

**Oracle® Contracts**

Implementation and Administration Guide

Release 12.1

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Oracle Contracts Implementation and Administration Guide, Release 12.1

Part No. E13469-04

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# Send Us Your Comments

## Oracle Contracts Implementation and Administration Guide, Release 12.1

### Part No. E13469-04

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

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# Preface

## Intended Audience

Welcome to Release 12.1 of the *Oracle Contracts Implementation and Administration Guide*.

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

See Related Information Sources on page xiii for more Oracle E-Business Suite product information.

## Deaf/Hard of Hearing Access to Oracle Support Services

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<http://www.fcc.gov/cgb/consumerfacts/trs.html>, and a list of phone numbers is available at <http://www.fcc.gov/cgb/dro/trsphonebk.html>.

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## Structure

### **1 Introduction to Oracle Contracts**

This chapter gives an overview of Oracle Contracts.

### **2 Implementation Considerations**

This chapter provides implementation details for Oracle Contracts.

### **3 Implementation Overview**

This chapter describes the implementation process and the steps required to implement Oracle Contracts.

### **4 Setting Up Contract Terms Library**

This chapter describes the steps to set up the Contract Terms Library.

### **5 Setting Up Contract Repository**

This chapter describes the steps to set up the Contract Repository.

### **6 Contract Terms Library Administration**

This chapter describes administration of the Contract Terms Library.

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This chapter describes how Oracle Contracts integrates with other Oracle applications.

### **A Validations**

This appendix describes the validations in Oracle Contracts.

### **B Workflows**

This appendix describes the workflows in Oracle Contracts.

### **C Concurrent Programs**

This appendix describes about concurrent programs in Oracle Contracts.

### **D Seed Data**

This appendix describes the seed data in Oracle Contracts.

### **E Look Up Codes**

This appendix describes the look up codes in Oracle Contracts.

## Related Information Sources

### Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

### Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently
- **Online Help** - Online help patches (HTML) are available on My Oracle Support.
- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.
- **Oracle Electronic Technical Reference Manual** - The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

## Guides Related to All Products

### Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user

interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

## **Guides Related to This Product**

### **Oracle Order Management User's Guide**

This guide provides information on how to use Oracle Order Management. Use this guide to learn how to enter and update sales orders, maintain sales agreements, combine sales orders with procurement orders, and process orders. In addition, this guide describes how you can authorize and manage returns, schedule across orders, apply charges and discounts, enter shipping information for orders, raise order invoices and process invoices and payments.

### **Oracle Partner Management Implementation and Administration Guide**

Oracle Partner Management enables vendors to recruit and motivate partners to sell products. You can implement partner dashboards for partners to manage their activities and channel manager dashboards for vendors to manage and monitor partner activities and performance. You can also create partner profiles, set up partner activities, and create partner programs to help train partners and provide incentives and benefits.

### **Oracle Purchasing User's Guide**

This guide describes how to create and approve purchasing documents, including requisitions, different types of purchase orders, quotations, RFQs, and receipts. This guide also describes how to manage your supply base through agreements, sourcing rules, and approved supplier lists. In addition, this guide explains how you can automatically create purchasing documents based on business rules through integration with Oracle Workflow technology, which automates many of the key procurement processes.

### **Oracle Quoting User Guide**

Oracle Quoting enables you to create and manage customer quotes across all sales and interaction channels and if approved by the customer, convert these quotes into orders. This guide describes how to create and modify quote templates, add and configure simple and related products, manage pricing and pricing adjustments, determine customer credit worthiness, and perform real-time global product availability checks.

### **Oracle Sales Contracts Implementation and Administration Guide**

The Sales Contracts functionality is a vital part of business processes like quoting, ordering, and negotiating long-term agreements. Oracle Sales Contracts supports all the stages of a typical contract life cycle,

## **Oracle Service Contracts Implementation Guide**

This guide describes how to define a standard set of templates for various service offerings and modify them to meet your customers' requirements. You can then define the services and subscription items you want to sell, and service availability. You can organize contracts into public and private contract groups and set up automatic renewals, action-based or date-based contract events for condition-based outcomes, and integration with Oracle Contracts, Oracle Installed Base, and Oracle Sales Online. If you transfer ownership of an Oracle Installed Base item with an associated service, you can keep the service with the original owner, terminate the service, or transfer the service to a new owner and create a new contract for it.

## **Oracle Workflow Administrator's Guide**

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

## **Installation and System Administration**

### **Maintaining Oracle E-Business Suite Documentation Set**

This documentation set provides maintenance and patching information for the Oracle E-Business Suite DBA. *Oracle E-Business Suite Maintenance Procedures* provides a description of the strategies, related tasks, and troubleshooting activities that will help ensure the continued smooth running of an Oracle E-Business Suite system. *Oracle E-Business Suite Maintenance Utilities* describes the Oracle E-Business Suite utilities that are supplied with Oracle E-Business Suite and used to maintain the application file system and database. It also provides a detailed description of the numerous options available to meet specific operational requirements. *Oracle E-Business Suite Patching Procedures* explains how to patch an Oracle E-Business Suite system, covering the key concepts and strategies. Also included are recommendations for optimizing typical patching operations and reducing downtime.

### **Oracle Alert User's Guide**

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

### **Oracle E-Business Suite Concepts**

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

## **Oracle E-Business Suite CRM System Administrator's Guide**

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

## **Oracle E-Business Suite Developer's Guide**

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

## **Oracle E-Business Suite Installation Guide: Using Rapid Install**

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12, or as part of an upgrade from Release 11i to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

## **Oracle E-Business Suite System Administrator's Guide Documentation Set**

This documentation set provides planning and reference information for the Oracle E-Business Suite System Administrator. *Oracle E-Business Suite System Administrator's Guide - Configuration* contains information on system configuration steps, including defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help. *Oracle E-Business Suite System Administrator's Guide - Maintenance* provides information for frequent tasks such as monitoring your system with Oracle Applications Manager, administering Oracle E-Business Suite Secure Enterprise Search, managing concurrent managers and reports, using diagnostic utilities including logging, managing profile options, and using alerts. *Oracle E-Business Suite System Administrator's Guide - Security* describes User Management, data security, function security, auditing, and security configurations.

## **Oracle E-Business Suite User Interface Standards for Forms-Based Products**

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



## **Other Implementation Documentation**

### **Oracle E-Business Suite Diagnostics User's Guide**

This guide contains information on implementing, administering, and developing diagnostics tests in the Oracle E-Business Diagnostics framework.

### **Oracle E-Business Suite Integrated SOA Gateway User's Guide**

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

### **Oracle E-Business Suite Integrated SOA Gateway Implementation Guide**

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

## **Training and Support**

### **Training**

Oracle offers a complete set of training courses to help you master your product and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any 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 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 your product working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

## Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

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# Introduction to Oracle Contracts

This chapter gives an overview of Oracle Contracts.

This chapter covers the following topics:

- Overview
- Oracle Contracts Overview
- Key Features

## Overview

This chapter provides an overview of Oracle Contracts and its key features.

## Oracle Contracts Overview

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

- Specific products or services that they sell and buy.
- Miscellaneous contracts, such as license agreements, nondisclosure agreements, and merger agreements.
- Terms and conditions that govern pricing, shipment, payment, quality, and other mutual business and legal obligations of the involved parties.

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

- Contract Terms Library, page 1-2
- Contract Terms Authoring and Printing, page 1-3

- Contract Document Management, page 1-4
- Contract Repository, page 1-5
- Contracts Workbench, page 1-5

## Key Features

The key features of the application are:

- Contract Terms Library, page 1-2
- Authoring Contract Terms, page 1-3
- Contract Document Management, page 1-4
- Contract Deliverables Management, page 1-4
- Contract Repository, page 1-5
- Contracts Workbench, page 1-5

## Contract Terms Library

Contract administrators and legal personnel may negotiate and author a vast number of complex contracts each year. Maintaining corporate control on the terms for each contract can be a time-consuming and daunting task. The application simplifies this process by providing a centralized contract terms library.

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

With access to the library, you can:

- **Manage standard clauses:** Contract administrators and legal department users can create clauses that contain standard business language for use in contracts. They can create clauses based on business and legal requirements, route them for approvals, and publish them for use across the organization. Users can modify published clauses by creating new versions of the clause while retaining the older versions for reference and comparison. Local operating units can localize clauses, created by the global operating unit, or adopt them as is.
- **Manage contract templates:** Companies implement best practices by creating standard contract boilerplates (templates) based on their unique contracting requirements. Contract templates enable rapid assembly and creation of contracts

and minimize the overhead that is involved in legal review and approval. The use of standard language in templates ensures that all contracts comply with company and regulatory policies.

- Set up Contract Expert rules: Contract Expert is a rule-based contracts authoring tool that helps organizations define their corporate standards and policies to select additional clauses automatically during authoring as well as report on how contracts deviate from their standard policies:
  - Clause Selection rules: These rules determine when additional clauses need to be brought into a contract. You can set up these rules in the Contract Terms Library and assign them to the appropriate contract templates. Based on the contract template that is applied, any additional information in the business document, and on answering some additional questions, Contract Expert evaluates the Clause Selection rules and recommends additional clauses to be included in the business document.
  - Policy Deviation rules: As a result of negotiations on contracts, companies could negotiate terms that exceed preapproved company policies and regulatory limits. The application uses the Policy Deviation rules to capture and report changes in business terms on business documents as contract deviations.
- Import clauses: Using the Import feature, the contract administrator can reduce the time that is required for converting and importing clauses from external systems. To stay current with changes in business process or government regulations, you can use the Import features on an ongoing basis and import clause updates into the library. You can use one of the following methods to import clauses:
  - Open Interface: This method is available since the 11.5.10 release.
  - XML Data File: This method is available only in the release 12.

## Authoring Contract Terms

Oracle provides comprehensive contract authoring capabilities that are embedded in the procurement and sales business flows. For instance, with Oracle Procurement Contracts, you can author contract terms in the Oracle Sourcing and Oracle Purchasing applications. Using Oracle Sourcing or Oracle iSupplier Portal, you can negotiate contract terms with your suppliers.

Similarly, with Oracle Sales Contracts, contract terms authoring capabilities are available through Oracle Quoting and Oracle Order Management. You can also publish contract terms to the storefront using Oracle iStore. Also, Oracle iStore uses Contract Expert rules to automatically determine the appropriate clauses to any specific business situation.

You can author contracts using the following features:

- Use preapproved templates, defined in the library, to quickly author the initial drafts.
- Use the Contact Expert feature to bring in additional clauses into the document.
- Add standard clauses from the contract terms library.
- Author nonstandard clauses that are specific to the business document.
- Select alternate clauses.
- Download contract terms to a Microsoft Word document, make changes, and then upload the document and automatically identify the changes.
- Change the layout of contract sections and clauses.
- Define deliverables that capture tasks and obligations that may need to be fulfilled according to contractual terms.
- Validate contract terms.
- Review contract deviations to understand how the contract terms deviate from predefined standards.
- Preview and print contract terms.

## **Contract Document Management**

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

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

## **Contract Deliverables Management**

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

You can define deliverables as part of the contract template creation process. If a

business document refers to a contract template, all deliverables that are associated with that contract template are copied to the business document.

## **Contract Repository**

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

## **Contracts Workbench**

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

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





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## Implementation Considerations

This chapter provides implementation details for Oracle Contracts.

This chapter covers the following topics:

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

### Overview

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

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

### Installation Verification

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

### Oracle Contracts Dependencies

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

capabilities.

This section describes mandatory and optional dependencies for Oracle Contracts.

## Mandatory Dependencies

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

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

## Conditional Dependencies

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

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

## Dependency Verification

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

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## Implementation Overview

This chapter describes the implementation process and the steps required to implement Oracle Contracts.

This chapter covers the following topics:

- Overview
- Process Description
- Implementation Task Sequence for Contract Terms Library
- Implementation Task Sequence for Contract Repository

### Overview

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

- Process Description, page 3-1
- Implementation Task Sequence for Contract Terms Library, page 3-2
- Implementation Task Sequence for Contract Repository, page 3-4

### Process Description

Contract Terms Library and Contract Repository are the main components of Oracle Contracts.

In an organization, the business practices group and legal professionals can use Contract Terms Library to create and manage a library that contains:

- All the standard business and legal language as well as company-standard contract boilerplates (templates).

- Contract Expert rules that define conditions under which:
  - Additional clauses can be added to a business document.
  - Deviations from standard corporate policies can be identified and reported.

Contract Repository enables you to create miscellaneous contracts, such as license agreements, nondisclosure agreements, and merger agreements, which are not specifically related to the functionality of other Oracle applications. You can also create miscellaneous agreements, such as License and Human Resource agreements, that are outside the normal purchasing or sales flows and for which full execution capabilities may not be required. Also, you can consider using Contract Repository for storing and managing legacy procurement or sales contracts that have limited execution needs.

To effectively implement Contract Terms Library, you must perform the following tasks:

- Set up profile options.
- Set up operating units for global and local implementation.
- Set up lookup codes.
- Migrate clauses from external sources to Contract Terms Library.

Additional setup is required to use the following features:

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

To effectively implement Contract Repository, you must perform the following tasks:

- Set up operating units.
- Set up approval rules.
- Set up contract types.

## Implementation Task Sequence for Contract Terms Library

The following table describes the implementation process for Contract Terms Library:

<b>Step</b>	<b>Description</b>	<b>Mandatory</b>	<b>Performed by Seeded Responsibility</b>
1	Set up operating units, page 4-1	Yes	Human Resources Manager
2	Implement Multi-Org access control, page 4-3	No	Human Resources Manager
3	Set up profile options, page 4-5	Yes	System Administrator
4	Set up approvers and workflows, page 4-7	Yes	Human Resources Manager and Workflow Builder
5	Set up lookup codes, page 4-7	Yes	Applications Developer
6	Enable keyword search, page 4-8	Yes	System Administrator
7	Set up layout templates, page 4-8	Yes	XML Publisher
8	Set up descriptive flexfields, page 4-11	No	System Administrator
9	Set up AutoNumbering, page 4-12	No	System Administrator
10	Set up value sets, page 4-13	Yes	System Administrator
11	Set up numbering schemes, page 4-8	No	Contract Terms Library Administrator
12	Set up function security, page 4-18	No	System Administrator

<b>Step</b>	<b>Description</b>	<b>Mandatory</b>	<b>Performed by Seeded Responsibility</b>
13	Migrate clauses to contract terms library, page 4-20	Yes	Contract Terms Library Administrator
14	Import clauses from external sources, page 6-26	No	Contract Terms Library Administrator

## Implementation Task Sequence for Contract Repository

The following table describes the implementation process for Contract Repository:

<b>Step</b>	<b>Description</b>	<b>Mandatory</b>	<b>Performed by Seeded Responsibility</b>
1	Set up operating units, page 5-2	Yes	Human Resources Manager
2	Implement Multi-Org Access Control, page 5-2	No	Human Resources Manager
3	Set up profile options, page 5-4	No	System Administrator
4	Set up approval rules, page 5-5	Yes	Oracle Approvals Manager
5	Set up lookup codes, page 5-7	No	System Administrator
6	Set up descriptive flexfields, page 5-8	No	System Administrator
7	Set up AutoNumbering, page 5-8	No	System Administrator

<b>Step</b>	<b>Description</b>	<b>Mandatory</b>	<b>Performed by Seeded Responsibility</b>
8	Set up function security, page 5-9	No	System Administrator
9	Set up contract types, page 5-10	Yes	Contracts Workbench Administrator
10	Set up risks, page 5-11	No	Contracts Workbench Administrator
11	Set up contact roles, page 5-12	No	Contracts Workbench Administrator
12	Set up access control list, page 5-12	Yes	Human Resources Manager
13	Set up customers and partners, page 5-13	No	Customers Online Manger
14	Set up suppliers, page 5-13	No	Payables Manager
15	Set up concurrent programs, page 5-13	Yes	System Administrator
16	Set up Contracts Workbench, page 5-13	No	Functional Administrator
17	Deploy Searchable Objects, page 5-15	Yes	Application Search Administration





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## Setting Up Contract Terms Library

This chapter describes the steps to set up the Contract Terms Library.

This chapter covers the following topics:

- Setting Up Operating Units
- Implementing Multiple Organizations Access Control
- Setting Up Profile Options
- Setting Up Approvers and Approval Workflow
- Setting Up Lookup Codes
- Enabling Keyword Search
- Setting Up Layout Templates
- Using Descriptive Flexfields
- Setting Up AutoNumbering
- Setting Up Value Sets
- Setting Up Numbering Schemes
- Managing Numbering Schemes
- Setting Up Function Security
- Migrating Clauses to Contract Terms Library
- Setting Up Contract Expert

### Setting Up Operating Units

To use the Contract Terms Library, you must define operating units in the Oracle Human Resources application. For more information, see the *Oracle Human Resources User's Guide*. Before you proceed with setting up operating units, using the steps that are provided later, you should identify one global operating unit for your implementation. You must also decide the following for each of the operating units that

you want to implement:

- Who is the primary approver for the Contract Terms Library in this operating unit?
- Do you have different approvers on the buy-side and sell-side for the contract terms library?
- If this operating unit is a local operating unit, do you need to approve each clause separately after a formal review? Operating units that have similar business practices and use the same language for business transactions as the global operating unit can choose to adopt global clauses automatically.
- Do you have different administrators that would be assigned to the administration functions relating to the buy-side and sell-side clauses and contract templates?

**Note:** The administrator, who is assigned in the Additional Information region of the Operating Unit definition on the Define Organizations form, receives notifications in case of events, including:

- System Failures: For instance, the system generates error notifications when concurrent processes have failed.
  - FYI Notifications: For instance, in a local operating unit, this would be the person who receives notifications when global clauses have been approved.
- Do you plan to number clauses automatically for this operating unit?

### Steps:

To set up operating units:

1. Log in to the Human Resources responsibility.
2. Open the Find Organization window.  
Navigation: Work Structures -> Organization -> Description.
3. Select the desired operating unit from the list of values.
4. Click the Find button.
5. In the Organization Classifications region, place the cursor in the Operating Unit classification.
6. Click the Others button.

7. Select the Contract Terms Setup option from the list of values.
8. In the Contract Terms Setup window, enter values for the following options:
  - Auto Adopt Global Clauses: This enables automatic adoption of global clauses in a local operating unit. The clauses do not have to be approved separately in the local operating unit if the Auto Adopt option is set to Yes.
  - Library Administrator for Sell Intent: Set a library administrator Sell intent to receive notifications when a global clause is created and needs adoption in the local operating unit.
  - Library Approver for Sell Intent: Set a library approver for Sell intent to route workflow approval notifications for clauses and templates.
  - Library Administrator for Buy Intent: Set a library administrator Buy intent to receive notifications when a global clause is created and needs adoption in the local operating unit.
  - Library Approver for Buy Intent: Set a library approver for Buy intent to route workflow approval notifications for clauses and templates.
  - Clause Sequence Category: Provide a value here if you want to activate the AutoNumbering function for clauses in the operating unit. Leave it blank if you want to number clauses manually. For more information, see the Setting Up AutoNumbering section, page 4-12.

**Note:** Users who are defined as **FND\_USERS**, using the System Administrator responsibility, can only be assigned the role of Library Administrators or Library Approvers. If the users are no longer valid, you must manually update the information in the contract terms setup. For example, if an employee is no longer with your organization, ensure that the relevant updates are made to the setup that was explained earlier.

## Implementing Multiple Organizations Access Control

The Multiple Organizations (Multi-Org) access control feature enables you to define the operating units within a specific responsibility that users can have access to. With the latest release of Oracle Contracts, you can set up Multi-Org access control in the Contract Terms Library. This feature enables users to access multiple operating units from a given responsibility. In the previous release of Oracle Contracts, access to an operating unit through a responsibility was controlled using the MO: Operating Unit profile option. Users could define this profile option and access the library for the specific operating unit.

**Steps:**

To define security profiles:

1. Log in to the Human Resources responsibility.
2. Open the Profile page.  
Navigation: Security > Profile page
3. Provide a name for the profile.
4. Select a business group to which all the operating units belong. If you have not defined your own business groups, select the default business group.
5. In the Security type field, select the "Secure Organizations by organization hierarchy and/or organization list" option from the list of values.
6. Navigate to the Organization Security tab. At this stage, you can select one of the following options:
  - Navigate to the Classification region and provide a list of operating units and their names. This will be the list of operating units under the security profile.
  - Select an organization in the Organization Hierarchy field. To use this option, you must first set up an organization hierarchy. For more information, see the Setting Up Organization Hierarchy, page 4-4.
7. Save your work.
8. Run the Security List Maintenance program.
  - You should select the One Named Security Profile option as the value for the Generate Lists for parameter and then provide the value of the security profile that you just created.
  - If you have multiple security profiles, you can run this program as many times as necessary. Also, you must run this program after you update the security profile definitions.

**Steps:**

To set up the organization hierarchy:

1. Log in to the Human Resources responsibility.
2. Open the Organization Hierarchy page.

Navigation: Workstructures > Organization > Hierarchy

3. Provide a hierarchy name.
4. Save your work.
5. Provide the version number and start date.
6. Save your work and close the window.
7. Query the hierarchy that you just created.
8. Navigate to the Subordinates region.
9. If you receive a warning message that indicates "The organization is not current as at the start date," ignore it and provide the list of operating units that you want to include in the hierarchy.
10. Save your work.

## Setting Up Profile Options

Set up the following profile options:

- Self service Accessibility Feature (User Level): For all users that want to use the Rich Text features in authoring clauses, set the User Level profile option to None. If you set this profile option to None, users can use the Rich Text features such as bold, italic, underline, and indent. If you do not set the profile option to None, they can use only the plain text to author clauses.
- OKC: Terms Library Intent (Responsibility Level): Use this profile option at the responsibility level to restrict library usage based on the intent for a particular responsibility. Setting this profile option is optional. You can set this profile option to:
  - Buy
  - Sell
  - All

**Note:** If you leave this profile option blank, it will have the same effect as setting it to All.

- OKC: Global Operating Unit (Site Level): Use this profile option to define your global operating unit.

**Note:** Changing the value of this profile option after it has been set is not recommended. This could cause data issues with clauses and templates in the Contract Terms Library.

- OKC: Generate Deviations Report for Approval (Application Level): Use this profile option to control whether the Contract Deviations report, which is generated during contract authoring, should be attached to the approval notification for the contract. If you set the profile option to No, the system does not attach the Contract Deviations report to the notification. For more information about the Contract Deviations report, see the online help topics in Oracle Contracts, Oracle Procurement Contracts, and Oracle Sales Contracts.
  - Even if you set the profile option to a specific value, you can override this value on a contract-by-contract basis.
  - For Oracle Sourcing and Oracle Quoting, set the profile option to **Not Applicable** to remove this option from the Review Contract Deviations page. The reason is that these applications do not support the feature of attaching the Contract Deviations report to the approval notifications.
- OKC: Clause Import XML File Location (Site Level): Use this profile option to specify the location of the XML file containing the clauses and other data that must be imported into the Contract Terms Library.
- OKC: Layout Template for Contract Deviations Report (Application Level): Use this profile option to control the format of the Deviations report that will be attached to the approval workflow notification.
- OKC: Use Contract Expert (Site Level): Use this profile option to make Contract Expert available for use in your organization. If you set the profile option to No, Contract Expert will not be available for use.
- OKC: Use Clause Number in Contracts (Site and Application Levels): Use this profile option to control whether the clause number is also displayed with the clause title when viewing contract terms in the structured view during contract authoring. For more information about structured terms, see the online help topics in Oracle Contracts.
- Sequential Numbering (Responsibility Level): Use this profile option to set up AutoNumbering clauses within one or more operating units. For more information, see the Setting Up AutoNumbering section, page 4-12.
- MO: Operating Unit (Responsibility Level): Use this profile option to determine the

operating units that can be accessed for a given responsibility. If you intend to use the Multi-Org access control feature, use this profile option in conjunction with the MO: Security Profile option that is provided subsequently.

**Note:** Set the profile option MO: Operating Unit at least at the Site level. If the profile option is not set at the Site level, you cannot access any responsibility.

- MO: Security Profile (Responsibility Level): Use this profile option if you want to implement the Multi-Org access control feature in the Contract Terms Library. For more information, see the Implementing Multiple Organizations Access Control section, page 4-3.
- BOM: Configurator URL of UI Manager (Site Level): Use this profile option to enable Contract Expert in Oracle Sales Contracts. Set the profile value to a URL, for example, *http://ap6172rt.us.oracle.com:8001/configurator/oracle.apps.cz.serolet.UiSerolet*.

## Setting Up Approvers and Approval Workflow

The system supports defining a single approver for each of the Buy and Sell intents as standard out-of-the-box functionality. Use the Operating Units setup to identify approvers of clauses and templates in the global and local operating units. For more information, see the Setting Up Operating Units section, page 4-1.

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

The workflow names are

- Contract Template Approval: OKCTPAPP
- Contract Clause Approval: OKCARTAP

## Setting Up Lookup Codes

Refer to the Look Up Codes appendix, page E-1 for the list of system, user, and extensible lookup codes. Use these tables to identify the lookup codes that you must define for your implementation. Use the Application Object Library Lookups window to define the lookup codes.

**Note:** Modifying seeded lookup values can corrupt data that was created using the lookup values. You cannot end date or disable seeded values.

## Enabling Keyword Search

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

- Synchronize Clauses Text Index: This program synchronizes the clauses text index.
- Optimize Clause Text Index: This program optimizes the clauses text index.
- Synchronize Template Text Index: This program synchronizes the contract templates text index.
- Optimize Template Text Index: This program optimizes the contract templates text index.
  - The foregoing concurrent programs can be run at once for all operating units. You do not need to run these programs separately for each operating unit.
  - It is recommended that you run the Synchronize and Optimize concurrent programs together as a request set. The implementation teams must determine the frequency of running these programs, depending on the specific business needs. If the clauses and templates are frequently updated, run these programs more often to obtain accurate search results.

## Setting Up Layout Templates

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

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

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

You cannot modify the seeded layout templates. However, you can download a copy of



the layout template to your desktop, modify it, and register it as a new layout template in Oracle XML Publisher.

You can use the seeded layout templates to print the:

- Contract document
- Deviations report

## Contract Terms Layout Template

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

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

## Deviations Report Layout Templates

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

For the list of seeded layout templates for Deviations report, see the Seeded Data appendix, page D-1.

