Oracle® Contract Lifecycle Management for Public Sector

Implementation Guide

Release 12.2

Part No. E48935-01

September 2013

Oracle Contract Lifecycle Management for Public Sector Implementation Guide, Release 12.2

Part No. E48935-01

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Contract Lifecycle Management for Public Sector Implementation Guide.*

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

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Structure

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A Predefined Lookups in CLM

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C List of Federal Attributes used in Contract Expert

D Additional Resources

Related Information Sources

Oracle Purchasing User's Guide

Oracle iProcurement Implementation and Administration Guide

Oracle Sourcing Implementation and Administration Guide

Oracle iSupplier Portal Implementation Guide

Oracle U.S. Federal Financials Implementation Guide

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.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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.

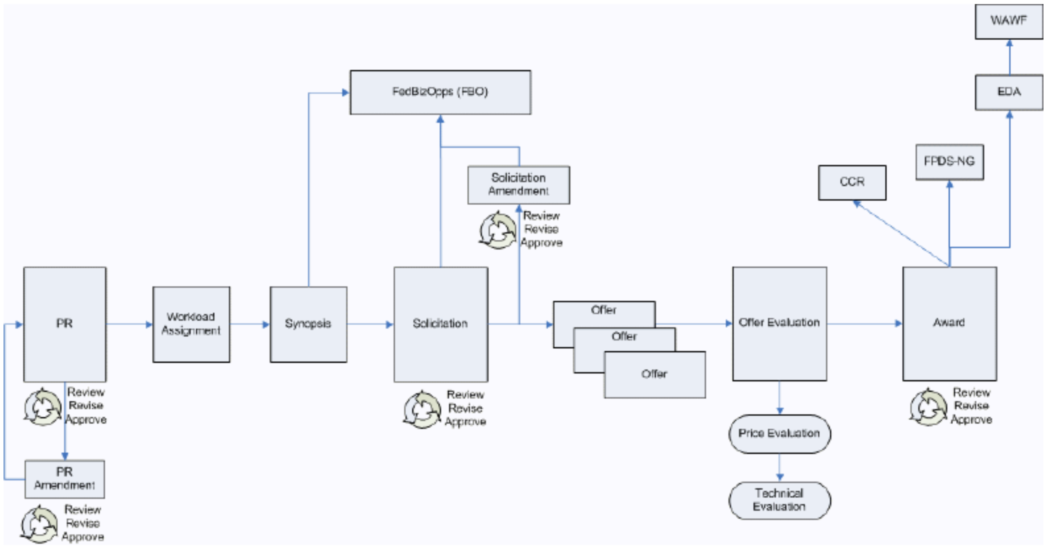
When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. 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.

1

Overview of Contract Lifecycle Management for Public Sector

Overview of CLM

Oracle Contract Lifecycle Management for Public Sector (CLM) is a comprehensive solution for managing procurement processes that need to be performed by US federal agencies. CLM features are available in OA Framework HTML pages. CLM supports FAR, DFARS, and other agency regulations that define the federal business processes, and encompasses a full procure-to-pay process flow within Oracle e-Business Suite which maximizes benefits to federal users. CLM enables contracting officers to drive operational excellence in federal procurement functions and enables the agencies to cut procurement costs dramatically. By providing the end-to-end business intelligence with a single source of data, CLM provides data transparency and visibility and provides contracting officers with support for strategic planning and improved decision making.



The flow starts with the creation of a purchase requisition which is a document that represents a requirement or demand for supplies and services. This is associated to an acquisition plan that outlines the procurement plan on a larger scale. The purchase requisition is converted to a solicitation and the solicitation is posted to FedBizOpps for obtaining quotes/offers from vendors. When the offers are received from the vendors, the offers are evaluated and the contract is awarded to one or more of the vendors.

This process depicts all of the major procurement steps from purchase request initiation and commitment, through competitive solicitation with an offer evaluation phase, and ultimate award decision. The process is often not executed in its entirety – several steps are optional and at the discretion of the contracting officer depending on the procurement process. Some steps may be required by an agency in order to follow it's policies and regulations, but from a system's perspective, the steps can be executed without every procurement document in the chain.

2

Setup Checklist for CLM Implementation

Overview of Setting up CLM

To start setting up CLM using the tabular setup steps below, the pre-requisites that need to be completed are:

- Depending on your business requirements and installation mode, complete the required setup steps in common applications such as HRMS and Financials.
- Oracle e-Business Suite Purchasing should be set up.

Please use the System Administrator responsibility for the initial steps such as adding CLM seeded responsibilities for your users, setting profile option values, etc.

Some of the steps below are mandatory to be set up (they are marked as Required), while other steps are Optional. You need to perform Optional steps only if you plan to use the related feature or complete certain business functions. The following table lists setup steps and also mentions the application in which the setup step should be done.

Step No.	Required	Step	Application
1.	Required	Add CLM pre-defined responsibilities for your users, page 2-3	Common Applications
2.	Required	Set Up Profile Options for CLM, page 2-3	Common Applications

Step No.	Required	Step	Application
3.	Required	Run CLM Seed Data Processor Concurrent Program, page 3-1	Common Applications
4.	Required	Set Up Sourcing, page 2-4	Sourcing
5.	Required	Set Up CLM Controls, page 2-4	Purchasing
6.	Required	Set Up Document Styles for Purchasing Documents, page 2-4	Purchasing
7.	Optional	Set Up Warrants, page 2-4	Purchasing
8.	Required	Set Up Printing, page 2-4	Sourcing and Purchasing
9.	Required	Attribute Setup Workbench, page 2-5	Purchasing
10.	Required	Set Up Extra Information Types for Contacts and Offices, page 2-5	HRMS
11.	Required	Configure Document Numbering, page 2-5	Purchasing
12.	Optional	Set Up for Enabling Encumbrance, page 2-5	Purchasing
13.	Required	Approvals Management Engine (AME), page 2-6	HRMS & Purchasing

Step No.	Required	Step	Application
14.	Optional	Workload Assignments, page 2-6	Purchasing
15.	Optional	Setup Steps to Integrate with other Systems, page 9-1	Purchasing
16.	Optional	Review PDFs, Customize Print Layouts and Configure SGD	Sourcing and Purchasing
17.	Optional	Evaluate required contract clause setup, and appropriately plan the variables, rules, questions and clause setup.	Sourcing and Purchasing
18.	Optional	Set up attribute templates for Deliverables and Small Business Coordination Record.	Sourcing and Purchasing

Given below is a brief description of each of the setup steps you need to perform for CLM. Please note that the implementation details are in subsequent chapters.

1. **Add CLM pre-defined responsibilities for your users**

   Using the System Administrator responsibility, navigate to Security > User > Define and add the required pre-defined CLM responsibilities for your users.

   For more information on the pre-defined CLM responsibilities, please refer to the section Initial Setup Steps, page 3-1 in the chapter Initial Settings for FAR / Non-FAR Documents.

2. **Set Up Profile Options for CLM**

   You need to set the appropriate values for certain given profile options in order to enable CLM for use. Using the System Administrator responsibility, navigate to Profile > System. The list of profile options and their expected values is in the section Initial Setup Steps, page 3-1 in the chapter Initial Settings for FAR / Non-FAR Documents.

3. **Run CLM Seed Data Processor Concurrent Program**

   Run the CLM Seed Data Processor concurrent program to enable federal nomenclature for entities such as menus, messages and lookups. More information on this concurrent program are available in the section Initial Setup Steps, page 3-1 in the chapter Initial Settings for FAR / Non-FAR Documents.

4. **Set Up Sourcing**

   Using the Sourcing Super User responsibility or a similar responsibility that gives you access to the Sourcing > Administration tab, set up the following:

   - Specify Standard Forms and Document Formats to view and print documents.

   - Select Notification Subscription options for buyers and suppliers.

   - Configure Negotiation Styles for Solicitation Document Type.

   - Setup steps to integrate with FedBizOpps.

   Please refer to the section Setup Sourcing Steps, page 8-2 in the chapter Setting up CLM Features for the first three Sourcing steps. Please refer to the section Integrating with FedBizOpps, page 9-3 in the chapter Setting up CLM Features for the setting up Sourcing to work with FedBizOpps.

5. **Set Up CLM Controls**

   Use the Purchasing Options page > CLM Controls region to enable / disable various CLM features such as MIPR, WDOL, ACRN, ELINs and CDRLs, Payment Instructions, etc. For more information on CLM Controls, please refer to the chapter Purchasing Options, CLM Controls, page 4-2 section.

6. **Set Up Document Styles for Purchasing Documents**

   Using a Purchasing responsibility that gives you access to the Setup windows and pages, navigate to Setup: Purchasing > Document Styles. Using the Document Styles page, you can enable a purchasing document as a CLM document or not.

   For more information on configuring document styles, please refer to the section Document Styles, page 5-4 in the chapter Document Types, Document Styles and Line Types.

7. **Set Up Warrants**

   The Federal Government grants Contracting Officers the authority to obligate money on behalf of the government via a warrant. Warrants are generally granted for specific amount limits. To set up warrants, you must complete a number of steps using the Purchasing Super User responsibility.

   See: Setting Up Warrants, page 8-6

8.

Set Up Printing

- Purchasing Documents: Use the Forms region in the Document Styles page to set up the XML Publisher templates you need to use with the Standard Forms and Document Formats. For more information on the Forms region, please refer to the section Document Styles, page 5-4 in the chapter Document Types, Document Styles and Line Types.

- Solicitation Document: Use the Forms region in the Negotiations Configuration page to set up the XML Publisher templates you need to use with the Standard Forms and Document Formats. For more information on the Forms region in the Negotiations Configuration page, please refer to the section Setup Sourcing Steps, page 8-2 in the chapter Setting up CLM Features.

- For more information, please refer to the Appendix - XML Publisher Templates for Standard forms for Awards/IDVs/Solicitations, page B-1.

9. **Attribute Setup Workbench**

   Use the Attribute Setup Workbench to define new attributes, group them, and associate that group to one or more type of documents transacted within CLM. Additionally, decide where and how attribute groups must render, and associate actions to configure the behavior of the attribute groups.

   See: Attribute Setup Workbench, page 6-1

10. **Set Up Extra Information Types for Contacts and Offices**

    Use the Extra Information Types (EIT) Framework of Oracle HRMS to setup locations as CLM Offices and persons as CLM Contacts. For more information, please refer to the section Configuring CLM Offices and Contacts, page 8-3 in the chapter Setting up CLM Features.

11. **Configure Document Numbering**

    - If using predefined document numbering scheme, set up and enable document numbering.

    - If defining document numbering, use Attribute Setup Workbench to define the details.

    See: Extending CLM Attributes using Attribute Setup Workbench, page 7-1

12. **Set Up for Enabling Encumbrance**

    If you require encumbrance / funding information in the CLM documents, perform the setup steps in Purchasing to enable encumbrance. For more information, please refer to the section Setup for Enabling Encumbrance, page 8-1 in the chapter Setting up CLM Features.

13. **Approvals Management Engine (AME)**

Approvals Management uses Oracle Workflow and Oracle Approvals Management Engine (AME) to create and define approval hierarchies, approval rules and link them to various CLM documents.

For more information, please refer to the section Approvals Management, page 8-6 in the chapter Setting up CLM Features; also refer to the Document Types, Document Styles and Line Types chapter to set up approval options.

14. **Workload Assignments**

This is the activity of assigning a responsible Buyer (by a Workload Administrator) to a collection of lines on a Purchase Request document for purposes of administering Pre-award procurement activities. The assignment will include an estimated completion date and will allow for calculation of suspense periods as determined by the Workload Administrator as well as allowing for tracking of historical buyer changes during the assignment period.

For more information, please refer to the section Workload Assignment Setup Steps, page 8-10 in the chapter Setting up CLM Features.

15. **Integrating with Other Systems**

CLM integrates with external federal systems such as FPDS-NG, FedBizOpps, ORCA, EDA, Clause Logic Service, Vendor Eligibility Check, WDOL, etc.

For more information on setting up integrations for these systems, please refer to the chapter Integrating with Other Systems.

16. As an implementer, you are also required to review PDFs, customize Print Layouts, if required, and configure SGD.

17. **Contracts related setup steps**

In order to setup Procurement Contracts to work with the CLM modules, you need to perform the following:

- Evaluate required contract clause setup
- Plan setup steps for variables, rules, questions and clauses

18. **Set up Attribute Templates for Deliverables and Small Business Coordination Record**

Navigate to the Contract Workbench Administrator responsibility to use Attribute Setup Workbench to create or set up templates to display additional details for Deliverables and Small Business Coordination Record.

3

Initial Settings for FAR / Non-FAR Documents

Initial Setup Steps

Users need to be able to distinguish between, and transact, federal and non-federal documents. In a CLM instance, the user needs to have the ability to transact with both federal as well as non-federal documents (even within the same Operating Unit). A CLM user should be able to access either federal documents or non-federal documents. However, for other users such as Receiving users or Payables users, view-only access is provided for both federal as well as non-federal documents transactions.

> **Important:** If users create non-FAR documents, they will be able to view and transact those documents using a non-CLM responsibility only. Users can work on FAR compliant documents using a CLM responsibility only. The system does not allow users to convert a non-FAR document to a FAR document.

In order to enable users to have access to the core CLM features, the following setup steps need to be performed:

1. Add the following CLM seeded responsibilities for your users, as relevant, using the System Administrator responsibility:

   - CLM Purchasing Contracting Professional
   - CLM Purchasing Super User
   - CLM Sourcing Contracting Professional
   - CLM Sourcing Super User
   - CLM Sourcing Team Member

- CLM iProcurement
- Small Business Coordinator
- Acquisition Plan Summary

> **Note:** When creating custom responsibilities, please ensure that the seeded CLM responsibilities should be replicated, and then modified as per your business requirements.

Before creating a custom responsibility, run the concurrent program Function Security Reports (Report Set) to detail the menu structure and function information of any seeded responsibility. This can be used as the basis to build the custom menus / responsibilities.

2. For more information on using Function Security, please refer to the Function Security section in this chapter.
    1. Log in as System Administrator and navigate to Application > Menu.
    2. Query the menu POS_ORDERS.
    3. Add a menu entry at Seq 15. The prompt should be Modifications and now assign the function Maintain Modifications to the prompt.
    4. Save your changes. A request gets processed that will recompile the menus; please ensure that the request completes successfully.
    5. Repeat the above steps for POS_INTERNAL_ORDERS.
3. Enable the following profile option values:

Sl. No.	Profile Option Name	Set at which Level	Value
1.	FND: Industry ID	site level	Public Sector - National Government
2.	PO: CLM Installed	site level	Yes
3.	PO: CLM Enabled	responsibility level	Yes

Sl. No.	Profile Option Name	Set at which Level	Value
4.	PO: Enable IDV In Document Builder	site level	Yes

4. Run the concurrent program CLM Seed Data Processor to enable federal nomenclature for entities such as menus, messages and lookups and to upload the relevant seed data. For more information, please refer to the section CLM Seed Data Processor in this chapter,

5. For PO (Purchasing) documents, the CLM Enabled checkbox at the Document Styles page enables you to make a Purchasing document CLM enabled or not.

   For PON (Sourcing) documents, there is no CLM Enabled checkbox at the Document Styles page. The new seeded document type - Solicitation - is CLM enabled. The non-FAR documents in Sourcing are: RFI, RFQ, Auction. The Sourcing FAR document is: Solicitation.

Function Security

The following table lists security functions in CLM.

Separate menus for CLM responsibilities are seeded, and there are no menu exclusions.

Function Name	Function Code Name	Description	Functional Area
Approved Awards	PO_AWD_APPR_FN	To enable or disable seeded views in Buyer Work Center, the corresponding security function must be included in CLM Purchasing responsibilities. All the functions are grouped under a single menu CLM Views (PO_CLM_VW_FUNCTIONS).	Oracle CLM Purchasing

Function Name	Function Code Name	Description	Functional Area
Incomplete Awards	PO_AWD_INC_FN		Oracle CLM Purchasing
In Process Awards	PO_AWD_IPRO_FN		Oracle CLM Purchasing
Open Awards	PO_AWD_OPEN_FN		Oracle CLM Purchasing
Rejected Bilateral Signatures Awards	PO_AWD_RBS_FN		Oracle CLM Purchasing
Expiring IDVs	PO_IDV_EXP_FN		Oracle CLM Purchasing
Incomplete IDVs	PO_IDV_INC_FN		Oracle CLM Purchasing
Open IDVs	PO_IDV_OPEN_FN		Oracle CLM Purchasing
Rejected Bilateral Signatures IDVs	PO_IDV_RBS_FN		Oracle CLM Pruchasing
System Generated Description	PO_GENERATE_DESCRIPTION	This function is relevant for CLM responsibilities. If excluded, users cannot generate/ view the change description, as the action will not appear in the modification page	Oracle CLM Purchasing Oracle CLM Sourcing Oracle CLM iProcurement Oracle CLM iSupplier Portal
Allow User to Edit the System Generated Description	PO_CLM_CHGDES_ALLOW_EDIT	This function enables users to edit the System Generated Description	Oracle CLM Purchasing Oracle CLM Sourcing Oracle CLM iProcurement

Function Name	Function Code Name	Description	Functional Area
Generate Description for Solicitation Amendment	PON_GENERATE_DESCRIPTION_FN	If excluded, users cannot generate/view the change description, as the action will not display in the Solicitation Amendment page.	Oracle CLM Sourcing
Maintain Modifications	POS_MODIFICATIONS	Add the function to the menus POS_ORDERS and POS_INTERNAL_ORDERS in order to enable users to access modification documents in iSupplier Portal.	Oracle CLM iSupplier Portal
Allows manual linking of Purchase Requisitions	PO_CLM_ALLOW_MANUAL_REQLINK	This function enables manual linking of purchase requisitions to awards, modifications and solicitations. This function enables the Requisition Linking feature at the award, modification, solicitation and amendment authoring screens. It also enables the Create Default Distribution action in the award and modification authoring screens	Oracle CLM Purchasing Oracle CLM Sourcing

Function Name	Function Code Name	Description	Functional Area
Workload Administrator	PO_CLM_WLOAD_ADMIN	This function enables actions (such as creating new assignments, adding lines to assignments, and updating assignments) for the Workload Administrator role. However, the Buyer Assignment Workload (PO_CLM_BUYER_WLOAD) menu should be excluded if you want to use this function for Workload Administrators.	Oracle CLM Purchasing
Protest	PROTEST_ADMIN	Users that do not have this function security are able to see protests for the documents they have access to as per document security. Users with access to this function are able to see protests for all documents, regardless of whether they have access to the document or not.	Oracle CLM Purchasing
Small Business Coordinator	OKC_REP_SBCR_RESP	For additional access (as a super-user), the Contract Repository Administrator function security can be added to the Small Business Coordinator responsibility	CLM Purchasing, CLM Sourcing

CLM Seed Data Processor concurrent program

The CLM Seed Data Processor concurrent program needs to be run after setting the value of the profile option PO: CLM Installed. You need to use the CLM Purchasing Super Use er responsibility to run this concurrent program. Note that the parameters for this concurrent program are:

- Mode: Indicates the mode in which the program must be run. Select Load as the mode.
- Document Style: This will be null and not applicable for the Load mode.

This concurrent program, along with the profile option FND: Industry ID, will set the federal nomenclature at the site level and not per responsibility.

Please review the workflow messages used in notifications and make appropriate customizations as per your implementation requirements.

If you are migrating data from previous releases to the current release, use the CLM Seed Data Processor concurrent program. To use the CLM Seed Data Processor concurrent program for enabling concurrent modifications feature for a document style: Run the CLM Seed Data Processor concurrent program with the document style name as the value for the parameter Document Style. Select ENABLE_CONC_MODS as the value for the parameter Mode.

Enabling CLM Documents

Implementers need to note that there are different steps used to enable transaction documents as CLM documents.

Type of Document	Control Level	Description
Purchasing Documents	Document Style	A new flag at the Document Style level has been added to indicate whether the document style is CLM Enabled or not. The checkbox (flag) is called CLM Enabled.
Solicitation Documents	Document Type	A new document type - Solicitation - is automatically CLM enabled.

Type of Document	Control Level	Description
Requisitions	Document Header	A flag has been added at the requisition header level to indicate if it's a CLM requisition or not. Therefore if the user logs in with a CLM responsibility and creates a requisition, the flag is automatically selected as being CLM enabled.

If the value of the profile option PO: CLM Installed is set to Yes, then iSupplier Portal users have access to both FAR and non-FAR documents. If the value of the profile option PO: CLM Installed is set to No, then iSupplier Portal users have access to only non-FAR documents.

Impact of Setup Steps on CLM Documents

For a given responsibility, if the value of the profile option PO: CLM Enabled is set to Yes, the CLM features are available for the user. Features such as Document Numbering, CLIN/SLIN, Options, Pricing, Funding, etc., are available for use.

With this profile option value set to Yes the user can create and view only those documents that are CLM enabled.

CLM Features are available for those purchasing documents that use styles enabled for CLM. The responsibility determines if the Requisition is a CLM document or not. For Sourcing, CLM features are available for those documents that have a Document Type Solicitation.

Document search is restricted to CLM documents only. The user also sees additional search criteria that can be used in searches.

All Lists of Values (LOVs) have their display lists governed by the profile option settings. Thus only those values relevant for CLM display in the LOVs.

4

Purchasing Options

Overview

Use the Purchasing Options window to define default values and controls for functions throughout Oracle Purchasing. You can often override purchasing options when you are creating documents.

Using an appropriate CLM Purchasing responsibility, navigate to Setup: Organizations > Purchasing Options.

The Purchasing Options window consists of several regions, using which you can define the options you require:

- Document Control
- Document Defaults
- Receipt Accounting
- Document Numbering
- CLM Controls
- CLM - FPDS-NG Reporting

For more information on the regions Document Controls, Document Defaults, Receipt Accounting and Document Numbering, please refer to the *Oracle Purchasing User's Guide.*

For more information on the regions CLM Controls and CLM - FPDS-NG Reporting, please refer to the sections that follow.

CLM Controls

CLM Controls region

In the Purchasing Options page, the CLM Controls region is used to enable functions and define some CLM options so that the listed features work in the application.

The checkboxes provided in the CLM Controls region are for controlling the features that each agency may or may not have.

This region is available and displayed only if the profile option CLM Installed has a value of Yes for the instance (CLM Installed is a site level profile). The functions in the CLM Controls region are enabled at the operating unit level.

Enabling the checkboxes for ACRN, MIPR, UCA, Payment Instructions, ELINs and CDRLs are one time setup steps. Implementers / administrators / users are advised not to change the value of the checkboxes (by selecting / deselecting) once documents are created using the respective feature.

The CLM Controls region consists of the following options:

- **Enable FPDS-NG Reporting:** This checkbox, when selected, is used to turn on the FPDS-NG functionality in CLM and integrate with the FPDS-NG website. This feature is enabled at the operating unit level. If you select this checkbox, another region called CLM - FPDS-NG Reporting is enabled and displays below the CLM Controls region. For more information on the CLM - FPDS-NG reporting region, please refer to the section that follows.

- **Enable Default Distributions in Award:** If you select this checkbox, when you create an award and add lines / schedules to it, the distributions are automatically created for you. If you leave this checkbox deselected, then distributions are not automatically created when you create award lines / schedules. The Create Default Distribution action can be used to create default distribution, if the checkbox is not selected. The creation of default distributions does not apply to auto-created awards.

  The setting of this checkbox is cached on the award header at the time of award creation. For example, if the checkbox is selected and awards are created, users can add lines to the award later and the distributions will be defaulted, regardless of the current value of the checkbox.

- **Enable Accounting Classification Reference Number:** If you select this checkbox, the ACRN field (which is a two-character field) is displayed in the Distributions tab of an award or the Accounts tab of a requisition. Additionally, the Regenerate ACRN action is enabled and displayed in the Actions list of values in these tabs. Users must enter the ACRN number or have it automatically generated using the Regenerate ACRN action.

- **Contracting Officer's Electronic Signature Required:** Determines if the contracting officer must electronically sign CLM documents. This is applicable only if the Bilateral Indicator on the document is selected. If this checkbox is not selected, then the signature gets routed to the buyer of the doc if the Bilateral Indicator is set to the value Signature Required. Selecting this checkbox will work in addition to the choice users will make at the document level.

- **Enable Undefinitized Contract Actions:** If you select this checkbox, the Undefinitized Contract Actions feature is enabled for users. Users can definitize/undefinitize lines in CLM documents using this feature.

- **Enable Payment Instructions:** The Enable Payment Instruction checkbox is displayed only if the Enable Accounting Classification Reference Number checkbox is selected. When you select the Enable Payment Instruction checkbox, the Payments Instructions feature is enabled and the Payment Instructions can be specified at header or line levels.

- **Enable Verify Vendor Eligibility:** When this checkbox is selected the Verify Vendor Eligibility action is available in the Actions list of values in awards, IDVs and solicitations. Using this action, users can open the Verify Vendor Eligibility page to help them check if the vendor is eligible to do business or has been debarred.

- **Enable Wage Determination Online:** This checkbox, when selected, enables and displays the Wage Determination action in the Awards, Modifications and Solicitations pages. Clicking this action opens the Wage Determination page, using which users can capture wage information along with the award, modification or solicitations.

  Wage Determination Online URL: Enter a URL of a wage determination website (http://WDOL.gov); when users click the Launch WDOL button in the Wage Determination page, the system reads this URL and opens the webpage in a new browser window.

