enabled for this purpose.
- Opportunity is created only when the lines belonging to an inventory item are involved in opportunity creation. When a line and its sub-lines are sourced from inventory, only the top line is sent to create an opportunity. The sub lines information is available in Oracle Contracts, Oracle Telesales, and Oracle Order Capture.

7.1.1 Manual Opportunity Creation

An entered contract is eligible for Opportunity creation. Opportunities can be created through **Contracts Authoring > Action > Create Opportunity**. This menu option is enabled only for contracts in Entered status. Opportunity creation requires the following set of parameters:

- Win Probability
- Expected Number of Days to Close

Win Probability can be picked from the list of values (LOV). The initial default values for both parameters are set in Telesales. The information entered in the Authoring form allows you to override the win probability defined by the profile. The expected number of days for closing of an opportunity are calculated as the number of days between the current date and the contract start date. If the expected closed date is not available, then the contract start date is used. If the expected number of days is changed, then the opportunity is created on a corresponding date.

Prerequisites

When a contract is in an Entered status, an opportunity can be created and assigned to a sales representative, who can view the opportunity via Telesales or Sales Online. In the contract on the Parties tab, for the Party role of Vendor, the contact must have a role of salesperson and name. This person must also have an associated @ FND_USER login name. For example, if the contact person is Abbott, Ms. Rachel, even though the name appears in the LOV as salesperson, she must also be associated with a user name like TSUSER.

Steps

1. From the Contracts Authoring window navigate to Action > Create Opportunity. Create Opportunity window opens.
2. Select the Win Probability

3. Select the Expected Number of Days to Close.
4. Click OK. An Opportunity will be created.

7.1.2 Automatic Opportunity Creation

An opportunity can be created automatically if a contract is set to auto renewal at or before expiration. In this scenario, the system will create a opportunity for the expiring contract. When the Contract Auto Renewal concurrent process is run, a new contract will be automatically created subsequently creating a new opportunity.

7.1.2.1 Opportunity Creation During Renewal

An opportunity is created automatically at renewal if the Contract category is eligible for opportunity creation. Some values are derived from corresponding Oracle Telesales profile values. Contracts will use the default values for Win Probability, and Expected Number of Days to Close from the Oracle Telesales profile values.

Steps

1. Navigate to Contracts Authoring **> (T) Summary.**
2. Enter the contract Start Date and End Date.
3. Click the Details sub tab. Ensure that the Auto Renewal checkbox is selected and the Number of Days Before Expiration field is entered.
4. Click Rules.
5. Click Rule Group and select Revenue from the LOV. Subsequently, Rule field displays Revenue Estimation. Rule Detail displays Estimation Percent and Date Estimate.
6. Enter Estimation Percent. This is a Win Probability.
7. Enter Date Estimate.
8. Click Parties.
9. Select Vendor in the Role LOV. Enter in the name of a valid sales representative assigned in the Contracts region.

An Auto Renewal concurrent program is run and creates opportunity when a contract is renewed.

Opportunity Creation for Contracts about to Expire

When a contract is about to expire and is not renewed, an opportunity can be created automatically. This is done using the Events engine. Oracle Contracts Core has a "create opportunity" outcome. The Date Based Assembler, a part of the Events Engine, will search for the contracts that meet this condition and will create opportunities for contracts that are about to expire.

7.1.3 Opportunities Handled by Oracle Telesales

Once an opportunity is created, it is handled by Oracle Telesales and is manually updated by the salesperson and not through any concurrent program. Every opportunity has one or more sales representatives assigned to it who can update the opportunity information. The other features of Oracle Telesales are:

- A manually created opportunity is created with a status. The status is defaulted based on profile options set at the application, responsibility and user levels. Only some statuses are not used for forecasting.
- An Opportunity can be created in any currency.
- A quote can be created from an opportunity. An opportunity and the contract does not remain in sync. An update to one does not automatically update the other.
- Products in Inventory will belong to a product category. If an Opportunity is not being created for a product, the product category must be specified.
- After an opportunity is created it can be viewed by the sales representative.

Steps

1. Switch responsibility to Telesales Agent. For this, you need to log in as a Telesales agent.
2. Navigate to eBusiness Centre.
3. Choose role and group from the LOV in a pop up window.
4. Select Party Type and choose Organization from the LOV
5. Select Organization and choose appropriate value from the LOV.
6. Click Opportunity sub tab. All opportunities are displayed on left. By clicking on a specific opportunity, the details are displayed on the right side. An opportunity name constitutes of the contract number and the modifier. The defaulted fields on that form are Win Probability, Channel, Status, Sales Stage, Close Date and Campaign Code (if required).