## Creating a Layout Template

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

### **Example:**

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

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

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

## Prerequisites

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

## Steps:

To create a layout template:

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

## Customizing the Contract Terms XSL-FO Stylesheet

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

## Using Descriptive Flexfields

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

- Standard clauses
- Contract templates
- Variables
- Contract template deliverables
- Folders

The following table displays the information for descriptive flexfields:

### *Descriptive Flexfields*

<b>Component</b>	<b>Name</b>	<b>Title</b>	<b>Description</b>	<b>Table</b>
Standard Clause	OKC_CLAUSES_DESCFLEX	OKC: Clauses Additional Information	Descriptive flexfields to capture additional information for clauses in the Contract Terms Library	OKC_CLAUSE_VERSIONS

Component	Name	Title	Description	Table
Contract Templates	OKC_TERMS_T MPL_DFF	OKC: Contract Templates Additional Information	Descriptive flexfields to capture additional information for contract templates in the Contract Terms Library	OKC_TERMS_TEMPLATES_ALL
Variables	OKC_VARIABLES_DESCFLEX	OKC: User defined Variables Additional Information	Descriptive flexfields to capture additional information for user-defined variables in the Contract Terms Library	OKC_BUS_VARIABLES_B
Contract Template Deliverables	DELIVERABLES_FLEX	OKC: Deliverables Additional Information	Descriptive flexfields to capture additional information for deliverables on a contract template in the Contract Terms Library as well as on a contract in the Contracts Repository.	OKC_DELIVERABLES
Folder	OKC_ART_DF	OKC: Folders Additional Information	Descriptive flexfields to capture additional information for folders	OKC_FOLDERS_ALL_B

## Setting Up AutoNumbering

Use this setup to number clauses automatically during creation:

- In the System Administrator responsibility, perform the following steps:
  1. Define a document sequence. Create a new document sequence by providing a name and description. Assign the application as Contracts Core and provide a start date. Also, if the initial value must be different from the default value of 1, provide the value.  
Navigation: Sequential Numbering > Define
  2. Define a sequence category. Define the category using OKC\_ARTICLES\_ALL as the table to be associated.  
Navigation: Sequential Numbering > Categories
  3. Assign the category to a set of books. Associate the category that is defined with the set of books and sequence.  
Navigation: Sequential Numbering > Assign
  4. Navigate to the System Profile Options page and set the Sequential Numbering profile option to **Always Used**.
  5. Navigate to the Organizations creation page. Under the Operating Unit classification, click Others to navigate to the Additional Information region. Select Contract Terms Setup, and for the field Clause Sequence Category, select the document sequence category that you defined in the earlier step. For more information, see the Setting Up Operating Units section, page 4-1.

**Note:** When you have completed the AutoNumbering setup, you are ready to create clauses. However, you must bounce the server anytime you update the Sequential Numbering profile option that is used in this setup. If you do not, the system may display an error message when you try to open the Create Clauses page.

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

## Setting Up Value Sets

In this application, value sets are used in:

- Clause variables, page 4-14
- Contract Expert variables and questions, page 4-14

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

## Value Sets Used in Clause Variables

You can define value sets for use in clause variables. Value sets are supported subject to the following conditions:

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

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

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

## Value Sets Used in Contract Expert Variables and Questions

The value sets that are used in questions and user-defined variables, for Contract Expert, are subject to the following conditions:

- **Format Types:** The supported format types are Character, Number. You must use the supported format type only when defining value sets for Contract Expert.
- **Validation Types:** For Character format type, the supported validation types are: Independent, Table, and Translatable Independent. For Number format type, the supported validation type is None. You must use the supported validation types only when defining value sets for Contract Expert.

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

- **Table:** A drop-down list of values.
- **Independent:** A drop-down list of values.

If a Number Format type value set is used, the Expert Runtime/Update Variables

screens display a Number only entry field.

### **Considerations for Setting Up and Using Value Sets**

- After value sets are created and associated with user-defined variables or questions, deleting values from a value set or deleting the value set definition could cause data issues that impact:
  - Contract templates containing clauses that use these user-defined variables.
  - Business documents that use these user-defined variables in standard and nonstandard clauses.
- Value sets that are used in defining Contract Expert rules operate with slightly varied business rules. Refer to the Contract Expert chapter, page 7-1 for more details on the restrictions in using value sets while defining Contract Expert rules.
- In defining value sets for clause variables or expert variables or questions, review the seeded value sets in the applications. This could save crucial implementation time because value sets are reusable across multiple variables or questions. For example, date type value sets or free-form entry value sets can typically be picked from the seeded value set definitions.

### **Setting Up Numbering Schemes**

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

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

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

The system currently supports the following numbering styles:

- a, b, c, d, and so on

- A, B, C, D, and so on
- i, ii, iii, iv, and so on
- I, II, III, IV, and so on
- 1, 2, 3, 4, and so on

### **Steps:**

To set up numbering schemes:

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

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

First level:

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

Second level:

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



The document will be numbered as:

- First Level = **a.**
- Second Level = **a.I)**

7. Click the Refresh button to preview the layout.
8. Optionally, add additional numbering levels.
9. Click Apply to save and close the Numbering Scheme page.
  - You cannot delete a numbering scheme after it has been assigned to a contract template or to a business document.
  - If you define a numbering scheme with the a, b, c, numbering type and a specific level with more than 26 entries, the system does not create further alphabets. Instead, the system uses symbols (such as aa, bb) for all entries beyond 26. Preview the template or contract, as applicable, and change the numbering scheme to another type.

## Managing Numbering Schemes

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

### Steps

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

**Note:** Numbering scheme is not mandatory. If your contract does not

follow any numbering schemes, you do not need to define any. If numbering on your contract is sporadic, consider using the Layout Template Definitions to configure the desired numbering. For more information, see the Setting Up Layout Templates section, page 4-8.

## Setting Up Function Security

Oracle Contracts enables organizations to control levels of access to authoring contract terms on business documents. Using the function security feature, customers can create custom responsibilities with the desired access controls depending on the users. Many businesses have multiple roles that are involved in the contract negotiation process, including contract negotiators, contract administrators, and contract approvers. The nature and extent of access to contracts can vary depending on the role of these personnel in an organization. Oracle Contracts supports varied levels of access to contract authoring features as noted here:

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

You can set up the following security function access controls:

- **Restricted Authoring Privileges:** To set up the Restricted Authoring security level, an administrator must remove the **Author Standard Terms** function from the default menu of functions.
- **Standard Authoring Privileges:** To set up the Standard Authoring Privileges security level, an administrator must remove the **Author Non-Standard Terms** function from the default menu of functions.
- **Non-Standard Authoring Privileges:** This is the default access level for the seeded menus. This contains the **Author Non-Standard Terms** function in the default menu setup.
- **Override Authoring Controls Privileges:** To set up the Override Authoring Controls Privileges security level, an administrator must add the **Override Authoring**

**Controls** function to the default menu of functions.

The following table displays the functions that each responsibility has access to:

<b>Feature</b>	<b>Restricted Authoring Privileges</b>	<b>Standard Authoring Privileges</b>	<b>Non-standard Authoring Privileges</b>	<b>Override Authoring Privileges</b>
Apply or update contract templates; Assignment in a contract	Yes	Yes	Yes	Yes
Update contract details; Assign legal contract or contract administrator	Yes	Yes	Yes	Yes
Validate contracts	Yes	Yes	Yes	Yes
Create and manage deliverables	Yes	Yes	Yes	Yes
Update contract details; Update contract sources	No	Yes	Yes	Yes
Upload contracts	No	Yes	Yes	Yes
Download contracts	No	Yes	Yes	Yes
Lock contracts	No	Yes	Yes	Yes
Preview contracts	Yes	Yes	Yes	Yes
Review contract deviations	Yes	Yes	Yes	Yes
Run contract expert	Yes	Yes	Yes	Yes

<b>Feature</b>	<b>Restricted Authoring Privileges</b>	<b>Standard Authoring Privileges</b>	<b>Non-standard Authoring Privileges</b>	<b>Override Authoring Privileges</b>
Renumber contracts	Yes	Yes	Yes	Yes
Add sections or standard clauses	No	Yes	Yes	Yes
Add nonstandard clauses	No	No	Yes	Yes
Delete mandatory clauses	No	No	No	Yes
Update clauses that are text protected	No	No	No	Yes
Change the layout of clauses; Move sections and clauses	No	No	Yes	Yes
Add document attachments	No	Yes	Yes	Yes
Update variable values	No	Yes	Yes	Yes

## Setting Up and Customizing Responsibilities

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

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

## Migrating Clauses to Contract Terms Library

To support the new features of Oracle Contracts, the Articles schema has changed

significantly.

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

Prior to release 11.5.10, clauses did not belong to any specific operating unit. Hence, clauses that were created in the library were accessible to all operating units.

This release contains the following changes:

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

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

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

## Migration Process Overview

The following figures illustrate the migration of clause data in the 11.5.10 release. The first figure represents the important clause attributes in a pre-11.5.10 environment. The articles and versions existed in OKC\_STD\_ARTICLES\_B/\_TL and OKC\_STD\_ART\_VERSIONS\_B/\_TL. The Article Name and the Article Text were translatable columns in OKC\_STD\_ARTICLES\_TL and OKC\_STD\_ART\_VERSIONS\_TL, respectively.

- This example assumes that:
  - Two languages are installed in the database:
    - US English (the base language)
    - French
  - The user has translated the:

- Clause "Termination" to "Annulation"
- Text "This is English" to "C'est Francais"
- As part of the migration process, the user has set up:
  - Vision Corporation as the global operating unit
  - Vision Operations as the only local operating unit

**Standard Clauses Prior to 11.5.10 Release**

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

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

The second figure represents how the clauses look after migration. Now three clauses are created in the new clause tables:

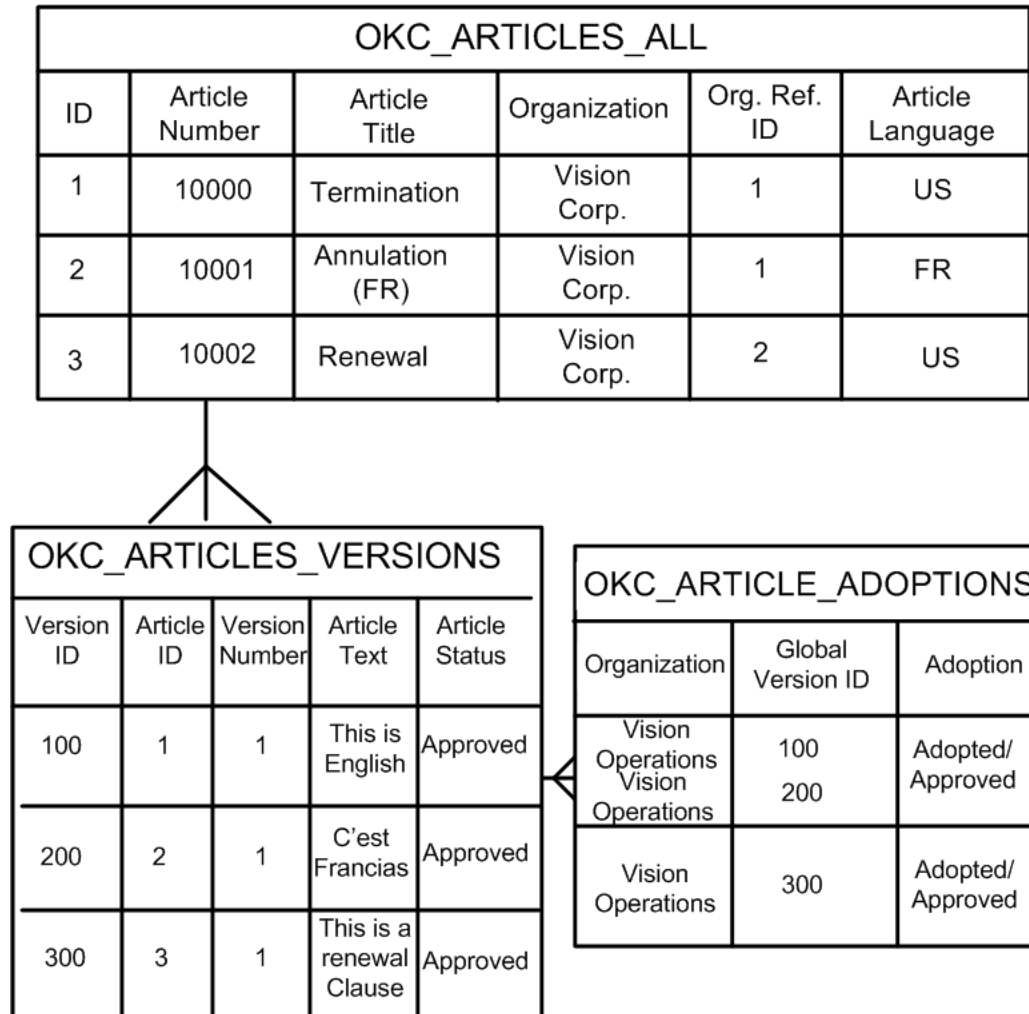
- OKC\_ARTICLES\_ALL.
- OKC\_ARTICLE\_VERSIONS.
- The translated clause Annulation is now a new clause in Vision Corporation.

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

In this example, these rows are created for the local operating unit, Vision Operations, and have an adoption type of Adopted and the adoption status of Approved. Users that belong to these two operating units are now able to view the clauses exactly as they did

in the earlier releases. Only the global operating unit, however, can make any updates to these clauses. For more details, see the Migration Steps section, page 4-24.

**Standard Clauses After 11.5.10 Migration**



**Migration Steps**

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

**Steps**

To migrate standard clauses:

1. Define operating units that use contracts. In 11.5.10 release, clauses are migrated to a global operating unit and automatically adopted by all the local operating units. This requires each operating unit to be set up for contract terms by defining additional information for the operating unit. For more information, see the Setting



Up Operating Units section, page 4-1. Note that the system will migrate clauses only in those operating units that have used clauses in their contracts. If an operating unit has used clauses in authoring contracts, but has not been set up to use the Contract Terms Library in 11.5.10, the concurrent process will not continue until the setup is completed. You must ensure that all relevant operating units have completed the required setup step in order to use the Contract Terms Library in 11.5.10 release.

2. Define the global operating unit. After the operating units are created, you must define a global operating unit using the site level OKC: Global Operating Unit profile option. For more information, see the Setting Up Operating Units section, page 4-1.
3. Migrate standard clauses: To migrate standard clauses to the new 11.5.10 schema, run the **Migrate Standard Clauses to 11.5.10** concurrent program. The concurrent program performs the following tasks:
  - In the global operating unit, the program creates global clauses in Approved status.
  - For each local operating unit, the clauses are migrated with adoption type as **Adopted as is**. All clause relationships are migrated to the local operating units as well.
  - The New Clause Versions table supports descriptive flexfields of size VARCHAR2(150) according to the current Oracle E-business Suite development standards. Note that this is a change from earlier releases in which these columns were of size VARCHAR2(450). The Migration program considers up to 150 bytes during the data conversion.
  - Clauses (including all versions) are migrated to the new schema using the following defaults:
    - Org Id: Global operating unit
    - Status: Approved
    - Intent: Sell
    - Version Number: System generated
    - Clause Language: Translated language
    - Clause Number: Autonumbered
    - Protect Text: No

- Insert By Reference: No
- Provision: No
- Translated articles (including all versions) are created as new clauses with the translated text.
- Article sets are migrated to folders. All existing FND\_LOOKUPS of type **ARTICLE\_SET** are migrated to clause folders and the existing associations are migrated to folder contents.
- Folders are created for each of the operating units that have been set up under the classification of Contract Terms Library Details. Hence, one article set in pre-11.5.10 release will now have the same number of folders as the number of operating units that you have set up. Folder associations (contents) also will have multiple entries for all the migrated Article Sets and Article Set Members.
- All incompatibilities are migrated as clause relationships of type **Incompatible** for every operating unit that has been set up under the Contract Terms Library Details classification. Hence, every incompatibility in a pre-11.5.10 release will now have the same number of relationships as the number of operating units that you have set up.
- All existing associations between the clause version and contract documents are updated to reflect the newly generated clause version ID.

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

## Setting Up Contract Expert

### Prerequisites

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

For more information, see the Setting Up Profile Options section, page 4-5.

**Note:** Contract Expert uses Oracle Configurator to process and evaluate the Contract Expert rules on business documents. To function properly, in Oracle Configurator the SSL port requires a special setting.

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

- Create and approve clauses, page 6-3
- Create and approve contract templates, page 6-39
- Define value sets, page 4-13
- Create Constants, page 7-6
- Create Questions, page 7-3
- Create and activate a library of rules and assign them to appropriate contract templates, page 7-8
- Enable Contract Expert on contract templates , page 6-39
- Determine the sequence of display of questions when Contract Expert is used on a business document, page 7-18



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## Setting Up Contract Repository

This chapter describes the steps to set up the Contract Repository.

This chapter covers the following topics:

- Setting Up Contract Repository - Overview
- Setting Up Operating Units
- Implementing Multiple Organizations Access Control
- Setting Up Profile Options
- Setting Up Approval Rules
- Setting Up Lookup Codes
- Using Descriptive Flexfields
- Setting Up AutoNumbering
- Setting Up Function Security
- Setting Up Contract Types
- Setting Up Risks
- Setting Up Contact Roles
- Setting Up Access Control Lists
- Setting Up Customers and Partners
- Setting Up Suppliers
- Setting Up Concurrent Programs
- Setting Up Contracts Workbench
- Deploy Searchable Objects

## Setting Up Contract Repository - Overview

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

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

These types of contracts are stored in a new Contract Repository, and are called Repository contracts. Each Repository contract will have a user-defined contract type, unlike the contracts that are created in other Oracle applications, which have system-defined contract types.

Repository Contracts are integrated with Contract Terms Library to enable Structured Terms Authoring. A Repository contract can include supporting documents and amendments, deliverables with notification capabilities, and risk information. Repository contracts support a flexible approval and signature process, and a bulk import process is available for loading legacy contracts into the system.

Enterprise Contracts Search enables you to search for keywords in both structured text, such as contract terms, and unstructured text, such as text contained in attached documents.

## Setting Up Operating Units

To use the Contract Repository, define your operating units in Oracle Human Resources. For more information, see the *Oracle Human Resources User's Guide*. If you are implementing the Contracts Repository as a standalone implementation, then you should set up the operating units. However, if you are implementing the Contracts Repository as part of Procurement or Sales Contracts, the operating units may already have been set up as described in the Setting Up Contract Terms Library chapter.

## Implementing Multiple Organizations Access Control

The Multiple Organizations (Multi-Org) access control feature enables you to define the operating units within a specific responsibility that users can have access to. With the latest release of Oracle Contracts, you can set up Multi-Org access control in the Contract Terms Library. This feature enables users to access multiple operating units from a given responsibility. In the previous release of Oracle Contracts, access to an operating unit through a responsibility was controlled using the MO: Operating Unit profile option. Users could define this profile option and access the library for the

specific operating unit.

### **Defining Security Profiles:**

To define security profiles:

1. Log in to the Human Resources responsibility.
2. Open to the Profile page.  
Navigation: Security > Profile page
3. Provide a name for the profile.
4. Select a business group to which all the operating units belong. If you have not defined your own business groups, select the default business group.
5. In the Security type field, select the "Secure Organizations by organization hierarchy and/or organization list" option from the list of values.
6. Navigate to the Organization Security tab. At this stage, you can select one of the following options:
  - Navigate to the Classification region and provide a list of operating units and their names. This will be the list of operating units under the security profile.
  - Select an organization in the Organization Hierarchy field. To use this option, you must first set up an Organization Hierarchy. For more information, see the Setting Up Organization Hierarchy section, page 4-4.
7. Save your work.
8. Run the Security List Maintenance program.
  - You should select the One Named Security Profile option as the value for the Generate Lists for parameter and then provide the value of the security profile that you just created.
  - If you have multiple security profiles, you can run this program as many times as necessary. Also, you must run this program after you update the security profile definitions.

### **Setting Up Organization Hierarchy:**

To set up an organization hierarchy:

1. Log in to the Human Resources responsibility.

2. Open the Organization Hierarchy page.  
Navigation: Workstructures > Organization > Hierarchy
3. Provide a hierarchy name.
4. Save your work.
5. Provide the version number and start date.
6. Save your work and close the window.
7. Query the hierarchy that you just created.
8. Navigate to the Subordinates region.
9. If you receive a warning message that indicates "The organization is not current as at the start date," ignore it and provide the list of operating units that you want to include in the hierarchy.
10. Save your work.

## Setting Up Profile Options

Set up the following profile options:

- MO: Operating Unit (Responsibility Level): If you do not plan on using the Multi-Org Access Control feature for your organization to implement Contracts Repository, you can use this profile option to determine the operating units that should have access to the Contracts Repository responsibility.
- MO: Security Profile (Responsibility Level): Use this profile option to determine which operating unit or group of operating units have access to the Contracts Repository responsibility. To set up this profile option, you need to first implement the Multi-Org Access feature. For more information, see the Implementing Multiple Organizations Access Control section, page 5-2.
- MO: Default Operating Unit (Responsibility Level): Optionally use this profile, in conjunction with the MO: Security Profile, to set a default operating unit for creating contracts in Contract Repository. The value of this profile must be one of the operating units in the MO: Security Profile.
- Contract Repository Auto-Numbering Enabled (Site Level): If this profile option is set to Yes, the system will assign numbers to the new contracts automatically. If you set the profile option to No, the application users must enter contract numbers manually. Contract numbers must be unique across all manually and automatically generated numbers.



- **Contract Intent Access Control (Site, Responsibility, User Levels):** When you define a contract and indicate the contract type, the system derives the contract's intent, which is an indication of whether the contract is buy-side, sell-side, or neither. Each contract type can be associated only with one intent. The possible values for Intent are Buy, Sell, and Other. This profile option restricts the users when that are creating or viewing Repository contracts, and when they are using the Contracts Workbench. The possible values of the profile option are Buy, Sell, Buy-Sell, Other, Buy-Other, Sell-Other, and Buy-Sell-Other.

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

## Setting Up Approval Rules

Integration of Oracle Contracts with Oracle Approvals Management, a self-service Web application, enables you to define business rules governing the process for approving Repository contracts. You can define simple or complex rules, which allow approval based on your defined conditions and attributes. For Repository contracts, Oracle Contracts enables the configuration of the list of approvers. Oracle Approvals Management determines who needs to approve the contracts. These rules can be customized to meet your business needs. You can also add approvers and resequence the list to meet specific needs. For more information, see the *Implementing Oracle Approvals Management Guide*.

## Defining Approval Rules

Define approval hierarchy and approval rules through the Oracle Approvals Management. You can define the rules around the following specific attributes for Repository contracts:

Attribute Name on Oracle Approval Management	Field Name in Oracle Contracts	Description	Values / Examples
CONTRACT_AMOUNT	Amount	The monetary value of the contract.	The numeric amount. For example, you can set up a rule that would apply only to the Repository contracts in which the contract amount is more than \$1,000,000.
CONTRACT_AUTHORIZING_PARTY	Authoring Party	The party that authored the contract terms.	For example: INTERNAL, EXTERNAL.

<b>Attribute Name on Oracle Approval Management</b>	<b>Field Name in Oracle Contracts</b>	<b>Description</b>	<b>Values / Examples</b>
CONTRACT_CURRENCY	Currency	The short code for the contract currency.	The three-letter currency code. For example, USD.
CONTRACT_INTENT	Intent	The Intent indicates the nature of the transaction between the parties in a contract. The possible values for Intent are Buy, Sell, and Other.	The possible values are B (buy), S (sell), and O (other).
CONTRACT_OVERALL_RISK	Overall Risk	The overall risk level that is assigned to the contract by the contract administrator.	The possible values are 1_Very_Low, 2_Low, 3_Medium, 4_High, and 5_Very High.
CONTRACT_TYPE	Type	The contract type. For more information, see Obtaining Contract Type Codes, page 5-7.	In this field, you need to enter the Contract Type Code. For example, "REP 1000".
PARTY_ID	Party ID	The Party ID for the contract party.	HZ_PARTIES.PARTY_ID, PO_VENDORS.VENDOR_ID
TRANSACTION_ORG_ID	Transaction Organization ID	The ID for the operating unit that the contract belongs to. For more information, see Obtaining Operating Unit Identification Number, page 5-7.	Operating unit ID number
TRANSACTION_REQUESTOR_PERSON_ID	Transaction Requester Person ID	The person ID for the person who submits the contract for approval.	Person ID from the PER_ALL_PEOPLE_F table.

## Obtaining Operating Unit Identification Number

You can obtain the ID number of your operating units from the Find System Profile Values window:

### Steps:

1. Log in to the System Administrator responsibility.
2. Navigate to the Find System Profile Values window.  
Navigation: Profile > System
3. In the Organization field, enter the name form the operating unit.
4. Click the Find button to view the ID number.

## Obtaining Contract Type Codes

To obtain the Contract Type Codes from the Contract Types Summary page, you must have the Personalization privileges.

### Steps:

1. Log in to the Contracts Workbench Administrator responsibility.
2. Open the Navigate to Contract Types Summary page.
3. Select the Personalize Summary Table for Repository Contract Types.
4. Select the Personalize icon for the Contract Type Code.
5. Set the Rendered attribute to True for the desired scope, for example, Function, Site, Organization, or Responsibility.
6. Apply the changes and navigate back to the Contract Types Summary page to view the Contract Type Codes.

## Setting Up Lookup Codes

Refer to the Look Up Codes appendix, page E-1 to identify the lookup codes that you must define for your implementation. Use the Application Object Library Lookups window to define the lookup codes.

## Using Descriptive Flexfields

The following table displays the Descriptive Flexfield for Contract Repository.

Title	Technical Name	Description	Table
Repository Contract	OKC_REP_CONTRA	Repository Contract	OKC_REP_CONTRA
Additional Information	CTS_ALL_DFF	Additional Information	CTS_ALL

- To use the Descriptive Flexfield for Repository Contract, first you need to enable appropriate segments as required for your implementation. For more information, refer to the *Oracle Applications System Administrator's Guide*.
- After completing the definition of the Descriptive Flexfield and enabling it for use, you need to bounce the Apache Server for the changes to take effect in the Contract Repository. Similarly, if you update the Descriptive Flexfield definitions, perform the Apache Server bounce.

## Setting Up AutoNumbering

Use the Contract Repository Auto-Numbering Enabled profile option to set the numbering option for Contract Repository. For more information, see the Setting Up Profile Options section, page 5-4.