- **Enable Exhibit for Deliverables (CDRL):** When this checkbox is selected, users can define deliverables as exhibits. When the Enable Exhibit for Deliverable (CDRL) checkbox is selected, the Manage Exhibit and Specify Exhibit buttons are available in the Define Contract Terms page. Additionally, the Exhibit Details and Pricing Details regions are displayed in the Create Deliverables page.

- **Enable Exhibit for Lines:** When this checkbox is selected, users can define lines as Exhibit lines in awards, IDVs, modifications and solicitations. The Exhibit column is displayed in the Lines page for awards, IDVs, modifications and solicitations when you select this checkbox. Using this column, users can specify if a line is an Exhibit line. When this checkbox is selected, the Manage Exhibits action is available at the document level and the Convert to/From Exhibit Lines action is available in the Lines details region.

- **Enable MIPR:** Use this checkbox to make the Military Interdepartmental Purchase Request (MIPR) feature available to users in Oracle CLM iProcurement and Oracle CLM Purchasing. If you deselect the Enable MIPR checkbox, and then re-select the checkbox, existing MIPRs (which are already created) will be shown to users.

- **Enable MIPR Acceptance:** This option is displayed only if the Enable MIPR checkbox is selected. When you select Enable MIPR Acceptance, for MIPRs of type MIPR-Own, the MIPR Acceptance region is displayed and is available to users in the Requisition page.

- **Enable Small Business Coordination Records:** Selecting this checkbox will enable users to create and use Small Business Coordination Records (DD-2579s). Creating DD-2579 documents may not be carried out by all federal agencies, which is why the checkbox is available to enable this feature for the agencies that require to create and use Small Business Coordination Records.

  Document Amount Threshold (USD): If this checkbox is enabled, users can also enter the threshold value. This Document Amount Threshold value is compared to the total value of the solicitation or modification. A warning message is displayed when the solicitation / modification is submitted for approval and the document's value exceeds the threshold, but a signed DD-2579 is not attached.

If you deselect an already selected checkbox, a warning message displays, informing you that disabling the feature will lead to data inconsistencies. You can opt to Revert Changes and let the checkbox remain selected; or, you can click Yes to disable the feature by deselecting the checkbox.

CLM - FPDS-NG Reporting region

If the checkbox Enable FPDS-NG Reporting is selected, the CLM - FPDS-NG Reporting region displays below the CLM Controls region. All the options in this region pertain to setup steps for FPDS-NG. The options are applicable for the operating unit level.

The CLM - FPDS-NG Reporting region consists of the following fields and options:

- **FPDS-NG Agency ID:** When you register at the FPDS-NG site, you need to provide your agency ID. You need to enter this registered agency ID value in the field in order to integrate with the FPDS-NG site. For example, an agency ID of 9700 (Navy) is registered at the FPDS-NG site. 9700 is the value you enter for this field.

- **FPDS-NG Contracting Office Agency ID:** When you register at the FPDS-NG site, you need to provide your Contracting Office agency ID. You need to enter this registered Contracting Office agency ID value in the field in order to integrate with the FPDS-NG site.

- **FPDS-NG Award XML Source:** The value of this LOV indicates the XML source for generating the payload for posting to the FPDS-NG page. The prefill information that is displayed in the Reporting Details region is also based on this XML.

- **FPDS-NG Award Mod XML Source:** The value of this LOV indicates the XML source for generating the payload for posting to the FPDS-NG page. The prefill information that is displayed in the Reporting Details region is also based on this XML.

- **FPDS-NG IDV XML Source:** The value of this LOV indicates the XML source for generating the payload for posting to the FPDS-NG page. The prefill information that is displayed in the Reporting Details region is also based on this XML.

- **FPDS-NG IDV Mod XML Source:** The value of this LOV indicates the XML source for generating the payload for posting to the FPDS-NG page. The prefill information that is displayed in the Reporting Details region is also based on this XML.

- **FPDS-NG CAR failure notification:** The values for this LOV are : Buyer or Approver. Before submitting for approval, the CAR needs to be authenticated. If any errors occur during this stage, the buyer or approver specified receives a notification listing the errors. During CAR approval, if there are any technical or other issues at the FPDS-NG site, notifications are sent to the buyer or approver specified, informing them of the errors.

5

Document Types, Document Styles and Line Types

Document Types

Login using your credentials and use a CLM Purchasing responsibility that gives you access to the Setup pages or windows.

Navigate to: Setup > Purchasing > Document Types to open the Document Types page. The Document Types page lists all the available document types that you can use with CLM for a given operating unit. The Operating Unit LOV is displayed in the top right corner of the page and you can select any listed operating unit to see the document types associated with it. The following columns provide more information on the document type:

- Type (some document types in CLM are: Award Standard, IDV with Lines, IDV without Lines, Requisitions)
- Name
- Document Type Layout
- Contract Terms Layout

Please note that the Document Types page is a common page to view all the document types. However you are allowed to create only certain document types, that is, Offers.

Click Create to create a new document type. The Create Document Type page opens, displaying the fields you need to specify to create a document type. Enter the following information:

- Document Type
- Document Subtype

- Document Name

You can enable or disable the document type using the Disable checkbox in the Control region.

Click Apply to save your changes and return to the Document Types page.

> **Note:** Customers upgrading from a prior release of e-Business Suite will see some nomenclature changes to the Document Type names. For example, Blanket Purchase Agreement will be displayed as IDV, Purchase Orders will be displayed as Awards, etc.

Updating a pre-defined Document Type

Click Update (pencil icon) in order to update your selected seeded document type. The Update Document Type page displays. The following fields are available for you to edit for procurement documents. The fields below are an example only, the Update Document Type page displays different fields for different document types:

- Name – you can provide any name for the document type
- Document Type Layout – for non-FAR documents, specify a BI Publisher Layout Template for viewing pdfs in the application
- Contract Terms Layout – for non-FAR documents, specify a BI Publisher Layout Template for viewing pdfs in the application

Approvals Region

The approval region enables you to set the approval controls for the document type. Please note that if the document types approval fields do not have values, the document styles values are used.

- Owner Can Approve checkbox – the owner of the document is also an approver for the document. This field is not applicable when the Document Type is Quotation or RFQ.
- Approver Can Modify checkbox – enables the approver of the document to modify the document and then forward it to the next approver
- Can Change Forward-To – the approver can change the next person to whom the document is forwarded
- Can Change Approval Hierarchy – the owner / approver can change the sequence and persons involved in the approval process. The Approval Hierarchy can be edited, that is, you can add, delete or move an approver.

- Approval Workflow – The Workflow Item Type that is used in this approval.
- Workflow Start Process – The top process (first entry process) that is used in this approval.
- Forward Method - The Forward Method field is not applicable when the Document Type is Quotation or RFQ. The following options apply regardless of whether you are using position hierarchies or the employee/supervisor relationship to determine your approval paths. Choose one of the following options:
  - Direct - The default approver is the first person in the preparer's approval path that has sufficient approval authority.
  - Hierarchy - The default approver is the next person in the preparer's approval path regardless of whether they have approval authority. (Each person in the approval path must take approval action until the person with sufficient approval authority is reached.)
- Default Hierarchy - The Default Hierarchy field is not applicable when the Document Type is Quotation or RFQ. Otherwise, when Use Approval Hierarchies is enabled in the Financial Options window, you can enter a position hierarchy from the Position Hierarchy window. This hierarchy then becomes the default in the Approve Documents window.

The following fields are in the Control region:

- Security Level: The following security levels are available:
  - Public - All system users can access the document
  - Private - Only the document owner and subsequent approvers can access the document
  - Purchasing - Only the document owner, subsequent approvers, and individuals defined as buyers can access the document
  - Hierarchy - Only the document owner, subsequent approvers, and individuals included in the security hierarchy can access the document
- Access Level: This LOV enables you to control which modification/control actions you can take on a particular document type once you gain access. Document owners always have Full access to their documents. The Access Level options include:
  - View Only - Accessing employees can only view this document
  - Modify - Accessing employees can view, modify, and freeze this document

- Full - Accessing employees can view, modify, freeze, close, cancel, and final-close this document

- Archive On: The Archive On field is applicable only when the Document Type is IDV, Award, or Order Referencing IDV. Choose one of the following options:
  - Approve - The document is archived upon approval. This option is the default.
  - Transmission - The document is archived upon communication. A document transmission action would be printing, faxing, or e-mail.

Click Apply to save your changes and return to the Document Types page.

Document Styles

Login using your credentials and use a CLM Purchasing responsibility that gives you access to the Setup pages or windows.

Navigate to: Setup > Purchasing > Document Styles to open the Document Styles page. The Document Styles page lists all the available document styles that you can use with CLM. Some styles are seeded and depending on the users' requirements, new styles can be created. Document Styles are relevant for Purchasing documents only. The values in the Document Styles page override the values that you have set in the Document Types page for Purchasing documents.

Click Create to access the Document Styles page in order to create a new Document Style. Enter a Name, Description and Status (Active or Inactive). Select the CLM Enabled checkbox to specify if the document style (and all subsequent documents created using that document style) are FAR documents or non-FAR documents.

By enabling this checkbox, you will be able to create FAR compliant documents with all the CLM functionality such as CLIN/SLIN structures, Complex Pricing of Contracts, Incremental Funding, Options etc. If this checkbox is not enabled, any document created using this style will be a non-FAR document. This checkbox cannot be updated, once selected and saved.

In the Document Types region, specify the document types and their display names that you wish to associate with the style. The display names appear in the LOV when users create a document, therefore it is a good practice to provide appropriate and meaningful display names. You can associate one or more document types to a document style. Select Enable to enable the document style for that document type.

If CLM Enabled checkbox is selected, then the Forms region appears. This region is applicable for CLM documents only. Click Add Another Row to add a document type and it's related formats. Select a Document Type from the list and then select a Standard Form and Document Format from the LOVs. The Standard Form LOV and Document Format LOV populate only those forms and formats which are applicable to that document type. The Standard Form Templates are actually BI Publisher Templates that print on the face page of the form. The Document Format Templates are also BI Publisher Templates that enable you to print the continuation pages of the form. In order to print a pdf, the Standard Form template and Document Format templates are combined to generate the output.

Select a Standard Form Template and a Document Format Template from the LOVs for that document type. Select the Active checkbox to activate the row, and select Default to select the document type as a default. For a given document type, you can specify many combinations of Standard Forms and Document Formats, however only one can be a default on the CLM transaction document.

If the CLM Enabled checkbox is selected, then the Document Controls region appears. The Document Controls region enables you to specify the approval workflows and to enforce warrants for the document style. Enter values for the following fields:

- Allow Concurrent Modifications - If this checkbox is selected, the user is able to create concurrent draft modifications for CLM documents (Awards/IDVs) that were created using that document style. This checkbox is editable only when there is no open modification for that document style.

  If there are open modifications for the document style, the checkbox is non-editable. If you wish to make the checkbox selected to enable Concurrent Modifications, run the CLM Seed Data Processor concurrent program with the document style name as the value for the parameter Document Style. Select ENABLE_CONC_MODS as the value for the parameter Mode.

  For more information on the CLM Seed Data Processor concurrent program that enables concurrent modifications in the Purchasing module, please refer to the section Initial Setup Steps, page 3-1 in this guide.

- Allow Post Award Requests: If you select this check-box, the Create Post Award Requests action is available for the approved awards that are currently in the system.

  Additionally, the Post Award Request Controls region is also displayed. This region is described in the following section.

- Approval Workflow - The Workflow Item Type (PO CLM Approval workflow using AME) that is used in this approval.

- Workflow Startup Process - The top process (PO CLM AME Approval Top Process) that is used in this approval.

- AME Transaction Type – The AME Transaction Type that is associated with this document style.

- AME Transaction Type for Modification – The AME Transaction Type for Modification that is associated with this document style.

  For more information on AME and Workflow, please refer to the Approvals chapter in this guide.

- Enforce Warrants Type - Select the warrant type to enforce from the list. If you do not select a value for this field, then the application does not enforce warrants. If you create a document from a document style for which warrant is enforced, then the application validates warrant enforcements based on the warrant level defined in document style.

  The application validates if the Contracting Officer (KO) specified on the document is valid. It validates if the warrant attached to the KO is valid and that the warrant status is Active. The application verifies if the amount specified for the document for the warrant is greater than or equal to the document total amount and that the document total amount includes the option amount. The application displays error messages if any of the above validations fail.

  If the document amount exceeds the warrant, the user must assign another KO with a higher warrant authority. The newly designated KO receives a notification and they must sign the document. If another KO is not available, then the system administrator can assign the notification to a different KO. If the validations fail, then the application rejects the document, and the buyer must resubmit it for approval. If the warrant currency is different from the ledger currency or the document currency, then the application displays an error message.

  To enforce warrants on change amounts or modifications, the application considers the document style with warrant type specified used to create the document for validation purposes.

  When the KO signs the Modification document, then the warrant enforcement depends on the sum of the absolute values of the line change amounts for the modification. For example, if Line 1 of the Modification increases by $500, and Line 2 decreases by $400, then warrant must be valid against $900. This implies that the KO who signs the Modification should have a warrant amount that is equal to or greater than $900.

The Post Award Requests region enables you to select some controls for post award requests.

- Click the Auto assign Post Award Requests checkbox if you wish to assign the post award request automatically to a specific user. The Auto assign to list of values displays, and you can select a specific user (Award Administrator, Buyer, Contracting Officer) that you wish to assign the post award request to.

- Enter a Document Format Template to associate the post award request with. This template is used to generate the PDF of the PAR document.

- Enter an AME Transaction Type that you wish to associate to the post award request.

In the Commodities region, specify the line types that you wish to associate with the document style. You can select one or more Purchase Basis for the line:

- Goods
- Services
- Temp Labor

  Note: Rate based temp labor line types are not supported for CLM FAR transactions.

If you select Specified as your Line Type, the Line Types LOV opens, enabling you to choose one or more line types for the document style.

The Pricing region is not applicable for CLM FAR transactions.

The Complex Payments region enables you to define the various payment types for complex work orders.

Click Apply to save your changes and return to the main page.

In the main page, you can duplicate a document style by selecting the Copy icon beside a document style. You can also update an existing document style by clicking the Update (pencil) icon.

Line Types

Oracle CLM Purchasing provides the line type feature so that you can clearly differentiate orders for goods from those for services. In addition, the services related line types support a broad range of service categories including general business services, consulting services, and contingent labor.

There are two basic line types: quantity-based lines and amount based lines.

Use quantity-based line types when you want to specify the quantity, unit of measure, and unit price for the items you are ordering. Oracle CLM Purchasing provides Goods as an initial quantity-based line type. You can modify this line type or create new quantity-based line types to satisfy your needs.

Use amount-based line types when you want to order services and other items by amount. You create an order for a service by selecting an amount-based line type, category, item description, and total amount of the service. You can also receive and match services by amount.

For more information on Line Types and how to set them up, please refer to the *Oracle Purchasing User's Guide.*

Severable Services

Severable services are services, when stopped midway, the executed part of the service is complete in itself and is measurable. Severable services are such services that accrue as time passes.

In contrast, non severable services produce a single or unified outcome, product or report. A non severable contract is essentially a single undertaking that cannot feasibly be subdivided. The agency does not receive value from the service rendered until that service is completed.

To specify a line type as severable, follow the outlined steps:

- Using an appropriate CLM Purchasing responsibility, navigate to the Line Types page: Setup > Purchasing > Line Types.
- Click Create to create a new line type and open the Create Line Type page. Or if you need to update an existing line type, click the Update (pencil) icon next to the line type to open the Update Line Type page.
- By default, the Severable Services checkbox is not selected. You can select the checkbox to specify that the line type is severable or you can leave it blank to specify that the line type is non-severable.
- Click Apply to save your work and return to the Line Types main page.

For more information on severable services, please refer to the *Oracle Contract Lifecycle Management for Public Sector Purchasing User Guide.*

> **Important:** Please note that though the Line Types page is available to CLM and non-CLM customers, the Severable Services feature is applicable only to CLM customers.

Setup Considerations for Modifications

Setup considerations for Modifications documents are as follows:

- The Standard Form and Document Format should be verified in the Setup > Purchasing > Document Styles page.
- There are two lookups for Cancellation/Termination Indicator - one for the header level and one for the line level. Both the lookups have the same values, which are:
  - No Cost Cancel
  - Terminated for Cause
  - Terminated for default
  - Terminated for convenience
- In AME (Approvals Management Engine), two transaction types and their

corresponding attributes related to Modifications are:

- Purchase Modification Approval
- Purchase Order Approval

6

Attribute Setup Workbench

Introduction

UDA or User-Defined Attributes provide an infrastructure that you can use to define new attributes, group them and associate that group to one or more type of documents transacted within CLM. The UDA framework is used for information only attributes that do not impact the E-Business Suite business flows and for information defaulting in purchasing documents. Examples of UDA include MDAP/MAIS Codes, program codes etc.

User-defined attributes capture all the detailed information about an object. The Attribute Setup Workbench enables you to create user-defined attributes with validation logic to support the needs of your organization.

A large number of federal fields are applicable to all type of documents transacted within the CLM application. The application captures and maintains these fields at the document header or for every line present on the document. Most of these fields are informational and are implemented as pre-defined UDAs

> **Note:** CLM UDA uses the framework provided by Oracle Product Information Management UDA. However, Oracle CLM uses only parts of that infrastructure. This guide provides you details of UDAs that are applicable for Oracle CLM users.

Planning your Implementation and Setting Up UDA

A summary of the steps you need to complete when planning your implementation, are listed below:

- Plan the attributes you require.
- Group the attributes.

- Define the values sets for attributes.
- Write PL/SQL code and load this to the database in apps schema.
- Register the code as PL/SQL function.
- Update the attribute template for usage and optionally as actions.

The key decision areas when planning your UDA implementation are:

- Decide upon the attributes you require and the levels (business entities) at which you need the attributes.
- Decide on how you want to group the set of attributes which need to display on the same set of levels into attribute groups in to suit your requirements. All operations on UDAs happen at the Attribute Group level. Attributes cannot exist outside an attribute group.
- Decide where the attribute groups should render. There are predefined locations on the application pages where UDAs can display. Usages on the Attribute Template control this display.
- Now, decide upon the allowable set of values for each attribute and how you would like it to render. For example, an attribute could render as a text field, check box, list, and so on.
- At this stage, decide whether you need any actions on your attribute groups. Actions are optional and enable you to configure the behavior of UDAs beyond simple data capture. Actions execute predefined PLSQL program units, which you need to write and load to the database in apps schema. You also need to register these program units as functions in the Attribute Setup Workbench and also associate these functions to the attribute group as actions via attribute template.

It is recommended that you create your value set before defining your attribute groups. Ensure you identify the attributes you want to capture on specific documents, and group the attributes into functional group based on the way you intend to share them across documents.

You use the Attribute Setup Workbench to complete your UDA setup. Use the CLM Purchasing Super User responsibility to access the Attribute Setup Workbench. Navigate to Setup : Attribute Setup Workbench: Attribute Setup Workbench to access and use the following tabs to complete the UDA setup:

- Attribute Templates, page 6-13
- Attribute Groups, page 6-6
- Functions, page 6-11

- Value Sets, page 6-3
- Simulate, page 6-26

To be able to set up UDA, you must:

1. Define value sets for User-Defined Attributes.
2. Define attribute groups.
3. Define functions and function parameters.
4. Create new revisions to existing templates or create a new template.
5. Create and update actions on the attribute template to associate attribute groups with functions.
6. Simulate and test your setup.

Value Sets

User-defined attributes capture all the detailed information about an object. The Attribute Setup Workbench enables you to create user-defined attributes with validation logic to support the needs of your organization. To do so, create value sets and associate the value sets with user-defined attributes. Attributes can have a static or dynamic list of valid values, or a range of values. For each user-defined attribute, you can optionally specify a value set with data type and validation rules to be applied when the user inputs data. Once created, value sets can be reused for different attributes. It is recommended that you create your value set before defining your attribute groups.

Creating Value Sets

To create a value set:

1. On the Attribute Setup Workbench page, click the Value Sets tab.
2. Click Create.
3. On the Create Value Sets page that displays, enter the Value Set Name. This is the name by which the system and users keep track of the value set. You can only enter alphanumeric (a, b, c,..., 1, 2, 3,...) and the underscore (_) characters for the value set name. You cannot use spaces or special characters. The length is limited to 15 characters. This is a mandatory field.

    Note: Once specified, you cannot edit the value set name

4. Enter a Description for the value set.

5. Select a Data Type for your value set. The data type that you select determines the values that are available in the value set. An attribute's data type must match the data type specified for that attribute's value set. The different data types are:

   - Character

   - Number

   - Standard Date

   - Standard Date Time

     Note: You cannot edit the data type once the value set has been created.

6. Enter value for Maximum Size if you wish to limit the user's input in the attribute text field. For example, in some cases you may wish to limit the number of characters in the attribute Date to 10 characters, or the number of characters in Name to 50. Keep the default value of 0 if you wish to omit this particular validation. This is a mandatory field.

7. Select a Validation Type from this list. This is a set of values against which the values entered by users are validated. You can choose from:

   - None - there is no explicit set of values against which the user's input is validated.

   - Independent - the explicit values against which the user's input is validated are defined here. To create explicit values, choose Poplist to display valid values as a drop-down list. Select List of Values radio to display valid values as a searchable list of values.

   - Translatable Independent - this validation type behaves the same as Independent, but enables the display of values in another language.

   - Table - the explicit values against which the user's input is validated comes from a database table. For Validation type Table, the value set can display as List of Values or Poplist.

     Note: Use Poplist if the value set is likely to have < 5 values. It is recommended to use List of Values if the number of values fetched in a value set is greater than 5 - 10. Additionally, note that the LOV defaulting actions is supported only on attributes which have a value set of type List of Values.

8. Click Apply and Continue.

9. Depending on the Validation Type you selected, you can enter values for your value set.

10. If you selected Independent or Translatable Independent, then enter the following details

    1. Enter a name for the Value. This is the name used to identify the value internally.

    2. Optionally, enter a description for the value.

    3. Ensure the Enabled check is selected.

    4. Enter a Sequence for the value. This sequence number determines the order in which the value displays.

    5. Optionally enter a Start Date and End Date.

    6. Click Add Another to add another value to the value set.

11. If you selected Table as the validation type, then enter the following details:

    1. Enter an Application Name. This is the name of the application in which the table is registered.

    2. Enter a Table Name. This is the name of the database table or view in the schema.

    3. In the Value Column section, enter the display name of the column. Enter the data Type of the value column, and the Size of the value column.

    4. In the Meaning Column section, enter the description of the value that renders in the LOV window. Enter the Type to determine the data type of the meaning column. Enter the Size of the meaning column.

    5. In the ID Column section, enter the internal value for the column. Enter the data Type of the ID column. Enter the Size of the ID column.

    6. In the Where Clause section, enter an additional Where clause to further constrain a query. You can also use bind values in Where clauses in the following ways:

- You can refer to other attributes in the same attribute group as the attribute that uses this value set by using the following syntax:

  :$ATTRIBUTEGROUP$.<your attribute's internal name>

  For example: (lookup_type='EGO_EF_Industry_TYPE' and instr(:$ATTRIBUTEGROUP$.Attr1 , tag) > 0)

  > **Note:** In the example above, ensure you include a space between Attr1 and the comma for the SQL string to parse correctly.

- You can refer to primary keys for the object to which the attribute group is associated by using the following syntax:

:$OBJECT$.<the object's primary key column name>

12. Click Apply.

Attributes and Attribute Groups

The Attribute Setup Workbench enables you to create set of operational user defined attributes that display at predefined locations in the application pages. Once you have decided upon the attributes you require, and the levels at which you require them, you can group sets of attributes, that need to display on the same set of levels, into attribute groups in a meaningful way based on your requirements. All operations on UDAs happen at the Attribute Group level.

In CLM, attributes are supported at the following levels:

- Award Header, Line, Shipment
- IDV Header, Line
- Requisition Header, Line
- Solicitation Header, Line
- Offer Line

An attribute group can be single-row or multi-row. Single row attribute groups displays a text field with a value. Multi-row attribute groups enable you to associate multiple sets of attribute values with the same object instance. For multi-row attribute groups, you can define which attributes or combination of attributes will maintain uniqueness of records in cases where the attribute group is displayed as multi-row.

You can set up as many attribute groups as necessary, with the following limitations on the number of attributes within each attribute group:

- 40 character attributes
- 20 number attributes
- 10 date attributes
- 40 translatable attributes

Attributes are defined by their names and values, and are saved within attribute groups. Attributes cannot exist outside an attribute group. You can create user-defined attributes that more specifically identify their characteristics and specifications, and capture information. At this point, decide on the allowable set of values for each attribute and how you would like to render the attribute. For example, you might want to display one attribute as a text field and another as a check box, and so on.

If you want to configure the behavior of UDAs beyond simple data capture, then define actions on your attribute group. You can define UDAs to possess certain validation logic (for example, value sets) and indexes. You can control where your attribute groups render based on the usages you define on the attribute template. There are however, predefined locations on the application pages where you can display UDAs.

Creating Attribute Groups

You create attribute groups to combine attributes in a logical, functional manner.