Upon enabling the AutoNumbering option for Repository contracts, the system uses a simple sequence (starting with number 1) to generate contract numbers.

To use a different starting number for Repository contracts (for example start at 1000 instead of 1) follow the following steps:

1. Set the Contract Repository Auto-Numbering Enabled profile option to No.
2. Enter a contract manually (or import) and enter the starting contract number (for example 1000) for the contract.
3. Set the Contract Repository Auto-Numbering Enabled profile option to Yes.
4. Proceed with entering contracts, either manually or by importing. In either case, the contracts that are created would take the next number in the sequence, in this example, from 1001 onwards.

**Note:** The AutoNumbering option for Contract Repository is separate from the AutoNumbering for clauses in the Contract Terms Library. The AutoNumbering option for clauses and Contract Repository must be set up separately. Repository does not use the AutoNumbering process that can be set up for clauses in the Contract Terms Library where you can set the starting number, prefixes, and so on.

## Setting Up Function Security

Function security provides control over the access of users to certain functions in the repository. A user can have View-Only, Authoring, or Administrator responsibility.

**Note:** Oracle Contracts provides the following seeded responsibilities:

- **Contracts Workbench Administrator:** This responsibility has control over the setup features of the Contract Repository, such as defining contract types and risks.
- **Contracts Workbench User:** You can use this responsibility to create and manage repository contracts as well as view Procurement and Sales contracts.

To define a view-only responsibility for the users in your organization, you must create your own responsibilities by using the seeded menus and adding or removing the appropriate functions listed in the following table.

The following table displays the functions that each responsibility has access to:

Function	View-Only Responsibility	Authoring Responsibility	Administrator Responsibility
View contract	Yes	Yes	Yes
Create and update contract	No	Yes	Yes
Change status from Approved to Signed	No	Yes	Yes
Manage deliverables	No	Yes	Yes
Manage risk	No	Yes	Yes

<b>Function</b>	<b>View-Only Responsibility</b>	<b>Authoring Responsibility</b>	<b>Administrator Responsibility</b>
Terminate contract	No	Yes	Yes
Update contract administrator of a contract	No	No	Yes
Change status from Draft directly to Signed	No	No	Yes
Import contracts	No	No	Yes
Use Repository Setup tab	No	No	Yes

## Setting Up Contract Types

When users create Repository contracts in Oracle Contracts, they must select one of the user-defined contract types, such as Non-Disclosure Agreement and Partnership Agreement, to the contract. You must define the contract types in advance. User can enable contract terms for Structured Terms Authoring.

### Steps

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

associated with an intent. The possible values for Intent are Buy, Sell, or Other. If the Contracts Intent Access Control profile option is used, this selection will limit which users will be able to select this contract type.

**Important:** If you select Intent as Other, Layout Template and Enable Contract Terms are disabled.

7. Select a start date. This is the date that the contract type becomes available.
8. Optionally, select an end date for the contract type. After the end date has passed, when creating new contracts, users will not be able to select this type.
9. Select the Enable Contract Terms check box.
10. Select the appropriate Layout Template.
11. Click the Apply button.

## Setting Up Risks

When users create Repository contracts in Oracle Contracts, they can select multiple risks associated with these contracts. Examples are partner bankruptcy, nonperformance of a deliverable, noncompliance with nondisclosure terms, loss or infringement of intellectual property, and damage to property or humans.

In Contract Repository, risks are driven and managed as a manual process. The user-defined risks serve only as a tool to assess and monitor risks on contracts that are created in the repository. These risks cannot be associated or managed in the context of Procurement or Sales contracts.

1. Log in to the Contracts Workbench Administrator responsibility.
2. Click the Risks link.

**Note:** For your reference, the Risks page displays the list of all user-defined risks. Oracle Contracts does not provide seeded risks.

3. The risks that you define should be unique across all operating units within the company.
4. Click the Create Risk button. The system displays the Create Risk page.
5. In the Name field, enter a unique identifier for the risk.
6. Enter a description for the risk.

7. Select a start date.
8. Optionally, select an end date for the risk. After the end date has passed, the risk cannot be selected on a contract.
9. Click Apply to save the risk.

## Setting Up Contact Roles

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

1. Log in to the Contracts Workbench Administrator responsibility.
2. Click the Contact Roles. For your reference, the Contact Roles page displays the list of all user-defined roles. The roles that you define should be unique across all operating units within the company.
3. Click the Create Contact Role button. The system displays the Create Contact Role page.
4. In the Name field, enter a unique identifier for the role.
5. Enter a description for the role.
6. Select a start date.
7. Optionally, select an end date for the role. After the end date has passed, the role cannot be selected on a contract.
8. Click Apply to save the role.

## Setting Up Access Control Lists

As the Repository contract administrator, you can use the Access Control list to restrict access to the contracts to a list of internal users (employees or groups of employees). Also you can grant View Only or Update access to these users. Only internal users can be on the Access Control List.

To add users to the Access Control list:

1. Define employees as users in Oracle Human Resources. For more information, see the *Oracle Human Resources User's Guide*.



2. Create application users for the employees. For more information, see the *Oracle Applications System Administrator's Guide*.
3. Import the employees into CRM Resources and synchronize their user names. For more information, see the *Oracle CRM Application Foundation Implementation Guide*.

## Setting Up Customers and Partners

Contract Repository enables users to add customers and partners as parties to a contract. You can create the parties in Oracle Customers Online. For more information, see the *Oracle Customers Online User Guide*.

## Setting Up Suppliers

Contract Repository enables users to add suppliers to a contract. You can create your suppliers in Oracle Payables. For more information, see the *Oracle Payables User Guide*.

## Setting Up Concurrent Programs

To enable some of the features of Contract Repository, you need to run the appropriate concurrent programs.

For more information, see the Concurrent Programs appendix, page C-1.

## Setting Up Contracts Workbench

This section covers the following topics:

- Contracts Workbench - Overview, page 5-13
- Personalizing Contracts Workbench, page 5-14

### Contracts Workbench - Overview

A single view of all enterprise contracts is essential for effective management of contract activities and for reporting and analysis of outstanding supplier, customer, and partner commitments. Oracle Contracts provides a centralized Contracts Workbench that gives access and visibility to all contractual agreements in the enterprise. Contracts Workbench enables contract administrators to see which contracts require attention, provides extensive search capabilities, and provides shortcuts to common tasks such as creating or approving a contract. A flexible security model ensures that contracts can be viewed or updated only by authorized users.

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

- Procurement and Sales contracts: Contracts that are created in buy-side and

sell-side of Oracle applications, such as purchase orders, purchase agreements, negotiations, orders, quotes, and sales agreements.

- Repository contracts: Oracle Contracts provides visibility to all enterprise contracts, including procurement and sales contracts, from a common workbench. Oracle Contracts also allows authoring of standalone contracts, such as partnership agreements, that are not part of a sales or purchase order. These types of contracts are stored in Contract Repository and are called Repository contracts.

### **Personalizing Contracts Workbench**

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

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

1. The default bins for the Contracts Workbench are:

- Notifications
- Recent Contracts
- Expiring Contracts
- Contract Deliverables
- Contracts at Risk

You can use the personalization option to add the Bookmarks bin, remove any of these bins, or change the order in which the bins are displayed.

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

- Contracts Number
- Contract Name
- Operating Unit
- Party Name
- Contract Type
- Intent
- Status
- Effective Date

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

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

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

## **Deploy Searchable Objects**

From the Application Search Administration page, search and deploy the OKC searchable objects.



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## Contract Terms Library Administration

This chapter describes administration of the Contract Terms Library.

This chapter covers the following topics:

- Contract Terms Library
- Managing Standard Clauses
- Creating Standard Clauses
- Defining Related Clauses
- Assigning Clauses to Folders
- Approving Clauses
- Managing Clauses Across Operating Units
- Searching for Clauses
- Contract Clause Analysis Report
- Managing Changes to Standard Clauses
- Importing Clauses
- Managing Contract Templates
- Creating Contract Templates
- Adding Sections and Clauses
- Creating Contract Template Deliverables
- Validating Templates
- Previewing Templates
- Approving Templates
- Searching for Templates
- Viewing Template Clauses
- Managing Changes to Contract Templates

- Defining Global Templates
- Viewing Contract Expert Rules
- Managing Variables
- Creating Variables
- Searching for Variables
- Displaying Clauses Using a Variable
- Managing Changes to Variables
- Managing Sections
- Creating Sections
- Searching for Sections
- Updating Sections
- Managing Folders
- Creating Folders
- Searching for Folders
- Managing Changes to Folders
- Considerations for Using Sections, Folders, and Clause Types

## Contract Terms Library

Contract Terms Library is a central repository for all preapproved clauses, contract templates, and Contract Expert rules that are used to create contracts across the enterprise.

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

You can use the Contract Expert feature of Oracle Contracts to create rules that represent these business policies and standards. For more information, see the Contract Expert chapter, page 7-1.

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

## Managing Standard Clauses

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

This section covers the following topics:

- Creating Standard Clauses, page 6-3
- Defining Related Clauses, page 6-9
- Assigning Clauses to Folders, page 6-10
- Approving Clauses, page 6-11
- Managing Clauses Across Operating Units, page 6-12
- Searching for Clauses, page 6-18
- Managing Changes to Standard Clauses, page 6-22
- Importing Clauses, page 6-26

## Creating Standard Clauses

You can create standard clauses in the following ways:

- Creating a New Clause, page 6-3
- Duplicating an Existing Clause, page 6-8

### Creating a New Clause

Use these steps to create a new clause.

#### Steps

To create a new clause:

1. Navigate to the Create Clauses page.

Navigation: Library > Clauses tab > Create Clause button

2. Select an operating unit from the list of values.

The list of values is based on the security profile that was defined for the responsibility that you are using. For more information, see the following sections:

- Setting Up Operating Units, page 4-1
- Setting Up Profile Options, page 4-5
- Implementing Multi-Org Access Control, page 4-3

3. Enter the following attributes:

- Number: This value can be manually entered or automatically generated. To automatically generate the number, see the Setting Up AutoNumbering section, page 4-8.

**Note:** You could have the same clause number assigned to multiple clauses if you choose to manually number clauses. Only the clause title is unique within a given operating unit.

- Clause Title: Enter a title for the clause. The clause title is unique within an operating unit.
- Display Name: Optionally, enter the display name for the clause. The display name does not have to be a unique name. Your operating unit can have alternate clauses with the same display name. The system uses the display name in a printed contract field. If you leave this field blank, the clause title is used as the display name.
- Intent: Select the intent of the contracts that can use the clause: Buy or Sell.

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

- Type: Use the Type field to classify the clause according to the business purpose (for example, General or Payment terms). Select a clause type from the list of values. For more information, see the Setting Up Lookup Codes section, page 4-7.
- Default Section: Optionally, select the default section from the list of values. You can use sections as headings to format contracts. For more information, see Managing Sections, page 6-73. The Default Section is used only in Contract Expert. When you run Contract Expert, each clause that the system selects is



placed into the default section that is provided for the clause. If a default section is not provided for the clause, the system places it into the default section that is provided for the contract template.

- Description: Optionally, enter a description for the clause.
4. Status: The system controls this field. During the creation process, the clause is in Draft status.
  5. Version: The system generates the version number.
  6. Start date: Accept the default or change the start date.
  7. End date: Optionally, enter an expiration date for the clause. The expiration date cannot be earlier than the current system date.
  8. Provision: Provisions are used in negotiation documents in **Oracle Sourcing only**. If applicable, select the Provision check box. If the first version of a clause is a provision, all subsequent versions of the clause will retain this attribute. You cannot update this attribute on subsequent versions.
  9. Protect Text: To prevent modification to the clause text in documents, select the Protect Text check box. On subsequent versions, you can update this attribute. This will not impact business documents that already contain these clauses.
  10. Global: To make the clause available to all operating units, select the Global check box. This field is available only in the Global operating unit and cannot be updated on future versions of the clause. For more information, see the Managing Clauses Across Operating Units section, page 6-12.
  11. Text: Enter the necessary text for the clause. Clause texts can include business variables. For more information about embedding variables, see the Managing Variables section, page 6-66. In the Text area, you can choose one of following modes:
    - Rich Text: The Rich Text editor provides special formatting of the text that is driven by business and legal requirements. The Rich Text editor provides a toolbar and a text area. You can format the text by choosing one of the following icons on the toolbar:
      - Cut
      - Copy
      - Paste
      - **Bold**

- *Italic*
  - Underline
  - Align Left
  - Align Center
  - Align Right
  - Number Order List
  - Bulleted List
  - Decrease Indent
  - Increase Indent
- Text: The Text mode provides a plain text area only. If you use the Rich Text mode to enter the clause text and then toggle to the Text mode, the system displays the HTML source for the text you have entered. However, the system prints the clause using the Rich Text features even if you have toggled to the Text mode.
12. Add Variables: Click the Add Variables button to search for available variables. The Add Variables page appears. From this page, you can search for available variables, then click the Insert icon to add the variable that you want into your text, at the location of the cursor within the text area. In the clause text, variables are displayed as tags in the format [*@Variable Name@*].
  13. Instructions: Optionally, enter instructions on how and when to use the clause in a contract template or business document. Users can view these instructions when they add the clause to a contract template or business document.
  14. Allow Include by Reference: Select the check box to replace the clause text with the reference text when the clause is used in a contract. Optionally, enter the following information:
    - Reference Source: Provide the source of the clause that cannot be printed in full text.
    - Reference Text: Enter the reference text. The system prints, on a printed contract, the reference text instead of the clause text.

**Note:** If you select the Allow Include by Reference check box,

the Reference Text field becomes mandatory.

15. If applicable, click one of the following buttons:

- **Submit:** To submit the clause for approval, click this button.
- **Apply and Add Details:** Click this button to save your work and move to the Update Clause page. The Update Clause page includes the following subtabs:
  - **General:** Use this subtab to update general information that was discussed in the previous steps.
  - **Related Clauses:** For detailed information, see the Defining Related Clauses section, page 6-9.
  - **Clause Folders:** For detailed information, see the Assigning Clauses to Folders section, page 6-10.
  - **Version History:** Use this subtab to display the history of the clause versions.
- **Apply:** Click the Apply button to save the clause and close the Create Clauses page.
- **Cancel:** Click the Cancel button to close the Create Clauses page without saving the clause.

### **Considerations for Setting Up and Using Clauses**

Consider the following when setting up and using clauses:

- **Operating units and clauses:** After a clause is created, you cannot change its operating unit. During creation of a new clause, you must ensure that you select the correct operating unit.
- **Copying clauses from external sources:** If you are creating clauses in the system by copying from external sources, you should first copy the clauses into a text editor application, such as WordPad, and then paste it in the clause text field. Copying content directly from external sources may cause issues with text formatting and undesirable results with the content that is copied.
- **Using HTML tables in clause text:** Copying text that includes HTML tables is supported. If a clause contains tables, you can copy these tables into the clause text.
- **Using descriptions and instructions:** Providing detailed descriptions and instructions on clauses helps the end users, who use these clauses to author

contracts, in making the appropriate selection during authoring.

- Using the AutoNumbering option for clauses: If you plan to use the Clause Import feature and in the import files have not provided numbers to these clauses, for a successful import, you must select the AutoNumbering option for the operating unit. Also, when you change the AutoNumbering setup, for the change to take effect, you must bounce the Apache port with a Clear cache. If you do not bounce the port, the changes do not take effect.
- To copy directly from an HTML page into the clause text field, first copy the content into a WordPad file. Then copy and paste the content from the WordPad file into the clause text. This causes any extraneous HTML tags that are not supported in the system to be removed and the clause text to retain the remaining format structure.
- Using the Rich Text editor: If you use the Rich Text editor to author clause text, the system inserts the variables at the point where the cursor is located in the clause text box. If you do not use the Rich Text editor, the variables are always inserted at the end of the clause text. You can then use the cut and paste operation to move a variable tag within the clause text to the appropriate location.

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

Also, you can create clauses that contain tables as part of the textual content. For more information, see the Copying Clauses from External Sources section, page 6-7.

## Duplicating an Existing Clause

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

### Steps

To duplicate an existing clause:

1. Navigate to the Search Clauses page.  
Navigation: Contract Terms Library > Clauses tab
2. Search and select a clause.  
For more information, see the Searching for Clauses section, page 6-18.
3. Click the Duplicate button.
4. In the New Clause Title field, enter a unique title.
5. Optionally, choose to copy folders and related clauses.

6. Click the Save and Continue button.
7. Enter or change the information as described in the Defining Clauses section, page 6-3.

**Note:** After you create a new clause, you cannot change its operating unit. The operating unit from the original clause is retained. To copy a clause into a different operating unit, you must create a new clause in that operating unit and then copy and paste individual details such as clause text, description, and instructions.

## Defining Related Clauses

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

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

**Tip:** Before defining clauses with alternate relationships, decide whether you want to use Contract Expert in the implementation. The reason is that alternate relationships can be built using Contract Expert rules. Consider using clause alternates in those cases that lend themselves to more standard contracting scenarios that are not driven by rules that can vary from one contract to another.

### Steps

To define related clauses:

1. Navigate to the Create Clauses or Update Clauses page.  
Navigation: Library > Clauses tab > Create Clause button
2. Open the Related Clauses subtab.
3. Click the Add Another Row button.

4. In the Relationship field, select one of the following options:
  - Alternate
  - Incompatible
5. In the Clause Title field, enter the clause title. You can also use the List of Values icon to search and select the clause.
6. Click Save.
7. Click the Compare button to compare related clauses. Select the two clauses that you want to compare and then click the button.
8. Click the Compare with Current button to compare the related clause with the current clause. Select only one clause from the list and click the button.
9. Click the Remove button to delete a clause relationship.

## Assigning Clauses to Folders

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

### Prerequisites

Define folders.

### Steps

To assign clauses to folders:

1. Navigate to the Clauses page.  
Navigation: Contract Terms Library > Clauses tab
2. Open a clause for update.  
For more information, see the Updating Clauses section, page 6-22.
3. Open the Clause Folders subtab.
4. Click Add Another Row.
5. In the Name field, enter the folder name. You can also click the List of Values icon to search and select the folder name (see Searching for Folders, page 6-76).
6. Click Save or Apply.

## Approving Clauses

To make standard clauses available for use in contracts, you must first approve them. You can:

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

### Prerequisites

Set up an approver. For more information, see the Setting Up Operating Units section, page 4-1.

### Steps

To approve clauses:

1. Navigate to the Clauses page.

Navigation: Contract Terms Library > Clauses tab

2. Create a new clause, or search and open a clause in Draft status.

For more information, see the Creating a New Clause , page 6-3, or Searching for Clauses section, page 6-18.

3. Click the Submit button to:

- Change the clause status from Draft to Pending Approval.
- Send a workflow notification to the approver.

4. The approver opens the notification and reviews the clause.

5. The approver can approve, reject, or reassign the clause.

As the result:

- The clause status is changed to Approved or Rejected.
- A workflow notification informs the author of the clause of the decision.

### Setup Considerations for Approving Clauses

Consider the following when setting up the process for approving clauses:

- From the workflow notification, the approver can assign the clause for approval to another user. While assigning, the approver can also delegate the notification while retaining the ownership on the notification or transfer the notification to the assignee.
- Use the Comments region in the approval notification to capture any additional information that you want to provide to the users who submitted the clause for approval. The Comments region captures the history of communication through the approval path of the clause.
- The default workflow supports one approver per intent (Buy or Sell.) However, you can modify the workflow processes to include more approvers and route approvals based on additional business conditions. For information about setting up workflow for approvals, see the *Oracle Workflow Administrator's Guide*.
- You can set up the system to receive notifications into an e-mail account instead of the workflow notifications bin in the system. If your approvers are offline or do not use the application, this would help them approve the clauses while offline. For information, see the *Oracle Workflow Administrator's Guide*.

## Managing Clauses Across Operating Units

This section discusses how companies with global operations can manage clauses across multiple operating units. This feature is useful for companies that contract with customers across the globe with operations in different countries and locations. In this document, we refer to those operating units that have been set up to use the Contract Terms Library as operating units. For information about how to set up operating units, see the Setting Up Operating Units section, page 4-1.

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

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

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



## Prerequisites

Before creating global clauses, you must:

- Set up the OKC: Global Operating Unit profile option. This is a site-level profile option to determine the operating unit that can create global clauses and templates. A check box to identify global type clauses and templates becomes available after you set up this profile option.
- Create global clauses in the global operating unit. For more information, see the Creating Standard Clauses section, page 6-3.
- Approve global clauses to make them available in local operating units.

## Adoption of Global Clauses by Local Operating Units

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

- Auto adoption of global clauses: This feature provides automatic adoption of global clauses to operating units that do not require a manual review and approval process. For example, a company with more than one operating unit can define global clauses and make them available to all operating units. During the workflow approval for a global clause, when the clause is approved, the system verifies the operating units that are set to adopt clauses automatically. The system automatically adopts the global clause for these operating units with no manual intervention
- Manually adopting or localizing global clauses: For operating units that require a review and approval process, this feature enables them to make the global clauses available for their use. The operating units can use one of the following options:
  - Adopt Global Clause as-is: Adopt the global clause without changes. The system records the user name and system date and time of adoption along with the adopting operating unit. The local operating unit can adopt multiple global clauses at the same time. After adoption and approval of global clauses, the local operating unit can use the clauses to author contracts.
  - Localize Global Clauses: Localize the global clause by making some changes to the clause or translating the clause to the language of the local operating unit. The system creates a copy of the clause in Draft status. During localizations, you can modify the clause text and add or delete variables from the text. You can then submit the local clause for approval. The system records the approver name and date as the adoption details for the clause.

**Note:** If you are not changing the context or intent of the clause text and

only translating it into a local language, you can select the Translation Only check box. This is for informational purposes and can be used to report on why a clause was localized.

This section covers the following topics:

- Creating Global Clauses, page 6-14
- Notifying Local Operating Units, page 6-14
- Reviewing Global Clauses for Adoption, page 6-15
- Approving Global Clauses in Local Operating Units, page 6-16
- Viewing Adoption Status, page 6-17
- Adopting Global Clauses in a New Operating Unit, page 6-18

## Creating Global Clauses

Use these steps to create a global clause.

### Steps

To create global clauses:

1. Create a standard clause. For more information, see the Creating Standard Clauses section, page 6-3.
2. Select the Global check box. This check box is available only in the designated global operating unit.

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

## Notifying Local Operating Units

### Prerequisites

Set up your library administrators. For more information, see the Setting Up Operating Units section, page 4-1.

When a global clause is approved, the system sends a notification to the library administrators in all local operating units to consider the clause for adoption. In case a local operating unit is set to automatically adopt global clauses, a notification is sent to

this operating unit informing the local administrators that a new global clause has been automatically adopted for that operating unit.

## Reviewing Global Clauses for Adoption

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

### Steps

To review global clauses for adoption:

1. Navigate to the Clauses page.

Navigation: Contract Terms Library > Clauses tab

2. Search for Global clauses. For more information, see the Searching for Clauses section, page 6-18.

Note that:

- A global clause that is approved (in the global operating unit) is available for adoption in local operating units. If a global clause is on hold or expired, although the clause is displayed in the search results, local operating units cannot adopt or localize it.
  - In a local operating unit, the first version of an adopted global clause must be manually assigned to a folder that is created in that operating unit. However, after adoption, the system assigns the subsequent versions of the global clause to the same folder.
  - Each time that a new version is created and approved for a global clause, that version becomes available for adoption in the local operating units. Each version of a global clause must be adopted individually.
3. In the Adoption Type field, select the Available for Adoption option from the list of values.
  4. Click Go to view the list of available clauses.
  5. Review every clause on a case-by-case basis and decide whether to adopt the clause as is or localize it.
  6. Click Review for Adoption to view the full text and clause details. At this point, you can:
    - Adopt the clause as is. In this case, you only need to submit this clause for local approval.

- Localize the clause. When you localize a clause, you can modify the text and check the Translation Only check box to indicate that the changes were for translation purposes. Submit the localized clause for approval upon completing the modifications.

### **Considerations for Defining Global and Local Clauses**

Consider the following points when defining global and local clauses:

- You can define only one global operating unit for your Oracle Contracts instance. Changing this value in the profile option after it has been set and used, for example to create clauses, could cause data corruption issues and is not recommended.
- For global clauses that are available for adoption, no status is displayed in the local operating units. For example, searching on Status, such as Draft, will not display the global clauses. Do not use the Status search parameter if you are looking for global clauses that are available for adoption.
- For performance reasons, you cannot search for clauses by the Adoption Type alone in a local operating unit. In searching for clauses that are available for adoption, you must enter additional search criteria such as Clause Type or Keyword.
- If a previous version of a global clause was adopted as is, you must adopt subsequent versions of the clause in the same manner. You cannot change the adoption type on subsequent versions of a clause.
- If the first version of a global clause is localized, and the next version is now available for adoption, when you choose to localize the second version, the Localize page displays the text from the localized version. Currently, the system does not provide a comparison of the current localized text and the second version of the global text. To view the text of the second version of the global clause, you must view the clause from the Search page.
- You can delete a clause that has been localized and is in the Draft status. This makes the original global clause available again for adoption.
- Be cautious when you duplicate a global clause in a local operating unit and your responsibility has access to both global and local units. The choices in the Operating Unit field include the global operating unit, and you must specifically change the operating unit to your own to ensure that you are duplicating the clause in the correct operating unit.

### **Approving Global Clauses in Local Operating Units**

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

The local administrator can approve or reject the clause. After approval, the Global clause (or the modified localized clause) becomes available for use in the local operating unit. If a clause is rejected, the local operating unit can choose to continue modifying the clause, based on the rejection comments, or modify the adoption type. For instance, a clause that was previously adopted as is can now be localized.

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

**Note:** When approving or rejecting a clause or contract template, you can use the Comments section to provide your remarks in the Approval notification. Your comments are visible to the user who has submitted the original approval request.

Also, you can send the approval notifications by e-mail. However, this would require additional configuration. For more information on how to set up the e-mail client to receive all notifications, see the *Oracle Applications System Administrator's Guide*.

## Viewing Adoption Status

A global operating unit can monitor when and how global clauses are adopted across local operating units. The Adoption Status report provides an overview of the adoption status across multiple local operating units for a given global clause. This report is available only in the global operating unit and enables the global operating unit to analyze cases in which the global clauses are not adopted in a timely manner.

## Steps

To view adoption status:

1. Navigate to the Clauses page.  
Navigation: Contract Terms Library > Clauses tab
2. In the global operating unit, search for Global clauses. For more information, see the Searching for Clauses section, page 6-18.
3. Click the clause title to view the clause detail.
4. Select the View Adoption Status option from the list.
5. Click Go.

The View Adoption Status report provides the following information:

- Operating Unit Name
- Clause Title

- Version
- Adoption Type (indicates whether the global clause was adopted as is or localized)
- Translation Only (indicates whether the global clause was translated only to the local language)
- Adoption Status (indicates whether the clause was approved in the local operating unit)
- Adoption Date (indicates the date that the clause was adopted)

### Adopting Global Clauses in a New Operating Unit

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

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

You do not need to rerun the concurrent program for a given operating unit more than once if all the migrated clauses and new global clauses have been created in the global operating unit at the time of running the concurrent program.

The clause status in the new operating unit can be one of the following:

- Adopted: If it is set up to automatically adopt clauses.
- Available for Adoption: If it is set to manually adopt clauses.

**Note:** If the global operating unit contains clauses that have been migrated from 11.5.9 or earlier, these clauses will automatically be adopted in the new operating unit, even if the global operating unit was set to manually adopt clauses.

### Searching for Clauses

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

- Searching for Clauses, page 6-19
- Using the Keyword Search Feature, page 6-21

- Browsing for Clauses, page 6-21

## Searching for Clauses

Use these steps to search for clauses.

### Steps

To search for clauses:

1. Navigate to the Clauses page.

Navigation: Contract Terms Library > Clauses tab

2. In the Search region, search for clauses by:

- Operating Unit (mandatory field)
- Keyword
- Type
- Title
- Number

3. To access additional search options, click the Show More Search Options link. The options are:

- Intent
- Status
- Start and end dates
- Provisions only
- Variables used in the clause
- Used in templates
- Default section
- Show all versions check box
- Adoption Type (available only in local operating units)

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

- Number
- Title
- Keyword
- Type
- Status
- Start Date
- End Date
- Used in Templates
  - You cannot perform blind searches or start your search criteria with the wildcard character (%).
  - If you do not select the Show All Versions check box, the system displays only the latest version of the clauses that match the search criteria.
  - Description does not work with leading searches. Also, the description returns only those clauses for which the description begins with the search criteria that you enter. For instance, if you enter A% in the Description field, only those clauses for which the description begins with the letter A are returned.

4. Click Go to view the search results.
5. In the Search Result section, select the check box for any clause and click one of the following buttons:
  - Submit: Submit the clause for approval.
  - Duplicate: Create a new clause by copying from an existing clause.
  - Create New Version: Create a new version.
  - Review for Adoption: This button is available only to local operating units for adopting global clauses. For more information, see the Approving Global Clauses in Local Operating Units section, page 6-16.



## Using the Keyword Search Feature

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

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

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

- Synchronize Clauses Text Index
- Optimize Clauses Text Index

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

**Note:** You do not need to run the foregoing concurrent programs for each operating unit. Running the program synchronizes the data across the operating units that use the Contract Terms Library.

## Browsing for Clauses

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

### Steps

To browse for a clause:

1. Navigate to the Clauses page.  
Navigation: Library > Clauses tab
2. Click Browse to search through folders for the clause that you want to retrieve. The system displays the list of available folders.
3. To view all clauses that are assigned to a folder, select the check box for that folder.
4. Optionally, click the clause title to view clause details.

5. If applicable, select the check box for any clause and click one of the following buttons:
  - **Submit:** Submit the clause for approval.
  - **Duplicate:** Create a new clause by copying from an existing clause.
  - **Create New Version:** Create a new version.
  - **Review for Adoption:** This button is available only to local operating units for adopting global clauses.
  - **Update:** Open the clause for update.

## Contract Clause Analysis Report

The Contract Clause Analysis report enables you to search for the contracts where a given set of clauses is used. After entering the search criteria for the clauses and the contracts, the system displays a list of all appearances of the clauses in those contracts. For more information on Contract Clause Analysis report, see the online help topics in Oracle Contracts, Oracle Procurement Contracts, or Oracle Sales Contracts.

## Managing Changes to Standard Clauses

This section covers the following topics:

- Updating Clauses, page 6-22
- Versioning Clauses, page 6-24
- Comparing Clauses, page 6-25
- Placing Clauses on Hold, page 6-25
- Deleting Clauses, page 6-26

### Updating Clauses

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

- View and assign alternate clauses.
- View and assign incompatible clauses.
- Add the clause to folders.

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

**Note:** A new version is required if:

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

## Steps

To update clauses:

1. Navigate to the Clauses page.

Navigation: Contract Terms Library > Clauses tab

2. Search for the clause that you want to update. For more information, see the Searching for Clauses section, page 6-19.

3. Verify the clause status:

- If the clause is in Draft status, all the fields are available for update.
- If the clause is in any other status, certain fields are protected and cannot be updated.

4. Click the Update icon. The system opens the clause for update.

5. Make the necessary changes:

- Except for the first version of a clause in Draft status, you cannot change the clause number, title, and intent.
- For clauses with the Approved status, you cannot make changes to the following fields: Display Name, Start Date, Provision and Global check boxes, Clause Text, and Allow Include by Reference.
- You cannot update the intent on a draft clause if the clause text contains an

embedded variable tag because variables are based on the intent.

6. Select one of the following actions:
  - Create new version (not available for clauses in Draft status)
  - Submit for approval (available only for clauses in Draft status)
  - Put on hold (not available for clauses in Draft status)
  - Delete (available only for clauses in Draft status)
  - Apply
  - Save
  - Cancel

## Versioning Clauses

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

A new version is required if:

- The clause is not in Draft or Rejected status.
- The clause is approved, and the attributes are controlled at the Clause Version level that is required to be updated.

## Steps

To version clauses:

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

6. Select one of the following options:

- Apply
- Save
- Submit
- Cancel

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

### **Considerations for Versioning Clauses**

Consider the following for versioning clauses:

- After the clause is approved, the latest version of the clause is automatically used when a contract template containing the clause is applied to a business document. However, existing business documents that already contain the clause are not impacted. You must manually apply the latest version to the existing business documents.
- You do not need to update or revise a contract template in which a clause is required merely because the clause has been versioned. The system automatically updates the template. That is, the view of clauses on a template is not version controlled. The system always displays the most recent approved version of a clause on a template.

### **Comparing Clauses**

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

You can choose any two versions of a clause, and then click the Compare button that is available in the Version History subtab of Updating Clause page, page 6-22.

### **Placing Clauses on Hold**

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

### **Steps**

To place clauses on hold:

1. Navigate to the Clauses page.

Navigation: Contract Terms Library > Clauses tab

2. Search for the clause that you want put on hold. For more information, see the

Searching for Clauses section, page 6-19.

3. Verify the clause status.
4. Click the Update icon or the clause title link.
5. Click Put on Hold.
6. Click Yes to confirm.
7. To release the hold, open the clause for update. For more information, see the Update section, page 6-22.
8. Click Release Hold. The system confirms the release.

## Deleting Clauses

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

### Steps

To delete clauses:

1. Navigate to the Clauses page.  
Navigation: Contract Terms Library > Clauses tab
2. Search for the clause that you want to delete. For more information, see the Searching for Clauses section, page 6-19.
3. Verify the clause status.
4. Click the Update icon or the clause title link.
5. Click Delete. The system asks you to confirm your request for deletion.
6. Click Yes.

## Importing Clauses

You use the Clause import feature to import clauses into the Contract Terms Library. In addition to clauses, you can import the following related entities:

- User-Defined variables with Manual source type
- Value sets that are used in variables
- Value set values

- Clause relationships that establish a clause to be an alternate or incompatible with one or more clauses

Clause import can also be used on an ongoing basis to update these entities in the library.

You can import clauses and the related entities using the following methods:

- Open Interface, page 6-32: For this method, use SQL\*Loader, PL/SQL Scripts, or JDBC to load the entities directly into the corresponding interface tables. This process is outside the scope of the Clause import program. The clause import validates the data and imports the content into the library.
- XML Data File, page 6-35: Using this method, you import data directly from a source XML file that conforms to the XML schema that is published for import. The clause import validates the XML data and imports the content into the library.

The following tables identify and describe the attributes that are imported for each entity:

## Clauses

Attribute	Description
Clause Number	Number that identifies the clause. Two alternatives for a clause could have the same number.
Description	Description of the clause.
Title	Clause title or name.
Clause Type	Type of clause.
Display Title	Title that is displayed for the clause in the application.
Start Date	Date from which the clause can be used.
End Date	Date until which the clause can be used.

Attribute	Description
Date Published	Date that uniquely identifies the updates. This date determines whether the update is subsequent to the one already in the clause library and whether a new version of the clause will be created.
Clause Text	Legal text of the clause. The variables in the clause text should be enclosed within <Var> and </Var> tags.
Intent	Business intent of the clause: (B) for Buy and (S) for Sell.
Language	Language in which the clause is authored.
Provision Indicator	Indicates whether the clause is a provision.  It only applies to clauses with the <b>Buy</b> intent.
Include By Reference Indicator	Indicates whether the clause should be used by reference in a contract.
Reference Source	Source from which clause is referenced.
Reference Title	Title of the clause in the source.
Operating Unit	Operating unit using the clause.
Global Clause Indicator	Indicates if the clause is a global clause (all operating units can use them).
Standard Indicator	Indicates whether the clause is standard or nonstandard.
Clause Status	Status of the clause. Valid values are Draft, Approved, Pending Approval, and Rejected.
Lock Text Indicator	Indicates if the clause text can be modified.
Action	Action that the import process should perform on the clause.



## Clause Relationships

Attribute	Description
Clause1 Number	Clause number of the first clause.
Source Clause1 Title	Clause title of the first clause.
Clause2 Number	Clause number of the second clause.
Source Clause2 Title	Clause title of the second clause.
Relationship Type	Relationship type code: <ul style="list-style-type: none"><li>• ALTERNATE: Clause1 and Clause2 are alternatives to each other.</li><li>• INCOMPATIBLE: Clause1 and Clause2 are incompatible with each other.</li></ul>

## User-Defined Variables

**Note:** All user-defined variables are imported with the Manual source type. For more information, see *Managing Variables*, page 6-66.

Clauses can have variables embedded in the clause text. System variables are already defined in the system and are available for use in clause text. However, user-defined variables must be defined in the system before they can be used in clauses. A variable code uniquely identifies the variable and must be specified as part of the definition. The variable code should follow the pattern **OKC\$<intent>\$<code>** and should be unique in the system. For example, if the variable is the VAT code of the supplier and is used in buy-side transactions, then the code could look like **OKC\$B\$VATCODE** where **B** stands for buy intent.

Attribute	Description
Code	Variable code that uniquely identifies the variable.
Name	Variable name.

Attribute	Description
Description	Description of the variable.
Data Type	Data type of the value of the variable. Valid values are Date, String, and Number.
Valueset	Code of the valueset used.
Intent	Intent of the variable: B (Buy) and S (Sell).
External User Updatable	Indicates whether suppliers can update the variable. <ul style="list-style-type: none"> <li>• Y, if suppliers provide the value.</li> <li>• N, if suppliers do not provide the value.</li> </ul> <p><b>Note:</b> This attribute is not available for Sales Contracts.</p>
Language	Language of the variable.
Contract Expert Enabled Indicator	Indicates whether the variable can be used in Contract Expert. <ul style="list-style-type: none"> <li>• N: Do not use in Contract Expert.</li> <li>• Y: Enabled for use in Contract Expert. Note that the value set for the variable should have a format type that is character or number and validation type independent.</li> </ul>

## Value Sets

Each user-defined variable that is embedded in the clause sources the value from a value set. Value sets can also be defined during the import process. Value sets can either enforce the data types or the actual values that a variable can have. Value sets that are defined during the import process should have a name in the format **OKC\$<SOURCE>\$<VALUESSETNAME>** to distinguish them from other value sets in the entire Oracle Applications. For example, a value set for a variable called Business Type used in a FAR clause can have the name **OKC\$FAR\$BUSINESSTYPE**.

Each valueset should have the following attributes:

---

<b>Attribute</b>	<b>Description</b>
Name	Name of the value set.
Description	Description of the value set.
Format Type	Format of the values that are provided by the value set: <ul style="list-style-type: none"><li>• D (Date)</li><li>• N (Number)</li><li>• C (Character)</li></ul>
Minimum Size of Values	Minimum number of characters for each value in the value set. Valid values are 1–38.
Maximum Size of Values	Maximum number of characters for each value in the value set. Valid values are 1–38.
Uppercase Values Allowed Indicator	Indicates whether uppercase values are allowed: <ul style="list-style-type: none"><li>• Y: Allowed</li><li>• N: Not Allowed</li></ul>
Precision Allowed for Number Types	Number of decimal points allowed for number values.
Validation Type	Validation type for the value set: <ul style="list-style-type: none"><li>• N: None</li><li>• I: Independent</li></ul>

---

### **Value Set Values**

Each value set that has validation type of independent should have a list of valid values.

Attribute	Description
Value	Actual value
Description	Description of the value

### Interface Tables Used for Import

The following tables are used during the import process:

Table Name	Description
OKC_ART_INTERFACE_ALL	This is the main interface table where the users load data from external systems.
OKC_ART_RELS_INTERFACE	This is the interface table that stores the relationships between clauses.
OKC_VARIABLES_INTERFACE	This interface table is used to import variables that are used in clauses.
OKC_VALUESETS_INTERFACE	This interface table is used to import value sets that are used in variables.
OKC_VS_VALUES_INTERFACE	This interface table stores the values for the value sets that are used in variables.
OKC_ART_INT_ERRORS	This table stores the errors that are reported by the run in the validation or import mode.
OKC_ART_INT_BATPROCS_ALL	This is an internal system table that stores the batch run details. This includes the processing status as well as all the parameters that are used for the run.

For detailed information about the preceding tables, see the *Oracle eTechnical Reference guide (eTRM)*.

### Clause Import - Open Interface Method

The following tasks constitute the Clause Import With Open Interface procedure:

- Preparing and loading data

- Importing in validate mode
- Reviewing error messages
- Correcting errors
- Importing data into the library
- Approving imported clauses in draft status
- Purging interface records

**Prerequisites**

- Set up necessary lookup codes, for example, clause types.
- Set up all necessary data, for example, variables and sections.
- Operating unit setup:
  - Set up clause approvers for Buy and Sell intent.
  - Determine whether the AutoNumbering option should be set up for the operating unit.

For more information, see the Setting up Oracle Contracts chapter of the *Oracle Contracts Implementation and Administration Guide*.

**Steps:**

1. Format the data in a form that is suitable for loading into the interface table. For example, if you are using SQL\*Loader to load data into the interface tables, you can choose to use a comma separated data file (CSV) and a control file that describes the data format.
2. Run the Import Clauses concurrent program in validation mode to identify any invalid data or errors. This is recommended but not a mandatory step. You can specify the following parameters for the Import Clauses concurrent program:

<b>Concurrent Program Parameter</b>	<b>Possible Values</b>	<b>Mandatory</b>	<b>Function</b>
Batch Name	Name of the batch	Yes	Provide a batch name to easily identify the records that you are importing.

<b>Concurrent Program Parameter</b>	<b>Possible Values</b>	<b>Mandatory</b>	<b>Function</b>
Run in Validation Mode	Yes / No	No	Set to Yes if you want to run in validation mode to identify potential errors.
Commit Size	1 to 300	Yes	Indicates the maximum number of records that the system processes and commits to the database at one time. For example, if you have 1,000 records to be imported and your commit size is set to 100, and an error occurs on the 150th record, the system has already processed the first 100, and the data will not be reprocessed the next time that you run the program. Consult your database administrator for the appropriate value.

3. The Import program generates a report that lists the success and error messages. The errors at this stage would primarily be related to data format or missing required data. Review the report and correct the errors outside the system and prepare the data for a reload.
4. Reload the data into the interface table after correcting the errors.
5. Run the Import Clauses concurrent program in import mode to create or update data in the library. If the program was run previously in the validation mode with no errors, then the import should succeed. The Import program generates a report that lists the success and error messages. Records with errors remain in the interface tables until they are purged or corrected.

6. If clauses are imported in Draft status, they must be approved before they are available for authoring contracts. If they are imported in the pending approval status, the system automatically routes the clauses to approvers for review and approval.
7. Purge the Interface records. See the Purge Interface Records section , page 6-38for details.

## Clause Import - XML Data File Method

### Prerequisites

Set up the following:

- Necessary lookup codes, for example, clause types.
- Necessary data, for example, variables and sections.
- For the operating unit:
  - Set up clause approvers for Buy and Sell intent.
  - Determine whether the AutoNumbering option should be set up.
- The OKC: Clause Import XML File Location profile option. This specifies the location (file directory) of the XML file. This is mandatory setup for using the XML-based import.

For more information, see the Setting Up Contract Terms Library chapter of *Oracle Contracts Implementation and Administration Guide*.

### Steps

1. Data preparation: Format the data to be imported in a form that is suitable for XML import. This involves generating an XML file with the clause data that conforms to the XML schema that was published for import (see the table below for how to access the schema definition file in Oracle XML Publisher).

Schema Definition File Name	Application	XML Schema	XML Preview File
Clause Import XML Data Definition	Contracts Core	OKCXMLIMPDFN.xsd	OKCXMLIMPDFN.xml

2. Staging the XML import file: Copy the XML file to the location specified by the **OKC: Clause Import XML File Location** profile option.

3. Import in the Validate mode: Run the **Import Clauses from XML File** concurrent program in the Validate mode to identify any invalid data or errors. This is recommended but is not a mandatory step. The program parses the XML file and populates the interface tables. You can specify the following parameters for the concurrent program:

Parameter	Possible Values	Default	Mandatory	Function
XML File Name	-	No	Yes	Name of the XML import file. The file must be present in the location that is specified by the profile option <b>OKC: Clause Import XML File Location</b> .
Default Operating Unit	Any operating unit for which contract terms are enabled	No	No	Identifies the operating unit for which the Import process needs to run. Leave it blank if the operating unit has already been provided for each record in the XML file. This value is used as the default for those records for which the operating unit is not provided.



Parameter	Possible Values	Default	Mandatory	Function
Create as Global Clause (Default)	Yes/No	No	No	If this parameter is set to Yes, it will import all clauses as global clauses. Note that the operating unit in which the clauses are imported must be set up as the global operating unit.
Default Clause Status	Approved, Draft, Pending Approval	No	No	This identifies the status in which to import the clauses. Leave it blank if the records already have a status. This value is used as the default for those records for which the status is not provided.
Validate Only	Yes/No	Yes	No	Run the Import process in validate mode to identify invalid data or errors.

4. Review the error messages: The import program generates a report that lists the success and error messages. The errors at this stage would primarily be related to data format or missing required data. Review the report and correct the errors outside the system and prepare the data for a reload.
5. Correct the errors: Review the report in the log file and correct errors in the XML data file.

6. Import data into the library: Run the **Import Clauses from XML File** concurrent program in import mode to create or update data in the library. If the program was run previously in validation mode with no errors, then the import should go through successfully. The Import program generates a report that lists the success and error messages.
7. Approvals: If clauses are imported in the Draft status, they must be approved before they are available for authoring contracts. If they are imported in the Pending Approval status, the system automatically routes the clauses to approvers for review and approval.
8. Purge the interface records. For more information see the Purge Interface Records section, page 6-38.

### Purge Interface Records

To optimize performance, you should periodically run the Purge Clause Import Interface Table concurrent program. This program purges records in the interface tables for clauses and the other related entities.

The following table describes the parameters for the Purge program:

Concurrent Program Parameter	Mandatory	Purpose
Start Date, End Date	No	Use the Start and End Dates to identify the range of dates for interface records that must be purged.
Process Status	No	Provide a specific status if you want to purge interface records with that status. The possible values are Error, Success, and Warning.
Batch Name	No	Provide a specific batch name if you want to purge records belonging only to that batch.

**Note:** If you do not specify any parameters, the system displays the following warning message: "No parameters found for this run. This request will delete all the records for your organization in the interface tables."

## Managing Contract Templates

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

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

This section covers the following topics:

- [Creating Contract Templates](#), page 6-39
- [Adding Sections and Clauses](#), page 6-45
- [Creating Deliverables](#), page 6-47
- [Validating Templates](#), page 6-50
- [Previewing Templates](#), page 6-53
- [Approving Templates](#), page 6-54
- [Searching for Templates](#), page 6-57
- [Viewing Template Clauses](#), page 6-59
- [Managing Changes to Contract Templates](#), page 6-59
- [Defining Global Templates](#), page 6-64
- [Viewing Contract Expert Rules](#), page 6-65

## Creating Contract Templates

To create a contract template, you can either:

- [Create a New Contract Template](#), page 6-39
- [Duplicate from an Existing Template](#), page 6-44

### Creating a New Contract Template

Use the following steps to create a new contract template.

## Steps

To create a new contract template:

1. Navigate to the Create Contract Template page.  
Navigation: Library > Contracts Template tab > Create Template button
2. Select an operating unit from the list of values. The list of values is based on the security profile that was defined for the responsibility that you are using. For more information, see *Setting Up Operating Units*, page 4-1 and *Setting Up Profile Options*, page 5-4.  

**Note:** After you save a template, you cannot change its operating unit, even if the template is in Draft status. Make your selection carefully when creating a template from the list of available operating units.
3. Enter a unique name for the template. Note that the template name is unique within operating units.
4. Select the Intent for the template. The intent for Sales Contracts should be set to Sell.
5. Either accept or change the default start date, which is the system date.
6. Optionally, enter a description for the template.
7. Either accept or manually change the status of a template from Approved to On Hold. When you create a new template, the system sets the template status to Draft. Except for the On Hold status, the system controls all statuses on a template.
8. Link all contract templates that have the same context and purpose but are in different languages. To do this, use the Language and Translated from Template fields to specify the language and primary template for the contract template:
  - The list of values for the Languages field displays all active languages that have been installed in your instance.
  - The list of values for the Translated from Template field includes all contract templates that are in the same operating unit as the current template, with the same intent but in a different language.
  - If you select a Translated From template, you also must select a language for the template.

- You cannot update the Translated From Template field on a template that is referenced by other translated templates.
- You can update the Language and Translated from Template fields after approval without requiring a template revision.

After you save the template, the system displays the Translated Templates subtab. If applicable, the subtab displays the following information: Name, Description, Language, Status, and Translated From.

9. Select a layout template from the list of values. The layout template is used by the system to prepare the template for preview. For more information, see the Setting Up Layout Templates section, page 4-8.
10. Optionally, enter any instructions for using the template.
11. Optionally, select the Global check box to make the template available for duplication in all operating units. This is applicable only for global operating units. For more information, see the Global Templates section, page 6-64.
12. Select the Contract Expert Enabled check box to make the Contract Expert feature available on a business document to which the template is applied. By selecting the check box:
  - Contract Expert rules can be assigned to the template.
  - All existing Contract Expert rules with the Apply to All Templates option selected are assigned to the template automatically. For more information about creating and assigning rules, see the Creating Rules section, page 7-9.
  - The system displays the Rules subtab (after the user has saved the template). From the Rules subtab, you can view the Contract Expert rules that are applicable to the contract template. Also, you can view the sequence of questions that are used in the rules.
13. Select the Expert Clauses Mandatory check box if you want to make the clauses, brought in by Contract Expert, mandatory on the business documents. You can select the Expert Clauses Mandatory check box only if you first select the Contract Expert Enabled check box.
 

**Note:** Selecting this box makes all of the Contract Expert clauses mandatory on the contract. You cannot apply this option to only certain clauses.
14. Select a Default Section if the template is enabled for Contract Expert.

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

**Note:** If you want to make changes to the Contract Expert fields after a contract template has been approved, see the special considerations that apply when you change Contract Expert fields on contract template revision, page 6-62.

15. In the Document Types region, you can assign the template to one or more business document types. This enables users to select this template while authoring a contract of this document type.
16. To add a document type, click the Add Another Row button and enter the following information:
  - In the Document Type field, select the relevant contract type from the list of values (examples are Standard Purchase Order and RFQ).
  - Optionally, select the Default Template check box to set the template as a default for all business documents that are authored using that document type. For each document type, you can set only one contract template as the default template.

**Note:** This is only a first level default setup. Other applications, such as Oracle Quoting and Oracle Order Management, require additional setup to define default contract templates. For instance, Oracle Order Management uses the Transaction Type definition to set up these defaults.

17. Click Apply and Add Details.
18. Add sections and clauses to the template. For more information, see the Adding Sections and Clauses section, page 6-45.
19. If Contract Expert is enabled on the contract template, you can click the Rules tab to view the list of rules that are assigned to the template. From the Rules table, you can click a rule link to view the rule details.

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

You can change the question sequence for the contract template on the Contract Expert tab. For more information, see the Managing Question Sequence section, page 7-18.

20. From the Actions menu, choose:

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

### **Considerations for Creating and Using Contract Templates**

Consider the following when creating and using contract templates:

- **Searching for templates:** As a convenience, you can perform blind searches on contract templates. If you are not sure about the criteria to search for templates, clicking Go, without entering any criteria, displays all the templates that exist in the system. However, note that Operating Unit is a mandatory search parameter.
- **Using Language and Translated from Template features:** If your company creates contracts in multiple languages, you may want to consider using these features. The Language and Translated from Template fields help you when selecting a contract template that you want to apply to a business document. In addition, if you are using Oracle iStore, the system automatically displays the template in the appropriate language, based on the language preferences setup.
- **Clauses used in language templates:** Clauses do not have languages associated with them. So, if you are creating templates in a specific language, ensure the clauses that you want to add to the template are also in the appropriate language.
- **Default section for Contract Expert:** This section is used to bring in Contracts Expert clauses that are not already assigned to any other section. From an implementation perspective, if you use Contract Expert to bring in the clause, a default section should be assigned to that clause.

Also, the list of values, for the default section on the template, is based on the sections that are created in the Contract Terms Library. For example, if you create a new section on the template, you cannot set this section as the default section.

If a section that was assigned as the default section is later inactivated, this change will not impact existing contracts. However, when the template is next updated, an appropriate warning is provided to update the default section assignment.

- A contract template that is enabled for Contract Expert can also contain standard

clauses and sections. As with all contract templates, its constituent clauses and sections are automatically added to a business document when the contract template is applied to the business document.

- Clauses are not mandatory for templates enabled for Contract Expert. However, they are mandatory for other templates.

## Duplicating from an Existing Template

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

You can also duplicate a global template in the local operating unit.