To create attribute groups:

1. On the Attribute Setup Workbench page, click the Attribute Groups tab. Click Create.
2. On the Create Attribute Group page that displays, enter an Internal Name for the attribute group.
3. Enter a Display Name. This is the name of the attribute group as it will be displayed in the user interface.
4. Optionally, enter the Description of the attribute group.
5. Select the Behavior of the attribute group:
   - Multi-Row to associate multiple sets of attribute values with the same object instance.
   - Single-Row to associate one attribute value with each object instance.
6. Click Maintain Unique Key to view, update , and delete unique key attributes. If the attribute group is multi-row, the Maintain Unique Key check box determines

whether or not the attribute is part of the key that uniquely identifies a row. A unique key is any set of attributes whose values can be used to uniquely identify a row within the attribute group. You can define the unique key on the attribute group Detail page. You can add/edit the unique key as long as doing so does not destroy the uniqueness (creating duplicates) of existing records. You can specify that each attribute is part of a unique key when creating the attribute, or--more conveniently--you can specify all unique key attributes in the group via the attribute group Detail page.

> **Note:** This is applicable for multi row attribute groups only.

7. Enter a value in the Number of columns shown in the table field. This field determines the number of columns that display in the attribute group page. The default value is 5.

8. Enter a value in the Number of rows shown in the table field. This field only appears for multi-row attribute groups and determines the number of rows that display in the attribute group page before the Next and Previous links display. The default value is 5.

   This field only appears for multi-row attribute groups and determines the number of rows that display in the attribute group page

9. Select the Business Entities to which you want to apply the attribute group.

   > **Note:** When you enable an attribute group at multiple levels, the attribute data will flow as a target document is auto-created from a source document.

   You can select all or choose from:

   - Order Header
   - Order Line
   - Order Shipments
   - Requisition Header
   - Requisition Line
   - Solicitation Headers
   - Solicitation Line
   - Offer Line

10. Click Apply and Add Attributes to add user-defined attributes to your attribute group.

11. On the Create Attribute page that displays, enter the internal name of the attribute. This the name by which the attribute is tracked internally.

12. Enter the Display Name. This is the name of the attribute as it appears within the user interface.

13. Enter the Sequence number for the attribute. The sequence determines the order in which the attribute is displayed on the page, and also determines the order in which the attribute is processed.

14. Enter a Tip for the attribute. This is the description of the attribute; this description also appears as tip text on pages that have attributes that can be updated.

15. Select a value for the Data Type. The data type you select determines the values that are available in the column and value set. An attribute's data type must match the data type specified for that attribute's value set. The list of values for a value set only displays value sets whose data type matches the data type of the attribute.

    Note: Selecting a data type always clears the column and value set. For example, say you selected the Number data type. Then you select your column and value set--remember that your column and value set choices are determined by the data type you chose. Then you decide to change the data type from Number to Date. Notice that after you change the data type, your column and value set are cleared; you need to select new ones based on your new data type. Additionally, the data type determines the values that are available in the Display As field. You cannot change the data type once an attribute is created.

    Note: The maximum number of characters for a character type attribute and translatable text fields is 2000 characters. Number type fields have a maximum size and precision of 22.5 (22 digits to the left of the decimal and 5 digits to the right).

16. Select a value for the Column to select where the attribute is stored in the database table. The column list of values only returns columns with the data type you specified in Data Type. The list of values also indicates whether or not the column is indexed.

17. The Enabled check box determines whether or not the attribute is enabled (and available for use) or disabled (and not available for use). By default, the Enabled check box is selected. If the attribute is enabled, specify whether or not the attribute

is optional or required. If required, the user cannot save data for an object using the attribute group without entering a value for that attribute. You can always disable attributes. However, you cannot delete attributes after an attribute group has been associated with an Attribute Template or a CLM document.

18. Select the Read Only check box to specify whether or not the user can update the attribute value.

19. Select the Required check box to specify whether or not the user must enter an attribute value.

20. Select a value in the Display As list to determine how the attribute appears within the user interface. The available values for Display As are determined by the data type selected.

    Note that Personalization is not supported. If you wish to display / hide an attribute, select Hidden from the Display As dropdown.

21. Select a Value Set that will serve as a set of constraints for an attribute.

22. Enter a Default Value for the attribute. If you've selected a value set, the value set's constraints apply to the default value. This value defaults upon object creation.

    > **Note:** In an attribute group with at least one required attribute, no default values are applied for any attributes when a required attribute does not have an assigned default value.

23. Click Apply and Add Another to save and create another attribute.

24. Once done, click Apply.

Copying Attribute Groups

When you copy an attribute group, all of the attribute group's field values and attributes default to the new attribute group. You can override all defaulted values and attributes except for the attribute group Behavior field.

To copy attribute groups:

1. On the Attribute Setup Workbench: Attribute Groups page, search for the attribute group you want to duplicate and click the Copy icon adjacent to it.

2. On the Create Attribute Group page that displays, the field values from the original attribute group appear. You must enter a new Internal name and Display Name for the copied attribute group. You have the option to change all field values except for the Behavior field; you cannot change the original Single-Row, Multi-Row in the Behavior field.

3. Click Apply. The Attribute Details page displays. The attributes from the original attribute group are attached to the newly copied attribute group. From this page, you can edit or delete the existing attributes and add new attributes.

Functions

To define your own custom logic, you can add user-defined functions and actions to Attribute Groups without having to customize the entire page. By first setting up user-defined attributes, you can then execute user-defined functions with those attributes. You need to define functions only if you plan to have actions associated with your attribute groups.

Actions execute predefined PLSQL program units. You must write these program units, containing logic you want to execute on various events related to the attribute group, and load them to the database in apps schema. Register these program units as functions. Using different algorithms, you can calculate values by passing attribute values to functions. User-defined functions can be PL/SQL functions. Functions use input and/or output parameters of various data types such as string, integer, or Boolean. You can also map these parameters to attributes, object primary key values, and external attributes. Actions are trigger points for functions which trigger at specific events or are displayed as buttons or links on the page. You can also prompt the user based on the user's input.

Creating Functions

To create a user-defined function:

1. On the Attribute Setup Workbench page, select the Functions tab.
2. On the Search and Select: Functions page that displays, click Create Function.
3. On the Attribute Setup Workbench: Functions page that displays, enter an Internal Name for the function.
4. Enter a Display Name. This is the name of the function as it appears in the user interface.
5. Enter a Description for the function.
6. Select the Function Type from the list. The supported function type for CLM is PL/SQL. When you select PL/SQL as the function, then you must also specify the Package in which the procedure resides and the procedure that implements your custom logic.

   Note: Run the PL/SQL package in your custom schema and then create a synonym for this package in the APPS schema.

7. Click Apply.

Deleting Functions

To delete a user-defined function:

1. On the Attribute Setup Workbench page, select the Functions tab.
2. On the Search and Select: Functions page that displays, select the function you want to delete and click Delete.

   Note: You can only delete a function when it is no longer associated with an action.

Creating Parameters for a Function

After creating a user-defined function, specify the parameters to pass when that function is called.

To create parameters for a function:

1. On the Attribute Setup Workbench page, select the Functions tab.
2. On the Search and Select: Functions page that displays, select the function for which you want to create parameters and click the Function Name.
3. On the Function Details page that displays, you can view the Basic Information of the Functions. This includes the Internal Name, Display Name, Description, Function Type, and the details associated with the function type.
4. Click Add.
5. On the Create Function Parameter page, enter the Internal Name of the parameter.

   Note: The internal name of the parameter must match exactly (case sensitive) to the parameter name of the PLSQL procedure/function in the database.

6. Enter the Display Name of the parameter as it appears in the user interface.
7. Enter the Sequence. This is the order in which this parameter appears relative to other parameters associated with this function. Sequence must be unique among all

parameters associated with this function. Specify the order sequence of the function parameters; this is the order in which the parameters are passed to a function or procedure.

8. Select the Data Type from the list, which contains the available data types. The values available are dependent on the type of function for which you are defining parameters.

   Note: The data type of the parameter must match the data type of the corresponding PLSQL function or procedure parameter in the database.

9. Select the Parameter Type for each parameter based on whether the corresponding attribute is providing an input parameter to the function or expecting a return value from the function (for example, input, output, input/output). The parameter options for a parameter depend on the function type and parameter data type you have already selected.

   The valid parameters for PL/SQL functions are:

   - Date
   - Error Array
   - Number
   - Varchar

10. Click Apply.

Templates

Using a template enables you to streamline the document creation process and is a mandatory step. There can be only one template for a given combination of Functional Area, Document Type, Document Style and Level. You can have any number of revisions to a template, however, only one of them can be active at any time. The effective dates determine whether a template revision is active or not. There can be only one revision with future effective dates. The revision number starts with 0 and increases incrementally by 1 each time you create a new revision to the template. You can work with Attribute Templates to:

- Search for Attribute Templates, page 6-14
- Create new Attribute Templates, page 6-14
- Update Attribute Templates, page 6-15

- Revise Attribute Templates, page 6-19
- View and Create Actions for Attribute Templates, page 6-21

Searching for Attribute Templates

To search a template:

1. On the Attribute Setup Workbench page, select the Attribute Templates tab.
2. Enter the parameters to search for a template. You can search based on any or all of the following criteria:
   - Template Name - the name of the template.
   - Functional Area - choose from Purchasing, Requisitions, or Solicitation.
   - Document Type - choose from Blanket Purchase Agreement, Contract Purchase Agreement, Standard Purchase Order, Solicitation, or Offer.
   - Document Style - Choose from the defined document styles.
   - Level - choose a level from Shipment, Line, or Header.
3. Click Go. The search results display up to 10 records. Click Next to view more search results.

Creating a New Attribute Template

To create a new template:

1. On the Attribute Setup Workbench page, select the Attribute Templates tab.
2. Click Create Template.
3. Enter a Template Name. Use this name to identify the template.
4. By default, the Functional Area is Purchasing. Creating templates is supported only for Purchasing functional area.

   > **Note:** For other functional areas such as Requisition and Solicitation, you can revise the existing predefined templates.

5. Select the Document Type. By default, you can only create templates for Purchasing. For Purchasing, you can select from:

- Blanket Purchase Agreement
- Contract Purchase Agreement
- Standard Purchase Order

6. Select the Document Style from the list. The list displays all active document styles that have the document type enabled.
7. Select the Level from the list. You can select from:
   - Header
   - Line
   - Shipment
8. Optionally, select a template from the Copy Usages list. When you select a template to copy and click Continue, the application creates a new template by copying usages and actions from the selected template. The newly created template displays in update mode with a revision 0.
9. Enter an Effective Date. Ensure you enter only the current date or a future date.
10. Enter any comments.
11. Click Continue to create the new template.

Updating an Attribute Template

To update a template:

1. On the Attribute Setup Workbench page, select the Attribute Templates tab.
2. Enter the parameters to search for a template. The page displays up to 10 records at a time.
3. Click the Template Name to view the Template. The Templates page displays the current revision of the template. The current revision is the one which is effective on the system date. If there is no current revision, then it displays the latest revision.
4. The Actions column displays a pencil icon denoting update, if the latest revision of the template does not have a transaction document associated with it. Click the Update icon to update the latest revision of the template. The Update Template page displays. You cannot update the Template Name, Functional Area, Document Type, Document Style, Level, and the Revision Number.

5. Enter an Effective From date. This is the date from which the revision is applicable.

6. The Effective To date is automatically displayed on the previous revision of the template when you provide an effective from date on the newer revision of the template.

7. Enter any comments for the template.

8. In the Usages section, you can view the existing Usages associated with the template. Usages denote the area on the document UI where the attribute group will display. Usage also indicates the purpose of an attribute group on a document (for example document numbering attribute group, complex pricing attribute group etc). You can also view the Context, Sequence, and Attribute Group associated with the usage.

9. Click the Usage Name to view the Template Usage.

10. Click Create Usage to add a new usage to the Template. On the Create Template Usage page that displays, select a value from the Usages list. The table below lists the Usages available in CLM.

CLM UDA Usages - Purchasing

Usage Name	Purchasing		
	Header	**Line**	**Shipment**
Document Numbering	Rendered in Document Number popup.	NA	NA
General Information	Rendered on Header Page	Rendered on Line Details page	Rendered on Schedule Details page
Addresses	Rendered on address tab. Driven by the address type lookup.	NA	NA
Additional Information	Rendered on address tab, not rendered on ISP	Rendered on Line details page, not rendered on ISP	NA

Usage Name	Purchasing		
Base Document Information	Rendered on Header page, read only on Modification	NA	NA
Federal Forms	Rendered on address tab, dependent on Document Form	NA	NA
Complex Pricing	NA	Rendered on Pricing Details popup.	NA
Modification	Rendered on Header page only on Modificaton	NA	NA
Document Chaining	Rendered on Header page, attribute group data shared across Base document and all its modification	Rendered on Line Details page, attribute group data shared across Base document and all its modification	Rendered on Schedule Details page, attribute group data shared across Base document and all its modification

CLM UDA Usages - Requisition

Usage Name	Requisition	
	Header	**Line**
Document Numbering	Rendered in Document Number popup.	NA
General Information	Rendered on Checkout: Requisition Information page	Rendered on Requisition Line details page

Usage Name	Requisition	
Addresses	Rendered on Checkout: Requisition Information page. Driven by the address type lookup.	NA
Additional Information	NA	NA
Base Document Information	NA	NA
Federal Forms	NA	NA
Complex Pricing	NA	Rendered on Pricing Details popup.
Modification	NA	NA
Document Chaining	Rendered on Checkout: Requisition Information page, attribute group data shared across Base document and all its amendments.	Rendered on Requisition line details page, attribute group data shared across Base document and all its amendments.

CLM UDA Usages - Sourcing

Usage Name	Solicitation		Offer
	Header	**Line**	**Line**
Document Numbering	Rendered in Document Number popup.	NA	NA
General Information	Rendered on Header Page	Rendered on Line Details page	Rendered on line details page
Addresses	Rendered on address page. Driven by the address type lookup.	NA	NA

Usage Name	Solicitation		Offer
Additional Information	Rendered on Header page, read-only on amendment	Rendered on Line details page	NA
Base Document Information	NA	NA	NA
Federal Forms	Rendered on Header page, dependent on Document Form	NA	NA
Complex Pricing	NA	Rendered on Pricing Details popup.	Rendered on Pricing Details popup.
Modification	NA	NA	NA
Document Chaining	NA	NA	NA

See: Extending CLM Attributes using Attribute Setup Workbench chapter for more information.

11. Click the Actions icon to update an action on a usage. Alternatively, click Create Action to add a new action for the usage.

    See: View and Create Actions for Templates, page 6-21

12. Enter a Sequence. This determines the order in which the attribute groups having the same usage render on the user interface.

13. Select an Attribute Group from the list to associate the usage to the attribute group. Click Apply.

14. Click the Attribute Group name to view and update the attribute group details. You can update all details except the Internal Name, and the Behavior.

    See: Creating Attribute Groups, page 6-7

Creating a New Revision to an Existing Attribute Template

To create a new revision to a template:

1. On the Attribute Setup Workbench page, select the Attribute Templates tab.

2. Enter the parameters to search for a template.

3. Click the Template Name to view the Template. The Templates page displays the current revision of the template. The current revision is the one which is effective on the system date. If there is no current revision, then it displays the latest revision.

4. The Actions column displays an icon denoting create revision if the latest revision has a transaction document associated with it. Click the Revision icon to revise the template. A warning message displays asking you to confirm that you want create a revision for the existing template. Click Yes to create a revision. The Update Template page displays with the template name and revision number for the template. You cannot update the Template Name, Functional Area, Document Type, Document Style, Level, and the Revision Number.

5. Enter an Effective From date. This is the date from which the revision is applicable.

6. The Effective To date is automatically displayed on the previous revision of the template when you provide an effective from date on the newer revision of the template.

7. Enter any comments for the template.

8. In the Usages section, you can view the existing Usages associated with the template. Usages denote the area on the document UI where the attribute group will display. Usage also indicates the purpose of an attribute group on a document (for example document numbering attribute group, complex pricing attribute group etc). You can also view the Context, Sequence, and Attribute Group associated with the usage.

9. Click the Usage Name to view the Template Usage.

10. Click Create Usage to add a new usage to the Template. On the Create Template Usage page that displays, select a value from the Usages list.

    See: CLM UDA Usages - Purchasing, page 6-16

    See: CLM UDA Usages - Requisition, page 6-17

    See: CLM UDA Usages - Sourcing, page 6-18

11. Click Copy Usage to copy an existing usage. On the Copy Template Usage page that displays, select the Template from which you want to copy the usage. Select the Usage you want to copy. Select the Action. You can choose from Add or Replace. By default, the Action is Replace. If you select Add, the Usages are added to the template. If you select Replace, then all existing usages are replaced by the usages you select. If you selected the Add action, then if you encounter duplicates, you can review and delete the usages you do not require, per the validation rules as follows:

    - The application allows only one usage for a given combination of document number usage and context (Applicable To, Owned by Issuing Org, and

Operating Unit).

- The application allows only one usage for a given combination of complex pricing usage and context (Applicable To, Owned by Issuing Org, and Operating Unit).

- The application allows only one usage for addresses.

- The application allows multiple usage entries for the same context for other types of usages but with different attribute groups and sequences.

- When you click Apply, the application submits a concurrent request to compile a template, without which a template cannot be used on a document.

12. Click the Actions icon to update an action on a usage. Alternatively, click Create Action to add a new action for the usage.

    See: View and Create Actions for Templates, page 6-21

13. Enter a Sequence. This determines the order in which the attribute groups having the same usage render on the user interface.

14. Select an Attribute Group from the list to associate the usage to the attribute group. Click Apply.

15. Click the Attribute Group name to view and update the attribute group details. You can update all details except the Internal Name, and the Behavior.

    See: Creating Attribute Groups, page 6-7

Viewing and Creating Actions for Attribute Templates

To associate the function as an action on a template, you can define actions.

To view, update, delete, or create actions:

1. On the Attribute Setup Workbench page, select the Attribute Templates tab.

2. Enter the parameters to search for a template. The page displays up to 10 records.

3. Click the Template Name to view the Template. The Templates page displays the current revision of the template. The current revision is the one which is effective on the system date. If there is no current revision, then it displays the latest revision.

4. Click the Update or Revision Action.

5. On the Update Template page, click the Actions icon to view the existing actions associated with the template. Select an Action from the list and click Update to

update the action or Click Delete to delete the selected action. Click Create Action to create a new UDA action associated with the template.

6. On the Create Action page that displays, the Object Name, Classification, and Attribute Group display by default. You cannot update these.

7. Enter a Sequence to define the order in which the action must execute.

8. Enter an Action Name to identify the action.

9. Optionally, enter a Description for the action.

10. Select a Function you defined from the list.

11. In the Action Execution region, select an Execution Method from the list. This controls the type of action. You can choose from:

    - User Action - Renders as a button next to the Attribute Group. The action is executed whenever the user clicks on the button.

    - LOV Defaulting Action - Triggers when an attribute with an LOV is modified by the user.

    - Reference Data Refresh - This automatically triggers when saving or submitting changes.

    - Submission Check Action - Triggers on submitting a document for approval. Errors are displayed on the user interface.

    - Document Number Generation Action - Triggers when the user clicks the OK button on the document numbering popup.

    - Defaulting Action - Triggers when rendering the attribute group for the first time. Also triggers for non-rendered attribute groups when the document is saved for the first time.

    - Post Data Save Action - Triggers upon saving the document. This is meant for executing any logic you want whenever a given attribute value is altered.

    - Validation Action - Triggers just before saving the document. Errors are displayed on the user interface.

    - Price Calculation Action - Triggers from the OK and Calculate buttons in the pricing details popup.

    - Post Approval Action - this action triggers at the end of the approval cycle.

12. If you selected User Action as the Execution Method, then you need to enter some

more details to define the user action. These are:

- Display Style - This is optional and defines the user interface element that executes the action. The action will display as a button or link next to the attribute group on the user interface where the attribute group renders. The action is executed when the user clicks on the button or the link.
- Prompt Application - This is mandatory and is the application of the prompt for the action if the prompt is defined in the database.
- Prompt Message Name - This is mandatory and is the message name of the prompt if the prompt is defined in the database. Otherwise, the actual prompt. This message is the label of the button or link.
- Dynamic Prompt Function - This is optional and selects an existing function whose return value will define the prompt of the action. Must have parameter of type Return, with data type String. The value returned by this function will be the button or the link label.
- Dynamic Visibility Function - This is optional and selects an existing function whose value will determine whether or not the action is rendered. The button or link is displayed or hidden based on the return value of this function.

13. Click Apply. The Action Details page displays.
14. Click Update in the Basic Information region to make updates to the basic information of the action.
15. In the Mappings for Function section, click Update. Use this page to map the parameters for the function.
16. On the Create Mappings page that displays, you can view the Action and the Function. You cannot update these details.
17. In the Mapping table, for each Parameter Name, select the Mapping Group Type and a Mapped Attribute. You can map function parameters to attributes in the attribute group, document primary keys, external parameters as follows:

Mapping Group Type	Mapped Attribute
Attribute Group	The list displays the attributes available within an attribute group.

Mapping Group Type	Mapped Attribute
Primary Key	The Primary Key list displays those primary keys associated with the document type. For example, for PO line level, you can select the PO Line ID and Draft ID. If you are on PO Header, then you can select PO Header ID and Draft ID. If you are on the Requisition Line, you can select Requisition Line ID.

Mapping Group Type	Mapped Attribute
External Attribute	When you select this mapping group type, the mapped attribute field changes to a free text field, and you must enter the external parameter to match exactly (case sensitive) to the parameter name in the list of external parameters available in CLM UDA. The external parameters supported are: • x_msg_data - use this external parameter for validation check functions and submission check functions • x_msg_count - use this external parameter for validation check functions and submission check functions • x_errorcode - use this external parameter for validation check functions and submission check functions • x_return_status - use this external parameter for validation check functions and submission check functions • VENDOR_CONTACT_ID - use this external parameter to pass vendor contact to the associated function • VENDOR_SITE_ID - use this external parameter to pass the vendor site to the associated function. • VENDOR_ID - use this external parameter to pass the vendor to the associated function. • ITEM_ID - use this external parameter to pass the item description to the associated function.

Mapping Group Type	Mapped Attribute
	• LINE_TYPE_ID - use this external parameter to pass the line type to the associated function. • SHIP_TO_LOC_ID - use this external parameter to pass the ship-to location to the associated function. • ORG_ID - use this external parameter to pass the organization description to the associated function. • AGENT_ID - use this external parameter to pass the agent description to the associated function. • CONTRACT_TYPE - use this external parameter to pass the contract type to the associated function. • CATEGORY_ID - use this external parameter to pass the category description to the associated function. • PREPARER_ID - use this external parameter to pass the preparer description to the associated function. External parameters are certain important fields on the document which are made available to UDAs to facilitate tighter integration as well as passing error messages back to the base application.

18. Click Apply.

Simulate

Use the Simulate tab to simulate and test your UDA setup based on the value sets, Defaulting and LOV Defaulting Event actions.

To simulate and test your UDA attributes:

1. On the Attribute Setup Workbench page, select the Simulate tab.

2. Select the Template from this list. This is the template you created or updated and want to test.

3. Select a value from the Usages list. This is the usage you want to test.

4. Click Test to test your UDA setup based on the value sets, Defaulting and LOV Defaulting Event actions.

7

Extending CLM Attributes using Attribute Setup Workbench

Document Numbering

CLM supports a user configurable segmented document numbering scheme. A document numbering scheme complying with DoD standards is predefined in CLM. You may choose to use this predefined scheme or define your own scheme. Configuring document numbering is mandatory.

Using the Predefined Document Numbering Scheme

Before you can use the predefined document numbering scheme, you must set up a set of lookups and providing values in the person EIT as follows:

1. Run the Register Extra Information Types (EITs) concurrent program to set up the HR_LOCATION_INFO_TYPES EIT using the Human Resources Responsibility. Ensure you enter the following parameters:
   - HR_LOCATION_INFO_TYPES - Office Code and Defaults
   - Multiple Rows - No

     Note: This registration is a one time activity. You cannot run this program with the same parameters if it has already been run once on the instance.

2. Run the Register Extra Information Types (EITs) concurrent program to set up the PER_PEOPLE_INFO_TYPES EIT using the Human Resources, Vision Enterprises Responsibility. Ensure you enter the following parameters:
   - PER_PEOPLE_INFO_TYPES - CLM Contact Title

- Multiple Rows - No

3. Setup the following Purchasing Lookups for Document Numbering using the CLM Purchasing Super User Responsibility. You need to define the lookup values for the following lookup types. These are used for the list of values for the corresponding attributes for the seeded attribute groups for document numbering.
   - PO CLM Agency Identifier
   - PO CLM Instrument Type
   - PO CLM Allowed Serial Range

     Note: When adding values to the Serial range value set, ensure you enter them in the format XXXX-XXXX where X is any number between 0-9 or alphabet between A-Z..

     The lookup PO_CLM_ALLOWED_RANGE should be defined in the following format: The minimum range should be four digits, for example 0001, 0010, 0100, 1000 etc with no trailing or leading spaces. Then there is a delimiter appended to the minimum range. The delimiter is a single character such as a hyphen '-', with no leading or trailing space Then the maximum range is appended. This is also four digits, for example 1000, 9999, 99ZZ with no trailing or leading spaces. For example, minimum range followed by a delimiter and a maximum range in the same order with no trailing or leading spaces..

   - PO CLM Modification Type
   - PO CLM Modification Code
   - PO CLM Call Order Codes

The following predefined attribute groups comply with the DoD requirements:

- Amendment Number
- Document Number
- Document Modification Number
- Order Modification Number
- Call Order Number
- Order off IDV

- Solicitation Number
- Solicitation Amendment Number

See: Predefined Attribute Groups, page 7-7

Configuring Your Own Document Numbering Scheme Using Attribute Setup Workbench

To use the Attribute Setup Workbench to set up numbering styles, complete the following steps:

1. Create an Attribute Group to define the structure for your document number.
2. Create Attributes. The Sequence number determines the order in which the attributes display on the page.

   > **Important:** Ensure you always map the attribute containing the final document number generated in the attribute group to the database column C_EXT_ATTR40.

   See: Creating Attribute Groups, page 6-7
3. Add your attribute group to the Document Numbering Usage for the attribute Template at the header level for the document type / style for which you are configuring the document number.

   Ensure you select the following details:

   - Select Document Numbering as the usage. There are three contexts to this usage - Applicable To, Owned by Issuing Org, and Operating Unit.
   - Applicable To: Associate the attribute group to Base Document or Amendment or Modification Document or PAR. In the Applicable To fields, select the type of document for which the usage is applicable. Base Document indicates the main document and Modification indicates the Amendment or Modification document. PAR indicates Post Award Request.
   - Owned by Issuing Org: For document number of awards for order off IDV cases, use this context to indicate which attribute group - usage is applicable based on whether the IDV is owned by the current user's organization or not.

     The first 6 characters on the IDV document number are assumed to be the DoDAAC code. The user's DoDAAC is setup in the CLM Contact Title EIT in the HRMS person definition for the current logged in user.

     For order off IDVs, the application selects the usage marked as Owned By Issuing Org = Yes when these two DoDACC values match. The application selects the usage marked as Owned By Issuing Org = No when these two

DoDAAC values do not match. For non- Order Off IDV scenarios, the application selects the usage marked as Owned By Issuing Org = Not Applicable.

- Operating Unit: Select the Operating Unit for which this usage is applicable to the Attribute group for Document numbering. Select All Operating Units to associate this usage to all operating units, else select the appropriate operating unit.

See: Updating a Template, page 6-15

4. Create the Actions: For document numbering, you define the following actions for each attribute groups:

   - Defaulting Action: Define this action to default the value for each segment of the Attribute group. At the time of creating the document when the user clicks the Save or Submit button, this action ensures the correct document number generation. This is a mandatory action.

     For Document Numbering Usages, the defaulting function is invoked twice. The first time when the document is rendered. It is invoked the second time on the first save of the document. Subsequent saves on the document does not trigger the defaulting action.

     > **Tip:** The document number is locked only when the document is saved. To avoid duplicate document number errors, code your defaulting action to return a 'XXXX' in the serial number segment (or whichever segment forms the unique identifier for a document in your numbering scheme) in the first invocation of the defaulting action. The second invocation of the defaulting action will happen at the time of save, and in this invocation the action should return the real value for the serial number segment.

   - Document Number Generation Action: This is a mandatory action for the document numbering usage. This action is triggered when the user clicks OK on the document number popup. Typically you would write code in this action to concatenate the segments as per your logic to generate the final document number.

   - Get Delimiter Action: You should write code in this action to return the delimiter character being used (if any) when you concatenate the segments to get the final document number.

   - Post Approval Action (optional): This is a post approval action, where you can write some extra logic if required. For example, upon approval of the Award

Modification if you want to modify the document number to a different value, then you can add the new logic here.

You may also define any other action you require to the document numbering attribute group as per site specific requirements.

See: Creating Functions, page 6-11

Note: Ensure you map the final document number attribute to the column c_ext_attr40.

Complex Pricing

CLM provides you the following set of contract types that you can use:

- Firm Fixed Price (FFP)
- Fixed Price Level of Effort (FP-LOE)
- Fixed Price Economic Price Adjustment (FP-EPA)
- Fixed Price Incentive (Firm Target) (FPI-FIRM)
- Fixed Price Incentive (Successive Targets) (FPI-SUC)
- Fixed Price Prospective Price Redetermination (FP-PPR)
- Fixed Ceiling Price Retro-price Redetermination (FCP-RPR)
- Award Fee (FEE)
- Fixed Price Award Fee (FPAF)
- Cost Contract (COST)
- Cost Plus Fixed Fee (CPFF)
- Cost Plus Award Fee (CPAF)
- Cost Sharing (CS)
- Cost Plus Incentive Fee (CPIF)
- Labor Hour (LH)
- Time and Materials (T&M)

- Other Direct Costs (ODC)

If you require to use additional contract types, then complete the following steps:

1. Add the contract type you require to the lookup type PO Federal Contract Types for Complex Pricing Amount Lines.
2. Create the attribute group, attributes, and value sets for use when using the new contract type.
3. Ensure the final total amount is mapped to the attribute n_ext_attr20.
4. Enable the attribute group at the line level for Purchasing, Requisitions, and Sourcing.
5. On the corresponding templates, add this attribute group against usage complex pricing, select the newly defined contract type, and select an IDC type.
6. Define a price calculation action . This action is invoked when a user clicks OK or Calculate on the complex pricing popups. You can define any other actions you require.

Forms

If you require to capture and display additional information besides the information currently displayed in the standard forms, then do the following:

- Create a new attribute group with the details you require to capture.
- Create a usage for your attribute group against Federal Forms Usage. Provide the form name for which you want to use the attribute group against the Form Type field when you define the usage.

As an example, refer the predefined form SF1442 or SF252.

Addresses

> **Important:** It is strongly recommended that you do not change the attribute groups for addresses. However, you can extend certain aspects of the addresses lookups, and these are detailed in the section below.

Adding New Address Types:

The address types available on the various purchasing documents are driven by the lookup types listed below:

- Awards & IDVs - PO UDA Address Types (PO_UDA_ADDRESS _TYPES)
- Modifications - PO Mod UDA Address Types (PO_MOD_UDA_AD DRESS_TYPES)
- PR and PR Amendments - PR UDA Address Types
- Solicitations - SOL UDA Address Types
- Solicitation Amendment - SOL AMD UDA Address Types
- PO Mod UDA Address Types

1. Decide the documents on which you need your new address type and add it to the corresponding address type lookup. This step enables you to add new address type in the procurement document UIs as well as in CLM default preferences for the corresponding application.
2. Add a segment in the Extra Location Information DFF under the context code CLM_OFFICE_CODE (Office Code and Defaults) for your new address type. This enables your address type in the locations EIT - Office Code and Defaults.

   See: Configuring CLM Offices and Contacts, page 8-3
3. Now you can query an existing location or create a new location using the Define Locations window and enable the locations for your address type using the Office Code and Defaults EIT window.
4. If you require to, you can also set up user level default values for the new address type using the Preferences page.
5. Optionally, you can configure the defaulting action, validation action, submission check action, LOV defaulting action and other actions against the addresses attribute group for any additional logic that you may want for the new address type.

   Note: Ensure that the Address Type code is exactly the same (case sensitive) in all the lookups to which you are adding the address type. Also ensure the Address Type code matches exactly with the segment name in the Extra Location Information DFF.

Predefined Attribute Groups

Cautionary Note:

Customers should not delete any of the seeded attribute groups or usages - except document numbering. Deleting usages / attribute groups can cause the seeded CLM reports to not work correctly (some data elements may be missed out). If there is a strong business requirement to delete an Usage, customers would also need to consider customizing the corresponding data elements in the reports.

Please do not delete any attribute groups or attributes that are seeded by Oracle for CLM. If you do not want to display an attribute, you can update it to change its display type to Hidden in the Attribute Groups Setup page in Attribute Setup Workbench. Deleting a seeded attribute / attribute group may lead to errors in the application.

> **Warning:** The attribute group for Addresses and Supplier Details should not be deleted.

However, customers may delete the document numbering usage if they are planning to implement and use their own custom document numbering scheme.

Customers have full freedom to add more UDA attributes as per their requirements. While adding new attributes, rather than adding to the seeded attribute groups, Oracle recommends that you define new attribute groups and add them to the Attribute template against the appropriate usage. The exception to this recommendation is the Addresses usage - this allows only one attribute group, therefore you should add new attributes to the seeded attribute group, if necessary.

CLM provides a set of predefined attribute groups. The following sections contain details of these attribute groups.

Federal Fields Attribute Group

Attribute Group Name: Additional Item Information

Attribute Group Description: Additional Item Information

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
NSN	National Stock Number (NSN) is a 13-digit number assigned to an item of supply.	No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Specification Number	The specification number as given by the manufacturer /vendor for the item being purchased.	No	Text Field	No		
Drawing Number	The drawing number as given by the manufacturer /vendor for the item being purchased.	No	Text Field	No		
Manufacturer Name	The name of the manufacturer by whom the goods are made.	No	Text Field	No		
Serial Number	The serial number as given by the manufacturer for the item being purchased.	No	Text Field	No		
Manufacturer Part Number	The part number as given by the manufacturer for theitem being purchased.	No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Piece Number	The piece number as given by the manufacturer for the item being purchased.	No	Text Field	No		
Product/ Catalog Number	In the case where a manufacturer provides a catalog from which goods can be purchased, this is the product/catalog number associated to the item being requested.	No	Text Field	No		
Model Number	The model number as given by the manufacturer for the item being purchased.	No	Text Field	No		
Supplier Part Number	The part number as given by the supplier for the item being purchased.	No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Item Long Description	In cases where the Commodity or Service Name / short description field does not provide enough space for the item/service being requested, the Item Long Description field is used to enter additional descriptive text. This is the description of what the government is procuring.	No	Text Area	No		

Attribute Group Name: Acquisition Plan

Attribute Group Description: Acquisition Plan

Applicable To: Requisition Header, Solicitation Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Acquisition Plan	Acquisition Plan	No	Text Field	No	PO_CLM_ACQUISITION_PLAN	Acquisition Plans defined in the system

Attribute Group Name: Award Categorization

Attribute Group Description: Award Categorization

Applicable To: Order Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
No Competitio n Reason	Authority for other than Full and Open Competition	No	Text Field	No	PO_CLM_ AUTH_OT R_FULL_ OPEN_CO MP	Based on Lookup: Authority for other than Full and Open Competiti on
Contract Category	A selection of attributes (taken from the Procurement Data Standard) describing the category of the IDV. Used mainly for reporting and categorization / aggregation of IDVs.	No	Text Field	No	PO_CLM_ CONTRA CT_CATE GORY	Based on Lookup: Contract Categories
Admin SCD	Surveillance Criticality Designator (SCD) - The criticality designatorcan be found on the first page of a contract. It is determined by the PCO and indicates the level of delivery urgency.	No	Text Field	No	PO_CLM_ ADMIN_S CD	Based on Lookup: Admin SCD

Attribute Group Name: Business Priority and Project Information

Attribute Group Description: Business Priority and Project Information

Applicable To: Order Header, Requisition Header, Solicitation Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
DPAS Rating	Defense Priorities and Allocations System Rating.	No	Text Field	No	PO_CLM_DPAS_RATING	Based on Lookup: DPAS Ratings
Priority Code	A numerical rating, 1-15, that describes the priority and is used internally within the Department of Defense.	No	Text Field	No	PO_CLM_PRIORITY_CODE	Based on Lookup: Priority Codes
Customer Project Code	Identifies documents created for special programs, exercises, projects, operations, or other purposes.	No	Text Field	No	PO_CLM_CUSTOMER_PROJECT_CODE	Based on Lookup: Customer Project Codes
Customer Project Text	Text Description of the selected project code.	No	Text Area			

Attribute Group Name: Federal Customer Designation

Attribute Group Description: Federal Customer Designation

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
MDAPS/MAIS	Major Defense Acquisition Programs/ Major Automated Information System Acquisition Programs.	No	Text Field	No	PO_CLM_MDAPS/MAIS	Based on Lookup: MDAPS/MAIS Codes
FSC/PSC	The Federal Supply Classification (FSC) is a set of codes designed to help the federal government in supplying operations.	No	Text Field	No	FV_FSC_TYPE FV_PSC_TYPE	Based on Lookup: FSC/PSC Codes
NAICS	The commodity group (defined by the NAICS) under which the size standard is applied.	No	Text Field	No	FV_NAICS_TYPE	Based on Lookup: NAICS Codes
Customer Project Code	This identifies PRs created for special programs, exercises, projects, operations, or other purposes.	No	Text Field	No	PO_CLM_CUSTOMER_PROJECT_CODE	Based on Lookup: Customer Project Codes

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Program Code	Allow the user to select from established Program Codes. Programs are also agency-defined and can be used to group and report purchases under a particular program.	No	Text Field	No	PO_CLM_PROGRAM_CODES	Based on Lookup: Program Codes
Customer Project Text	Text Description of the selected project code. It is used to capture / map the A & E Project Title and Location for the SF252 form and the Project number for the 1442 form as well.	No	Text Area	No		

Attribute Group Name: FSC PSC Codes

Attribute Group Description: FSC PSC Codes

Applicable To: Order Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
FSC/PSC Codes	The Federal Supply Classification (FSC) is a set of codes designed to help the federal government in supplying operations.	No	Text Field	No	FV_FSC_TYPE FV_PSC_TYPE	Based on Lookup: FSC/PSC Codes

Attribute Group Name: Inspection and Acceptance Information

Attribute Group Description: Inspection and Acceptance Information

Applicable To: Award Line, Requisition Line, Solicitation Line

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Inspection Responsibility	Identifies whose responsibility is to inspect the good.	No	Text Field	No	PO_CLM_INSPECTION_RESP	Based on Lookup: Inspection Responsibilities
Inspection Level	This is a one or two character integer describing the level of inspection for the item.	No	Text Field	No		
Inspection Location	Identifies whether the location of inspection is a Destination, Source, or other facility.	No	Text Field	No	PO_CLM_INSPECTION_LOC	Based on Lookup: Inspection Location

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Inspection Address	Location where the inspection of the item is to take place.	No	Text Area	No		
Acceptance Location	Identifies whether the location of acceptance is a Destination, Source, or other facility.	No	Text Field	No	PO_CLM_INSPECTION_LOC	Based on Lookup: Inspection Location
Acceptance Address Location	Identifies the acceptance address location.	No	Text Field	No	PO_INSP_ACCP_LOCATION	Based on Lookup: Value set for Inspection and Acceptance address location
Inspection Address Location	Identifies the inspection address location.	No	Text Field	No	PO_INSP_ACCP_LOCATION	Based on Lookup: Value set for Inspection and Acceptance address location
Inspection Address Code	Identifies the inspection address code.	No	Text Field	No	PO_INSP_ACCP_ADD_CODE	Based on Lookup: Value set for Inspection and Acceptance Address Code

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Acceptance Address Code	Identifies the acceptance address code.	No	Text Field	No	PO_INSP_ACCP_ADD_CODE	Based on Lookup: Value set for Inspection and Acceptance Address Code
Inspection Address Detail	Identifies the complete inspection address.	No	Text Field	No		
Acceptance Address Details	Identifies the complete acceptance address.	No	Text Field	No		

Attribute Group Name: Competitive Information

Attribute Group Description: Competitive Information

Applicable To: Order Header, Solicitation Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Set Aside Status	Indicates whether this IDV is set aside for a specific disadvantaged business.	Yes	Text Field	No	PO_CLM_SET_ASIDE_STATUS	Based on Lookup: Set Aside Statuses

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
NAICS	The commodity group (defined by the NAICS) under which the size standard is applied.	No	Text Field	No	FV_NAICS_TYPE	Based on Lookup: NAICS Codes
Set Aside Type		No	Text Field	No	PO_CLM_SET_ASIDE_TYPE	Based on Lookup: Set Aside Types
Size Standard		No	Text Field	No	PO_CLM_SIZE_STANDARD	Based on Lookup: Size Standards
Set Aside Percent		No	Text Field			

Attribute Group Name: SF1442 Information

Attribute Group Description: SF1442 Information

Applicable To: Order Header, Solicitation Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set	Values
Bond Required	Designates whether one or more bonds is required throughout the life of the project.	No	Text Field	No	PO_CLM_BOND_REQUIRED_YN	Based on Lookup: Bond Required

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set	Values
Bond Days	Number of days that the contractor has to furnish bonds.	No	Text Field	No		
Days to Start	Number of days the contractor has to start the construction project.	No	Text Field	No		
Days to Complete	Number of days the contractor has to complete the overall construction project.	No	Text Field	No		
Period Status	Indicates whether the number of days to start/complete is mandatory or negotiable.	No	Text Field	No	PO_CLM_PERIOD_STATUS	Based on Lookup: Period Statuses

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set	Values
Period Reference	Refers to the location in the solicitation / or IDV document that describes the flexibility, if the Period Status is negotiable.	No	Text Field	No		
Work Description	Summary information about the work and reference attachments that more fully describe the work.	No	Text Area	No		

Attribute Group Name: SF252 Information

Attribute Group Description: SF252 Information

Applicable To: Order Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Administrative, Appropriation and Accounting Data	Text to describe administrative information.	No	Text Area	No		

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Contract Amount	The total amount of the contract, written out in words as if you were writing a check for that amount.	No	Text Area	No		
Negotiation Authority	FAR or other regulatory citation that defines the authority under which the government is allowed to enter into this contract.	No	Text Area	No		
Contract For	General description of the supplies and services to be provided.	No	Text Area	No		
Relevant Clauses and Documents List	Text to describe or elaborate information on any attachments, clauses, or other relevant details.	No	Text Area	No		

Attribute Group Name: Additional Shipping Information

Attribute Group Description: Additional Shipping Information

Applicable To: Order Shipments, Requisition Line, Solicitation Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
FOB Code	Indicates broad category (destination or origin) and/or specifics (e.g., FOB inland point country of importation, etc.) dealing with where the goods are delivered free on board.	No	Text Field	No	PO_CLM_FOB_VALUES	Based on Lookup: FOB values
Transportation Control Number	The TCN is a 17-character data element assigned to control and manage every shipment unit throughout the transportation pipeline.	No	Text Field	No		
Shipment Mode	Per line item delivery, it is a way to designate how the items in the shipment should be moved.	No	Text Field	No	PO_CLM_SHIPMENT_MODES	Based on Lookup: Shipment Modes

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Transportation Priority	Indicator assigned to eligible traffic that establish its movement precedence.	No	Text Field	No		
Charge Shipping To	Use to record the shipping charges.	No	Text Field	No		
Precious Metal Code		No	Text Field	No	PO_CLM_PRECIOUS_METAL_CODE	Based on Lookup: Precious Metal Codes
MILSTRIP Code	Military Standard Requisitioning and Issue Procedures - 80 character string concatenating various pieces of information and used in several legacy operations across the DoD.	No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
HAZMAT Code	A four character alphanumeric field describing the hazardous material	No	Text Field	No	PO_CLM_HAZMAT	Based on Lookup: HAZMAT Codes
Additional Marking Text	Indicator for other markings on the shipment.	No	Text Field	No		
Ship-To Address	Location to which the goods are requested to be delivered.	No	Text Area	Yes		
Country		No	Hidden	No		
ZIP Code		No	Hidden	No		
Hidden Ship to address xml		No	Hidden	No		

Attribute Group Name: Sourcing Information

Attribute Group Description: Sourcing Information

Applicable To: Requisition Header

Attribute	Attribute Description	Required Field	Display As	Display Only	Value Set Name	Values
Suggested Award Number		No	Text Field	No		

Attribute	Attribute Description	Required Field	Display As	Display Only	Value Set Name	Values
Justification and Approval Number	Documentation used to justify soliciting and awarding a contract without full and open competition.	No	Text Field	No		
Security Clearance Required		No	Text Field	No	PO_CLM_SECURITY_CLR_REQ_INDIC	Based on Lookup: Security Clearance Required indicators

Attribute Group Name: Supplier Details

Attribute Group Description: Supplier Details

Applicable To: Order Header

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
EFT Indicator	Indicates whether payments / disbursements will be made through electronic transfer or a manual check.	No	Checkbox	No	EGO_YES_NO	Based on Lookup: Yes No Lookup
Doing Business As		No	Text Field	Yes		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
EFT Exclusion Reason	Allows the contracting officer to specify a reason why electronic funds transfer (preferable method) cannot or is not being used.	No	Text Field	No	PO_CLM_EFT_EXCLUSION_REASON	Based on Lookup: EFT Exclusion Reason
DUNS Number	The Dun & Bradstreet unique nine (9)-digit DUNS Number associated with an organization.	No	Text Field	Yes		
Remit To Address	Vendor's address for sending payments when there is a live check.	No	Text Field	No	PO_REMIT_TO_ADDRESS	Pay sites for the supplier associated to the Operating Unit for the Award
DUNS+4 Number	DUNS+4 numbers are used to identify different CCR records for the same vendor at the same physical location.	No	Text Field	Yes		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Remit To Address Detail		No	Text Area	Yes		
CAGE Code	A CAGE Code is a five (5) position code that identifies companies doing, or wishing to do, business with the Federal Government. Foreign vendors use a NCAGE Code in lieu of a standard CAGE code.	No	Text Field	Yes		
CCR Registration Indicator	Indicates if the vendor is registered with the Central Contracting Registry (CCR).	No	Text Field	Yes		
TIN Number		No	Text Field	Yes		
CCR Registration Status		No	Text Field	Yes		
Physical Address		No	Text Area	Yes		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
CCR Exception Reason	Use to cite exceptions if a user cannot synchronize with the CCR prior to award finalization.	No	Text Field	No	PO_CLM_CCR_EXP_REASON	Based on Lookup: CCR Exception Reason
Supplier Contact Name		No	Text Field	Yes		
Original Supplier Name	In case of supplier name change, the original supplier name is refreshed from the master data to the Award/IDV modification.	No	Text Field	Yes		
Supplier Size		No	Text Field	No	PO_CLM_VENDOR_SIZE	Based on Lookup: Vendor Size
Phone Number		No	Text Field	Yes		
Socio Economic Information	Socio Economic Information that is stored in the supplier profile.	No	Text Area	Yes		
Email		No	Text Field	Yes		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
HIDD_ADDRS_XML		No	Hidden	No		
Hidden Vendor Id		No	Hidden	No		
Hidden Org Id		No	Hidden	No		
Hidden Contact Detail XML		No	Hidden	No		
Hidden Remit to Address Detail xml		No	Hidden	No		

Attribute Group Name: Addresses

Attribute Group Description: Multi Row Addresses

Applicable To: Order Header, Requisition Header, Solicitation Header

Attribute	Attribute Description	Required Field	Displayed As	Display only	Value Set Name	Values
Hidden Address Type		No	Hidden	No		
Hidden Lookup Type		No	Hidden	No		
Address Type		No	Text Field	Yes	PO_UDA_ADDRESS_TYPES	Based on Lookup: PO UDA Address Types

Attribute	Attribute Description	Required Field	Displayed As	Display only	Value Set Name	Values
Location		No	Text Field	No	PO_UDA_LOCATION	Active Locations enabled for the address type in the 'Office Code and Defaults' Locations EIT
Address Code		No	Text Field	No	PO_UDA_ADDRESS_CODE	DODAAC codes for the address type defined in the 'Office Code and Defaults' Locations EIT
Contact		No	Text Field	No	PO_UDA_CONTACT	Active Persons in HRMS
Address Details		No	Text Area	Yes		
Contact Details		No	Text Area	Yes		
Address Details XML		No	Hidden	No		
Contact Details XML		No	Hidden	No		
Country		No	Hidden	No		
ZIP Code		No	Hidden	No		

Attribute Group Name: Modification Justification

Attribute Group Description: Modification Justification

Applicable To: Order Header

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Modification Authority		Yes	Text Field	No	PO_CLM_MOD_AUTHORITY	Based on Lookup: Po Uda Modification Authority
Justification		Yes	Text Area	No		
Authority Text		No	Text Area	No		

Document Numbering Attribute Groups

Attribute Group Name: Amendment Number

Attribute Group Description: Federal Amendment Number

Applicable To: Order Header, Requisition Header, Solicitation Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Base Document Number		No	Text Field	Yes		
Serial Number		No	Text Field	Yes		
Delimiter		No	Text Field	Yes		
Document Number		No	Text Field	Yes		

Attribute Group Name: Document Number

Attribute Group Description: Document Number for Fed Civilian Documents

Applicable To: Order Header, Requisition Header, Solicitation Header

Attribute	Attribute Description	Require Field	Displayed As	Display Only	Value Set Name	Values
Prefix		No	Text Field	No		
Fiscal Year		No	Text Field	Yes		
Agency Identifier		No	Text Field	No	PO_CLM_AGENCY_IDENTIFIER	Based on Lookup: PO CLM Agency Identifier
Agency Identifier Hidden		No	Hidden	Yes		
Allowed Range		No	Text Field	No	PO_CLM_ALLOWED_RANGE	Based on Lookup: PO CLM Allowed Serial Range
Allowed Range Hidden		No	Hidden	Yes		
Minimum Range Value		No	Hidden	No		
Maximum Range Value		No	Hidden	No		
Serial Number		No	Text Field	No		
Delimiter		No	Text Field	Yes		
Document Number		No	Text Field	Yes		

Attribute Group Name: Document Number

Attribute Group Description: Document Number for DOD Awards

Applicable To: Order Header

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
DoDAAC		Yes	Text Field	No		
Fiscal Year		Yes	Text Field	Yes		
Instrument Type		Yes	Text Field	No	PO_CLM_INSTRUMENT_TYPE	Based on Lookup: PO CLM Instrument Type
Allowed Range		Yes	Text Field	No	PO_CLM_ALLOWED_RANGE	Based on Lookup: PO CLM Allowed Serial Range
Minimum Range Value		No	Hidden	No		
Maximum Range Value		No	Hidden	No		
Serial Number		Yes	Text Field	No		
Delimiter		No	Text Field	Yes		
Document Number		No	Text Field	Yes		
DODAAC Hidden		No	Hidden	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Instrument Type Hidden		No	Hidden	No		
Allowed Range Hidden		No	Hidden	No		