When a global template is copied to a local operating unit, the system does not copy the Contract Expert rules from the global operating unit. Any rules that are marked "Apply to All Templates" in the local operating unit are copied to the local template automatically.

For more information, see the Global Templates section, page 6-64.

## Steps

To duplicate from an existing template:

1. Navigate to the Contract Templates page.  
Navigation: Library > Contract Templates tab
2. Search for the source template. For more information, see the Searching for Templates section, page 6-57.
3. In the Results section, select the source template.
4. Click the Duplicate button to open the Duplicate Contract Template page.
5. In the Name field, enter a new name for the template. The system copies the entire content of the source template along with the section, subsections, layout, and formatting details to the new template. The status of the new template is Draft.
6. Make other necessary changes to the new template. For more information, see the Creating a New Contract Template section, page 6-39.
7. Save the template.
8. From the Actions menu, you can select:



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

## Adding Sections and Clauses

Use the following steps to add sections and clauses to a template.

### Steps

To add sections and clauses:

1. Navigate to the Create Contract Template page.  
Navigation: Library > Contracts Template tab > Create Template button
2. Enter the general information for the template.
3. Click Apply and Add Details.
4. Navigate to the Clauses subtab. On the Clauses subtab, you can define the structure and layout of the template consisting of sections, subsections and clauses. This is the component that contains all the contract terms. From the Clauses subtab, you have access to the following options:
  - Add Sections: You can build a hierarchy of sections and subsections and insert clauses into this hierarchy. You can create a new section or select from a predefined library of sections. If you pick a section from the library, you cannot override the section name. To add clauses, you must define at least one section on the template.
  - Add Clauses: To add a clause, select a location for the clause in the hierarchy, and then click the Add Clause button. You can insert clauses only in the context of a section or subsection. You can perform a blind search or begin your search with % to add clauses to the template. You can also search for clauses by browsing through folders, or based on:
    - Keyword
    - Number
    - Clause Type

- Title
  - Default Section
  - Provisions Only: Select this check box if you want to search only for Provision type clauses (this field is available for templates with the Buy intent only).
5. To make a clause mandatory in the template, select the Mandatory check box. This prevents the clause from being deleted from the business document, except through special privileges.
  6. If a clause has alternate relationships defined, the Select Alternate icon is enabled. Click Select Alternate to view all the alternates for the clause on the template. If you select an alternate clause, it replaces the original clause on the template.
  7. After creating the necessary sections and subsections and inserting clauses, use the Move button to change the order of clauses and sections in the template. Select the sections or clauses that you want to move, and click the Move button. Select the location in the hierarchy where you want to move the selections. Then, for sections, use the Location field to indicate whether you want to move before, after, or within the selected location.
  8. You can apply a numbering scheme to the sections and clauses structure. Use the Renumber button to renumber the terms.

### **Considerations for Adding Sections and Clauses to Templates**

Consider the following for adding sections and clauses to templates:

- Building the structure of sections and clauses: The first time you create a template and click Apply and Add Details and navigate to the Clauses subtab, the system displays an empty page. As a first step, you must select the check box next to the Contract Terms node and click Add Section. Remember that you cannot add clauses directly onto a template without a section. So first create a section, and then select the check box next to that section that you created to add clauses within that section. After creating the first section, you can repeat this step to create additional sections below the one that you just created.
- Selecting alternate clauses: If the alternate clauses are inactive when the contract template is applied to a business document, the Select Alternate icon does not appear on the business document.
- Renumbering after editing terms: If you use the Move feature to reorganize, add, or remove sections or clauses, the system automatically renumbers the sections and clauses. You must use the Renumber feature and reapply the numbering scheme.

- Using Contract Expert in conjunction with clauses and sections: Before creating a template, you must determine how many of the clauses are standard boilerplate text that is not likely to change on a contract-by-contract basis. You need to only add these clauses to the template. Remember that if you plan to use Contract Expert, you may not even need to have any clauses on the template if all your clauses are Contract Expert driven. However, you should provide at least the section hierarchy on the template as a placeholder for the clauses that are brought in by Contract Expert. This ensures that the sequence in which the sections and clauses must appear on a printed document is maintained.

## Creating Contract Template Deliverables

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

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

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

### Steps

To create contract template deliverables:

1. Navigate to the Create Contract Template page.  
Navigation: Library > Contracts Template tab > Create Template button
2. In the Deliverable subtab, click the Create Deliverable button.
3. Enter the deliverable name. This is the name of the task that is being requested.
4. Select the deliverable type. You can define the following types of deliverables:
  - Contractual Deliverable: A deliverable on a contractual document (for example, Purchase Orders, Blanket Purchase Agreement).
  - Negotiation Deliverable: A deliverable on a negotiation document (for example, Request for Quote (RFQ), Request for Information, Response).
  - Internal Purchasing Deliverable: Internal Purchasing deliverables are used to track internal schedules and commitments that are relevant to a contract. They

are not part of the contractual terms of a contract, and hence do not directly represent a formal commitment between the parties.

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

A one-time deliverable can have a fixed due date or due date that is relative to a life cycle event on the document.

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

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

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

Agreement are retained on the negotiation document and carried forward to the Blanket Purchase Agreement.

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

- Start Date: This is specified through a fixed date or a date that is relative to a certain event.
- Repeating Type: For example, Weekly, or Monthly.
- Frequency: In combination with the Repeating Type, this gives the frequency of the repeating deliverable, such as every six weeks, or every three months.
- Day of the week to repeat on, in case of the Weekly frequency type.
- Day of the month to repeat on, in case of the Monthly frequency type.

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

The Event = Signing of the Purchase Agreement

Frequency = Monthly

Interval = 3

Day of the month to repeat on = 5

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

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

- Escalate after Due Date: You can specify how many days after the due date to send an escalation notification. You can also specify the recipient of the notification.
12. In the Attachments region, attach additional documents as part of the deliverable creation that you want your trading partner to see. For example, you might want the supplier to use a standard Progress Report Template for this contract. You must provide a description for the attachment to identify the nature, context, and purpose of the attachment on the deliverable. In addition, you need to specify a name for the attachment.

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

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

## Validating Templates

Prior to submitting a contract template for approvals, you can validate the template to identify potential errors and warnings. In addition, the system automatically runs the validation process when you submit a template for approval. If any error conditions are found, the template is not submitted for approval. You must correct the error conditions and resubmit the template for approval.

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

### ***Type of Validations***

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Inactive Clauses	Error	This validation checks for clauses in On Hold and Expired status. Templates with clauses in these statuses cannot be submitted for approval. Note that this validation is enforced only for those clauses that do not have any approved, previous versions.
Alternate Clauses	Warning	This validation checks for the presence of two alternative clauses on the same template.
Incompatible Clauses	Warning	This validation checks for the presence of incompatible clauses on the template.
Layout Template not Defined	Warning	This validation checks whether the contract template has a layout template assigned to it.
Invalid Variable for Document Type	Warning	This validation checks whether the system variables that are embedded within clauses and used in the template are supported for the document types in which the contract template is used.
Duplicate Clauses	Warning	This validation checks whether the contract template contains duplicate clauses.
Inactive Rules	Warning	This template validation checks whether the contract template has one or more rules that are not active.

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Expired Clause	Error	This rule validation checks for an Expired clause used in the rule.
Invalid Clause	Error	This rule validation checks for an On-Hold clause used in the rule.
Draft Clause	Error	This rule validation checks for a Draft clause used in the rule.
Invalid Question Valueset Query	Error	This rule validation checks for an invalid value set query used in a question in the rule.
Invalid Variable Valueset Query	Error	This validation checks for an invalid value set query used in a variable in the rule.
Missing Value Set value in Question	Error	This rule validation checks for a missing value set value used in a question in the rule.
Missing Value Set value in Variable	Error	This rule validation checks for a missing value set value used in a variable in the rule.
Invalid Value Set in Question	Error	This rule validation checks for a deleted value set used in a question in the rule.
Invalid Value Set in Variable	Error	This rule validation checks for a deleted value set used in a variable in the rule.
Invalid Question	Error	This rule validation checks for a disabled question in the rule.



Validation Type	Condition	Description
Missing Template Association	Error	This rule validation checks for missing template associations, where the Apply to All Templates option is not selected.

You can run the QA process at any stage during the template creation. The system also runs the QA process when a template is submitted for approval. For more information, see the Approving Templates section, page 6-54.

## Steps

To validate templates:

1. Navigate to the Contract Templates page.  
Navigation: Library > Contract Templates tab
2. Open the template for update. For more information, see the Updating Templates section, page 6-59.
3. Select the Validate option from the list.
4. Click Go. The system performs the validation and displays the results along with the suggested corrections.
5. Click the Printable Page button if you want to print the list of validations.
6. If applicable, correct the error conditions and resubmit the template for validation.

## Previewing Templates

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

## Steps

To preview templates:

1. Navigate to the Contract Templates page.  
Navigation: Library > Contract Templates tab
2. Search for the template that you want to preview. For more information, see the

Searching for Templates section, page 6-57.

3. Click Go. The system displays the search results.
4. Select the Update icon for the template.
5. Select the Preview option from the Actions list of values.
6. Click Go. The system displays the template in the Portable Document Format (PDF).

## Approving Templates

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

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

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

The Deliverables functionality is currently supported only on contract templates with Buy intent.

## Approving Draft Clauses with Contract Templates

Special considerations exist for contract templates that include unapproved clauses, that is, clauses for which the status is either Draft or Rejected.

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

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

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

Draft clauses can belong to one of the following categories:

1. No approved previous version exists, or the previous version of the clause is not valid.

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

- The version expires before the contract template effective date.
- The clause is on hold.

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

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

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

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

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

## Approving Contract Templates

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

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

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

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

The approver can reassign the contract template for approval to another user. While

reassigning, the approver can delegate the notification while retaining ownership on the notification or transfer the notification to the assignee

## Steps

To approve contract templates:

1. Navigate to the Contract Templates page.

Navigation: Library > Contract Templates tab

2. Open the contract template and select the Submit option from the Actions list of values. Alternatively, from the search results, query the contract template and click the Submit button.

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

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

### Approving Draft Clauses

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

The types of clauses that may exist in the list are:

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

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

The Validation Results report lists the warnings.

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

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

If no warnings appear or no errors occur, the contract template is submitted for approval.

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

## Searching for Templates

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

- Searching for Templates, page 6-57
- Using the Keyword Search Feature, page 6-58

### Searching for Templates

Use these steps to search for contract templates.

#### Steps

To search for templates:

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

- Translated From Template.
- Template Effectivity: Search for templates based on start and end dates.
- Owing Operating Unit (only available for local operating units): Search for template used in local operating units or the global operating unit. Note that the search is set by default to the local operating unit. Also, if the owing operating unit is set to Global, the only applicable status value is Approved. You cannot search for global templates in other statuses in a local operating unit.
- Default Templates Only: Search for any templates that are used as the default for document types.
- Global Only (only available for the global operating unit): Search for global templates in the global operating unit.
- Contract Expert Enabled: Search for any templates that use the Contract Expert feature.

For more information, see the Create a New Contract Template section, page 6-39.

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

### Using the Keyword Search Feature

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

- Template Name
- Description
- Instructions

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

- Synchronize Template Text Index
- Optimize Template Text Index

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

## Viewing Template Clauses

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

**Note:** The latest version of the clause is always appears if that is the only available version of the clause in the library.

For display purposes, the system uses the latest version of the clause subject with the following exceptions:

- Latest Version is On Hold. In this case, the system displays the previous approved version of the clause if it exists.
- Latest version is Pending Approval. When the latest version of the clause has status Pending Approval, the following extra condition is evaluated:  
If a previous version of the clause is expired, the latest version of the clause appears. Otherwise, the previous approved version of the clause appears.
- Approved Clause with a later Draft version. If a later version exists in Draft status, the clause text from the draft version appears.
- Approved Clause with future Draft version. The system displays the latest approved version of a clause when the latest draft version of a clause has a start date that is later than the current system date.

## Managing Changes to Contract Templates

This section covers the following topics:

- Updating Templates, page 6-59
- Reordering Deliverables, page 6-61
- Creating Template Revisions, page 6-62
- Placing Templates on Hold, page 6-63
- Deleting Templates, page 6-63

### Updating Templates

You can update general information about an approved template, including:

- Description

- Document Types
- Language
- Translated From Template
- Layout Template
- Instructions

For more information, see the Create a New Contract Template section, page 6-39.

You must create a revision to update any of the sections, clauses, or deliverables. You can update templates in any of the following statuses:

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

You can also perform the following updates to contract templates:

- Place on hold
- Release the hold
- Change the end date

## Steps

To update templates:



1. Navigate to the Contract Templates page.  
Navigation: Library > Contract Templates tab
2. Enter the search criteria for the template. For more information, see the Search for the Templates section, page 6-57.
3. Click Go. The system displays the search results.
4. Select the Update icon for the template that you want to update. You can perform the following actions while updating a template:
  - Add, update, or delete sections and clauses.
  - Add, update, or delete deliverables (available only for templates in Draft, Rejected, and Revision status).
  - Submit for approval (available only for templates in Draft, Rejected, and Revision status).
  - Place on hold (not available for templates in Draft, Rejected, and Revision status).
  - Delete (available only for templates in Draft, Rejected, and Revision status).
  - Validate (all statuses of the template).
  - Create revision (available only for templates in Approved status).
  - Preview.

## Reordering Deliverables

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

### Steps

To reorder deliverables:

1. Navigate to the Contract Templates page.  
Navigation: Library > Contract Templates tab
2. Enter the search criteria for the template. For more information, see the Search for the Templates section, page 6-57.
3. Open the template for update. For more information, see the Updating Templates section, page 6-59.

4. Click the Deliverables tab.
5. Click Reorder. The Reorder Deliverables page opens.
6. For each deliverable that you want to resequence, click the deliverable, and then click the Up or Down arrow. Deliverables are printed in the order that you specify.
7. Click Apply.

## Creating Template Revisions

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

- Template Name
- Intent
- Start Date

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

## Changing Contract Expert Fields on Contract Template Revisions

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

## Steps

To change Contract Expert fields on contract template revisions:

1. Navigate to the Contract Templates page.

Navigation: Library > Contract Templates tab

2. Enter the search criteria for the template. For more information, see the Search for the Templates section, page 6-57.
3. Open the template for update. The template must be in Approved status.
4. Select the Create Revision option from the Actions list of values.
5. Click Go. The status of the template changes to Revision.
6. Make the necessary changes.
7. Submit the template for approval.

### **Placing Templates on Hold**

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

### **Steps**

To place templates on hold:

1. Navigate to the Contract Templates page.  
Navigation: Library > Contract Templates tab
2. Search for the template that you want to place on hold. For more information, see the Search for the Templates section, page 6-57.
3. Click Go. The system displays the search results.
4. Select the Update icon for the template.
5. Select the Place on Hold option from the Actions list of values.
6. Click Go.

### **Deleting Templates**

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

### **Steps**

To delete templates:

1. Navigate to the Contract Templates page.  
Navigation: Library > Contract Templates tab

2. Search for the template that you want to delete. For more information, see the Search for the Templates section, page 6-57.
3. Click Go. The system displays the search results.
4. Select the Update icon for the template.
5. Select the Delete option from the Actions list of values.
6. Click Go.
7. Click Yes to confirm.

## Defining Global Templates

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

The global templates feature is different from the global clauses. Unlike a global clause, the system does not track adoption of the global templates. The local operating units are responsible for determining whether they want to duplicate a global template. The system allows a local operating unit to duplicate the global template subject to the following conditions:

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

### Considerations for Using Global Templates

Note the following considerations for using global templates:

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

- Global check box in the contract template: To create a global template, you must select the Global check box. When the template is approved, it becomes available in local operating units for copy.
- Duplicate global templates: Local operating units can search for global templates using the search field Owning Operating Unit and selecting the Global radio button. Note that you can preview the global template first to ensure that the contract terms meet your requirements. Users in local operating units cannot modify or delete global templates unless the security profile for the responsibility allows them access to the both operating units.
- You can view contract terms in global templates subject to the following exceptions:
  - The local operating unit cannot view the clauses that are local to the global operating unit.
  - The local operating unit cannot view the global clauses that were adopted or localized.
  - The local operating unit can view all contract rules in the global operating unit.
- Contract Expert rules are not copied over when a global template is duplicated in a local operating unit.
- Ordering sections for Contract Expert clauses: Sections are ordered based on how these sections are defined in the contract template that is used to author a contract. In addition, users can modify or create sections in the contract. As long as the clauses brought in by Contract Expert have a default section assigned to them, the ordering provided in the contract is maintained. If clauses do not have a default section, then the default section that was defined in the template is applied.
- Ordering Contract Expert clauses within sections: To order clauses within sections, you can use the Move feature available in the contract. You cannot provide a preset ordering for the clauses in the library.

## Viewing Contract Expert Rules

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

### Steps

To view Contract Expert rules:

1. Navigate to the Contract Templates page.

Navigation: Library > Contract Templates tab

2. Enter the search criteria for the template. For more information, see the Search for the Templates section, page 6-57.
3. Click Go. The system displays the search results.
4. Click the Name link for the template that you want. The system displays the Contract Template page.
5. Open the Rules tab to view the rules. For more information, see the Contract Expert Chapter, page 7-1.

## Managing Variables

Oracle Contracts supports the use of business variables (tokens) in both clauses and Contract Expert rules. During authoring, values from the business document replace the variables. Oracle Contracts supports the following types of variables:

- System-defined variables: Represent contract document attributes, such as payment terms, customer name, and supplier name. You can embed system variables in the clause text, which will automatically be substituted with values when the clause is used in a contract. System variables are also available to be used in defining Contract Expert rules.
- Table variables: Attach Table type variables to clause text to display product and pricing information as part of contract terms. The actual products and prices are sourced from the business document during contract authoring. Note that table variables are currently supported only for Sell intent contracts. Oracle Contracts supports the following seeded table variables:
  - Lines
  - Modifiers
  - Price Lists
- Deliverable variables: Attach Deliverable type variables to clause text to display deliverable information as part of contract terms. Note that deliverable variables are currently supported only for Buy intent contracts. Oracle Contracts supports the following seeded deliverable variables:
  - Supplier Contractual Deliverable
  - Buyer Contractual Deliverable
  - All Contractual Deliverables
  - Supplier Negotiation Deliverables

- All Negotiation Deliverables
- User-defined variables: User-defined variables are tokens that you define over and above the system variables. Users must provide values for these variables as part of the contract authoring process. You can define variables that are sourced or derived from contract data. User-defined variables can be used in clause text or for Contract Expert rules. You can indicate the variable source as:
  - Manual: If you set the variable source to Manual, users must provide values for the variable as part of the contract authoring process.
  - PL/SQL Procedure: If the variable source is set to PL/SQL Procedure, the variable value is sourced or derived from the contract data.

### Variable Identification

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

[@VARIABLE\_NAME@]

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

[@Payment Terms@]

The Managing Variables section covers the following topics:

- Creating Variables , page 6-67
- Searching for Variables, page 6-69
- Displaying Clauses Using a Variable, page 6-70
- Managing Changes to Variables, page 6-71

## Creating Variables

Oracle Contracts provides seeded and user-defined variables:

- Seeded variables cannot be deleted or modified. Seeded variables include:
  - System variables: These variables represent contract document attributes.
  - Deliverables variables: These variables capture deliverable information on a contract.

**Note:** Deliverable variables are available only for use in

## Procurement Contracts.

- Table variables: These variables capture structure information, such as items and price lists that map to multiple rows.

**Note:** Table variables are available only for use in Sales Contracts.

- User-defined variables are based on the needs of the contractual documents of the operating unit. These variables are replaced with values during contract authoring. In most cases, you can update or delete these variables. User-defined variables can be used either as tokens in clause text or to drive Contract Expert rules.

### Prerequisite

- Define the corresponding value sets. For more information, see the Setting Up Value Sets section, page 4-13.
- Define stored procedures for variables with source type PL/SQL Procedure. For a sample PL/SQL procedure code, see Sample Variable for PL/SQL Procedure Source Type Appendix, page G-2.

### Steps

To create variables:

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

**Note:** You must assign the appropriate value set when creating a variable. The system does not verify that the appropriate value set has been attached. For more information, see the Setting Up Value Sets section, page 4-13 .

5. In the Intent field, select the intent for the variable. You can select the Buy or Sell option from the list of values. Only clauses with the same intent can use the variable for embedding.



6. Optionally, select the External Party Updateable check box to allow updates to the variable by external users. Note that currently the system supports this feature only for authoring contracts with the Buy intent. Suppliers can be required to provide values for user-defined variables during the negotiation process. When you select the External Party Updateable check box, the variables are displayed in the iSupplier portal for supplier inputs. Suppliers using the iSupplier Portal to respond to purchase orders or sales agreements can update variable values in their responses.

**Note:** For variables that use source of PL/SQL Procedure, the External Party Updateable option cannot be selected.

7. Select the Manual or PL/SQL Procedure option as the variable Source from the list of values.
8. If you select the PL/SQL Procedure option as the source, the system displays the following mandatory fields:
  - Procedure Name: Enter a PL/SQL stored procedure name that is used for deriving the value for the variable. The name must be entered in the <schema name>.<package name>.<procedure name> format (for example, APPS.CUSTOM\_UDV\_PKG.Get\_PO\_Amount). If the format is not valid, the system displays an error message when you try to save the variable and asks you to correct the error. When the variable is saved, the system checks whether the procedure exists and is valid. If the procedure is not valid, the system displays a warning message and saves the variable.
  - Variable Code: Enter a unique variable code. The code cannot be a number.

**Note:** Variable Source, Procedure Name, and Variable Code cannot be updated if the variable has already been used in a Contract Expert rule or clause.

9. Click Apply to save the variable.

## Searching for Variables

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

For performance reasons:

- You must search on at least one of the following criteria
  - Name

- Description
  - Type
- The system does not support blind searches or searches beginning with the wildcard character %.

## Steps

To search for variables:

1. Navigate to the Variables page.  
Navigation: Library > Variables tab
2. In the Variables Search region, you can perform searches on variables by:
  - Name
  - Description
  - Type
  - Intent

You must enter your search criteria in one of the following fields: Name, Description, or Type.
3. Click Go. The system displays the list of variables that match your search criteria.
4. To view a variable, click the Variable Name link.

## Displaying Clauses Using a Variable

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

## Steps

To display clauses using a variable:

1. Navigate to the Variables page.  
Navigation: Library > Variables tab
2. Search for the variable that you want. For more information, see the Searching for Variables section, page 6-69.
3. In the Results section, select the check box for the variable.

4. Click Display Clauses to view clauses that use the variable. The system displays all versions of a clause that use the specific variable.

**Note:** Clauses appear only for the operating units that are defined using the MO Security Profile for the current responsibility.

## Managing Changes to Variables

You can change or delete user-defined variables only.

This section covers the following topics:

- Updating User-Defined Variables, page 6-71
- Deleting User-Defined Variables, page 6-72

### Updating User-Defined Variables

You can update user-defined variables. However if the variable is used in Contract Expert rules or clauses, you cannot update the following fields:

- Value set
- Variable Source
- Procedure Name
- Variable Code

### Steps

To update user-defined variables:

1. Navigate to the Variables page.  
Navigation: Library > Variables tab
2. Search for the variable that you want to update. For more information, see the Searching for Variables section, page 6-69.
3. Click the Update button to open the variable for update. You cannot update the variable name, intent, and source. Also, after the variable has been used in a clause, you can update only the variable description and select the Disable check box. After the variable has been used in a clause or a rule, you must create a new variable if you want to change a value set that is assigned to a user-defined variable.
4. Make the necessary changes. For more information, see the Creating Variables

section, page 6-67.

5. Select the Disable check box, if you want to prevent further use.
6. Click Apply to save the variable.

### Considerations for Defining Variables

Consider the following for defining variables:

- Before you begin to define user-defined variables, review the list of system-defined variables that have been seeded in the application. The variable that you want to define may already be present as a system-defined variable.
- Note that if you are defining a user-defined variable, you can define value sets exclusively for that variable or use generic value sets across many variables. This analysis could save time and effort in the creation and maintenance of variables. For example, if the variable you are looking for is a free-form text-enterable field, you could create one generic free-form validation value set and reuse it across different variables.
- If the value set that was used on a variable is deleted, the variable becomes unusable in Oracle Contracts. You must create a new variable with a valid value set, and then update all the clauses, templates, and business documents that were impacted by this change.
- If you have created a user-defined variable with the intention of using it in Contract Expert rules, but the variable that you created is not available when you are defining a rule, review the value set that is associated with the variable. The value set definition may not meet the criteria that make it available in Contract Expert.
- Variables are not specific to the operating unit. If you create a user-defined variable, it will immediately be available to all operating units that use Oracle Contracts. You could use the Description and Name fields to provide additional qualifications if you do not want to use a variable across operating units.
- For the application to perform better, tune queries used in PL/SQL Procedures and value sets. Query performance will impact the application performance.

### Deleting Variables

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

### Steps

To delete variables:

1. Navigate to the Variables page.

Navigation: Library > Variables tab

2. Search for the variable that you want to delete. For more information, see the Searching for Variables section, page 6-69.
3. Click Go to view the search results.
4. Select the check box for the variable that you want to delete.
5. Click the Delete icon. The system displays the Warning page.
6. Click Yes to confirm.

## Managing Sections

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

This section covers the following topics:

- Creating Sections, page 6-73
- Searching for Sections, page 6-74
- Updating Sections, page 6-74

## Creating Sections

### Steps

To create sections:

1. Navigate to the Create Section page.  
Navigation: Library > Sections tab > Create Section button
2. Enter the following parameters:
  - Code
  - Name
  - Description (optional)

- Effective From
  - Effective To (optional)
3. Click Apply to save the new section and close the Create Section page.

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

## Searching for Sections

Use these steps to search for sections.

### Steps

To search for sections:

1. Navigate to the Sections page.

Navigation: Library > Sections tab

2. Enter your search criteria for section:

- Name
- Code

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

## Updating Sections

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

### Steps

To update sections:

1. Navigate to the Sections page.

Navigation: Library > Sections tab

2. Search for the section that you want to update. For more information, see *Searching for Sections*, page 6-74.
3. Click the Update icon for the section that you want to change.
4. Make the necessary changes. You can change the following fields:
  - Description
  - Effective to Date
5. Click Apply to save your changes and close the page.