Attribute Group Name: Document Modification Number

Attribute Group Description: Document Number for DOD Award Modification

Applicable To: Order Header

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
PIIN		No	Text Field	Yes		
Control Character		No	Text Field	Yes		
Serial Number		No	Text Field	Yes		
Delimiter		No	Text Field	Yes		
Modification Type		Yes	Text Field	No	PO_CLM_MODIFICATION_TYPE	Based on Lookup: PO CLM Modificaton Type

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Modification Code		No	Text Field	No	PO_CLM_MODIFICATION_CODE	Based on Lookup: PO CLM Modification Code
Second Character		No	Text Field	No		
Document Number		No	Text Field	Yes		
Approved Serial Number		No	Hidden	No		

Attribute Group Name: Order Modification Number

Attribute Group Description: Document Number for DOD Order Modification

Applicable To: Order Header

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
PIIN		No	Text Field	Yes		
Control Character		No	Text Field	Yes		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Modification Type		Yes	Text Field	No	PO_CLM_MODIFICATION_TYPE	Based on Lookup: PO CLM Modification Type
Serial Number		No	Text Field	Yes		
Delimiter		No	Text Field	Yes		
Document Number		No	Text Field	Yes		
Modification Type Hidden		No	Hidden	No		

Attribute Group Name: Call Order Number

Attribute Group Description: Document Number for Orders Not Owned By Issuing Org

Applicable To: Order Header

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Source Document Number		No	Text Field	Yes		
Call Order Code		Yes	Text Field	No		
Serial Number		Yes	Text Field	No		
Delimiter		No	Text Field	Yes		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Document Number		No	Text Field	Yes		

Attribute Group Name: Order off IDV

Attribute Group Description: Document Number for Orders Owned By Issuing Org

Applicable To: Order Header

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Source Document Number		No	Text Field	Yes		
Allowed Range		No	Text Field	No		
Minimum Range Value		No	Hidden	Yes		
Maximum Range Value		No	Hidden	Yes		
Serial Number		Yes	Text Field	No		
Delimiter		No	Text Field	Yes		
Document Number		No	Text Field	Yes		
Allowed Range Hidden		No	Hidden	Yes		

Attribute Group Name: Solicitation Number

Attribute Group Description: Document Number for DOD Solicitations

Applicable To: Solicitation Header

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
DoDAAC		Yes	Text Field	No		
Fiscal Year		No	Text Field	Yes		
Instrument Type		Yes	Text Field	No	PO_CLM_INSTRUMENT_TYPE	Based on Lookup: PO CLM Instrument Type
Allowed Range		Yes	Text Field	No	PO_CLM_ALLOWED_RANGE	Based on Lookup: PO CLM Allowed Serial Range
Minimum Range Value		No	Hidden	No		
Maximum Range Value		No	Hidden	No		
Serial Number		Yes	Text Field	No		
Delimiter		No	Text Field	Yes		
Document Number		No	Text Field	Yes		
DODAAC Hidden		No	Hidden	No		
Instrument Type Hidden		No	Hidden	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Allowed Range Hidden		No	Hidden	No		

Attribute Group Name: Solicitation Amendment Number

Attribute Group Description: Document Number for DOD Solicitations

Applicable To: Solicitation Header

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
PIIN		No	Text Field	Yes		
Control Character		No	Text Field	Yes		
Serial Number		No	Text Field	Yes		
Delimiter		No	Text Field	Yes		
Document Number		No	Text Field	Yes		

Attribute Group Name: Document Identifier

Attribute Group Description: Document Numbering for CLM Documents

Applicable To: Order Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Document Number		No	Text Field	Yes		

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Serial Number		No	Hidden	Yes		
Base Document Number		No	Hidden	No		
Delimiter		No	Hidden	No		
Document Type		No	Hidden	No		
Owning Organization		No	Hidden	No		
Document Sub Type		No	Hidden	No		
Source Document Number		No	Hidden	No		
Style Id		No	Hidden	No		
Organization Id		No	Hidden	No		

Complex Pricing

Attribute Group Name: Award Fee - Definite Quantity

Attribute Group Description: Award Fee - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Award Fee		No	Text Field	No		
Total Award Fee	(Total Award Fee = Award Fee)	No	Text Field	Yes		

Attribute Group Name: Award Fee - Indefinite Quantity

Attribute Group Description: Award Fee - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Award Fee		No	Text Field	No		
Total Award Fee	(Total Award Fee = Award Fee)	No	Text Field	Yes		

Attribute Group Name: Award Fee

Attribute Group Description: Award Fee

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Award Fee		No	Text Field	No		
Total Award Fee	(Total Award Fee = Award Fee)	No	Text Field	Yes		

Attribute Group Name: Award Fee - Requirements

Attribute Group Description: Award Fee - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Award Fee		No	Text Field	No		
Total Award Fee	(Total Award Fee = Award Fee)	No	Text Field	Yes		

Attribute Group Name: Cost Contract - Definite Quantity

Attribute Group Description: Cost Contract - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		

Attribute Group Name: Cost Contract - Indefinite Quantity

Attribute Group Description: Cost Contract - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Max Cost		No	Text Field	No		

Attribute Group Name: Cost Contract

Attribute Group Description: Cost Contract

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		

Attribute Group Name: Cost Contract - Requirements

Attribute Group Description: Cost Contract - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		

Attribute Group Name: Cost Plus Award Fee - Definite Quantity

Attribute Group Description: Cost Plus Award Fee - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		
Base Fee		No	Text Field	No		
Award Fee		No	Text Field	No		
Total Amount	(Total Amount = Estimated Cost + Base Fee + Award Fee)	No	Text Field	Yes		

Attribute Group Name: Cost Plus Award Fee - Indefinite Quantity

Attribute Group Description: Cost Plus Award Fee - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		
Base Fee		No	Text Field	No		
Award Fee		No	Text Field	No		
Total Amount	(Total Amount = Estimated Cost + Base Fee + Award Fee)	No	Text Field	Yes		

Attribute Group Name: Cost Plus Award Fee

Attribute Group Description: Cost Plus Award Fee

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		
Base Fee		No	Text Field	No		
Award Fee		No	Text Field	No		
Total Amount	(Total Amount = Estimated Cost + Base Fee + Award Fee)	No	Text Field	Yes		

Attribute Group Name: Cost Plus Award Fee - Requirements

Attribute Group Description: Cost Plus Award Fee - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Base Fee		No	Text Field	No		
Award Fee		No	Text Field	No		
Total Amount	(Total Amount = Estimated Cost + Base Fee + Award Fee)	No	Text Field	Yes		

Attribute Group Name: Cost Plus Fixed Fee - Definite Quantity

Attribute Group Description: Cost Plus Fixed Fee - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		
Fixed Fee		No	Text Field	No		
Total Amount	(Total Amount = Estimated Cost + Fixed Fee)	No	Text Field	Yes		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Fixed Fee %	(Fixed Fee % = Fixed Fee / Estimated Cost)	No	Text Field	Yes		

Attribute Group Name: Cost Plus Fixed Fee - Indefinite Quantity

Attribute Group Description: Cost Plus Fixed Fee - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Maximum Cost		No	Text Field	No		
Fixed Fee		No	Text Field	No		
Total Amount	(Total Amount = Maximum Cost + Fixed Fee)	No	Text Field	Yes		

Attribute Group Name: Cost Plus Fixed Fee

Attribute Group Description: Cost Plus Fixed Fee

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Require d Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		
Fixed Fee		No	Text Field	No		
Total Amount	(Total Amount = Estimated Cost + Fixed Fee)	No	Text Field	Yes		
Fixed Fee %	(Fixed Fee % = Fixed Fee / Estimated Cost)	No	Text Field	Yes		

Attribute Group Name: Cost Plus Fixed Fee - Requirements

Attribute Group Description: Cost Plus Fixed Fee - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Require d Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup

Attribute	Attribute Description	Require d Field	Displayed As	Display Only	Value Set Name	Values
Estimated Cost		No	Text Field	No		
Fixed Fee		No	Text Field	No		
Total Amount	(Total Amount = Estimated Cost + Fixed Fee)	No	Text Field	Yes		
Fixed Fee %	(Fixed Fee % = Fixed Fee / Estimated Cost)	No	Text Field	Yes		

Attribute Group Name: Cost Plus Incentive Fee - Definite Quantity

Attribute Group Description: Cost Plus Incentive Fee - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_ UOM_COD ES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		
Target Fee		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Total Amount	(Total Amount = Target Cost + Target Fee)	No	Text Field	Yes		
Minimum Fee		No	Text Field	No		
Maximum Fee		No	Text Field	No		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		

Attribute Group Name: Cost Plus Incentive Fee - Indefinite Quantity

Attribute Group Description: Cost Plus Incentive Fee - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Target Fee		No	Text Field	No		
Total Amount	(Total Amount = Target Cost + Target Fee)	No	Text Field	Yes		
Minimum Fee		No	Text Field	No		
Maximum Fee		No	Text Field	No		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		

Attribute Group Name: Cost Plus Incentive Fee

Attribute Group Description: Cost Plus Incentive Fee

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Target Fee		No	Text Field	No		
Total Amount	(Total Amount = Target Cost + Target Fee)	No	Text Field	Yes		
Minimum Fee		No	Text Field	No		
Maximum Fee		No	Text Field	No		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		

Attribute Group Name: Cost Plus Incentive Fee - Requirements

Attribute Group Description: Cost Plus Incentive Fee - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display only	Value Set Name	Values
Target Fee		No	Text Field	No		
Total Amount	(Total Amount = Target Cost + Target Fee)	No	Text Field	Yes		
Minimum Fee		No	Text Field	No		
Maximum Fee		No	Text Field	No		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		

Attribute Group Name: Cost Sharing - Definite Quantity

Attribute Group Description: Cost Sharing - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed as	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup

Attribute	Attribute Description	Required Field	Displayed as	Display Only	Value Set Name	Values
Estimated Cost		No	Text Field	No		
Govt Share Percent		No	Text Field	No		
Govt Share Amount	(Govt Share Amount = Estimated Cost * Govt Share Percent)	No	Text Field	Yes		
Cont. Share Amount	(Cont. Share Amount = Estimated Cost - Govt Share Amount)	No	Text Field	Yes		

Attribute Group Name: Cost Sharing - Indefinite Quantity

Attribute Group Description: Cost Sharing - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Max Cost		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Govt Share Percent		No	Text Field	No		
Govt Share Amount	(Govt Share Amount = Estimated Max Cost * Govt Share Percent)	No	Text Field	Yes		
Cont. Share Amount	(Cont. Share Amount = Estimated Max Cost - Govt Share Amount)	No	Text Field	Yes		

Attribute Group Name: Cost Sharing

Attribute Group Description: Cost Sharing

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		
Govt Share Percent		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Govt Share Amount	(Govt Share Amount = Estimated Cost * Govt Share Percent)	No	Text Field	Yes		
Cont. Share Amount	(Cont. Share Amount = Estimated Cost - Govt Share Amount)	No	Text Field	Yes		

Attribute Group Name: Cost Sharing - Requirements

Attribute Group Description: Cost Sharing - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Name	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Estimated Cost		No	Text Field	No		
Govt Share Percent		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Name	Value Set Name	Values
Govt Share Amount	(Govt Share Amount = Estimated Cost * Govt Share Percent)	No	Text Field	Yes		
Cont. Share Amount	(Cont. Share Amount = Estimated Cost - Govt Share Amount)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Award Fee - Definite Quantity

Attribute Group Description: Fixed Price Award Fee - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Award Fee		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price + Award Fee)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Award Fee - Indefinite Quantity

Attribute Group Description: Fixed Price Award Fee - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Require d Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Award Fee		No	Text Field	No		
Maximum Price	(Maximum Price = Quantity * Unit Price + Award Fee)	No	Text Field	Yes		
Minimum Quantity		No	Text Field	No		

Attribute Group Name: Fixed Price Award Fee

Attribute Group Description: Fixed Price Award Fee

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displaye d As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Unit Price		No	Text Field	No		
Award Fee		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price + Award Fee)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Award Fee - Requirements

Attribute Group Description: Fixed Price Award Fee - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required As	Displayed As	Display Only	Value Set Name	Values
Estimated Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Award Fee		No	Text Field	No		
Estimated Price	(Estimated Price = Estimated Quantity * Unit Price + Award Fee)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Economic Price Adjustment - Definite Quantity

Attribute Group Description: Fixed Price Economic Price Adjustment - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Economic Price Adjustment - Indefinite Quantity

Attribute Group Description: Fixed Price Economic Price Adjustment - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Maximum Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Maximum Price	(Maximum Price = Maximum Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Economic Price Adjustment

Attribute Group Description: Fixed Price Economic Price Adjustment

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Economic Price Adjustment - Requirements

Attribute Group Description: Fixed Price Economic Price Adjustment - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Estimated Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Estimated Price	(Estimated Price = Estimated Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Firm Fixed Price - Definite Quantity

Attribute Group Description: Firm Fixed Price - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Firm Fixed Price - Indefinite Quantity

Attribute Group Description: Firm Fixed Price - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Require d Field	Display ed As	Display Only	Value Set Name	Values
Maximum Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_U OM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Maximum Price	(Maximum Price = Maximum Quantity * Unit Price)	No	Text Field	Yes		
Minimum Quantity		No	Text Field	No		

Attribute Group Name: Firm Fixed Price

Attribute Group Description: Firm Fixed Price

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Require d Field	Displyed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		

Attribute	Attribute Description	Require d Field	Displyed As	Display Only	Value Set Name	Values
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Firm Fixed Price - Requirements

Attribute Group Description: Firm Fixed Price - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Require d Field	Displaye d As	Display Only	Value Set Name	Values
Estimated Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Estimated Price	(Estimated Price = Estimated Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed-Price Incentive (Firm Target) - Definite Quantity

Attribute Group Description: Fixed-Price Incentive (Firm Target) - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Value Set
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		
Target Profit		No	Text Field	No		
Total Target Price	(Total Target Price = Target Cost + Target Profit)	No	Text Field	Yes		
Ceiling Price		No	Text Field	No		
Ceiling Price %	(Ceiling Price % = Ceiling Price / Target Cost)	No	Text Field	Yes		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		

Attribute	Attribute Description	Require d Field	Display ed As	Display Only	Value Set Name	Value Set
Target Unit Price	(Target Unit Price = Total Target Price / Quantity)	No	Text Field	Yes		

Attribute Group Name: Fixed-Price Incentive (Firm Target) - Indefinite Quantity

Attribute Group Description: Fixed-Price Incentive (Firm Target) - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displaye d As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_U OM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		
Target Profit		No	Text Field	No		
Total Target Price	(Total Target Price = Target Cost + Target Profit)	No	Text Field	Yes		
Ceiling Price		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Ceiling Price %	(Ceiling Price % = Ceiling Price / Target Cost)	No	Text Field	Yes		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		
Target Unit Price	(Target Unit Price = Total Target Price / Quantity)	No	Text Field	Yes		

Attribute Group Name: Fixed-Price Incentive (Firm Target)

Attribute Group Description: Fixed-Price Incentive (Firm Target)

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		
Target Profit		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Total Target Price	(Total Target Price = Target Cost + Target Profit)	No	Text Field	Yes		
Ceiling Price		No	Text Field	No		
Ceiling Price %	(Ceiling Price % = Ceiling Price / Target Cost)	No	Text Field	Yes		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		
Target Unit Price	(Target Unit Price = Total Target Price / Quantity)	No	Text Field	Yes		

Attribute Group Name: Fixed-Price Incentive (Firm Target) - Requirements

Attribute Group Description: Fixed-Price Incentive (Firm Target) - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display only	Value Set Name	Values
Quantity		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display only	Value Set Name	Values
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		
Target Profit		No	Text Field	No		
Total Target Price	(Total Target Price = Target Cost + Target Profit)	No	Text Field	Yes		
Ceiling Price		No	Text Field	No		
Ceiling Price %	(Ceiling Price % = Ceiling Price / Target Cost)	No	Text Field	Yes		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		
Target Unit Price	(Target Unit Price = Total Target Price / Quantity)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Incentive (ST) - Definite Quantity

Attribute Group Description: Fixed Price Incentive (ST) - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		
Target Profit		No	Text Field	No		
Total Target Price	(Total Target Price = Target Cost + Target Profit)	No	Text Field	Yes		
Ceiling on Firm Target Profit		No	Text Field	No		
Floor on Firm Target Profit		No	Text Field	No		
Ceiling Price		No	Text Field	No		
Ceiling Price %	(Ceiling Price % = Ceiling Price / Target Cost)	No	Text Field	Yes		
Govt. Share Above Target %		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Govt. Share Below Target %		No	Text Field	No		
Target Unit Price	(Target Unit Price = Total Target Price / Quantity)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Incentive (ST) - Indefinite Quantity

Attribute Group Description: Fixed Price Incentive (ST) - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Require d Field	Displaye d As	Display only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_U OM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		
Target Profit		No	Text Field	No		
Total Target Price	(Total Target Price = Target Cost + Target Profit)	No	Text Field	Yes		

Attribute	Attribute Description	Required Field	Displayed As	Display only	Value Set Name	Values
Ceiling on Firm Target Profit		No	Text Field	No		
Floor on Firm Target Profit		No	Text Field	No		
Ceiling Price		No	Text Field	No		
Ceiling Price %	(Ceiling Price % = Ceiling Price / Target Cost)	No	Text Field	Yes		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		
Target Unit Price	(Target Unit Price = Total Target Price / Quantity)	No	Text Field	Yes		

Attribute Group Name: Fixed-Price Incentive (Successive Target)

Attribute Group Description: Fixed-Price Incentive (Successive Target)

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		
Target Profit		No	Text Field	No		
Total Target Price	(Total Target Price = Target Cost + Target Profit)	No	Text Field	Yes		
Ceiling on Firm Target Profit		No	Text Field	No		
Floor on Firm Target Profit		No	Text Field	No		
Ceiling Price		No	Text Field	No		
Ceiling Price %	(Ceiling Price % = Ceiling Price / Target Cost)	No	Text Field	Yes		
Govt. Share Above Target %		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Govt. Share Below Target %		No	Text Field	No		
Target Unit Price	(Target Unit Price = Total Target Price / Quantity)	No	Text Field	Yes		

Attribute Group Name: Fixed-Price Incentive (Successive Target) - Requirements

Attribute Group Description: Fixed-Price Incentive (Successive Target) - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Target Cost		No	Text Field	No		
Target Profit		No	Text Field	No		
Total Target Price	(Total Target Price = Target Cost + Target Profit)	No	Text Field	Yes		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Ceiling on Firm Target Profit		No	Text Field	No		
Floor on Firm Target Profit		No	Text Field	No		
Ceiling Price		No	Text Field	No		
Ceiling Price %	(Ceiling Price % = Ceiling Price / Target Cost)	No	Text Field	Yes		
Govt. Share Above Target %		No	Text Field	No		
Govt. Share Below Target %		No	Text Field	No		
Target Unit Price	(Target Unit Price = Total Target Price / Quantity)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Level Of Effort

Attribute Group Description: Fixed Price Level Of Effort

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Level Of Effort - Indefinite Quantity

Attribute Group Description: Fixed Price Level Of Effort - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Maximum Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Maximum Price	(Maximum Price = Maximum Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Level Of Effort - Requirements

Attribute Group Description: Fixed Price Level Of Effort - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Estimated Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Estimated Price	(Estimated Price = Estimated Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Prospective Price Redetermination - Definite Quantity

Attribute Group Description: Fixed Price Prospective Price Redetermination - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Prospective Price Redetermination - Indefinite Quantity

Attribute Group Description: Fixed Price Prospective Price Redetermination - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Maximum Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Maximum Price	(Maximum Price = Maximum Quantity * Unit Price)	No	Text Field	Yes		
Minimum Quantity		No	Text Field	No		

Attribute Group Name: Fixed Price Prospective Price Redetermination

Attribute Group Description: Fixed Price Prospective Price Redetermination

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Price Prospective Price Redetermination - Requirements

Attribute Group Description: Fixed Price Prospective Price Redetermination - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Estimated Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Estimated Price	(Estimated Price = Estimated Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Ceiling Price Retro Price Redetermination - Definite Quantity

Attribute Group Description: Fixed Ceiling Price Retro Price Redetermination - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Ceiling Price Retro Price Redetermination - Indefinite Quantity

Attribute Group Description: Fixed Ceiling Price Retro Price Redetermination - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Maximum Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Maximum Price	(Maximum Price = Maximum Quantity * Unit Price)	No	Text Field	Yes		
Minimum Quantity		No	Text Field	No		

Attribute Group Name: Fixed Ceiling Price Retro Price Redetermination

Attribute Group Description: Fixed Ceiling Price Retro Price Redetermination

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Fixed Ceiling Price Retro Price Redetermination - Requirements

Attribute Group Description: Fixed Ceiling Price Retro Price Redetermination - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Estimated Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Estimated Price	(Estimated Price = Estimated Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Labor Hour - Definite Quantity

Attribute Group Description: Labor Hour - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Labor Hour - Indefinite Quantity

Attribute Group Description: Labor Hour - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Maximum Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Maximum Price	(Maximum Price = Maximum Quantity * Unit Price)	No	Text Field	Yes		
Minimum Hours		No	Text Field	No		

Attribute Group Name: Labor Hour

Attribute Group Description: Labor Hour

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Labor Hour - Requirements

Attribute Group Description: Labor Hour - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Estimated Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Estimated Price	(Estimated Price = Estimated Quantity * Unit Price)	No	Text Field	Yes		

Attribute Group Name: Other Direct Costs - Definite Quantity

Attribute Group Description: Other Direct Costs - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Other Direct Costs		No	Text Field	No		
Extended Price	(Extended Price = Other Direct Costs)	No	Text Field	Yes		

Attribute Group Name: Other Direct Costs - Indefinite Quantity

Attribute Group Description: Other Direct Costs - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Other Direct Costs		No	Text Field	No		
Maximum Price	(Maximum Price = Other Direct Costs)	No	Text Field	Yes		
Minimum Hours		No	Text Field	No		

Attribute Group Name: Other Direct Costs

Attribute Group Description: Other Direct Costs

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Require d Field	Display ed As	Display Only	Value Set Name	Values
Other Direct Costs		No	Text Field	No		
Extended Price	(Extended Price = Other Direct Costs)	No	Text Field	Yes		

Attribute Group Name: Other Direct Costs - Requirements

Attribute Group Description: Other Direct Costs - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Other Direct Costs		No	Text Field	No		
Estimated Price	(Estimated Price = Other Direct Costs)	No	Text Field	Yes		

Attribute Group Name: Amount - Time and Materials (ODC) - Indefinite

Attribute Group Description: Amount - Time and Materials (ODC) - Indefinite

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Other Direct Costs		No	Text Field	No		
Maximum Price	(Maximum Price = Other Direct Costs)	No	Text Field	Yes		
Minimum Hours		No	Text Field	No		

Attribute Group Name: Amount - Time and Materials (ODC)

Attribute Group Description: Amount - Time and Materials (ODC)

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Other Direct Costs		No	Text Field	No		
Extended Price	(Extended Price = Other Direct Costs)	No	Text Field	Yes		

Attribute Group Name: Amount - Time and Materials (ODC) - Requirements

Attribute Group Description: Amount - Time and Materials (ODC) - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Other Direct Costs		No	Text Field	No		
Estimated Price	(Estimated Price = Other Direct Costs)	No	Text Field	Yes		

Attribute Group Name: Time and Materials - Definite Quantity

Attribute Group Description: Time and Materials - Definite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Other Direct Costs		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price + Other Direct Costs)	No	Text Field	Yes		

Attribute Group Name: Time and Materials - Indefinite Quantity

Attribute Group Description: Time and Materials - Indefinite Quantity

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Maximum Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Other Direct Costs		No	Text Field	No		

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Maximum Price	(Maximum Price = Quantity * Unit Price + Other Direct Costs)	No	Text Field	Yes		
Minimum Hours		No	Text Field	No		

Attribute Group Name: Time and Materials

Attribute Group Description: Time and Materials

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Other Direct Costs		No	Text Field	No		
Extended Price	(Extended Price = Quantity * Unit Price + Other Direct Costs)	No	Text Field	Yes		

Attribute Group Name: Time and Materials - Requirements

Attribute Group Description: Time and Materials - Requirements

Applicable To: Order Line, Requisition Line, Solicitation Line, Offer Line

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Quantity		No	Text Field	No		
UOM	Unit of Measure	No	Text Field	No	PO_UDA_UOM_CODES	Units of measures defined in inventory setup
Unit Price		No	Text Field	No		
Other Direct Costs		No	Text Field	No		
Estimated Price	(Estimated Price = Quantity * Unit Price + Other Direct Costs)	No	Text Field	Yes		

Closeout Attribute Group

Attribute Group Internal Name: CLOSEOUT

Display Name: Additional Information

Description: Closeout Additional Information

Applicable To: Award /IDV Header

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name	Values
Final Payment Voucher Number	Final Payment Voucher Number	No	Text Field	No	Null	-
Payment Date	Payment Date	No	Date	No	Null	-
Final Invoice Number	Final Invoice Number	No	Number	No	Null	-
Date Forwarded	Date Forwarded	No	Date	No	Null	-
Excess Fund Amount	Excess Fund Amount	No	Number	No	Null	-