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

## Managing Folders

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

- *Creating Folders*, page 6-75
- *Updating Folders*, page 6-77

You can assign a clause to more than one folder.

This section covers the following topics:

- *Creating Folders*, page 6-75
- *Searching for Folders*, page 6-76
- *Managing Changes to Folders*, page 6-71

## Creating Folders

Folders are unique within an operating unit. All operating units that use the Contract Terms Library can create their own folders. Folders that are created in a global operating unit are not copied over or created in the local operating unit.

## Steps

To create folders:

1. Navigate to the Create Folder page.  
Navigation: Contract Terms Library > Folders > Create Folder button
2. Select an operating unit from the list of values. The list of values is based on the security profile that was defined for the responsibility that you are using. For more information, see *Setting Up Operating Units*, page 4-1 and *Setting Up Profile Options*, page 5-4.
3. Enter a name for the folder.
4. Optionally, enter a description for the folder.
5. Click Save or Apply.

## Searching for Folders

Use these steps to search for folders.

## Steps

To search for folders:

1. Navigate to the Folders page.  
Navigation: Contract Terms Library > Folders tab
2. Enter the search criteria for:
  - Operating Unit
  - Folder Name
  - Description
3. Click Go. The system displays the folders that match your search criteria.

## Managing Changes to Folders

This section covers the following topics:

- *Updating Folders*, page 6-77
- *Adding Clauses to Folders*, page 6-77



- Removing Clauses from Folders, page 6-78
- Deleting Folders, page 6-78

## Updating Folders

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

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

## Steps

To update folders:

1. Navigate to the Folder page.  
Navigation: Library > Folders tab
2. Search for the folder that you want to update. For more information, see the Searching for Folders section, page 6-76.
3. In the Result section, click the Update icon for the folder that you want to change. The system opens the folder for update. You can:
  - Change the name and description
  - Add clauses
  - Remove clauses

## Adding Clauses to Folders

You can assign one clause to more than one folder.

## Steps

To add clauses to folders:

1. Navigate to the Folder page.  
Navigation: Library > Folders tab
2. Search for the folder that you want to update. For more information, see the Searching for Folders section, page 6-76.
3. In the Result section, click the Update icon for the folder to which you want to add

clauses.

4. Click Add Clauses to open the Search Clause page.
5. Enter the search criteria for the clause. Note that you can add clauses of any status to the folder. The system does not maintain references to a specific version of a clause when it is added to a folder. When you browse a folder to select clauses on a contract template or contract, the appropriate version will be selected on the template or the contract.
6. Click Go to view the search results.
7. Select the clauses that you want to add.
8. Click Apply to add the clauses to the folder.
9. Click Save or Apply to save your changes.

## Removing Clauses from Folders

Use these steps to remove a clause from a folder.

### Steps

To remove clauses from folders:

1. Navigate to the Folder page.  
Navigation: Library > Folders tab
2. Search for the folder that you want to update. For more information, see the Searching for Folders section, page 6-76.
3. In the Result section, click the Update icon for the folder that you want.
4. In the Clauses section, select the check box for the clause that you want to remove.
5. Click Remove.
6. Click Save or Apply to save your changes.

## Deleting Folders

You can delete any folder from the Folders library.

### Steps

To delete folders:

1. Navigate to the Folder page.  
Navigation: Library > Folders tab
2. Search for the folder that you want to delete. For more information, see the Searching for Folders section, page 6-76.
3. In the Results section, click the Delete icon for the folder that you want to remove.
4. Click Yes to confirm.

## Considerations for Using Sections, Folders, and Clause Types

The following table covers the purpose and possible implementation considerations for using any of these features. These are considerations, not recommendations:

Details	Sections	Folders	Clause Types
Is setup mandatory?	Yes	No	Yes
What is the intended purpose?	Sections are the headings under which clauses are structured and appear together on a printed contract.	Folder is a tool for users of the Contract Terms Library to organize clauses that they work on for easy access and retrieval.	Clause Types can be used to classify clauses based on nature, type, form, or function.
What are the common examples?	<ul style="list-style-type: none"> <li>• Payment Terms</li> <li>• Products</li> <li>• Pricing</li> </ul>	<ul style="list-style-type: none"> <li>• Liability Clauses</li> <li>• Fixed Price Clauses</li> <li>• Localized clauses</li> </ul> <p>Note: One clause can be assigned to multiple folders.</p>	<ul style="list-style-type: none"> <li>• Finance clause - Limitation of Liability</li> <li>• Miscellaneous term</li> <li>• Marketing clause - Termination</li> <li>• Finance clause - Special payments</li> </ul>

Details	Sections	Folders	Clause Types
How is it used in a contract?	Sections and clauses together form the formatted content of a printed contract.	Folders are available as a browse tool for users who are authoring contracts to easily locate and add clauses to a contract.	<p>Clause types are used as search criteria for users who are authoring contracts to easily search for and add clauses to a contract.</p> <p>Clause types can also be used to route the contracts for special approvals. For example, all nonstandard Finance type clauses are to be routed to the Finance group for approval.</p>

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# Contract Expert Administration

This chapter covers the following topics:

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

## Overview

The Contract Expert feature enables organizations to define rules for creating contracts and reporting policy deviations.

- **Contract Creation Rules:** These rules assist users in authoring complex contracts with minimal legal supervision. Using Contract Expert, companies can centrally define and enforce their business policy rules that govern the contract clauses to be included in a contract document. Rules can be applicable to specific templates or applied globally for all contracts that are authored in the organization.

After rules are defined, you can invoke Contract Expert while authoring a business document like Sales Agreement, Sales Order, Blanket Purchase Agreement, or Purchase Order. Contract Expert leads you through a contract creation questionnaire and automatically adds required clauses based on the responses that you provided. In addition to the responses to these questions, rules can also be based on the terms that are negotiated on a business document, such as payment or shipment terms, and item category. For example, contracting organizations may require additional clauses in contracts involving hazardous materials, or in contracts for which the supplier or customer is located in a specific foreign country.

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

- **Policy Deviation Rules:** These rules can capture and report changes in business terms on business documents as deviations from corporate policy. As a result of negotiations on business documents, organizations may negotiate terms that exceed preapproved company policies and regulatory limits. For example, as a policy, all customers are allowed payment terms of Net 45. However, the contract administrator may agree to payment terms of Net 60 on a specific business document. This deviation should be brought to the attention of contract approvers to ensure that all deviations from corporate standards are approved in accordance with the approval policies. The Policy Deviation Rules feature helps you define all such corporate policies and identify any variations from these policies on contracts.

The sections in this chapter include:

- Managing Questions, page 7-3
- Managing Constants, page 7-6
- Managing Rules, page 7-8
- Managing Question Sequence, page 7-18
- Creating Dependencies Between Questions, page 7-19
- Using Contract Expert on Business Documents, page 7-20

## Managing Questions

In Oracle Contracts, you can define questions that drive both clause selection and policy deviation rules. You can also define the response type that is appropriate for different questions.

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

This section covers the following topics:

- Creating User Questions, page 7-3
- Searching for Questions, page 7-5
- Updating Questions, page 7-5

## Creating User Questions

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

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

After you define these question types, questions are available across all operating units that use the Contract Terms Library.

### Prerequisites

If the response type to a question is Numeric, you must set up constants.

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

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

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

### Steps

To create user questions:

1. Navigate to the Create Questions page.

Navigation: Contract Expert > Questions tab > Create Question button

2. In the Name field, enter a short name for the question. The name must be unique for a given intent and across all operating units.
3. In the Description field, describe the purpose of the question.
4. In the Intent field, select the intent for the question: Buy or Sell.
5. In the Question Prompt field, enter the question that you want to appear at run time for the users to respond to.
6. Use the Disable check box to disable the question to prevent it from being used in a rule. The Disable check box is available only in Update mode.
7. Select a response type from the list of values. The system supports the following response types:
  - Yes and No: At run time, the response appears as a drop-down list with two values, Yes and No. Select the appropriate response.
  - Numeric: The response is a numeric value that should be provided at run time.
  - List of Values: This option provides an enumerated list of values as its response. For example, possible responses to the Contract Type question could include Fixed Price, Cost Plus Pricing, and Services only Pricing.
8. If in the Response Type field you selected the List of Values option, the system displays the Value Set field.

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

**Note:** You must set up value sets as described in the prerequisites section, page 7-3.

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

9. Click Apply to activate and save the question.

**Note:** Contract Expert does not currently support default responses on user questions. An exception, however, is a question with response type Numeric that always defaults to 0 in the business document. You



must change this default value when answering numeric questions.

## Searching for Questions

Use these steps to search for questions.

### Steps

To search for questions:

1. Navigate to the Questions page.

Navigation: Contract Expert > Questions tab

2. Enter your search criteria for the question.

The following fields are available as search criteria:

- Name
- Description
- Question Prompt
- Intent

You can also search on the following fields:

- Value Set

**Note:** The Value Set search provides only the value sets that have been used in the questions, not all the value sets that were created in the system.

- Response Type
- Enabled check box

3. Click Go.

The system displays the questions that match your search criteria.

## Updating Questions

You can make changes to the existing questions. However, you cannot update Name, Intent, Response Type, and Value Set if the question is used in a rule. You can update

Description and Question Prompt even if the question is used in a rule. For the prompt changes to take effect on a business document, you must run the Contract Expert: Synchronize Templates concurrent program.

## Steps

To update questions:

1. Navigate to the Questions page.

Navigation: Contract Expert > Questions tab

2. Search for the question that you want to update.

For more information, see the Searching for Questions section, page 7-5. The system displays the questions that match your search criteria. From this page, you can select one of the following options:

- **Update:** To make changes to a question, click the Update icon. The system displays the Update Question page. You can use the Disable check box to prevent the question from being used in a new rule. This will not impact existing rules that use this question.
- **Delete:** A question cannot be deleted if it is used in a rule. To delete a question, click the Delete icon. The system displays the Warning page. Click Yes to confirm.

## Managing Constants

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

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

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

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

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

This section covers the following topics:

- Creating Constants, page 7-7

- Searching for Constants, page 7-7
- Updating Constants, page 7-8

## Creating Constants

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

After they are defined, constants are available across all operating units that use the Contract Terms Library.

### Steps

To create constants:

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

## Searching for Constants

Use these steps to search for constants.

### Steps

To search for constants:

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

- Intent

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

3. Click Go.

The system displays the constants that match your search criteria.

## Updating Constants

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

### Steps

To update constants:

1. Navigate to the Constants page.

Navigation: Contract Expert > Questions tab

2. Search for the constant that you want to update.

For more information, see the Searching for the Constants section, page 7-7. The system displays the constants that match your search criteria. From this page, you can select one of the following options:

- **Update:** To make changes to a constant, click the Update icon. The system displays the Update Constant page. You can make changes to the name, description, intent, and value of the constant if the constant is not used in any rules. If the constant is included in a rule, you can change only its value and description.
- **Delete:** You can delete a constant if it is not used in a rule. To delete a constant, click the Delete icon. The system displays the Warning page. Click Yes to confirm.

## Managing Rules

Contract Expert rules are created based on Buy or Sell intent for a specific organization. These rules can be applicable to all templates of one organization or can be associated with specific templates.

This section covers the following topics:

- Creating Rules, page 7-9

- Searching for Rules, page 7-13
- Activating Rules, page 7-14
- Disabling Rules, page 7-16
- Updating Rules, page 7-17

## Creating Rules

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

### Steps

To create rules:

1. Navigate to the Create Rule page.  
Navigation: Contract Terms Library > Contract Expert > Rule tab > Create Rule button
2. Select the operating unit for the rule.
3. Select one of the following rule types:
  - If you want to set up a rule to bring additional clauses into a business document, select the Clause Selection rule type.
  - To set up a rule to capture and report changes in business terms on contracts, select the Policy Deviation rule type.

For more information about the rule types, see the Contract Expert - Overview section, page 7-1.

4. Enter a unique name for the rule to identify the rule.
5. Enter a description explaining the nature and purpose of the rule.
6. Select the intent for the rule: Buy or Sell.
7. Review the Status field, which is a read-only field.

Contract Expert supports the following statuses for a rule:

- Draft: When you can create and update a rule, the rule is in the Draft status.
- Active (in Progress): When the rule is submitted for activation, the status of the

rule is changed from Draft to Active (in Progress).

- Active: The status of the rule is changed to Active when it is available for use in Contract Expert.
- Disabled (in Progress): This is the status of the rule while Contract Expert is performing the process of disabling the rule (when the disabled rule is exported to Oracle Configurator).
- Disabled: The status of a rule is changed to Disabled when it is no longer available for use in Contract Expert.
- Revision: When you update an Active rule, its status is changed to Revision.

8. To add a condition, click the Add Another Row button.

9. Select the Match All or Match Any condition option.

If the conditions must all be true to select the results, select the Match All radio button. Select the Match Any radio button if any condition can be true to select the results.

10. In the Type field, select one of the following condition types:

- Clause: The Clause type is available only for Clause Creation rules. Use this type if the rule requires a Contract Expert selected clause to be present in the business document. For instance, select the Clause type to create a rule to bring in Clause B if Clause A, which was selected by Contract Expert, is present in the document.
- Variable: You can use the Variable type to create Clause Creation and Policy Deviation rules.  
  
Use this type for the Clause Creation rules if a system or user-defined variable drives the clause selection on a business document. For instance, bring Clause A if the variable Payment terms = Net 30 is in the document.  
  
For Policy Deviation rules, use this type if a system or user-defined variable drives the policy deviation for a business document. For instance, if Contract Amount is less than \$1,000,000, then the standard for Payment Terms is Net 30. Or if the non-solicitation remedy is more than \$25,000, then the standard for Termination Days is 30 days.
- Question: Use this type if a user question should drive the clause selection or policy deviation on business documents. For instance, bring Clause A if the answer to Question B is Yes.

**Note:** You can use both system and user-defined variables to define Contract Expert rules.

For more information about Variables, see *Managing Variables*, page 6-66.

11. Select a name in the Name field: the available options are based on the condition type that you selected in the Type field:
  - Clause: The Name field is not available for this option.
  - Variable: The system provides access to a search page for both seeded and user-defined variables.
  - Question: The system provides access to a search page for questions that are defined in the Contract Expert.

12. Select an operator in the Operator field. Operators provide the logic in defining a condition, for instance, Payment terms **IS** Net 30.

To create a rule, Oracle Contracts supports the following operators:

- Logic Condition operators
    - IS
    - IS NOT
    - IN (allows selection of multiple values)
    - NOT IN (allows selection of multiple values)
  - Numeric Condition operators:
    - >=: Greater than or equal to
    - <=: Less than or equal to
    - =: Equal to
    - Not equal to
    - >: Greater than
    - <: Less than
13. Depending on the Type and other options, you must select one or more values in either the Value or Update Values field. For example:

- For condition Type = Clause, use the Update Values field.
- For condition Type = Question and if the response type is "Yes or No" or the question uses a value set of type Independent, use the Value field.
- For condition Type = Question with response type of Numeric or List of Values, use the Update Values field.

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

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

14. Click the Remove icon if you want to delete a condition from a rule.
15. Use the Results region to define the results if the defined conditions are met. The Results region is available only for Clause Creation rules.  
In the Results region, you can select clauses that must be brought in and ask the user additional questions on a business document.
16. In the Results - Clauses region, click the Add Clauses button to add another Result row to the rule.  
The Results - Clauses Table displays the Clause Title and Description for the clauses that you have chosen.
17. In the Results - Clauses Table, you can access the following:
  - Show Details: The system provides a hide or show option to display general information about one clause or all the clauses.
  - Remove icon: You can use the icon to delete a result row from the rule.
18. Use the Question Table of the Results region to select one or more additional questions that should be asked at run time if the conditions are met.

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

The Question table includes:

- Question: You can select from the list of questions that are already defined during Contract Expert setup.



- Question Prompt: The system displays the question prompt details from the library.
  - Delete icon: You can delete a question row from the rule.
  - Add Questions button: Click this button if you want to add another question to the result row of the rule.
19. Use the Contract Template Assignments region to assign the rule to one, many, or all contract templates. You can assign contract templates in Draft or Approved status to a rule. Only contract templates that are Contract Expert-enabled and belong to the same intent as the rule will be available to be assigned to the rule.
- Note:** Even though you can assign templates in any status to a rule, because only approved templates can be used to author business documents, the rules are effective only when applied to approved templates.
- To assign a rule to all contract templates in an organization, select the Apply to All Templates check box.
  - To select and assign one or more contract templates, click the Add Template button.
20. Select one of the following options:
- Cancel: The system closes the Create Rule page without saving any changes.
  - Save: The system validates the rule but does not close the page. If the rule fails validation, the system displays an error message.
  - Apply: The system validates the rule and displays the Rules Summary page. If the rule fails validation, the system displays an error message.
  - Apply and Add Another: The system validates the rule that was created and opens a new Create Rule page. If the rule fails validation, the system remains in the page and displays an error message.

## Searching for Rules

Use these steps to search for existing rules.

### Steps

To search for rules:

1. Navigate to the Rule page.  
Navigation: Contract Expert > Rules tab
2. In the Search region, search for rules by:
  - Operating Unit (mandatory field)
  - Name
  - Intent
  - Status
  - Contains Clause (search for a rule that uses a specific clause)  
This option searches only for clauses that are currently used in rules.
  - Contains Variable (search for a rule that uses a specific variable)  
The list of values displays only those variables that have been used on rules.
  - Contains Question (search for a rule that uses a specific question)  
The list of values displays only those questions that have been used on rules.
  - Assigned to Template (search for a rule that is assigned to a contract template)  
The list of values displays only the templates that are Contract Expert-enabled.
3. Click Go.  
The system displays the rules that match your search criteria.

## Activating Rules

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

### Prerequisites

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

### Steps

To activate rules:

1. Navigate to the Rules page.  
Navigation: Contract Expert > Questions tab

2. Search for the rule that you want to activate.

For more information, see *Searching for Rules*, page 7-13. The system displays the rules that match your search criteria.

3. Click **Activate**.

The *Active Rules: Confirmation* page appears. This page provides validation information on rules that are eligible to be published and those rules that cannot be published due to validation problems.

The validations include the following:

- The rule contains invalid clauses (that is, clauses that are not in the *Approved* status) in conditions or results.
  - The rule contains questions with invalid value sets. That is, the value set is not valid either because it was set up incorrectly or because a value set has been removed. For details of setting up value sets, see the prerequisites in the *Creating User Questions* section, page 7-3.
  - The rule contains no contract template assignments.
  - The rule contains inactive questions.
  - Values that are used in rules are invalid. For instance, the values that are used in a value set are no longer valid.
4. If validation errors occur, you cannot complete rule activation. You must first correct the errors, and then restart the *Rule Activation* process.
  5. When the *Activate Rules: Confirmation* page shows only rules that are ready to be activated, click **Finish**.

This generates the following processes:

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

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

**Note:** To improve database performance, run the following Configurator concurrent programs periodically:

- **Purge Configurator Tables:** This program physically removes all logically deleted records in the tables and subschemas of the CZ schema.
- **Purge to Date Configurator Import Tables:** This program deletes data in the CZ\_IMP tables, and the corresponding data in the CZ\_XFR\_RUN\_INFOS and CZ\_XFR\_RUN\_RESULTS control tables. The data for the number of days, which is specified in the Input parameter, is retained.

For more information, see the *Oracle Configurator Implementation Guide*. For additional information about improving database performance, see the *Oracle Configurator Performance Guide*.

## Disabling Rules

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

### Steps

To disable rules:

1. Navigate to the Rules page.

Navigation: Contract Expert > Rules tab

2. Search for the rule that you want to disable or activate.

For more information, see the Searching for Rules section, page 7-13. The system displays the rules that match your search criteria.

3. Click Disable.

When you choose to disable a rule:

- The system runs the Contract Expert: Disable Rules concurrent program, and the status of the rule is changed to Disabled (in Progress).
- If the program finishes successfully, the status of the rule changes to Disabled.
- If any system errors are encountered during the disabling process, the system

stops the concurrent program, and the status of the rule remains in the Disabled (in Progress). The rule is picked up for disabling the next time that you select other rules to be disabled.

- Alternatively, you can run the Contract Expert: Disable Rules concurrent program manually from the Contract Terms Library Administrator responsibility.

## Updating Rules

The steps for updating active rules are:

### Steps

To update rules:

1. Navigate to the Rules page.

Navigation: Contract Expert > Rules tab

2. Search for the rule that you want to update.

For more information, see the Searching for Rules section, page 7-13. The system displays the rules that match your search criteria. From this page, you can update, duplicate, or delete rules.

3. Update Rules: If you click the Update icon, the system changes the status of the active rule to Revision; if you update a draft rule, the status remains Draft. The system allows updates to the conditions, results, and template assignments.

However, you cannot update the following fields:

- Operating Unit
  - Rule Type
  - Name
  - Intent
  - Apply to All Templates
4. Delete Rules: You can delete only rules in the Draft status.
  5. Duplicate Rules: You can duplicate rules within your organization. The system creates a new rule. You must provide a new name and description for the rule. The system validates the rule when you click the Save, Apply, or Apply and Add Another button. The contract template assignments are also copied during the

duplicate process

## Managing Question Sequence

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

### Steps:

To manage question sequence:

1. Navigate to the Rules page.

Navigation: Contract Expert > Rules tab

2. To view or reorder the question sequence, select a contract template to use to view or update the sequence and then click the View Question Sequence button to open the View Question Sequence page.

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

In the Questions area of the View Question Sequence page, the column Displayed During Authoring, when selected, indicates the availability of questions during document authoring. The questions that are not selected belong to inactive rules. To enable these questions, you must activate the rules.

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

5. Use the Up and Down arrows to change the question sequence.

**Note:** During authoring, a dependent, lower-level question appears only if a higher-level question is answered. If the dependent question is not properly organized under the higher-level question, the dependent question appears out of sequence in the questionnaire during document authoring. For more information about question dependencies, see *Creating Dependencies Between Questions*, page 7-19.

6. Click Apply to save and close the page.

7. Run the Contract Expert: Synchronize Templates concurrent program to publish the

updates to question sequence. You must run this concurrent program manually to enable the changes at run time for document authoring. The concurrent program can finish with either of two statuses:

- Completed/Normal
- Completed/Error: If the program fails due to system errors, a notification is sent to the Contract Expert Administrator.

## Creating Dependencies Between Questions

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

### Overview

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

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

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

### Setting Up Independent Questions

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

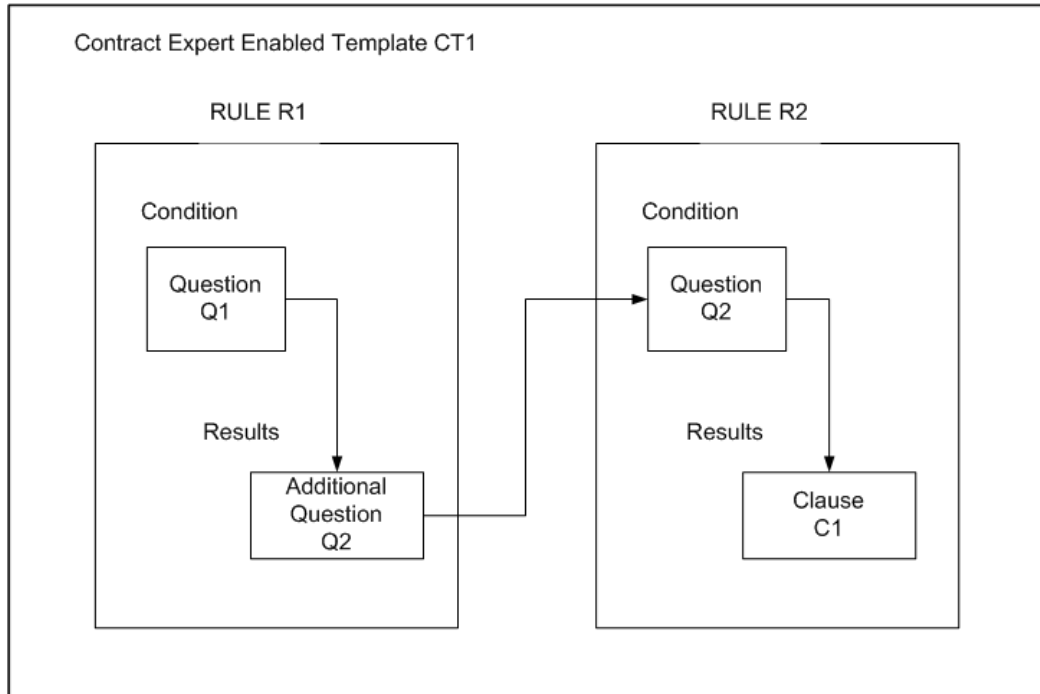
- In the Conditions region, specify a Question type condition.
- In the Results region, specify one or more clauses, but no additional questions.
- Associate the rule with a Contract Expert-enabled contract template.

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

### Setting Up Dependent Questions

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

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



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

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

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

## Using Contract Expert on Business Documents

You can use the Contract Expert functionality to author contract terms and conditions based on the corporate standards and policies. Observe the following guidelines when using Contract Expert:

- Start with a standard contract template that may contain some standard clauses.
- Use Contract Expert on the business document to bring in additional clauses, based



on criteria including items, item categories, payment terms, and other business terms in the document.

- You may need to provide additional responses in Contract Expert to drive further clause selection.
- All of the Contract Expert-recommended clauses are brought into the business document and organized under appropriate sections.
- You can periodically run Contract Expert on the business document to ensure that the document contains all the appropriate clauses based on the latest set of business rules.

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



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# Integrations

This chapter describes how Oracle Contracts integrates with other Oracle applications.

This chapter covers the following topics:

- Integration Overview
- Integration with Other Oracle Applications

## Integration Overview

Oracle Sales Contracts and Oracle Procurement Contracts are no longer standalone applications. They are options that enhance the existing core sales and procurement applications. The contract management capabilities of Oracle Sales Contracts and Oracle Procurement Contracts are now embedded within the Procure-to-Pay and Quote-to-Cash flows. Thus, Oracle Sales Contracts requires either Oracle Quoting or Oracle Order Management, and Oracle Procurement Contracts requires Oracle Sourcing or Oracle Purchasing.

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

## Integration with Other Oracle Applications

Oracle Contracts integrates with the following Oracle applications:

## Oracle Procurement Contracts

Oracle Procurement Contracts enables you to:

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

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

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

## Oracle Purchasing

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

## Oracle Sourcing

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

## Oracle iSupplier

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

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

## Oracle Sales Contracts

Oracle Sales Contracts extends Oracle Quoting and Oracle Order Management by offering embedded terms and conditions authoring and negotiation capabilities. Contracts functionality is integrated into the quote-to-cash process for seamless integration into your existing business processes. Negotiated terms are automatically enforced during order execution without the need for additional integration, allowing companies to streamline their contract management processes.

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

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

## Oracle Quoting

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

## Oracle Order Management

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

- Quoted orders
- Sales orders
- Sales order releases
- Sales agreements

## Oracle iStore

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

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

## Oracle Service Contracts

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

## Oracle Configurator

The Contract Expert feature uses Oracle Configurator to process and evaluate the Contract Expert rules that bring additional clauses into a business document. Oracle Contracts needs to run certain concurrent processes periodically to import data into

Oracle Configurator. The data that is imported from the Contract Expert setup, in Oracle Contracts, to Oracle Configurator includes:

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

### **Oracle Partner Management**

When business partners enroll in a program, they might be expected to sign a contract. Oracle Partner Management leverages the functionality of Oracle Contracts to display terms and conditions that the partners need to review and accept as part of the Partnership enrollment process. For more information, see the *Oracle Partner Management Implementation Guide*.





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## Validations

This appendix describes the validations in Oracle Contracts.

This appendix covers the following topics:

- Validations - Overview
- Contract Templates Validations
- Contract Expert Validations
- Business Documents Validations
- Repository Validations
- Deliverables Validations

### Validations - Overview

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

### Contract Templates Validations

The following table lists all errors and warnings that the system uses as part of the validation process for Contract Templates.

Validation Type	Condition	Description
Alternate Clauses	Warning	Checks for the presence of alternate clauses on the document.

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Clause Default Section	Error	Checks whether the default section of the draft clause is valid.
Clause Inactive Variable	Error	Checks whether the draft clause contains an inactive variable.
Clause Invalid Status Change	Error	Checks whether the clause is being changed to an invalid status.
Clause Type	Error	Checks whether the clause type of the draft clause is valid.
Clause Variable Invalid Value Set	Error	Checks whether the draft clause contains a user-defined variable with an inactive value set.
Contract Expert Template Not Exported	Warning	Checks whether a template is not exported for Contract Expert.
Contract Expert Template Not Published	Warning	Checks whether a template is not published for Contract Expert.
Duplicate Clauses	Warning	Checks the document for presence of repeated clauses.
Empty Section	Warning	Checks for the presence of sections with no clauses.
Inactive Clauses	Error	This checks for the presence of invalid clauses in the document.
Incompatible Clauses	Warning	Checks for the presence of incompatible clauses on a document.

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Invalid Default Section in Template	Warning	This checks for the presence of a valid default section in the Contract Expert area.
Invalid Variable for Document Type	Warning	Checks for variables without any document type association.
Layout Template Not Defined	Warning	Checks whether a stylesheet has been defined on a template.
Template Rules That Are Not Active	Warning	Checks whether any rules are attached to templates that are not active.
Template With No Active Rules	Warning	Checks whether the template has no Active rules attached.
Translated Template Has Been Revised	Warning	Checks whether the parent template has been revised.
Translated Template is Invalid	Warning	Checks whether the parent template is expired or on hold.

## Contract Expert Validations

The following table lists all errors and warnings that the system uses as part of the validation process for Contract Expert rules.

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Expired Clause	Error	Checks for any expired clause that is used in the rule.
Invalid Clause	Error	Checks for any On Hold clause that is used in the rule.

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Draft Clause	Error	Checks for any Draft clause that is used in the rule.
Circular Dependency	Error	Checks for questions with circular dependencies on other rules.
Invalid Question Valueset Query	Error	Checks for an invalid valueset query in a question that is used on a rule.
Invalid Variable Valueset Query	Error	Checks for an invalid valueset query in a variable that is used on a rule.
Missing Valueset Value in Question	Error	Checks for any missing valueset values for a question that is used in a rule.
Missing Valueset Value in Variable	Error	Checks for missing valueset values for a variable that is used in a rule.
Invalid Valueset in Question	Error	Checks for deleted valueset for a question that is used in a rule.
Invalid Valueset in Variable	Error	Checks for deleted valueset for a variable that is used in a rule.
Invalid Question	Error	Checks for disabled questions in the rule.
Invalid Default Section	Warning	Checks for the effectivity of the default section that is associated with the template.
Missing Template Association	Error	Checks for missing template associations in non-organization-wide rules.

Validation Type	Condition	Description
Invalid Procedure in Variable	Error	Checks for invalid procedure in the variable that is used in a rule.
Invalid Procedure Name in Variable	Error	Checks for incorrect procedure name format for user-defined variables. The correct format is: <schema name>.<package name>.<procedure name>
Invalid or Missing Procedure	Warning	Checks for invalid procedure in a new user-defined variable.

## Business Documents Validations

The following table lists errors and warnings that are used in the application, during authoring, as part of the validation process for contract documents.

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

Validation Type	Condition	Description
Alternate Clauses	Warning	Checks for the presence of alternate clauses on the document.
No Clause Amendment Description	Warning	Checks for the presence of amended clauses without amendment descriptions.
No Clauses Exist	Warning	Checks whether any clause exists on the document.

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Inactive Clauses	Warning	Checks for the presence of inactive clauses in the document.
Check Contract Administrator	Warning	Checks whether you have defined a contract administrator for the document.
Duplicate Clauses	Warning	Checks the document for the presence of repeated clauses.
Empty Section	Warning	Checks for the presence of sections with no clauses.
Contract Expert not Run on Document	Warning	Checks whether Contract Expert has been run on a document.
Unresolved External Variables	Warning	Checks for the presence of external variables without values.
Incompatible Clauses	Warning	Checks for the presence of incompatible clauses on a document.
Incomplete Contract Expert Configuration	Warning	Checks for an incomplete Contract Expert configuration based on current document attribute values.
Unresolved Internal Variable	Warning	Checks the document for the presence of internal variables without values.
Invalid Contract Expert Setup	Warning	Checks for an invalid Contract Expert configuration based on the current document attribute values.

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Old Version of Clause Used	Warning	Checks the document for older versions of a clause from the library.
Contract Locked	Warning	Checks whether the contract has been locked.
New Contract Expert Clause	Warning	Checks whether Contract Expert returns a clause that is not in the Contract Expert configuration that is currently in the document.
Not Required Contract Expert Clause	Warning	Checks for Contract Expert clauses in the document that are no longer required.
Primary Contract Document not Found	Warning	Checks whether a primary contract document is uploaded when the Contract Source is set to Attached Document.
No Section Amend Description	Warning	Checks whether the amendment description is missing for a section-related change during amendment of a document.
Inactive Template	Warning	Checks for an inactive contract terms template when it is used to create business document terms and conditions.
Unassigned Clause	Warning	Checks for clauses that are not assigned to any section.
Unresolved System Variable	Warning	Checks for the system variables without any values.

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Invalid Variable for Document Type	Warning	Checks for the variables without any document type association.

## Repository Validations

The following table lists the validation codes for Repository.

<b>Validation Type</b>	<b>Condition</b>	<b>Description</b>
Validate Effective Date	Error	Checks whether the contract has a valid effective date.
Validate External Party	Warning	Checks whether the contract has an external party.
Contract Type Active	Warning	This checks whether the contract has a valid contract type.
Contact Role Active	Warning	Checks the contract for the presence of invalid contract roles.
Risk Active	Warning	Checks whether the contract was assigned an invalid risk.
External Party Active	Warning	Checks for the presence of invalid external parties in a contract.
Contact Active	Warning	Checks for the presence of invalid contacts in a contract.

## Deliverables Validations

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



Type	QA Code	Description
Deliverable	CHECK_BUYER_CONTACT (Buyer Contact)	Verifies whether a buyer contact is not provided or not a valid contact. Buyer contact is a required field on a deliverable. Hence, this check is qualified as an error.
Deliverable	CHECK_BUYER_CONTACT _VALID	Error message to indicate that the buyer contact must be a current employee.
Deliverable	CHECK_REQUESTER_CONT ACT_VALID	Error message to indicate that the requester must be a current employee.
Deliverable	CHECK_ESCALATION_CO NTACT_VALID	Error message to indicate that the escalation assignee must be a current employee.
Deliverable	CHECK_NOTIFICATIONS	Error message to indicate that the Escalation notification details must not be blank if the Escalation notification is checked.
Deliverable	CHECK_SUPPLIER_CONTA CT (Supplier Contact)	Verifies whether the provided supplier contact is a valid contact for the given supplier ID and is only an error if supplier contact is provided on a deliverable.

Type	QA Code	Description
Deliverable	CHECK_DUE_DATES (Due Date)	Verifies the following deliverable due-date details: <ul style="list-style-type: none"> <li>• If the deliverable is defined for a fixed due date, the date must be provided.</li> <li>• If the deliverable is defined relative to an event, the date must be specified on the given business document.</li> </ul>
Deliverable	CHECK_AMENDMENT (Deliverable Amendment)	Verifies the amendment details for the deliverable. A warning message is shown if the amendment description is not provided when a deliverable is amended.
Deliverable	CHECK_DELIVERABLES_V AR_USAGE (Deliverable variable usage)	Verifies whether the deliverable variables are used in a clause when no deliverables are on the document.
Deliverable	CHECK_RESP_PARTY	Verifies whether the responsible party is incompatible with the deliverable type.

# B

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## Workflows

This appendix describes the workflows in Oracle Contracts.

This appendix covers the following topics:

- Workflows - Overview
- Contract Terms Library
- Repository
- Deliverables

### Workflows - Overview

The following tables list the new workflows for Contract Terms Library, Repository, and Deliverables.

### Contract Terms Library

The following table lists the new workflows for Contract Terms Library.

<b>Workflow Name</b>	<b>Technical Name</b>	<b>Description</b>
Contract Clause Approval	OKCARTAP	<p>This workflow routes contract clauses for approval. If applicable, it also notifies:</p> <ul style="list-style-type: none"> <li>• Approvers that a clause requires approval.</li> <li>• Contract administrators, when clauses are approved or rejected.</li> <li>• Local organizations, when global clauses become available for adoption or are automatically adopted in local organizations.</li> </ul>
Contract Template Approval	OKCTPAPP	<p>This workflow routes contract templates for approval. It also notifies:</p> <ul style="list-style-type: none"> <li>• Approvers, if a template requires approval.</li> <li>• Contract administrators, when templates are approved or rejected.</li> </ul>

## Repository

The following table lists the new workflows for Repository.

<b>Workflow Name</b>	<b>Technical Name</b>	<b>Description</b>
Contract Repository Approval	OKCREPAP	This workflow routes the Repository Contracts for approval.

<b>Workflow Name</b>	<b>Technical Name</b>	<b>Description</b>
Repository Contract Expiration Notifications	OKCREPXN	For a contract that is created in Contracts Repository and has an expiration date, you can set up a notification to be generated prior to the expiration date. This workflow generates the notifications and sends them to the user roles defined in the contract.

## Deliverables

The following table lists the new workflow for Deliverables.

<b>Workflow Name</b>	<b>Technical Name</b>	<b>Description</b>
Deliverables Notification	OKCDELWF	<p>This workflow handles sending out notifications for the following events:</p> <ul style="list-style-type: none"> <li>• A deliverable becomes overdue</li> <li>• Reminder to perform a deliverable prior to the due date</li> <li>• The status of a deliverable is updated</li> </ul>



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## Concurrent Programs

This appendix describes about concurrent programs in Oracle Contracts.

This appendix covers the following topics:

- Concurrent Programs - Overview
- Contract Terms Library
- Contract Expert
- Repository

### Concurrent Programs - Overview

The tables in the following sections list the concurrent programs for Contract Terms Library, Contract Expert, and Repository.

### Contract Terms Library

The following table lists the new concurrent programs for Contract Terms Library.

Concurrent Program	Technical Name	Description
Synchronize Clauses Text Index	ARTSYNCCTX	Use this program to synchronize the clauses text index and enable searching for clauses using the Clause Keyword field. The keyword searches the clause name, clause display name, clause description, and clause text fields.

<b>Concurrent Program</b>	<b>Technical Name</b>	<b>Description</b>
Optimize Clause Text Index	ARTOPTCTX	Use this program to optimize the clauses text index for improved performance when users search for clauses using clause keyword.
Synchronize Contract Template Text Index	OKCTMPLSYNCCTX	Use this program to synchronize the contract templates text index to search for templates using the template keyword field. The keyword searches the template name and description.
Optimize Contract Template Text Index	OKCTMPLOPTCTX	Use this program to optimize the contract templates text index for improved performance when users search for templates using the template keyword.
Adopt Global Clauses for a New Organization	OKCADPNEWORG	Use this program to automatically adopt approved global clauses for a new local organization.
Import Clauses	OKCARTIMPORT	Use this program to import external clauses into the Clause Library. This program validates data in the open interface table, and imports the valid clauses into the Contract Terms Library.
Migrate Standard Clauses to 11.5.10	OKCSTDARTMIG	Use this program to migrate standard clauses to multiple organizations. This program is used for upgrades from earlier releases.



<b>Concurrent Program</b>	<b>Technical Name</b>	<b>Description</b>
Purge Clause Import Interface Table	OKCPURARTINF	Use this program to purge data from the Clause Interface table after the clause import has been completed.
Overdue Deliverable Notifier	OKCOVERDUEDELMGR	Use this program to periodically send out notifications or e-mail messages to the concerned parties for all overdue deliverables.
Deliverable Due Date Notifier	OKCBEFORREDUEDELMGR	Use this program to periodically send out reminder notifications or e-mail messages for all deliverables that are about to become due.
Deliverable Escalation Notifier	OKCESCALATEDELMGR	Use this program to periodically send notifications to the escalation assignee for all overdue deliverables.

<b>Concurrent Program</b>	<b>Technical Name</b>	<b>Description</b>
Oracle Contracts Purge Routines	OKCPURGE	<p>Use this program to purge data that is used in the application. Currently, purge of the following data is allowed through this program:</p> <ul style="list-style-type: none"> <li>• <b>QA Validation Errors:</b> Purges all validation results (errors or warnings) that are generated during contract template or business document approvals.</li> <li>• <b>Standard Deviations Date:</b> Purges all deviations data that is generated when the Contract Deviations report is run (either by the system or by the user) on a business document.</li> <li>• <b>Contracts Workbench:</b> Purges the oldest items in the Recent Contracts bin.</li> </ul>

## Contract Expert

The following table lists the concurrent programs for Contract Expert.

<b>Concurrent Program</b>	<b>Technical Name</b>	<b>Description</b>
Contract Expert: Activate Rules	OKC_XPRT_PUBLISH_RULE S	Use this program to manually activate rules when the Automatic Rule Activation concurrent program fails due to system or functional errors.

<b>Concurrent Program</b>	<b>Technical Name</b>	<b>Description</b>
Contract Expert: Disable Rules	OKC_XPRT_DISABLE_RULES	Use this program to manually disable rules when the Automatic Rule Disabling concurrent program fails due to system or functional errors.
Contract Expert: Synchronize Templates	OKC_XPRT_REBUILD_TEMP LATES	Use this program to synchronize Question Prompt information (users can update the question prompt in Contract Expert) in the Contract Expert setup.

## Repository

The following table lists the concurrent programs for Repository.

<b>Concurrent Program</b>	<b>Technical Name</b>	<b>Description</b>
Contract Repository Expiry Notifications	OKC_REP_CONTRACT_EXPIRY_NTF	Use this program to send expiry notification to the contract administrator prior to contract expiration.
Contract Repository Import	OKC_REP_IMPORT	Use this program to import Repository Contracts and upload their associated documents using the import template.
Contract Repository Update Text Index	OKC_REP_TXT_INDEX_UPDATE	Use this program to synchronize the text index that provides keyword search on Repository Contracts.
Contract Repository Optimize Text Index	OKC_REP_TXT_INDEX_OPTIMIZE	Use this program to optimize the text index that provides keyword search on Repository Contracts.

---

<b>Concurrent Program</b>	<b>Technical Name</b>	<b>Description</b>
Contract Repository Update Contract Status	OKC_REP_STATUS_UPDAT E	Use this program to update contract status based on various events in the life cycle of contracts.

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# D

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## Seed Data

This appendix describes the seed data in Oracle Contracts.

This appendix covers the following topics:

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

### Responsibility

The seeded responsibilities are:

- Contracts Workbench Administrator
- Contracts Workbench User
- Contract Terms Library Administrator

This responsibility can be used only if the MO: Operating Unit profile option has a value that is assigned either at the site level or for this responsibility.

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

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

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

- Root Menu: OKC Contract Repository Root Menu

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

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

## Deliverables

The following table displays the seeded deliverables:

### *Seeded Deliverables*

<b>Name</b>	<b>Description</b>
All Contractual Deliverables	All contractual deliverables.
All Negotiation Deliverables	All negotiation deliverables.
Buyer Contractual Deliverables	Contractual deliverables for which the buyer is the responsible party.
Supplier Contractual Deliverables	Contractual deliverables for which the supplier is the responsible party.
Supplier Negotiation Deliverables	Negotiation deliverables for which the supplier is the responsible party.

## Document Types

The following table displays the seeded document types:

### *Seeded Document Types*

<b>Name</b>	<b>Description</b>	<b>Document Class</b>	<b>Application</b>
AUCTION	Auction	SOURCING	Oracle Sourcing

<b>Name</b>	<b>Description</b>	<b>Document Class</b>	<b>Application</b>
AUCTION_RESPONSE	Bid	SOURCING	Oracle Sourcing
B	Sales Agreement	SO	Oracle Order Management
ISP_PO_REF	iSupplier view of PO documents	PO	Oracle iSupplier Portal
O	Sales Order	SO	Oracle Order Management
OKE_BUY	Project Contracts (Buy)	OKE	Oracle Project Contracts
OKE_SELL	Project Contracts (Sell)	OKE	Oracle Project Contracts
OKL	Lease Management	OKL	Oracle Lease Management
OKS	Service Contracts	OKS	Oracle Service Contracts
PA_BLANKET	Blanket Purchase Agreement	PO	Oracle Purchasing
PA_CONTRACT	Contract Purchase Agreement	PO	Oracle Purchasing
PO_STANDARD	Standard Purchase Order	PO	Oracle Purchasing
PV_PARTNER_PROGRAM	Partner Program	POL	Oracle Partner Management
QUOTE	Quote	QUOTE	Oracle Order Capture
RFI	RFI	SOURCING	Oracle Sourcing
RFI_RESPONSE	RFI Response	SOURCING	Oracle Sourcing

Name	Description	Document Class	Application
RFQ	RFQ	SOURCING	Oracle Sourcing
RFI_RESPONSE	Sourcing Quote	SOURCING	Oracle Sourcing

## Layout Template

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

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

The seeded layout templates for printing contract terms are:

- Oracle Contract Terms Template
- Contract Terms Template
- Contract Terms Layout Template for iStore

**Note:** The **Contract Terms Layout Template for iStore** layout template does not print the clause title. It prints only the clause text under the respective sections.

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

### *Seeded Layout Templates for Deviations Report*

Name	Type	Description
Contract Deviations Sourcing Template	RTF	The main Rich Text Format template for Sourcing.
Contract Deviations Order Management Template	RTF	The main Rich Text Format template for Order Management.
Contract Deviations Template for Quoting	RTF	The main Rich Text Format template for Quoting.



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

## Notifications

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

### **Seeded Notifications**

<b>Type</b>	<b>Business Context</b>	<b>Description</b>
Clauses	Clause submitted for approval	Notifies the global or local organization approvers when a global or local clause requires approval.
Clauses	Global Clause approved	Sends a notification to the requestor and library administrators of local organizations when a global clause is approved.

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

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



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## Look Up Codes

This appendix describes the look up codes in Oracle Contracts.

This appendix covers the following topics:

- Lookup Codes

### Lookup Codes

The following tables provide the list of system, user, and extensible lookup codes for Oracle Contracts. Use these tables to identify the lookup codes that you need to define for your implementation.

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

#### *Extensible Lookup Code for Clauses and Templates*

Type	Description
OKC_SUBJECT	Clause types

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

#### *Seeded Lookup Codes for Clauses, Templates, and Variables*

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

<b>Type</b>	<b>Description</b>
OKC_ART_IMP_PROCESS_STATUS	Clause import statuses
OKC_ART_USER_ACTS	User actions allowed on clauses
OKC_ART_VAR_DATATYPE	User-defined variable data types
OKC_ART_VAR_TYPE	Variable types
OKC_ARTICLE_ADOPTION_TYPE	Clause adoption type
OKC_ARTICLE_DATE_PERIOD	Date search criteria
OKC_ARTICLE_IMPORT_ENTITY	Entities used for the XML-based clause import
OKC_ARTICLE_INTENT	Clause intent
OKC_ARTICLE_PROVISION	Clause type (Provision or Clause)
OKC_ARTICLE_RELATIONSHIP_TYPE	Relationship type of the clause
OKC_ARTICLE_SECTION	System-seeded default section
OKC_ARTICLE_STATUS	Clause statuses
OKC_BEFORE_AFTER	Before-After lookup for business doc events
OKC_CA_ADOPTION_TYPE	Clause analysis adoption type
OKC_CA_ADOPTION_TYPE_GORG	Clause analysis adoption type for the global organization
OKC_CA_ADOPTION_TYPE_LORG	Clause analysis adoption type for the local organization
OKC_CA_SUMMARIZE	Clause analysis summary
OKC_CA_USAGE	Clause analysis usage
OKC_CONTRACT_TERMS_SOURCES	Possible sources for contract terms: Attached Document or Structured Terms

<b>Type</b>	<b>Description</b>
OKC_DEL_BEF_AFT	Deliverable due dates before and after
OKC_DEL_DUE_DATE_RADIO_GRP	Deliverable due date radio group
OKC_DEL_INT_EXT	Deliverables internal and external organizations
OKC_DEL_PROMPTS	Deliverables UI prompts
OKC_DEL_REPEAT_FREQ	Deliverable repeat frequency
OKC_DEL_REPEAT_RADIO_GRP	Deliverable repeat radio group
OKC_DELIVERABLE_STATUS	Deliverable statuses
OKC_DELIVERABLE_TIME_UNITS	Seeded time units used in contract deliverables
OKC_DELIVERABLE_TYPES	Deliverable types
OKC_DEVIATIONS_AUTOGEN_PREF	The preference for generating the Deviations report: Yes, No, or Not Applicable
OKC_DOCUMENT_TYPE_CLASS	Error type for validations
OKC_DOWNLOAD_FILE_FORMAT	Download file formats
OKC_ERROR_RECORD_TYPE	QA error record types (for example, Clause, Contract Expert, Deliverable, and Document)
OKC_INVALID_ARTICLES	Deviation code for deviation category: Invalid Clauses (Clause Expired, Clause on hold, Clause not required per Contract Expert)
OKC_MISSING_STD_ARTICLES	Deviation code for deviation category: Standard Clauses Missing (Clause required per Contract Expert, Mandatory Clause removed, Optional Clause removed)

Type	Description
OKC_NON_STD_ARTICLES	Deviation code for deviation category: Non-Standard Clauses (non-standard clause added, modified standard clause)
OKC_NUMBER_LEVEL	Contract numbering scheme levels
OKC_NUMBER_SEQUENCE	Contract terms document numbering sequence
OKC_PURGE_TYPE	List of tables that can be purged through the concurrent program
OKC_QA_SEVERITY	Validation severity (error or warning)
OKC_REPO_ATTACH_DOC_FROM	Attach document using the following options: Add New Document or Add from Previous Version
OKC_SECTION_LOCATION	Contract terms section location (before, after, or within)
OKC_SECTION_SOURCE	Source of the section (from library or new)
OKC_STD_ARTICLES_ADDED	Deviation code for the Deviation category: Standard Clauses Added (standard clause added, standard clause replaced with alternate)
OKC_TERM_QA_LIST	Contract terms validation issues listing
OKC_TERMS_AUTH_ACTIONS_AMEND	Contract terms authoring actions in the Amend mode
OKC_TERMS_AUTH_ACTIONS_UPDATE	Contract terms authoring actions in the Update mode
OKC_TERMS_AUTH_ACTIONS_VIEW	Contract terms authoring actions in the View mode
OKC_TERMS_DEVIATION_CATEGORIES	Terms Deviation Categories: Invalid Clauses, Standard Clauses Missing, Non-standard Clauses, Standard Clauses Added



<b>Type</b>	<b>Description</b>
OKC_TERMS_DEVIATIONS_VIEWBY	Contract terms deviations view by category (default view) or section
OKC_TERMS_INTENT	Contract terms intent
OKC_TERMS_MOVE_LOCATION	Location to move contract terms: after, before, or within
OKC_TERMS_QA_TYPE	Contract terms QA type
OKC_TERMS_TEMPLATE_ACTIONS	Contract template actions supported
OKC_TERMS_TMPL_DATE_PERIODS	Contract template date search criteria
OKC_TERMS_TMPL_STATUS	Contract template statuses supported
OKC_TERMS_UPLOAD_ACTIONS	Review upload actions
OKC_VARIABLE_SOURCE	User-defined variable source
OKC_XPRT_CHAR_OPERATOR	Contract Expert rules' character operators: In, Not In, Is, Is Not
OKC_XPRT_COND_OBJECT_TYPE	Contract Expert condition object types
OKC_XPRT_COND_VALUE_TYPE	Contract Expert condition value types
OKC_XPRT_NUMBER_OPERATOR	Contract Expert rules' numeric operators
OKC_XPRT_QUESTION_DATATYPE	Contract Expert question data types
OKC_XPRT_QUESTION_TYPE	Contract Expert question entity type
OKC_XPRT_RULE_RECORD_TYPE	Contract Expert rule condition types
OKC_XPRT_RULE_STATUS	Contract Expert rule statuses
OKC_XPRT_RULES_QA_LIST	Contract Expert rules quality assurance checklist

<b>Type</b>	<b>Description</b>
OKC_XPRT_VIEW_RULE_ACTIONS	Rule actions in the View mode
OKC_YN	Contract flags: Yes or No

The following table provides the list lookup codes for Contract Repository.