Small Business Coordination Record (DD-2579) Attribute Groups

Attribute Group Name: SBCR_ADD_INFO

Attribute Group Description: Additional Info

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Valueset Name
SBCR_SB_PROG_PAY	SB Progress Payments	-	Dropdown	-	OKC_XPRT_YES_NO
SBCR_SYN_REQ_COM	Exception Reason	-	Text Field	-	-
SBCR_REMARKS	Remarks	-	Text Area	-	-
SBCR_LOCAL_USE	Local Use	-	Text Area	-	-

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Valueset Name
SBCR_SC_PLAN_REQ	Subcontracting Plan Required	-	Dropdown	-	OKC_XPRT_YES_NO
SBCR_SYN_REQ	Synopsis Required		Dropdown		OKC_XPRT_YES_NO

Attribute Group Name: SBCR_ACQ_HIST

Attribute Group Description: Acquisition History

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Valueset Name
SBCR_ACQ_TYPE	Acquisition Type	-	Dropdown	-	OKC_SBCR_ACQ_HIST_TYPE

Attribute Group Name: SBCR_PRE_ACQ

Attribute Group Description: Previous Acquisition

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name
ACQ_COMMENTS	Comments	-	Text Field	-	-
ACQ_PREV	Previous Acquisition	-	LOV	-	OKC_SBCR_ACQ_SET_ASIDE

Attribute Group Name: SBCR_PROC_INFO_AG

Attribute Group Description: Procurement Information

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name
SBCR_TOTAL_AMOUNT	Total Estimated Value	-	Text Field	-	-
SBCR_CURRENCY	Currency	-	Text Field	-	-
SBCR_BUYER	Buyer	-	Text Field	-	-
SBCR_OFF_SYM	Office Symbol	-	Text Field	-	-
SBSS_NAICS_Code	NAICS Code	-	LOV	-	PO_CLM_NAICS
SBCR_SBSS_SIZE_STANDARD	Size Standard	-	Dropdown	-	PO_CLM_SIZE_STANDARD
SBCR_FSC_SVC_CODE	FSC/SVC Code	-	LOV	-	PO_CLM_FSC_PSC
SBCR_ITEM_DESC	Item Description	-	Text Area	-	-

Attribute Group Name: SBCR_REC_AG

Attribute Group Description: Recommendation

Attribute	Attribute Description	Required Field	Displayed As	Display Only	Value Set Name
RECOMMEND_PERCENT	Set-Aside %	-	Text field	-	-
RECOMMENDATION_TYPE	Set-Aside Type	-	Text field	-	OKC_SBCR_REC_SET_ASIDE

Contract Data Requirements List (CDRL) Attribute Group

Attribute Group Name: Data Item Details

Attribute Group Description: Data Item Details

Applicable To: Data Deliverable (CDRL)

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Valueset Name	Values
Category	Category	No	Text Field	No	OKC_CDRL_CATEGORY	Configuration Management, Others,Provisioning,Technical Manual,Technical Data Package
Authority	Authority	No	Text Field	No		
Contract Reference	Contract Reference	No	Text Field	No		
DD 250 Required	DD 250 Required	No	Text Field	No	OKC_CDRL_DD250_REQD	
Approval Code	Approval Code	No	Text Field	No	OKC_CDRL_APP_CODE	Prior Approval Required,Approval and Distribution statement required,Distribution Statement Required,Approval on Receipt,Not applicable

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Valueset Name	Values
Distribution Statement Required	Distribution Statement Required	No	Text Field	No	OKC_DIST_STMT_REQD	
Frequency	Frequency	No	Text Field	No		
As Of Date	As Of Date	No	Text Field	No		
Date of first submission	Date of first submission	No	Text Field	No		
Date of subsequent submissions	Date of subsequent submissions	No	Text Field	No		

Attribute Group Name: Distribution Address

Attribute Group Description: Distribution Address

Applicable To: Data Deliverable (CDRL)

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Valueset Name	Values
Address	Address	No	Text Area	No		
Address Code	Address Code	No	Text Field	No		
Draft Copies	Draft Copies	No	Text Field	No		
Final Regular Copies	Final Regular Copies	No	Text Field	No		

Attributes	Attribute Description	Required Field	Displayed As	Display Only	Valueset Name	Values
Final Reproducible Copies	Final Reproducible Copies	No	Text Field	No		

8

Setting up CLM features

Overview

The sections below describe the various setup steps for different CLM features such as:

- Enabling Encumbrance
- Configuring CLM Offices and Contacts
- Sourcing Setup Steps
- Approvals Management
- Setting Up Warrants
- Workload Assignment Setup Steps

Setup for Enabling Encumbrance

CLM enables you to provide funding / encumbrance information for a Requisition, Award / Order. You can create and approve Requisitions, Awards and Orders with no funding or with partially available funds. You can incrementally fund the Award / Order lines through the Modification feature, depending upon the availability of funds.

Set up Encumbrance using the implementation steps below:

1. Login with your credentials and use a Purchasing responsibility that gives you access to the setup windows/pages.
2. Navigate to Setup: Organizations > Financial Options.
3. In the Find Financial Options window, select an Operating Unit and click Find.
4. Click the Encumbrance tab for the selected Operating Unit and select the following

three checkboxes:

- Use Requisition Encumbrance
- Reserve at Completion (optional - determines whether to reserve funds for a requisition at the time of submission or at the time of final approval)
- Use PO Encumbrance

5. Save your work and close the Financial Options window.

Sourcing Setup Steps

Some of the setup steps you will need to perform in Sourcing for CLM are:

- Setup steps for selecting templates in order to view solicitations using the Standard Forms and Document Formats. The output that is generated is a pdf.
- Setup steps to specify which notification the user can receive.
- Specify Negotiation Styles for CLM Solicitation document type.

Select Templates for printing forms:

1. Login with your credentials and use a CLM Sourcing responsibility that has the Administration tab enabled. Click the Administration tab and then click the Negotiations Configuration link.
2. In the Forms region, you can specify the various templates for the CLM Standard Forms and Document Formats.

   Please ensure that the Active checkbox is selected for that solicitation document.
3. Specify one of the documents as a Default document.
4. Click Apply to save your changes.

   For more information, please refer to the Appendix - XML Publisher Templates for Standard forms for Awards/IDVs/Solicitations.

Specify the notifications you want to receive:

1. Select the Administration tab and then click the Notification Subscription link.
2. The Notification Subscription page consists of two regions - Buyer Notifications and Supplier Notifications.
3. Select the Solicitation checkbox to specify which notifications buyers and suppliers

should receive.

4. Click Apply to save your changes.

Specify controls for Negotiation Styles:

1. Select the Administration tab and then click the Negotiation Styles link.

2. The Negotiation Styles page opens, and in the Search region, enter the search criteria. For example, you can enter Solicitation as the Document Type and the Status as Active to query all negotiation styles that have a Solicitation document type. Click Go.

3. The search results display in the region below. Click on the Name hyperlink to view the negotiation style controls. The pre-defined negotiation styles for the Solicitation document type are:

   - Large Negotiation

   - Standard Negotiation

4. Click on the Update (pencil) icon to edit the controls for the negotiation style.

5. The Update Negotiation Style page opens, enabling you to set the different controls for the negotiation style. There are header level controls and line level controls that you can set.

6. In the Document Types region, select the Enabled checkbox for the Solicitation Document Type.

7. Click Apply to save your changes and close the page.

Configuring CLM Offices and Contacts

Extra Information Types are defined using descriptive flexfields. Oracle HRMS provides some predefined EITs. You may add your own information types, but you must not change the definitions of the delivered EITs. Unlike the usual descriptive flexfields, EITs are child entities with separate tables to hold the information you enter. This means that you can have multiple instances of an EIT for each main record. When you define the EIT, you can specify whether you want to allow multiple instances. With the exception of organizations, EIT data is viewed and entered in a separate window which you can task flow.

In order to set up address locations and contacts, CLM makes use of the Extra Information Types found in the Oracle HRMS application.

The Preferences page of your module enables you to select default values for the CLM

Offices and Contacts. This saves data entry time and effort for the user. Click the Preferences link at the top of your application page to open the Preferences page. You can specify the values for offices and contacts that you want defaulted everytime the user creates/updates a CLM document.

Follow the steps below in order to set up office address locations and contacts:

1. Use an HRMS responsibility that has the HR Manager function.

   Navigate to Work Structures > Location.

2. Run the Register Extra Information Types (EITs) concurrent program. This registration is a one time activity. You cannot run this program with the same parameters if it has already been run once on the instance.

   (M) View > Requests > Submit a New Request.

   Enter the following parameters for Office Codes:

   - Table Name = HR_LOCATION_INFO_TYPES
   - Information Type = Office Code and Defaults
   - Multiple Rows = No

   Run the concurrent program again with the following parameters for Contact Titles. This is also a one-time step.

   - Table Name = PER_PEOPLE_INFO_TYPES
   - Information Type = CLM Contact Title
   - Multiple Rows = No

3. Navigate to the HR Security form: Security > Information Types Security

   Enter the following for your responsibility (example, FED HRMS Manager) in the Information Types region:

   - CLM_CONTACT_TITLE
   - CLM_OFFICE_CODE

4. In the Location window, query for your location (F11 & Ctrl-F11) and when your location details display in the fields, click Extra Information Types (Extra Inform..). This opens the Extra Location Information window for that location. The Type region should display Office Code and Defaults in the row. Place your cursor in the Office Code and Defaults row, and click on the Details row. This opens up the Extra Location Information window and enables you to enter the information for the following fields:

- Location Code (DoDACC may be set up as a Location Code)
- COTR Office
- Issuing Office
- Property Administration Office
- Payment Office
- Requesting Office
- SBA Office
- Invoice Office
- Administration Office
- Assisting Office

Specify whether the location is a specific office type or not (for example: for COTR Office, click on the COTR Office row and then select Yes or No). Click Ok to save your changes and return to the Extra Information Location window. The Details row displays the values (Yes, No) that you have selected for all the offices. Save your work and close the Extra Location Information window.

5. Navigate to People > Enter and Maintain window. Find the person you wish to enter as an office contact and enter a title for (for example: Buyer, Contracting Officer).
   - Enter the person details such as Full Name, Social Security or Number in the Find Person window. Click Find and the search results appear in the People window.
   - Click Others, and in the Navigation Options popup that displays, select Extra Information and click Ok.
   - The Extra Person Information window opens for that person. Put your cursor in the CLM Contact Title row to select it and then click the Details row. The Extra Person Information popup opens.
   - Enter a Title (such as Buyer), DoDACC (the code for defaulting the document number - this is optional), Call/Order Code. Click Ok to save your work and return to the Extra Person Information window. The Details row is populated with the information you entered in the popup. The Contact Title is used in the printing of the forms.

Related Topics

Oracle HRMS Configuring, Reporting, and System Administration Guide.

Approvals Management

Oracle Approvals Management (AME) is a self-service Web application that enables you to define business rules governing the process for approving transactions in Oracle e-Business Suite modules that have integrated AME. Oracle Approvals Management enables you as a business user to specify the approval rules for an application without having to write code or customize the application. After you define the rules for CLM, CLM communicates directly with AME to manage the approvals for its transactions.

> **Note:** CLM also supports the approval routing methods of job-position hierarchy and employee-supervisor hierarchy.

The AME Approval workflows need to be used as the AME Approval workflows contain the rules governing CLM document approvals. You may customize the workflows to suit specific agency requirements, however your customizations need to be based on the AME Approval workflows.

Some pre-defined workflow files (.wft) that are used in the approval process by communicating with AME:

CLM Document Name	.wft filename
Requisition & Requisition Amendment	poxwfrqa.wft
Award & Modification	poappame.wft
Solicitation & Solicitation Amendment	ponwfapp.wft

The pre-defined Transaction Types such as Purchase Requisition Approval, Purchase Order Approval, Purchasing Modification Approval have their corresponding pre-defined attributes that you can view in AME using the Approvals Management Business Analyst responsibility or a similar responsibility.

For more information on Approvals Management, please refer to the *Oracle Approvals Management Implementation Guide.*

Setting Up Warrants

The Federal Government authorizes Contracting Officers (KO) to obligate money on behalf of the government via warrants. Warrants are generally granted for specific amount limits, for example, $25K, $100K, $1M, and so on.

To set up warrants, complete the following steps:

1. Create a Warrant.

   See: Creating a Warrant, page 8-7

2. Define a Contracting Officer and associate the warrant with the Contracting Officer.

   See: Defining a Contracting Officer and Associating Warrants, page 8-9

3. Set the Document Style for warrants to ensure the application validates the warrant at the time of finalizing the award.

   See: Document Styles, page 5-4

Creating a Warrant

You create a warrant from the Warrants page using the Purchasing Super User responsibility.

To create a warrant:

1. From the Oracle Applications Home Page, select Setup : Purchasing, and click Warrants.

2. On the Search Page that displays, click Create.

3. On the Warrants page that displays, in the Create Warrants region, enter the following details:

   - Enter a unique Warrant Name. This is a mandatory field.

   - Enter a Description for the warrant.

   - Select either Active or Inactive as the Status of the warrant. This is a mandatory field.

   - Select a Currency from the list. By default, this is USD.

   - Select an Issuing Office from the list. This is the office that issued the warrant to the Contracting Officer (KO).

   - Enter an Issuing Date. This is the date on which the warrant was issued to the user.

   - Enter a Received Date. This is the date on which the user received the warrant.

- Enter the Status Date. This is the date on which the status was last updated.

4. In the Warrants Line region, click Add Another Row, and add the following details:

   - Select a Document Type from the list. For example, Awards, IDV with Lines, and IDV without Lines.

   - Select an Award Type from the list. The award type you can select depends on the Document Type you choose.

     If you select Award as the Document Type, then you can choose from Award, BPA Call, Delivery Order, Negotiated Agreement, or Purchase Order as the Award Type.

     If you select IDV with Lines as the Document Type, then you can choose Definite Quantity, Indefinite Quantity, Requirements, or Basic Ordering Agreement as the Award Type.

     If you select IDV without Lines as the Document Type, then you can choose Basic Agreement or Blanket Purchase Agreement as the Award Type.

   - Select a Warrant Type from the list. The values you see in this list depend on user-defined lookups.

   - Enter a positive integer value as the Amount. This is the amount that is enforced on the Base document as well as the Modification to the respective base document.

   - To remove a row, click the Remove icon.

5. In the Attachments region, click Add Attachment to add documents, such as Forms like SF1402, which contain details of the warrant for the Contracting Officer. On the Add Attachment page that displays, enter the following details:

   - In the Attachment Summary Information region, enter the Title, and Description of the document. The application displays the Category automatically.

   - In the Define Attachment region, select the Type from the list. You can choose from File, URL, and Text.

     If you select File, click Browse and search for a file to attach.

     If you select URL, enter the URL.

     If you select Text, enter the text in the box.

     Click Apply to add the attachment. Click Add Another to save the current attachment and add another attachment.

6. Click Save to create the warrant. The application validates that the combination of Document Type, Award Type and Warrant Type is unique if you create and save multi-row records.

Defining a Contracting Officer and Associating Warrants

You define contracting officers and associate warrants with them using the Warrants page available from the Purchasing Super User responsibility.

To define a contracting officer and associate warrants:

1. From the Oracle Applications Home Page, select Setup : Personnel, and click Buyers.
2. On the Buyers page that displays, click Add Buyer.
3. Select a Buyer from the list.
4. Select a Category from the list.
5. Select a Ship-To location from the list.
6. Enter the Begin Date.
7. Enter the End Date.
8. Select the Contracting Officer check box to indicate that the buyer is a contracting officer. When you designate a buyer as a contracting officer, the warrants list displays.

   Note: You can also use the Preferences Page to select a Contracting Officer. To do this, click the Preferences link and select Purchasing CLM Defaults to access the Offices and Contact Details page from which you can select the Contracting Officer. The contracting officer you select here defaults to the header on the document type you create.

9. Select a defined warrant from the Warrant list.

   Note: You can associate only one warrant to a Contracting Officer.

10. Click Save to save your definition and association.

Workload Assignment Setup Steps

In order to use Workload Assignments, you need to set up Milestones and Milestone Templates.

Milestones

An assignment milestone is a set of tasks associated with a particular procurement action. For example: Prepare Solicitation Package, Submit Solicitation Package, Perform Proposal Evaluation, etc.

To view or define a system milestone, you need to navigate to Setup: Purchasing > Lookup Codes and search for the lookup ASSIGNMENT_MILESTONES_SYSTEM. The lookup type is User, which means that you can extend the list by adding more milestone lookups.

Milestone Templates

Milestone Templates enable you to define/use a set of milestones in a sequence for a given workload assignment. You can further re-use this template for other workload assignments. Using an appropriate CLM Purchasing responsibility, navigate to the Setup > Purchasing > Assignment Milestone Templates page.

Using the Search region in the Milestone Template page, you can search for an existing template using the template name or description as the search criteria.

Milestone Templates display in the search results. Click on the Update (pencil) icon to open the Update Assignment Milestone Template page and make your changes to the template.

You can update the Assignment milestone template name, description, and estimated duration. You can also update user milestone details. However, for a system milestone, only the Estimated Days is updatable. You can add milestones to the template or remove milestones from the template as per your requirement. Click the Delete (trashcan) icon for a milestone, and it gets removed from the milestone template.

To create a new Milestone Template, click Create Assignment Milestone Template in the Milestone Template page. The Create Milestone Template displays, and you need to enter a Milestone Template Name, Description (optional) and Estimated Days that the assignment will be completed in.

In the Milestone Types region, enter/select the milestone information for the template. Milestone Types are: System or User. If you select the Milestone Type System, the LOV for the Milestone Name displays the values from the milestones lookup and you can select one. The Milestone Name and Description are defaulted for you. Enter a value for the Estimated Days field.

If you select the Milestone Type User, you need to enter the values for the Milestone Name, Description and Estimated Days. The milestone you created as type User is applicable and usable only for this template and not for other templates. The system milestones can be used across templates.

The estimated days at the header level of the milestone template should be equal to or more than the highest value of estimated days provided for any milestone for that particular template, otherwise an error message is displayed.

Click Apply to save your newly created or updated milestone template. Otherwise, click Cancel to undo your changes or not save your template.

Concurrent Program to calculate Completion Date

The concurrent program Compute Milestones Completion Date for Assignment updates the completion date for system defined milestones. This program can be scheduled on periodic basis to calculate the completion date of system milestones. User milestones can either be updated manually or a custom hook used along with this concurrent program is available to compute the completion date of user milestones.

To use Workload Assignment custom hook, please refer to the section Extending the Workload Assignment feature, page 10-4 in the Extensibility for Implementers chapter.

Setting up Multi-Row Variables in Contracts

Some clause variables require values that span across multiple rows and columns. These variables are called Multi-Row Variables (MRVs) and they enable the user to update the variable to contain multiple values.

The steps to set up Multi-Row Variables are as follows:

1. Determine the Multi-Row Variables (MRV) required for authoring your contract terms.

2. Determine the layout required for printing the MRV values.

3. Create an attribute group with required attributes for the MRVs.

   - Using the Contracts Terms Library Administrator responsibility, navigate to Contracts > Contract Terms Library > Attribute Group.

   - Click the Create button. Enter the Internal Name and Display Name. Select the Behavior as Multi-Row. Click the Apply and Add Attributes button.

   - Enter Internal Name, Sequence, Data Type, and Column - repeat this step for each attribute of the multi-row variable. Click the Maintain Unique Key button to define the unique key, that is a set of attributes whose combination uniquely determines a row in the Attribute Group.

4. Create a RTF layout template that is needed to print the values of the Multi-Row Variable. This layout template is used during preview and in the PDF output.

   For designing the layout, an understanding of the XML generated for each MRV variable is required. A sample XML is attached to explain the same.

- The XML generated for Multi-Row Variables is always in the following form:

```
<VAR_VALUE> <- Always Root Element
<HAZARD>    <- INTERNAL Name of the 'Attribute Group'
<MATERIAL>Uranium</MATERIAL> <- INTERNAL Name of the 'Attribute.
 <IDNUM>0001</IDNUM> <- INTERNAL Name of the 'Attribute.
    </HAZARD>
     <HAZARD>
     <MATERIAL>Plutonium</MATERIAL>
             <IDNUM>0002</IDNUM>
      </HAZARD>
                …….
               ……
</VAR_VALUE>
```

- Simple RTF layouts can be designed with the above XML example. For complex layouts, create the XML for the custom attribute group mentioned above, and use the XML example to create the layout. For more details, refer to the *Oracle Business Intelligence Publisher Report Designer's Guide*.

- Register the RTF template in the application using XML Publisher Administrator. Ensure the data definition is set to Multi Row Variable Data Def.

5. Create the required variable in Contracts Terms Library and use the attribute group and layout template.

Setting up Closeout Checklist Templates

Closeout Checklist Templates enable you to create a template that contains tasks which need to be executed on the contract document. The Closeout Checklist Template can be used across documents; all you need to do is attach the template to the document(s) that you propose to close out.

Use the following information to create a Closeout Checklist Template and add tasks to it, to create a reusable template for closing out one or multiple documents.

Using the appropriate CLM Purchasing responsibility, navigate to Setup: Purchasing > Closeout Checklist Templates. The Closeout Checklist Templates page enables you to search for existing closeout checklist templates. Additionally, you can use this page to update existing closeout checklist templates that have a status of Draft, create new closeout checklist templates, submit the checklist template for approval, create revisions for approved closeout checklist templates and duplicate existing closeout checklist templates.

Use the Search region to specify search criteria to retrieve existing closeout checklist templates. Use the Add Another list of values to add additional search criteria fields and their values to your existing search criteria. When you have entered the search criteria field values, click Go to retrieve closeout checklist templates. The search results display in the region below. The Actions list of values also displays, and you can perform the following actions on a selected closeout checklist template: Create New Version, Delete, Duplicate, Update.

Click Create Template to create a new template. The Create Closeout Checklist Template displays with some fields that you need to enter in order to complete the template header details. The closeout checklist template consists of 2 parts: the header and the tasks. First enter the header information and then enter the task information.

The mandatory fields in the header are Operating Unit, Template Number, Template Name, Template Administrator, and Effective From (Effective To is an optional field). Enter the mandatory and other fields to complete the header information. The Version and Status fields are defaulted for you.

Click Apply and Add Details to add tasks to the closeout checklist template. Click the Tasks link at the top left corner of the page to add tasks to the closeout checklist template. The Closeout Checklist Template: Tasks page displays, click Add Task to enter tasks for the template you just created. A new row for the task displays and you can enter the relevant task information. Enter a Task Name and Description. Then select a Task Type (Contractual or Internal) and a Responsible Party (Internal or Supplier). Internal Contact is a mandatory field, irrespective of whether the task type is Contractual or Internal. Enter a Duration that the milestone needs to be completed in, after physical completion of the document. You can select between days, weeks and months. In the Actions column, click the Update (pencil) icon to open the Closeout Checklist Template: Update Task page. The first region of the Closeout Checklist Template: Update Task page displays all the fields that you entered in the previous page. The other regions are:

Milestones after Physical Completion: Enter a duration (period) of days, weeks or months that you will complete the task in. The due date for the task completion will be calculated from the date on which the status of the document is updated to Physically Complete.

Notifications: Select Prior to Due Date and number of Days if you want to be notified a few days prior to the due date of the task. Select Status Change if you wish to be notified whenever the checklist undergoes a change in status. If you wish to be notified when the task is overdue, select the Task is Overdue checkbox. Select the Escalate after Due Days checkbox if you wish to escalate this task if it is overdue. Enter the number of days and also enter the person who will be notified if this task is escalated.

Attachments: The Attachments region enables you to attach various kinds of files to the task – including the ability to annotate the task with a note. Click Add Attachment to open the Add Attachment page and specify the kind of attachment you would like to use: Desktop File/Text/URL or From Document Catalog.

1. Select a Category from the list of values. The Category defines the purpose of an attachment, and controls which forms or pages can access it.

2. Select the attachment Type:

   - File - specify a file name to upload. Enter the file location, or use the Browse button to locate the file.

- URL - enter the URL for a Web page.
- Text - Enter text that is less than 2000 characters. If the text you want to attach is more than 2000 characters, upload it in a file.

3. From the Document Catalog:
   - Use the Search regions to query existing documents.
   - Select the Document Name link to view a document before attaching it.
   - Select the document(s) to attach.
   - Click Apply.

Save your work in the application page from which you launched the attachments flow. The attachments are not added until you save your work in the parent region.

Click Apply to save your changes and return to the Closeout Checklist Template: Tasks page. In a similar manner, you can add more tasks to the closeout checklist template by clicking Add Tasks. You can also re-sequence the tasks by clicking Reorder. The Closeout Checklist Template: Reorder page displays and you can use the up and down arrow keys to re-sequence the tasks. Click Apply to save your changes and return to the Closeout Checklist Template: Tasks page.

Click Save to save your updates and then proceed with any of the actions in the Actions list of values:

Select **Delete** from the Actions LOV and click Go. You get a warning message that the closeout checklist template will be deleted. Click Yes if you wish to delete the template or No if you wish to retain the template.

Select **Duplicate** from the Actions LOV and click Go if you wish to make a copy of the template. The Closeout Checklist Template: Duplicate page displays, and you can enter the header details for the copied template. The Operating Unit, Version and Status values are defaulted for you and are read-only fields. Enter a Template Name, Template Number, Template Administrator, Effective Dates, Description and Instructions for the newly copied template. Click Apply and Add Details and then click the Tasks link at the top left corner of the page. The Closeout Checklist Template: Tasks page displays with the tasks from the source template copied to the destination template. You can add more tasks to the newly copied template and also save and apply your changes.

Submit for Approval: Select this action and click Go in order to get your closeout checklist template approved. When the template is approved, the status of the template in the Closeout Checklist Templates page, below the search criteria fields, shows as Approved. You can then associate this template to a document (award or IDV) for the purpose of processing the closeout of the document.

View History: Select this action and click Go to see the revision history of the closeout checklist template. The View History page displays with the version details of the closeout checklist template. Click the Return to Closeout Checklist Template link to return to the header page of the template.

Closeout Eligible Documents concurrent program

The Closeout Eligible Documents concurrent program send notifications to the administrators, informing them of the eligible documents for closeout. An example of an eligible document is a document in process for payment. Implementers can either use this concurrent program as is, or customize it using code, to adapt it for specific agency requirements.

Closeout Workflow

The Contract closeout workflow (POCLSOUT) orchestrates the contract closeout process by setting the closeout status of the documents, comparing the closeout statuses, activating the task list, submitting the concurrent programs for generating the PDFs, sending the notifications of validation failures, PDF signatures and PDF generation failures.

- File: patch/115/import/US/poxcloseout.wft
- Item type: POCLSOUT
- Display name: PO Closeout
- Description: PO Initiate Closeout Workflow

1. Selector defined 'POCLSOUT_SELECTOR' for callback and setting the application context if this was lost.
2. Sets the different closeout status for the document based on the orchestration defined. The closeout statuses are:
    - Physically Complete: The document is said to be Physically Complete when the contractor has completed the required deliveries and the agency has inspected and accepted the supplies or when the contractor has performed all services and the agency has accepted these services.
    - Administratively Complete: A contract will go through the administrative closeout process after it is considered physically complete. A contract is administratively complete once the contract administration office has gone through the closeout procedures as outlined in FAR 4.804-5 which includes completing the contract closeout checklist and contract completion statement.
    - In Closeout: Contracts in which contract administration personnel have

initiated the closeout process, but the contract is not physically or administratively complete. The document status will be In Closeout when the Checklist tasks are completed and the Contract Completion Statement is pending to be signed by Administration Office.

- Closed out: The contract closeout procedures have been completed for the contract and it is considered both physically and administratively complete. At which point, it is closed for further action and can only be accessed in a read-only state. If additional actions are required, it would need to first be reopened. The Reason field is enabled and is a required field only for the Closed out value.

3. Activates the task list by calling the procedure and ends the process. When the business event is triggered on completing the task, the contract closeout workflow is launched again for the document.

   A business event "oracle.apps.okc.deliverables.deliverableCompleted" is raised whenever a deliverable in closeout is completed/cancelled/failed to perform. The business event subscription checks whether all the deliverables for that document are either completed or cancelled or failed to perform. If the above condition is satisfied then it launches the closeout workflow process. This business event takes deliverble_id as the parameter.

4. Submits the java concurrent program request to generate the Checklist PDF and Contract completion statement PDF based on the pdf type that is passed and waits for the concurrent program to complete.

   Concurrent program details:

   EXECUTABLE: POCLSOUTPDF

   EXECUTION_FILE_NAME: PoCLMClsoutPDFCP (P_DOC_ID, P_CLOSEOUT_PDF_TYPE, P_DOC_NUMBER as parameters)

5. Sends the following notifications based on the orchestration steps:

   Closeout Error Notification - (Information Notifications-Unexpected errors)

   Checklist Signature Notification - (Checklist signature notifications with Closeout Details URL and Checklist PDF attached)

   Validation Error Notification - (Notification with list of errors and provision to Revalidate)

   Validation Warning Notification - (Notification with list of warning and provision to Continue and Revalidate)

   ACO Self Sign Notification - (Contract completion statement signature notifications with Closeout Details URL and CCS PDF attached)

   ACO Acknowledge Sign Notification - (Contract completion statement signature notifications with Closeout Details URL and CCS PDF attached)

PCO Self Sign Notification - (Contract completion statement signature notifications with Closeout Details URL and CCS PDF attached)

PCO Acknowledge Sign Notification- (Contract completion statement signature notifications with Closeout Details URL and CCS PDF attached)

Post Award Requests (PAR) Setup Steps

Adding the PAR menu in Oracle CLM iProcurement

In Oracle CLM iProcurement, Role Based Access Control (RBAC) is used to grant access to PAR to a user role.

The grant called ICX PAR Requester Grant grants access to the PAR function. The role ICX PAR Requester Role contains this grant. This is responsibility context sensitive.

Implementers can assign the ICX PAR Requester Role role as a child role to each of the responsibilities in which PAR is to be made available.

To add the PAR tab in the CLM iProcurement responsibility, we need to add ICX PAR Requester Role to the CLM iProcurement role. Use the following steps:

1. Using the system administrator login, navigate to the User Management Responsibility > Roles and Inheritance.
2. Query for the CLM iProcurement role.
3. View In Hierarchy > Add Node > Search for ICX PAR Requester Role.

Other PAR setup steps

Other PAR setup steps are documented in different sections of this guide:

1. Using the Document Styles page, you need to enable Post Award Requests for that document style. For more information, please refer to the section Document Styles, page 5-4 in this guide.
2. Using the Attribute Setup Workbench, you can create / customize the document numbering for a PAR document. For more information, please refer to the chapter Extending CLM Attributes using Attribute Setup Workbench, page 7-1.

Setting up Small Business Coordination Record (DD-2579)

Use the following steps to implement Small Business Coordination Record (DD-2579) documents in the system:

1. Navigate to the Purchasing options page > CLM Controls region. Select the Enable Small Business Coordination Records checkbox and also enter a threshold value for the document amount. For more information on this setup step, please refer to the Purchasing Options chapter, section on CLM Controls, page 4-2.

2. Add the Small Business Coordinator responsibility to the respective users. You can also add the Small Business Coordination Record menu to an existing custom responsibility.

3. AME setup for adding approvers: This setup step needs to be performed using the OKC_REP_CONTRACT transaction type for the Contract Type REP_SBCR. Contract Type is a seeded attribute for this transaction. Serial and parallel setup steps are supported for Small Business Coordination Record.

4. The following workflows are used for approvals and signatures for this feature:

   - Small Business Coordination Record Approval Workflow (OKCREPAW.wft): This workflow is used to route the SBCR documents for Approval based on the AME setup.

   - Small Business Coordination Record Signature Workflow (OKCREPSW.wft): This workflow is used to route the SBCR documents for signature based on the signatories defined in the document.

5. UDA Seeded Template: Implementers will have to copy the seeded template SBCR Uda Template to a new template and freeze the template to use this in SBCR. Navigate to Contracts Workbench Administrator - User Attributes setup to copy the seeded template.

6. Auto Numbering setup: At the contract type level, if you define a value for the Autonumbering Enabled field, this will take precedence over the profile option value Contract Repository Auto-Numbering Enabled. This has be set up in Contract type setup page using the Contract Workbench Adminstrator responsibility. You can also have custom numbering for the document by implementing the required logic in method 'GET_REP_CONTRACT_NUMBER' of package OKC_REP_NUM_HOOK.

7. Workflows: The standard workflows for approval and signature can be customized by the customer. Otherwise, new workflows can be used for the process. The new workflows have to be specified at the contract type definition of Small Business Coordination Record. Also the process to be started needs to be launched from the following code hooks:

   - Approval Workflow: okc_rep_app_wf_code_hook.launch_custom_app_wf

   - Signature Workflow: okc_rep_wf_code_hook.launch_custom_sign_wf

This is not a mandatory setup step.

8. The Small Business Coordination Record PDF Template: For the PDF generation, the DD 2579 form is supported by CLM by default.. This can be customized like any other supported DD forms. If this is not required by the customer, a new custom layout template can be specified in the contract type definition according to customer requirement. Choose the appropriate layout in the Contract Type setup to select any of the pre-defined custom templates.

Military Interdepartmental Purchase Request (MIPR) Setup Steps

1. Navigate to Setup > Purchasing Options page > CLM Controls region to enable the MIPR feature in the instance. For more information, please refer to the section CLM Controls, page 4-2 in the Purchasing Options chapter.

2. Charge account segments need to be configured by the implementer. For MIPR, this segment must include Appropriation, Limit/Sub Head. Appropriation, Limit/Sub Head is printed in the DD-448 form in the charge account for each line, if it is configured in the charge account as one of the segments.

3. At the assisting agency, for direct citation, receiving, invoicing and payment may not happen; this is optional, because obligation does not take place in the assisting agency for direct citation. If the agency still wants to perform all the transactions such as invoicing and payment, actual accounts need not be affected or impacted; it is advisable to use a dummy account so that there is no financial impact for direct citation lines in the assisting agency.

4. Awards that are created from MIPR-Own MIPRs will not be visible in iSupplier Portal. If you are a MIPR requesting agency / office, you should model the assisting agency for the MIPR as a supplier. The supplier site created for this assisting agency should be setup to not make it visible to iSupplier Portal. Use this supplier/site for the obligation documents created against the MIPR-own. This will ensure that such documents will not be available in iSupplier Portal. As an implementer, you need to ensure that the above setup steps are completed.

5. The office details and contacts for the Invoice Office and Assisting Office need to be set up along with the other offices. For more information on setting up the Invoice Office and Assisting Office, please refer to the section Configuring CLM Offices and Contacts, page 8-3 in this chapter.

6. In order to print the title of the employee along with the name in the DD 448 and DD 448-2 forms, you first need to enter the title in HR Employee Definition. Navigate to the appropriate HR responsibility and then select Enter and Maintain > Find Employee. Click the Others button, and a popup listing options appears. Select the Extra Information option.

7. MIPR Information region and MIPR Acceptance region are UDA regions. If users are unable to view these regions, navigate to the Attribute Setup Workbench (UDA) and check if the attribute groups for these regions are associated to the Requisition Header Template. If not, the attribute groups for these regions need to be associated to the Requisition Header Template. Additionally, you need to check if the revision number is the latest, otherwise you need to update the revision number.

8. Email configuration: The system picks up the contact name in the Assisting Agency and retrieves the email address of that contact to send the DD-448 to. Thus the Contact field is mandatory. However, if the contact name is not entered for any reason, the workflow fails and the form does not get sent. Additionally, you have to ensure that the mail server is configured correctly for the mail to work.

   For more information on configuring and setting up the mail server, please refer to the *Oracle Workflow Administrator's Guide*.

9

Integrating with Other Systems

Overview

The setup steps to integrate with other federal systems such as FPDS-NG, FedBizOpps, etc, are described below.

FPDS-NG Setup Steps

Federal Procurement Data System, Next Generation (FPDS-NG) is an external web application maintained by Global Computer Enterprises that collects contract related data from every agency in the Government for reporting purposes. Congress, federal departments, and agencies use FPDS-NG to track small business goals, report number and amount of contracts to date, show geographical placement of contracts, and summarize contract data for a specific contractor.

CLM integrates with FPDS-NG by providing users the ability to update FPDS-NG information from within the system, create, update, and link Contract Action Reports (CARs) to CLM documents, etc. Before users can use CLM with FPDS-NG, implementers need to set up the following:

1. Define valid Address Codes for Issuing Office: This is a pre-requisite step. For more information on defining address codes, please refer to the section Configuring CLM Offices and Contacts in the chapter Setting up CLM features. Also, refer to the section Addresses in the chapter Extending CLM Attributes using Attribute Setup Workbench.

2. Define valid Instrument Types: This is also a pre-requisite step. An Instrument Type indicates the type of instrument by entering a pre-defined upper case letter in position nine of the procurement instrument identification number (PIIN). For example, Indefinite delivery contracts –D and Basic Ordering Agreement – G. For more information on defining valid Instrument Types, please refer to the section Document Numbering in the chapter Extending CLM Attributes using Attribute Setup Workbench.

3. Set up Site Agency Administration: When your agency registers its details in FPDS-NG, the FPDS-NG site communicates site agency information to you. Site agency information such as Agency ID, Site ID, Password is sent to you and then you can set up your Site Agency information in CLM. Using the appropriate CLM Purchasing responsibility, navigate to the FPDS-NG Agency Administration page. The page enables you to create an Agency by clicking the Create button. You can also update the agency information by using the Update (pencil) icon.

4. Set up Profile Options: The profile options you need to define values for are:

   - PO: Enable FPDS-NG Reporting: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

   - PO: FPDS-NG Agency ID: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

   - PO: FPDS-NG Contracting Office Agency ID: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

   - PO: FPDS-NG Award XML Source: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

   - PO: FPDS-NG Award Mod XML Source: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

   - PO: FPDS-NG IDV XML Source: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

   - PO: FPDS-NG IDV Mod XML Source: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

   - PO: User to Notify for Award Release Check Failure: This profile option is obsolete. It has been replaced by a control (FPDS-NG CAR failure notification) in the CLM Controls region, page 4-2.

   - PO: FPDS-NG User Account for contract action reporting

   - PO: FPDS-NG User Account for viewing contract action report

   - PO: OA_HTML Absolute Path

   Some profile options are obsolete and are replaced with controls (in the CLM Controls region of the Purchasing Options page). If the profile values are already defined, then these values are migrated automatically by the system to the CLM Controls region.

   For more details on the FPDS-NG related profile options, please refer to the section Profile Options, page 12-1 in the chapter Profile Options in CLM for Public Sector.

5. Set up Proxy Server Information: Set up the following proxy server details-
   - Applications Proxy Port: the proxy port of the internal network, e.g. 80.
   - Applications Server-Side Proxy Host And Domain: the proxy host of the internal network e.g. www-proxy.us.oracle.com
6. Navigate to the FPDS-NG website, download the security certificate and import it to the key store in the Weblogic server.
7. Update Configuration File, FPDSConfig.xml: This file contains the Business Service URL and GUI Service URL for IDV and Award for FPDS-NG Webservice calls. These URLs should be appropriately modified during implementation.
8. Extending the Pre-Filled Information region: Please refer to the section Extending the Pre-Filled Information region, page 10-4 in the chapter Extensibility for Implementers for more information.

Integrating with FedBizOpps

FedbizOpps is the single point of entry for Federal buyers to publish Federal government procurement opportunities across departments and agencies. US Federal Government complex contracting and procurement business processes require that all opportunities over a certain amount, currently at $25,000, must be posted to FedBizOpps, where suppliers seeking Federal markets for their products and services can search, monitor, and retrieve opportunities solicited by the entire Federal contracting community. Use Sourcing Abstract and Forms in order to integrate with FedBizOpps.

As a pre-requisite step, please ensure that CLM is installed and enabled in your instance. Login using your credentials and use the CLM Sourcing Super User responsibility or any other Sourcing responsibility that gives you access to the Administration tab.

Perform the following steps:

1. Navigate to CLM Sourcing Super User > (T) Administration > Negotiation Tools region > (H) Abstract and Forms.
2. The seeded forms list appears. The status of the forms associated with FedBizOpps are set to Draft initially. You need to set the status of each form to Active to be able to use it in the solicitation. Click Update (pencil icon) in order to open the form individually. Select Active from the Status LOV and click Apply to save your changes. Making the form status as Active is a one-time step.
3. The following profile options need to be set up:

- Provide the value for the profile option PON: FedBizOpps Username
- Provide the value for the profile option PON: FedBizOpps Password
- Create a directory in the server where xml files for notices are to be saved. Provide the full path of this directory along with a trailing slash in the profile option PON: FedBizOpps XML Directory.
- Provide the value for the profile option PON: FedBizOpps government agency URL

4. Webservices are invoked directly and implementers need not add webservice subscription.

   Click the Post button in the Abstract and Forms window. This initiates the seeded business event FedBizOpps Notice Post Event. The seeded business event invokes the appropriate FedBizOpps web service. When the business event receives a response from FedBizOpps, a second seeded business event called FedBizOpps Notice Callback Event is invoked. This event calls the PL/SQL API that will update the success/failure status of the posting to FedBizOpps.

5. Test URL for FedBizOpps is http://fbo-test.symplicity.com/ws/fbo_api.php?wsdl

Integrating with ORCA

Online Representations and Certifications Application (ORCA) replaces most of the paper based Representations and Certifications (Reps and Certs) in Section K of solicitations with an web services interface. ORCA enables suppliers to register their certifications (small business, HUBZone business, etc.). CLM enables buyers to extract this information from ORCA and store it along with the CLM document.

To obtain an ORCAXML account, please use the ORCAXML public website.

For more information on the profile options used in CLM for integrating with ORCA, please refer to the Profile Options section in this guide.

Integrating with EDA

The following setup steps help you to complete the integration with EDA:

1. Set the appropriate values for the following profile options:

   - PO: EDA Batch Size
   - PO: EDA Files Location

   For more information on these profile options, please refer to the Profile Options, page 12-1 section.

2. The concurrent programs described below help you to generate XML, Index and PDF files for EDA:

   1. Generate XML File for EDA: The purpose of this program is to generate an EDA XML file for a given document number.

      The parameters for the concurrent program are:

      - Is Modification Document ? : Select Y if the document is a modification document, select N if the document is a base document (award or IDV).
      - CLM Document Number: The document number list displays according to the document type you select in the first parameter Is Modification Document ?
      - Schema Version: This is the version of the Procurement Data Standard schema used to produce the procurement instrument.
      - System Administrator DoDACC: This is the DoDACC of the user in the agency and is represented by an alphanumeric code.
      - Data Template: The name of the data template POEDAXML defaults in the parameter field. The data template comes with the patch POEDAXML.xml.
      - DIPTR Number: Enter the DIPTR Number as per your agency standards.
      - Document Purpose: Enter the appropriate value as per your agency standards.

   2. Generate PDF File for EDA: The purpose of this program is to generate an EDA PDF file for a given document number.

      The parameters for the concurrent program are:

      - Is Modification Document ? : Select Y if the document is a modification document, select N if the document is a base document (award or IDV).
      - CLM Document Number: The document number list displays according to the document type you select in the first parameter Is Modification Document ?

   3. Generate Index File for EDA: The purpose of this program is to generate an Index file for a given document number.

      The parameters for the concurrent program are:

      - Is Modification Document ? : Select Y if the document is a modification document, select N if the document is a base document (award or IDV).

- CLM Document Number: The document number list displays according to the document type you select in the first parameter Is Modification Document ?

- System Name: Enter the name of the contract writing system as provided by your system administrator.

3. The Generate Files for EDA concurrent program is used to generate all three EDA files (PDF, XML and Index) in a single concurrent program for a given document number or set of documents. The set of documents are queried on the range based input given. This also ensures proper naming for output files.

   The concurrent program Generate Files for EDA help you to generate XML, Index and PDF files for EDA. The parameters of this concurrent program are described below:

   - Base or Modification Documents: You can specify what kind of documents are to be included for EDA processing. The values are Base Documents, Modifications, Both. Based on the input for this value the next lists of values are displayed as part of the parameters. Base Documents is to be used for Awards / IDVs and Modifications is to be used to generate the Modification documents for Awards / IDVs.

   - EDA Document Number: Based on the above field value, all the eligible document numbers are shown here. This parameter enables you to specify a single document number or a range of document numbers along with the EDA Document Number (To) parameter value.

   - • EDA Document Number (To): The values that are displayed for this parameter are dependent on the EDA Document Number parameter.

     If you selected the value ABCDEF-11-A-0010 (DoDACC-Year-Instrument Type-Serial Number) in the EDA Document Number parameter, the system automatically shows you those document numbers where the DoDACC and Instrument Type is the same as the EDA Document Number parameter. Therefore, the EDA Document Number (To) parameter displays only those documents whose numbers contain DoDACC and Instrument Type values that are identical to the EDA Document Number value. You can now select all documents with Year and Serial Number equal to or greater than the EDA Document Number parameter value. For example, you can select 11 or 12 as the Year and any Serial Number equal to or greater than 0010.

   - Approved Date (From) enables you to enter a date so that all documents whose approval date is greater than or equal to this parameter value are processed.

- Approved Date (To) enables you to enter a date value so that all documents whose approval date is below and equal to this parameter value are processed.
- Effective Date (From) enables you to enter a date value. All documents whose effective date is greater than or equal to this date value are processed.
- Effective Date (To) enables you to enter a date value. All documents whose effective date is less than or equal to this date value are processed.
- Select one of the three values of the Document Status parameter: Approved, Draft, All. You can specify which of the statuses of the documents are to be processed.
- The EDA Status parameter has three values – Generated, Not Generated, All. This parameter enables you to specify a value based on the whether the concurrent program was run or not, prior to this run, for a given document. Select Generated when you want to re-generate the files that have been generated already.
- Schema version: This is the version of the Procurement Data Standard schema used to produce the procurement instrument.
- System administrator DODAAC: This is the DoDACC of the user in the agency and is represented by an alphanumeric code.
- Data Template: The name of the data template POEDAXML defaults in the parameter field. The data template comes with the patch POEDAXML.xml. If the customer has customized this data template for their specific implementation, then the new data template name is the parameter value for the Data Template parameter.
- DIPTR Number: Enter the DIPTR Number as per your agency standards.
- Document Purpose: Enter the appropriate value as per your agency standards.
- System Name: Enter the name of the contract writing system as provided by your system administrator.

Setting up Clause Logic Service (CLS)

Perform the following setup steps in order to enable Clause Logic Service (CLS) in CLM:

1. The clause library of the user should contain the clauses that will be received from CLS. Either one of the following situations can occur for the user:

- The user wishes to sync the clauses in the clause library with the CLS clause library. In this case, the user has to perform the sync, as explained below:
  - Get the clauses and their details from Clause Logic Service. The user needs to perform the following steps to get the clauses and their details from CLS:
    1. Get all the clauses from CLS: CLSOperationsRepository.getLibraryClauses(OAApplicationModule am) is used to call the web service that retrieves all the clauses from the CLS library.
    2. Populate the data from this xml to OKC_ART_INTERFACE_ALL with following instructions:

       - art_system_reference_code with 'CLS'.

       - _system_reference_id1 with the xpath – '/Response/Clauses//Clause/@id'

       - ver_system_reference_code with 'CLS'

       - ver_system_reference_id1 with the xpath – '/Response/Clauses//Clause/Revision/@id'

       - The remaining fields, as per your requirement
    3. Run the Import Clauses concurrent program that will import the clauses to the local library.
    4. If the user wishes to follow a different approach for syncing, the following has to be taken into consideration.

       When populating in OKC_ARTICLES_ALL table, the ORIG_SYSTEM_REFERENCE_CODE should have 'CLS' and ORIG_SYSTEM_REFERENCE_ID1 should have the Id of the clause that CLS has sent.

       When populating in OKC_ARTICLE_VERSIONS, the ORIG_SYSTEM_REFERENCE_CODE should have 'CLS' and ORIG_SYSTEM_REFERENCE_ID1 should have the revision id

       When all of the above steps are completed, the profile option OKC: Clause Library in sync with Clause Logic Service should be set to Y.

       Note: The first method is the recommended approach, compared to the second approach.

- The clause library already contains the clauses that will come from Clause Logic Service. The user wishes to use the same clauses and does not want to sync with

CLS. In this case, the implementer needs to set the profile option to OKC: Clause Library in sync with Clause Logic Service to N. In this case, even if one clause is not found, the entire process will display an error.

2. When the clause Library of the user contains the relevant and required clauses, the next and final step is to personalize the Create Template page. Open the Create Template page (/oracle/apps/okc/terms/webui/TemplateCreatePG) and click on Personalize Table Layout: (HeaderRN. Expand Labeled Field Layout: (HeaderLeftLayout) and then select Personalize Message Check Box: Clause Logic Service Enabled. Set the Rendered property to True at the site level. Similarly personalize the View and Update Contract pages (/oracle/apps/okc/terms/webui/TemplatePG).

3. The seed table is OKC_CLS_CONFIG_DATA, it contains the configuration information of the Clause Logic Service i.e., configuration data of the REST API. Therefore, if any URIs or host name updates are to be made, use the seed table OKC_CLS_CONFIG_DATA. When the updates are completed, the middle tier needs to be refreshed.

   The table contains the configuration data in name value pairs. This data does not change too often. Each item is explained as follows:

   - API_KEY - the api key provided by CLS that is used for encryption of data.
   - _SECRET - the api secret provided by CLS that is used for encryption of data.
   - REST_HOST – the host name where the web service is hosted.
   - CREATE_PROC_DOC_URL - the URL (without the host name) for the web service to create a procurement document in CLS.
   - CREATE_CLAT_URL - the URL (without the host name) for the web service to create a CLAT.
   - LAUNCH_CLGUI_URL - the URL (without the host name) for the web service to retrieve the CLS launch URL.
   - PUT_INDICATOR_URL - the URL (without the host name) for the web service to send the indicators for an existing document.
   - GET_ALL_CLAUSES_FOR_DOC_URL - the URL (without the host name) for the web service to retrieve all the recommended clauses for a procurement document after running the rules.
   - GET_ALL_DOCUMENTS_URL - the URL (without the host name) for the web service to retrieve all the procurement documents created using the API KEY and SECRET.

- EXPIRE_CLAT_URL - the URL (without the host name) for the web service to expire the existing active clat with the system.
- LIBRARY_CLAUSES_URL - the URL (without the host name) for the web service to retrieve all the clauses in CLS library.
- SERVER_TIMESTAMP_URL - the URL (without the host name) for the web service to retrieve the timestamp of the server.

10

Extensibility for Implementers

Customizing Document Submission Checks

You can extend document submission checks by using the following custom hooks:

- Procedure for pre-check: do_pre_submission_check (fired before the rest of the submission checks)
- Procedure for post-check: do_post_submission_check

These custom hooks for document submission checks are applicable to the following CLM documents:

- Requisitions
- Awards
- IDVs

The documentation on how to code these submission checks is available as comments in the files PO_CUSTOM_SUBMISSION_CHECK_PVT.plb and PO_CUSTOM_SUBMISSION_CHECK_PVT.pls.