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

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## XML Reference

This appendix covers the following topics:

- Contract Terms XML Reference

### Contract Terms XML Reference

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

#### Contract Terms XML

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

The ContractTermsAM XML element has the following structure:

**Note:** The DeliverablesAM node is applicable to procurement contracts only.

ContractTermsAM

VariablesMetaDataVO (1)

VariablesMetaDataVORow (0 or more)

ParametersVO (1)

ParametesVORow (1)  
 SectionsArticlesToPrintVO (1)  
 SectionsArticlesToPrintVORow (0 or more)  
 DeliverablesAM (1)  
 DeliverablesAllForBusinessDocExpVO (0 or 1)  
 DeliverablesAllForBusinessDocExpVORow (0 or more)  
 DeliverablesForAllSourcingExpVO (0 or 1)  
 DeliverablesForAllSourcingExpVORow (0 or more)  
 DeliverablesForInternalContractualExpVO (0 or 1)  
 DeliverablesForInternalContractualExpVORow (0 or more)  
 DeliverablesForExternalSourcingExpVO (0 or 1)  
 DeliverablesForExternalSourcingExpVORow (0 or more)  
 DeliverablesForExternalContractualExpVO (0 or 1)  
 DeliverablesForExternalContractualExpVORow (0 or more)  
 DeliverablesForInternalSourcingExpVO (0 or 1)  
 DeliverablesForInternalSourcingExpVORow (0 or more)

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

```

<?xml version="1.0" encoding="UTF-8" ?>
<ContractTermsAM type="AM" name="ContractTermsAM1">
  <VariablesMetadataVO type="VO" name="VariablesMetadataVO">
    <VariablesMetadataVORow>
      <ArticleVersionId>6319</ArticleVersionId>
      <VariableCode>EXTERNAL_CONTRACTUAL_DEL</VariableCode>
      <VariableType>D</VariableType>
      <DocType>TEMPLATE</DocType>
      <ViewObjectName>DeliverablesForExternalContractualExpVO</ViewObjectName>
      <ExternalYn>N</ExternalYn>
    </VariablesMetadataVORow>
  </VariablesMetadataVO>
</ContractTermsAM>
  
```

```

</VariablesMetadataVORow>
<VariablesMetadataVORow>
<ArticleVersionId>6313</ArticleVersionId>
<VariableCode>1022</VariableCode>
<VariableType>U</VariableType>
<ExternalYn>N</ExternalYn>
</VariablesMetadataVORow>
</VariablesMetadataVO>
<ParametersVO type="VO" name="ParametersVO">
<ParametersVORow>
<PrintAmendments>0</PrintAmendments>
<DocumentName>Example Contract Template</DocumentName>
</ParametersVORow>
</ParametersVO>
<SectionsArticlesToPrintVO type="VO" name="SectionsArticlesToPrintVO">
<SectionsArticlesToPrintVORow>
<UniqueId>SECTION14394</UniqueId>
<StructureLevel>1</StructureLevel>
<ObjectType>SECTION</ObjectType>
<DocumentId>3941</DocumentId>
<DocumentType>TEMPLATE</DocumentType>
<DisplaySequence>10</DisplaySequence>
<Label>I.</Label>
<Title>Contract Terms and Conditions</Title>
<ArticleText />
<CatId>14394</CatId>
</SectionsArticlesToPrintVORow>
<SectionsArticlesToPrintVORow>
<UniqueId>ARTICLE36293</UniqueId>
<StructureLevel>2</StructureLevel>
<ObjectType>ARTICLE</ObjectType>
<ParentId>14394</ParentId>
<DocumentId>3941</DocumentId>
<DocumentType>TEMPLATE</DocumentType>
<DisplaySequence>10</DisplaySequence>
<Label>1.</Label>
<Title>Limitation of Government Liability</Title>
<ArticleNumber>10415</ArticleNumber>
<ArticleText>

```

```

<P>a) A <var name="1022" type="U" meaning="Contract Type"/>
<EM>[insert specific type of contract]</EM>
definitive contract is contemplated. </P>

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

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

</ArticleText>
<ArticleVersionId>6312</ArticleVersionId>
<ArticleId>6006</ArticleId>
<CatId>36293</CatId>
<InsertByReference>N</InsertByReference>
</SectionsArticlesToPrintVORow>
</SectionsArticlesToPrintVO>
<DeliverablesAM type="AM" name="DeliverablesAM1">
<DeliverablesForExternalContractualExpVO type="VO"
name="DeliverablesForExternalContractualExpVO">
<DeliverablesForExternalContractualExpVORow>
<DeliverableId>29101</DeliverableId>
<DeliverableName>Prototype</DeliverableName>
<ResponsiblePartyName>Supplier Organization</ResponsiblePartyName>
<PrintDueDate>01/03/2004</PrintDueDate>
</DeliverablesForExternalContractualExpVORow>
</DeliverablesForExternalContractualExpVO>
</DeliverablesAM>
</ContractTermsAM>

```

## ContractTermsAM

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

The following table displays the nodes for the ContractTermsAM element:

### **Nodes for ContractTermsAM**

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

### **ContractTermsAM Components**

The following sections describe the components of the ContractTermsAM:

#### **SectionsArticlesToPrintVO**

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

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

**Child Elements for SectionArticleToPrintVORow**

<b>Element/Attribute</b>	<b>Set to Null</b>	<b>Type</b>	<b>Comments</b>
UniqueId	No	String	The unique identifier for this element. The unique identifier is composed of the prefix "SECTION" or "ARTICLE" and the CatId.
StructureLevel	No	Integer	The indentation level of the section or clause. For example, sections with StructureLevel=2 are subsections.
ObjectType	No	Enumeration	The object type is either SECTION or ARTICLE.
ParentID	No	Long	The CatId of the parent element. For a subsection this would be the identifier of the section in which you find the subsection. Since only sections and not clauses can be parents, the CatId is unique.
DocumentID	No	Long	The identifier of the contract document.
DocumentType	No	String	The type of the contract document. For a contract template, the type is TEMPLATE.
DisplaySequence	No	Integer	The display or printing order for sections and clauses.



<b>Element/Attribute</b>	<b>Set to Null</b>	<b>Type</b>	<b>Comments</b>
Label	No	String	The sequential number defined by the numbering scheme for sections and clauses.
Title	No	String	The title of a section or a clause.
ArticleNumber	No	String	The clause number.
ArticleText	No	String	The text of the clause. This text may contain selected HTML tags such as <EM>, <STRONG> or <B>. Oracle Contracts ensures that all tags are closed and XML compliant.
ArticleId	No	Long	The unique clause identifier (may be identical to a section identifier).
ArticleVersionId	No	Long	The unique identifier for the clause version.
CatId	No	Long	A document may contain the same clause more than once. Therefore, the ArticleId and the ArticleVersionId may not be unique for a document. However, the CatId is different, even if the same clause is twice in the same document.

<b>Element/Attribute</b>	<b>Set to Null</b>	<b>Type</b>	<b>Comments</b>
InsertByReference	Yes	Enumeration	Especially in government contracts (FAR), clauses may be inserted by reference. If this clause should be inserted by reference, the value is "Y", otherwise "N".
ReferenceText	Yes	String	The text shown when a clause inserted by reference.
AmendDescription	Yes	String	The amendment description for the clause. If the clause has not been amended or no amendment description has been provided, the element is missing.
AmendmOperation Meaning	Yes	String	The translated description of the AmendmentOperationCode. For English language, the values are: Added, Updated, and Deleted. If the deliverable has not been amended, the element is missing.
AmendmentOperatio nCode	Yes	Enumeration	The code for the amendment operation. The code can be set to: ADDED, UPDATE, or DELETED. If the deliverable has not been amended, the element is missing.

Element/Attribute	Set to Null	Type	Comments
PrintTextYm	Yes	String	If the clause has been amended, the user chooses if the complete clause text should be displayed (PrintTextYn="Y") or not (PrintTextYn="N").

## DeliverablesAM

**Note:** The DeliverablesAM node is applicable to procurement contracts only.

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

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

### *Child Elements for DeliverablesAM*

Element/Attribute	Set to Null	Type	Comments
DeliverablesAllForBusinessDocExpVO	Yes	Complex	All deliverables of the document.
DeliverablesForAllSourcingExpVO	Yes	Complex	All deliverables specific to the sourcing phase.
DeliverablesForInternalContractualExpVO	Yes	Complex	All internal or outbound contractual deliverables.

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

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

Each of these elements contains the data for one deliverable.

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

***Child Elements for DeliverablesRow***

Element/Attribute	Set to Null	Type	Comments
DeliverableId	No	Long	The unique identifier of the deliverable.
DeliverableName	No	String	The name of the deliverable.
Description	Yes	String	The description of the deliverable.

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

## VariablesMeatDataVO

The VariablesMeatDataVO contains variable values (for user variables) or the XPath to the element that contains the data for the variable. Typically contract templates do not contain variable values. The only exception is deliverable variables, since deliverables can be associated with templates. The variable section is automatically resolved by the code in the stylesheet, and there should be little need to customize this code.

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

### Child Elements

Element/Attribute	Set to Null	Type	Comments
ArticleVersionId	Yes	Long	This field is only important for user variables since user variables may have different values for different clauses. The identifier of the clause version that has this value.
VariableCode	No	String	The code of the variable: a unique identifier in the document.
VariableType	No	Enumeration	The variable type: <ul style="list-style-type: none"><li>• D: Deliverable</li><li>• S: System</li><li>• U: User</li><li>• T: Table</li></ul>
DocType	Yes	String	The type of the contract document. For a contract template the type is TEMPLATE.

Element/Attribute	Set to Null	Type	Comments
Value	Yes	String	The value for a user variable
CatId	Yes	String	The CatId of the clause that contains this value for the user variable.
ViewObjectName	Yes	String	XPath of the data associated with system variable.
AttributeName	Yes	String	The name of the element that contains the variable. The element is relative to the XPath of the "ViewObjectName"
ExternalYn	Yes	Enumeration	Indicates if the variable is external (Y) or not (N). In a negotiation, this flag controls, if a variable should be communicated to an external party or not.

### ParametersVO

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

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

**Child Elements of ParametersVORow**

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



---

## Sample Variable for PL/SQL Procedure Source Type

This appendix covers the following topics:

- Sample for PL/SQL Procedure Source Type

## Sample for PL/SQL Procedure Source Type

```
REM | CUSTOM PACKAGE SCPCIFICATION
REM | =====
REM | Package specification for the custom package to source user defined
REM | variables with procedures.
REM | Write one procedure to return a variable value from a database
REM | table for a given document. The procedure returns a variable
REM | value for a variable code passed during invocation. The same
REM | procedure can be overloaded for returning variable value for
REM | multiple variable codes. For better maintenance, create
REM | separate procedures for SELL and BUY variables.
REM | You need to decide whether to use the same or separate procedures
REM | to handle variables for different document types under same inten.
REM | Make sure that you grant execute permission for your procedure
REM | to the Oracle Application user (APPS by default).
REM | Please remove Comments /* */ on the package spec and body before
REM | using.
+=====
*/

REM The following is a sample package specification for contract
REM expert custom package. P_VARIABLE_CODE in used to pass the
REM user variable code you enter in the variable creation page
REM for a user variable with procedure and the owner package and
REM procedure name of this API should match the value provided
REM in "PL/SQL procedure Name" column. X_VARIABLE_VALUE_ID will
REM be used to return the value of the variable for a given document.
REM Name the package meaningfully to show it is a custom package used
REM for Contract Expert. You can use a single or multiple packages for
REM multiple variables; but make sure you do not overload to the extent
REM that the API causes performance issues. The following parameters
REM are used in the API: P_DOC_TYPE : Document type parameter. Represents
REM document type such as sales order, purchase order, quote etc.
REM P_DOC_ID : Document header id. For PO this is the
REM PO_HEADERS.HEADER_ID.
REM For sales order, this is the OE_ORDER_HEADERS_ALL.HEADER_ID
REM P_VARIABLE_CODE: Variable code for which the value needs to
REM be derived. This is the unique code given when defining the User
REM variable during setup X_VARIABLE_VALUE_ID : Standard in out
REM variable to return the value for a given variable code
REM X_RETURN_STATUS: Standard out variable to return final
REM API execution status.
REM X_MSG_COUNT: Standard out variable to return the number of messages.
REM X_MSG_DATA: Standard out variable to return the message string.
REM NOTE: Use all OUT and IN OUT parameter with NOCOPY option.
REM This API template (specification and body) assumes that the user
REM created the following 3 user variables with procedure name as
REM "OKC_XPRT_CUSTOM_PACKAGE.GET_OE_HEADER_VALUES".
REM OE$BLANKET_NUMBER - blanket number associated with a sales order
REM OE$USER_STATUS_CODE- user status code on the sales order header
REM table OE$CONTEXT - context value on the sales order header table

SET VERIFY OFF;
WHENEVER SQLERROR EXIT FAILURE ROLLBACK;
WHENEVER OSERROR EXIT FAILURE ROLLBACK;
=====
- TO CUSTOMIZE : Change the Package Name & Procedure Name only
- in the following package specification.
```

```

=====
/* CREATE OR REPLACE PACKAGE OKC_XPRT_CUSTOM_PACKAGE AS

    PROCEDURE GET_OE_HEADER_VALUES (
        P_DOC_TYPE          IN VARCHAR2,
        P_DOC_ID            IN NUMBER,
        P_VARIABLE_CODE     IN VARCHAR2,
        X_VARIABLE_VALUE_ID IN OUT NOCOPY VARCHAR2,
        X_RETURN_STATUS     OUT NOCOPY VARCHAR2,
        X_MSG_COUNT         OUT NOCOPY NUMBER,
        X_MSG_DATA          OUT NOCOPY VARCHAR2
    );
END;
/
commit; */

REM
/*=====+
REM | CUSTOM PACKAGE BODY
REM | =====
REM | Package body for the custom package to source user defined
REM | variables with procedures.
REM | This package body will explain how to create a package
REM | /procedures for sourcing user defined variable values
REM | for a document.Contract Expert will invoke this procedure
REM | See sample codeat the end this file)by passing the
REM | variable code. This variablecode may be used in the
REM | clauses and rules in the contract document.
REM | The procedure in this sample package is named as
REM | GET_OE_HEADER_VALUES
REM | The procedure GET_OE_HEADER_VALUES reads data from
REM | OE_ORDER_HEADERS_ALL
REM | table and returns the value of the three user defined variables
REM | OE$BLANK_NUMBER, OE$USER_STATUS_CODE and OE$CONTEXT
REM | to the VARIABLE_VALUE_ID when called with
REM | the corresponding Variable code.
REM |
+=====*/

=====
TO CUSTOMIZE: Change the Package Name & Procedure Name only
in the following package body.
- Change SQL query, variable code, document type etc. appropriately.
- Replace G_PKG_NAME value with customer procedure name.
=====

/* CREATE OR REPLACE PACKAGE BODY OKC_XPRT_CUSTOM_PACKAGE AS
=====
- - Define GLOBAL CONSTANTS
- - Always use the package name and procedure name in
- - error messages for easy debug
=====
G_PKG_NAME  CONSTANT  VARCHAR2(200) := 'OKC_XPRT_CUSTOM_PACKAGE';
G_APP_NAME  CONSTANT  VARCHAR2(3)   := OKC_API.G_APP_NAME;
G_MODULE    CONSTANT  VARCHAR2(250) := 'okc.plsql.'||g_pkg_name||'.';

- -
- - The following lines define true, false and product constants
- -

```

```

G_FALSE      CONSTANT  VARCHAR2(1) := FND_API.G_FALSE;
G_TRUE       CONSTANT  VARCHAR2(1) := FND_API.G_TRUE;
G_OKC       CONSTANT  VARCHAR2(3) := 'OKC';

- -
- - The following lines define The return status from the procedure
- - The procedure must return on of these statuses in X_RETURN_STATUS
- -
G_RET_STS_SUCCESS      CONSTANT  varchar2(1) :=
FND_API.G_RET_STS_SUCCESS;
G_RET_STS_ERROR        CONSTANT  varchar2(1) :=
FND_API.G_RET_STS_ERROR;
G_RET_STS_UNEXP_ERROR  CONSTANT  varchar2(1) :=
FND_API.G_RET_STS_UNEXP_ERROR;

G_UNEXPECTED_ERROR    CONSTANT  varchar2(200) := 'OKC_UNEXPECTED_ERROR';
G_SQLERRM_TOKEN       CONSTANT  varchar2(200) := 'ERROR_MESSAGE';
G_SQLCODE_TOKEN       CONSTANT  varchar2(200) := 'ERROR_CODE';

PROCEDURE GET_OE_HEADER_VALUES (
    P_DOC_TYPE          IN VARCHAR2,
    P_DOC_ID            IN NUMBER,
    P_VARIABLE_CODE     IN VARCHAR2,
    X_VARIABLE_VALUE_ID IN OUT NOCOPY VARCHAR2,
    X_RETURN_STATUS     OUT NOCOPY VARCHAR2,
    X_MSG_COUNT         OUT NOCOPY NUMBER,
    X_MSG_DATA          OUT NOCOPY VARCHAR2
)
IS

=====
- - TO CUSTOMIZE: Change the l_api_name value to this custom procedure
- - Define local variables for variables addressed in this API
- - Create appropriate cursor statements (use p_doc_id parameter)
=====
l_api_name CONSTANT VARCHAR2(30) := 'GET_OE_HEADER_VALUES';
l_blanket_number OE_ORDER_HEADERS_ALL.BLANKET_NUMBER%TYPE;
l_user_status_code
OE_ORDER_HEADERS_ALL.USER_STATUS_CODE%TYPE;
l_context OE_ORDER_HEADERS_ALL.CONTEXT%TYPE;

- -
- - Define Cursor to read the variable value for the document
- - If you are reading data from multiple tables with multiple
SELECT statements,
- define all cursors here with appropriate names.
-
- The following cursor is defined to retrieve values for the user
defined variables
- for a sales order (DOCUMENT_TYPE = 'O')
-
Cursor l_oe_header_csr Is
SELECT BLANKET_NUMBER,
       USER_STATUS_CODE,
       CONTEXT
FROM OE_ORDER_HEADERS_ALL
WHERE HEADER_ID = p_doc_id;

BEGIN

```

```

IF (FND_LOG.LEVEL_PROCEDURE >= FND_LOG.G_CURRENT_RUNTIME_LEVEL)
THEN
    FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE , G_MODULE||l_api_name,
        '100: Entered '||G_PKG_NAME ||'.'||l_api_name);
    FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE , G_MODULE||l_api_name,
'P_DOC_TYPE: '||P_DOC_TYPE);
    FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE , G_MODULE||l_api_name,
'P_DOC_ID: '||P_DOC_ID);
    FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE , G_MODULE||l_api_name,
'P_VARIABLE_CODE: '||P_VARIABLE_CODE);
    END IF;

    x_return_status := G_RET_STS_SUCCESS;
=====
TO CUSTOMIZE: Check for appropriate P_DOC_TYPE
Change cursor names and INTO variables with local variables
defined above
Modify IF...ELSE statements appropriately to assign correct
to the parameter
=====

IF P_DOC_TYPE = 'O' THEN
    OPEN l_oe_header_csr;
    FETCH l_oe_header_csr INTO l_blanket_number, l_user_status_code,
l_context;
    CLOSE l_oe_header_csr;

    IF P_VARIABLE_CODE = 'OE$BLANKET_NUMBER' THEN
        X_VARIABLE_VALUE_ID := l_blanket_number;

    ELSIF P_VARIABLE_CODE = 'OE$USER_STATUS_CODE' THEN
        X_VARIABLE_VALUE_ID := l_user_status_code;

    ELSIF P_VARIABLE_CODE = 'OE$CONTEXT' THEN
        X_VARIABLE_VALUE_ID := l_context;

    END IF;
END IF;

IF (FND_LOG.LEVEL_PROCEDURE >= FND_LOG.G_CURRENT_RUNTIME_LEVEL)
THEN

    FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE , G_MODULE||l_api_name,
        '1000: Variable Codes along with values:');

        FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE ,
G_MODULE||l_api_name,
        'Variable Code and Value' || ' ' || P_VARIABLE_CODE ||
        ' = ' || X_VARIABLE_VALUE_ID );

    FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE , G_MODULE||l_api_name,
        '1000: Leaving '||G_PKG_NAME ||'.'||l_api_name);
    END IF;

EXCEPTION
    - -
    - - retain all error handling below as it is. Do not change
    - -
=====
- - TO CUSTOMIZE: Close all cursors

```

```

- - DO NOT delete debug statements.
- - Add more debug statements if required.
- - Follow the same structure for debug statements
=====

        WHEN FND_API.G_EXC_ERROR THEN
        IF (FND_LOG.LEVEL_PROCEDURE >= FND_LOG.G_CURRENT_RUNTIME_LEVEL)
THEN
        FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE ,
G_MODULE||l_api_name,
        '1001: Error: Leaving '||G_PKG_NAME ||'.'||l_api_name);
        END IF;

        IF l_oe_header_csr%ISOPEN THEN
        CLOSE l_oe_header_csr;
        END IF;

- -
- - if you have more cursors, add cursor closing statements here
as shown above
-

        x_return_status := G_RET_STS_ERROR ;
FND_MSG_PUB.Count_And_Get(p_encoded =>'F',
        p_count => x_msg_count,
        p_data => x_msg_data );

        WHEN FND_API.G_EXC_UNEXPECTED_ERROR THEN
        IF (FND_LOG.LEVEL_PROCEDURE >= FND_LOG.G_CURRENT_RUNTIME_LEVEL)
THEN
        FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE , G_MODULE||l_api_name,
        '1002: Unexpected Error: Leaving '||G_PKG_NAME ||'.'||l_api_name);
        END IF;

        IF l_oe_header_csr%ISOPEN THEN
        CLOSE l_oe_header_csr;
        END IF;

- -
- - if you have more cursors, add close cursor statements here as
shown above
- -

        x_return_status := G_RET_STS_UNEXP_ERROR ;
FND_MSG_PUB.Count_And_Get(p_encoded=>'F', p_count =>
x_msg_count, p_data => x_msg_data );

        WHEN OTHERS THEN
        IF (FND_LOG.LEVEL_PROCEDURE >= FND_LOG.G_CURRENT_RUNTIME_LEVEL)
THEN
        FND_LOG.STRING(FND_LOG.LEVEL_PROCEDURE , G_MODULE||l_api_name,
        '1003: Other Error: Leaving '||G_PKG_NAME ||'.'||l_api_name);
        END IF;

        IF l_oe_header_csr%ISOPEN THEN
        CLOSE l_oe_header_csr;
        END IF;

- -
- - if you have more cursors, add close cursor statements here as
shown above

```

```

- - -
      x_return_status := G_RET_STS_UNEXP_ERROR ;
      FND_MSG_PUB.Count_And_Get(p_encoded=>'F', p_count => x_msg_count,
p_data => x_msg_data );

      END GET_OE_HEADER_VALUES;
END;
/
commit; */

REM
/*****
REM TO CUSTOMIZE: DELETE ALL CODE FROM THE ABOVE LINE TO THE END
REM OF THIS FILE
REM Change values of p_doc_type, p_doc_id, l_variable_code and
REM the procedure name
REM The following sample code shows how to invoke the above procedure
REM in PL/SQL. Customers are not required to write this code, since
REM the customer procedures are always invoked from Contract Expert.
REM
REM Customers can copy the following code and create a test procedure
REM to test their custom APIs to check return variable values.
REM Create a document and pass the document type and document id with the
REM variable used in the clause or rule (in the document)
REM
*****/
**/

DECLARE

    l_msg_count NUMBER;
    l_msg_data VARCHAR2(100);
    l_return_status VARCHAR2(1);
    l_variable_code VARCHAR2(30) := 'OE$BLANKET_NUMBER';
    l_variable_value_id VARCHAR2(200) := NULL;

BEGIN

    OKC_XPRT_CUSTOM_PACKAGE.GET_OE_HEADER_VALUES (
        p_doc_type => 'O',
        p_doc_id => 154333,
        p_variable_code => l_variable_code,
        x_variable_value_id => l_variable_value_id,
        x_return_status => l_return_status,
        x_msg_count => l_msg_count,
        x_msg_data => l_msg_data
    );

    dbms_output.put_line ( 'Return Status is ' || l_return_status);
    dbms_output.put_line ( 'and the table Variable value after the
procedure execution is:');

    dbms_output.put_line(SubStr('Variable Code =
'||l_variable_code,1,255));
    dbms_output.put_line(SubStr('Variable Value Id =
'||l_variable_value_id,1,255));

END;

```

```
/  
COMMIT;  
EXIT;\
```



---

# Glossary

## **Adopt As-Is**

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

## **Amendment**

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

## **Auto-Adoption**

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

## **Business Document**

A document that is generated in the procurement or sales contracting business flows. Examples are, Purchase Order, Quote, Sales Order, and Blanket Purchase Agreement.

## **Clause**

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

## **Contract**

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

## **Contract Document**

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

## **Contract Template**

A document containing standard (boilerplate) terms and conditions that organizations

use to rapidly create new contracts with preapproved legal language.

### **Contract Terms**

See: Terms and Conditions., page Glossary-6

### **Contract Terms Library**

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

### **Contract XML**

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

### **Contracts Workbench**

Users can access contracts authored in other applications (for example, Oracle Order Management) and manage repository contracts from the contracts workbench.

### **Contractual Deliverable**

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

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

### **Data Source Name**

The name of the data definition for a layout template.

### **Deliverable**

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

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

### **Deliverable Variable**

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

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

### **Document Type**

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

**Execute a Contract**

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

**External Party**

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

**Global Organization**

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

**Insert by Reference**

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

**Intent**

Determines the usage of contract.

**Internal Deliverable**

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

**Internal Party**

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

**Keyword Search**

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

**Layout Template**

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

- XSL-FO

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

**Local Organization**

An operating unit of a larger organization. Local organizations subscribe to global clauses that are approved by the global organization, and adopt or localize them for use in local contracts., page Glossary-4, page Glossary-1

**Localization**

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

**Negotiation Deliverable**

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

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

**Numbering Scheme**

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

**One-Time Order**

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

**Order Release**

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

**Party**

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

**PDF**

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

**Provision**

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

**Redline Comparisons**

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

**Rich Text Editor**

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

**RTF**

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

**Sales Agreement**

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

**Section**

A categorization that helps group clauses under a logical common heading.

**System Variable**

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

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

**Table Variable**

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

**Template**

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

**Terms and Conditions**

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

**User-Defined Variable**

Tokens that you define over and above the system variables. As part of the contract authoring process, users must provide values for these variables. You can define variables that are sourced or derived from contract data. These variables can be used in clause text or for Contract Expert rules. You can indicate the variable source as Manual or PL/SQL Procedure.

**Variable**

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

**XML**

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

**XSL-FO Stylesheet**

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

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