Location of the files:

$PO_TOP/patch/115/sql/PO_CUSTOM_SUBMISSION_CHECK_PVT.plb

$PO_TOP/patch/115/sql/PO_CUSTOM_SUBMISSION_CHECK_PVT.pls

The packages are always enabled, requiring no profile options to enable them.

Customizing Funds Check

You can extend the funds check function by using the following custom hook:

Procedure for custom funds check : PO_CUSTOM_FUNDS_PKG.do_action (Fired after the standard Oracle Funds Check and overrides the results of the standard Funds Check.)

This custom hook for Funds Check is applicable to the following CLM documents:

- Requisitions
- Awards

The documentation on how to code the Funds Check is available as comments in the files PO_CUSTOM_FUNDS_PKG.plb and PO_CUSTOM_FUNDS_PKG.pls.

Location of the files:

$PO_TOP/patch/115/sql/PO_CUSTOM_FUNDS_PKG.pls

$PO_TOP/patch/115/sql/PO_CUSTOM_FUNDS_PKG.plb

The packages are always enabled, requiring no profile option to enable them.

Customizing the Print Function

Printing documents such as Awards, solicitations and IDVs involves the following steps:

1. Generating XML and extracting the required information from underlying tables using the BI Publisher data templates.
2. Designing the layout and creating appropriate mapping to XML elements using BI Publisher PDF and RTF templates.

Review both data and printing layout templates to obtain the required PDF. Use the concurrent program Generate XML for CLM documents to generate XML for a given document. Review the output to verify if the data required is already part of the XML. If not, you are required to customize the data definition. In order to customize the printing layouts, you need to review the PDF templates which are the standard forms or face pages and the RTF templates which are the continuation pages or document format. Refer to the *Oracle Business Intelligence Publisher Report Designer's Guide* (Appendix B) that lists the template code for each seeded form and continuation pages.

With some standard forms related to Award, there is a requirement to include certain FAR clauses as the print output or not. This depends on how clauses will be modeled, therefore a custom hook is provided where the logic can be written during implementation.

The Package is: PO_DT_CUSTOM_PKG and the function is: FUNCTION get_clause_number(p_header_id NUMBER) RETURN VARCHAR2;

This function is used to check whether the specified FAR clauses are present as part of the given header id. It returns Y if clauses are present or N if specific clauses are not present.

PO_DT_CUSTOM_PKG

Implementation must be provided for the following custom package: PO_DT_CUSTOM_PKG. The following methods have been added for this package:

- `FUNCTION is_addenda_attached(p_header_id NUMBER ) RETURN VARCHAR2;`

  Used in SF1449 to determine if addenda is attached or not.

- `FUNCTION is_doc_award_or_notice(p_header_id NUMBER ) RETURN VARCHAR2;`

  Used in SF1442 to determine if award or notice is required.

- `FUNCTION is_guarantee_reqd(p_header_id NUMBER ) RETURN VARCHAR2;`

  Used in SF1442 to determine if guarantee is required.

- `FUNCTION get_calendar_days(p_header_id NUMBER ) RETURN VARCHAR2;`

  Used in SF1442 to determine the calendar days value.

Location of the files are: $PO_TOP/patch/115/sql/PO_DT_CUST.pls and $PO_TOP/patch/115/sql/PO_DT_CUST.plb

The packages are always enabled, requiring no profile options to enable them.

PON_DT_CUSTOM_PKG

Implementation must be provided for the following custom package: PON_DT_CUSTOM_PKG. The following methods have been added for this package:

- `FUNCTION is_far_clause_present(p_auction_header_id NUMBER ) RETURN VARCHAR2;`

  Used in SF1449 to determine if certain FAR clauses are present as part of the solicitation.

- `FUNCTION is_addenda_attached(p_auction_header_id NUMBER ) RETURN VARCHAR2;`

  Used in SF1449 to determine if addenda is attached or not.

- `FUNCTION is_doc_award_or_notice(p_auction_header_id NUMBER ) RETURN VARCHAR2;`

  Used in SF1442 to determine if award or notice is required.

- `FUNCTION is_guarantee_reqd(p_auction_header_id NUMBER ) RETURN VARCHAR2;`

  Used in SF1442 to determine if guarantee is required.

- `FUNCTION get_calendar_days(p_auction_header_id NUMBER ) RETURN VARCHAR2;`

Used in SF1442 to determine the calendar days value.

Location of the files are: $PON_TOP/patch/115/sql/PON_DT_CUST.pls and $PON_TOP/patch/115/sql/PON_DT_CUST.plb

The packages are always enabled, requiring no profile options to enable them.

Extending the Workload Assignment feature

Generating Assignment Number

The custom hook 'po_palt_assignments_hook.AssignmentNumberCustHook' is provided as part of the files POPTASHS.pls (package Specification) and POPTASHB.pls (package Body). The custom hook uses Requisition Line IDs as input and returns the Assignment Number. The Assignment Number is used in the Buyer Work Center, when requisition lines are assigned to a workload assignment. Note that you can implement your own code to generate the Assignment Number.

Computing Milestone Completion Date for Assignment

The other custom hooks that are used as part of the concurrent request Compute Milestones Completion Date for Assignment are listed below. They are provided as part of the files POPTMCHS.pls (package Specification) and POPTMCHB.pls (package Body). Implementers can customize the logic to derive the dates for these milestones based on their requirements.These API's take Assignment Number as input and return the relevant date:

- To return the Solicitation Creation Date : PO_PALT_MILESTONE_CMPL_HOOK.Get_Solicitation_Creation_Dt
- To return the Solicitation Publish Date : PO_PALT_MILESTONE_CMPL_HOOK.Get_Solicitation_Publish_Dt
- To return the Award Creation Date : PO_PALT_MILESTONE_CMPL_HOOK.Get_Award_Creation_Dt
- To return the Award Approval Date : PO_PALT_MILESTONE_CMPL_HOOK.Get_Award_Approval_Dt

The above mentioned package can be extended to compute the completion date for user defined milestones.

Extending the Pre-Filled Information for FPDS-NG reporting

For FPDS-NG reporting, the pre-filled XML payload contains only minimum required information for creating and updating the CAR.

To extend the Pre-Filled Information for FPDS-NG reporting, perform the following steps:

- Modify the Data Source
- Modify the XML payload XSLT
- Modify the XSL template to render the pre-fill in Update FPDS-NG information page

Modify the Data Source:

1. The BI Publisher data template forms the XML source. The following are the seeded data definition used to generate the XML payload.

Data Definition Code	Name
POAWDFPDSNG	Award Data Template for FPDS-NG
POIDVFPDSNG	IDV Data Template for FPDS-NG
POAWDMODFPDSNG	Award Mod Data Template for FPDS-NG
POIDVMODFPDSNG	IDV Mod Data Template for FPDS-NG

2. Using the XML Publisher Administrator responsibility > Data Definitions, search for the above definitions using the code mentioned. Download the required definition file.
3. Modify the data template to include fields required. For more information on how to edit a data template, please refer to the *Oracle XML Publisher Administration and Developer's Guide.*
4. Create a new custom data definition using XML Publisher Administrator responsibility > Data Definition and upload the modified file.
5. The custom definition must be specified in the following profiles so that the XML generation process picks the new definition file:

Profile Name	Data Definition Name
PO: FPDS-NG Award XML Source	Award Data Template for FPDS-NG

Profile Name	Data Definition Name
PO: FPDS-NG IDV XML Source	IDV Data Template for FPDS-NG
PO: FPDS-NG Award Mod XML Source	Award Mod Data Template for FPDS-NG
PO: FPDS-NG IDV Mod XML Source	IDV Mod Data Template for FPDS-NG

Modify the XML payload XSLT:

1. The XML generated from the data template is then transformed to the payload XML required by FPDS-NG. You can locate the following XSLT in the $OA_HTML folder.

XSLT File Name	Applicable Document
POAWDFPDSNG.xsl	Award XML
POAWDMODFPDSNG.xsl	Award Mod XML
POIDVFPDSNG.xsl	IDV XML
POIDVMODFPDSNG.xsl	IDV Mod XML

2. Modify this file to include the elements of interest. This is an XSLT file to select the appropriate nodes from the source XML.

3. This will include the newly added elements to FPDS payload XML with the appropriate namespace. This becomes the source for rendering the pre-fill information.

Modify the XSL template to render the pre-fill:

1. The pre-fill information is rendered using BI Publisher XSL-HTML templates. The following are the seeded template definitions:

Template Code	Name
POAWDPREFIL	Award Pre-fill
POIDVPREFIL	IDV Pre-fill

2. Using the XML Publisher Administrator responsibility > Templates, search for the above templates using the code mentioned. Download the definition file.

3. This is an XSL stylesheet that will apply to the XML to render the content. Include the columns of interest from the XML payload. For more information on how to edit template files refer to the *Oracle XML Publisher Administration and Developer's Guide.*

4. Upload the modified file to the application using the same responsibility under the appropriate template code.

Customizing Contract Clause Sorting

The CLM patch contains the procedure sort_clauses in the package OKC_CODE_HOOK, which has sample logic to sort the clauses based on the clause number. The ordering is initiated every time the user clicks on the Sort button in the Contract Terms Structure page. This button is displayed only when the profile option OKC: Enable Clause Sorting is set to Yes.

Sample sorting logic

The FAR clauses are usually numbered as follows:

<number1>.<number2>-<number3><space>[ALT<space><roman numeral> or (DEV)]. Some examples are:

- 52.202-1
- 52.211-8 Alt II
- 52.219-8 (DEV)
- 75.903

CLM clause numbers are required to be numbered as per FAR clause numbering rules, hence the clauses are sorted in ascending order first by <number1> part, second by <number2> part, third by <number3> part and then by <roman numeral> part of the clause numbers.

Implementation Considerations

- If the clause number is not of the form specified above and/or a different logic is required to sort the clauses, you can modify the cursor c_sort_articles.
- Implementers may also write their own logic to populate the OUT parameter x_cont_art_tbl.

Customizing the Contracts Function

OKC_CODE_HOOK.IS_NOT_PROVISIONAL_SECTION is the code hook that can be leveraged to exclude provisional sections flowing down from solicitation to award document.

Package: OKC_CODE_HOOK (File $OKC_TOP/patch/115/sql/OKCCCHKB.pls).
Function: IS_NOT_PROVISIONAL_SECTION (p_section_heading IN VARCHAR2).
Section Name is the input parameter for this function.

Example illustrating the implementation of the code hook:

```
FUNCTION IS_NOT_PROVISIONAL_SECTION
( p_section_heading IN VARCHAR2
) RETURN VARCHAR2
IS
x_hook_used NUMBER;

BEGIN
x_hook_used := 1;
IF x_hook_used = 1 THEN
-- An example: 'Section K' is a provisional section, then the following
piece of code is to be added in the code hook.
              IF p_section_heading = 'Section K' THEN
                 RETURN FND_API.G_FALSE;
              END IF;
          --Note that the section name is case-sensitive
     -One IF block is required for each section name that needs to be
dropped
END IF;
RETURN FND_API.G_TRUE;
EXCEPTION WHEN OTHERS THEN
          x_hook_used :=-1;
END IS_NOT_PROVISIONAL_SECTION;
```

Related Topics

Contract Clause and Rules Import API

A set of APIs has been provided to assist implementers import Contract Clauses, Templates, Questions, Constants and Rules. For more details on the APIs, please refer to the relevant *My Oracle Support* notes.

Contract Clause Migration API

A set of APIs has been provided to help implementers migrate contract clauses that are in a procurement document. For more details on the APIs, please refer to the relevant *My Oracle Support* notes.

Customizing GL Date Defaults

Package name: PO_CUSTOM_FUNDS_PKG. Procedure name: gl_date.

Following is the 5 level preference check for defaulting the GL Date:

1. The first preference is the date passed.

2. The second preference is the System Date.

3. The third preference is the Earliest Open Period date, which is in the near Future period (the period is open)

4. The fourth preference is the Earliest Open Period date, which is in near Past period (the period is open)

5. Call the custom hook to obtain the customer's preferred GL (General Ledger) Date.

Customizing Novation Exceptions

You can extend the Novation Exception function by using the following custom hook:

The procedure name is PO_CUSTOM_MULTIMOD_VAL_PVT.generate_custom_exceptions.

The custom hook is applicable to all CLM documents selected for Supplier Change (Novation) action.

Location of file: $PO_TOP/patch/115/sql/PO_CUSTOM_MULTIMOD_VAL_PVT.pls, $PO_TOP/patch/115/sql/PO_CUSTOM_MULTIMOD_VAL_PVT.plb

The packages are always enabled, requiring no profile options to enable them.

The documentation on how to code these custom checks is available in the file comments.

Extending EDA

The XML file for EDA is generated using seeded data template PO Generate XML for EDA (POEDAXML). The default package linked to this data template is PO_EDA_DATATEMPLATE_PKG. Values that cannot be directly queried from underlying tables are processed by the methods in the PO_EDA_DATATEMPLATE_PKG plsql package to return appropriate values. PO_EDA_MAPPING is a reference table that has been modeled to capture the descriptions required by PDS schema for some of the data elements that have different descriptions/names in the underlying tables. PO_EDA_UDA_ATTR_VALUE is a reference table which gets populated in the 'afterParameterFormTrigger' of the data template and holds the values for all UDA groups (Header/Line/Shipment) that has been configured for the given document.

If your agency requires to extend/customize the XML generation logic, you need to perform the following steps:

1. Copy the seeded data template definition available at $PO_TOP/patch/115/publisher/defs/POEDAXML.xml to your working directory.

2. Review the existing mappings in the data template and plan your changes.

3. If the value/name/description in the underlying table doesn't meet the specification of the PDS schema, you may need to add some entries to the PO_EDA_MAPPING table.

4. If you have configured new attribute groups as part of the implementation, the UDA values are already updated in the PO_EDA_UDA_ATTR_VALUE reference table and are available for mapping to the PDS schema.

5. Add a new data definition using XML Publisher Administrator responsibility and upload your customized file. This data definition can be used as a parameter when the Generate XML File for EDA concurrent program that generates the required XML.

The XML for EDA that is generated complies with the latest PDS schema. The system generates the required files (XML, index file and document PDF file) and places them in a configurable directory. Implementers need to evaluate their available options for reporting the files to GEX for the current release.

Extending MIPR

The submission checks for Addresses and MIPR Acceptance region are found in the PL/SQL package called PO_FED_FIELD_FUNCTIONS.

1. The pr_addresses_XSC procedure validates if the Invoice Office and Assisting Office have values entered. If not, an error message is displayed.

   Error Messages:

   PO_LOCATION_NOT_NULL -> Location cannot be null for &Office

   PO_CONTACT_NOT_NULL -> Contact cannot be null for &Office

2. MIPR Acceptance region: If a value is selected for Funds Information, user must enter Amount corresponding to it.

```
IF p_funds_info IS NOT NULL AND p_amount IS NULL THEN
    x_return_status := FND_API.G_RET_STS_ERROR;
      x_errorcode     := '-1';
      l_msg_count     := l_msg_count + 1;
      x_msg_count     := to_char( l_msg_count) ;
      x_msg_data  := 'Enter a value for Amount if you have selected
a value in Funds Information.' ;

fnd_message.set_name(d_appln_short_name,'ICX_AMOUNT_NOT_NULL') ;
          fnd_msg_pub.ADD;
    END IF;
```

Error Codes: ICX_AMOUNT_NOT_NULL -> Enter a value for Amount if you have selected a value in Funds Information.

If MIPR Acceptance status is Rejected or Rejected with changes, user must enter Remarks for it. Error code: ICX_REMARKS_NOT_NULL -> Enter the remarks if MIPR Acceptance Status is Rejected with changes.

Using BI Publisher Templates

In order to develop reports associated for the MIPR feature, PDF and RTF templates are used as the reports were available in PDF format. To create these reports, standard XML publisher API and setup is used.

To create a report in XML publisher, the Data definition XML and a template is required. For the DD448/DD448-2 form, both PDF and RTF templates are used, because the report's face page was designed using PDF template and continuation page using RTF template. The data definition that is created is common to both the pages (face page and continuation page) and both the reports (DD448 and DD448-2).

Data Definition : ICXMIPRDD448 PDF

Template for DD448 (Face page): ICXMIPRDD448

RTF Template for DD448 (Cont. page): ICXDD448SUB

PDF Template for DD4482 (Face page): ICXMIPRDD4482

RTF Template for DD4482 (Cont. page): ICXDD4482SUB

As of now, these template names were created in seeded instance and hard coded. The API related to reading these template names have to be overridden by the implementer.

PLSQL package: ICX_DATATEMPLATE_PKG

Procedure: GET_TEMPLATES_FOR_DD448() and GET_TEMPLATES_FOR_DD448_2()

Definition:

```
PROCEDURE GET_TEMPLATES_FOR_DD448(x_facePageTemplate OUT NOCOPY
VARCHAR2,
                                     x_contPagesTemplate OUT NOCOPY
VARCHAR2,
                                     x_datadef OUT NOCOPY VARCHAR2) IS
BEGIN
   -- Code need to be written for getting PDF template code for DD448
report.
   x_facePageTemplate := 'ICXMIPRDD448';
   x_contPagesTemplate := 'ICXDD448SUB';

   SELECT data_source_code INTO x_datadef
   FROM XDO_TEMPLATES_VL
   WHERE template_code = 'ICXMIPRDD448';
END GET_TEMPLATES_FOR_DD448;
```

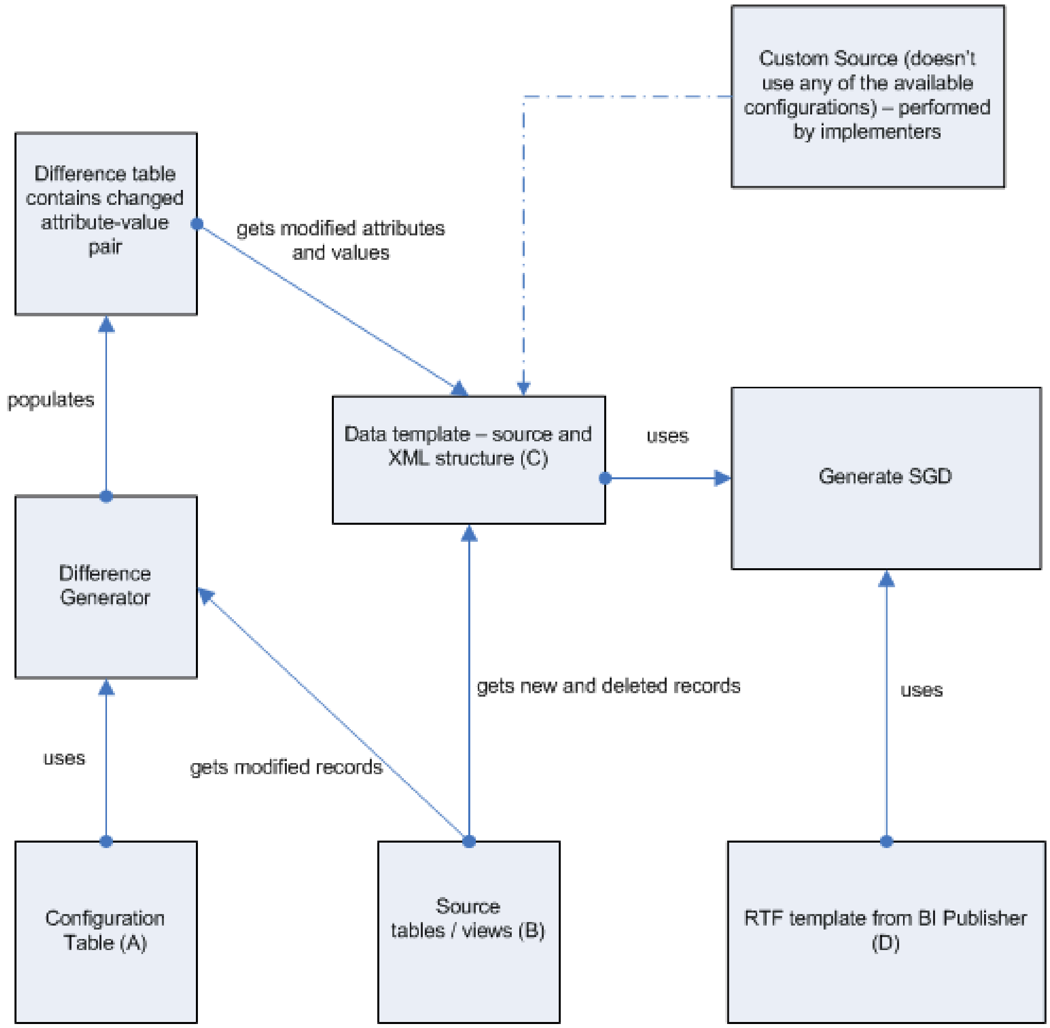
11

Extending System Generated Description (SGD)

Overview

You can customize the System Generated Description (SGD) to meet your agency's specific requirements. The following diagram outlines how SGD is generated in CLM:

Generating SGD



In order to create simple customizations, you can change one or more entries in the Configuration Table (A) that serves as a registry.

In order to perform complex customizations, you can add/modify Source Tables / Views (B), add/modify entries in Configuration Table (A) , modify the Data Template (C) to get the values to XML, or customize the layout in RTF Template (D).

To create your own customized entries for generating SGD, you may not use any of the above steps and obtain the required differences directly on the data template from custom source (E).

The following steps outline the process by which you can perform the customization:

1. Review the SGD output from the seeded template.

2. Run the Generate XML for CLM Documents concurrent program to get the XML

generated for SGD. Review the XML output to identify what to customize, that is, source to difference generator, data template or printing layout.

3. Create/Edit appropriate supporting views (this becomes the data sources for the difference generator). You should create customized sources if any change is required in seeded sources.

   Configure the table that feeds the difference generator to pick the new attribute/source or to control seeded attribute/source.

4. Edit the appropriate data template to pick the new source/attribute. If it is a seeded source, and an attribute has been enabled in the configuration table, the difference generator will automatically report this difference.

   Edit the RTF template to print the differences of the attribute added, if required.

Customizing SGD

Source Views

Difference generator relies on source views to give the base and modified (updated) records for a given entity as attribute name-value pair. Two views are required one for base and one for mod/amendment records. Depending on the entity, you can select appropriate values as primary key values (Upto 5 values are supported) to uniquely identify a record.

The following are the columns that are expected out of the source views:

Column	Data Type	Description
PK1_VALUE	Number	Primary key value. This first value is mandatory.
PK2_VALUE	Number	Primary key value. Can be left null based on your entity.
PK3_VALUE	Number	Primary key value. Can be left null based on your entity.
PK4_VALUE	Number	Primary key value. Can be left null based on your entity.
PK5_VALUE	Number	Primary key value. Can be left null based on your entity.

Column	Data Type	Description
COL_NAME	Varchar2(40)	Column/attribute name
COL_VALUE	Varchar2(4000)	Column/attribute value
COL_DESC	Varchar2(4000)	Column/attribute description. This is primarily for non-numeric columns.

A sample definition is given below, however any definition can be adopted as long as the above metadata can be used.

```
with po_header_unpivot_data as (
(
SELECT ph.po_header_id,
ph.draft_id,
ph.org_id,
to_char(po_datatemplate_pkg.get_header_amount_ordered(ph.po_header_id,
ph.draft_id)) total_amount,
ph.acceptance_required_flag,
to_char(ph.acceptance_due_date) acceptance_due_date,
null as clm_noofcopies,
to_char(ph.clm_contract_officer) clm_contract_officer,
ph.user_document_status,
to_char(ph.vendor_site_id) vendor_site_id,
to_char(ph.vendor_contact_id) vendor_contact_id,
ph.supplier_notif_method,
ph.fax,
ph.email_address,
ph.clm_external_idv,
ph.clm_vendor_offer_number,
to_char(ph.clm_effective_date) clm_effective_date,
to_char(ph.agent_id) agent_id,
to_char(ph.clm_award_administrator) clm_award_administrator,
ph.comments,
ph.confirming_order_flag,
to_char(ph.terms_id) terms_id,
to_char(ph.clm_no_signed_copies_to_return)
clm_no_signed_copies_to_return,
to_char(ph.ship_to_location_id) ship_to_location_id,
ph.ship_via_lookup_code,
ph.freight_terms_lookup_code,
ph.shipping_control,
ph.note_to_vendor,
ph.note_to_receiver,
ph.change_status

FROM po_headers_draft_all ph

WHERE ph.po_header_id = PO_GEN_DIFF_PKG.getModPK1
      and ph.draft_id = PO_GEN_DIFF_PKG.getModPK2 )
)

select  po_header_id pk1_value, draft_id pk2_value,  null pk3_value,
null pk4_value, null pk5_value,
  col_name , col_value,
       decode(col_name,
       'ACCEPTANCE_REQUIRED_FLAG', (select meaning from
fnd_lookup_values
                                    where lookup_code = col_value
                                    and lookup_type =
'ACCEPTANCE_REQUIRED'
                                    and language = userenv('lang') and
enabled_flag = 'Y'),
   'CLM_CONTRACT_OFFICER', (select full_name from per_all_people_f
                              where person_id = col_value and
trunc(sysdate) between effective_start_date
                              and effective_end_date),
   'USER_DOCUMENT_STATUS', (select meaning from fnd_lookup_values
                              where lookup_code  = col_value
                              and lookup_type =
'PO_USER_DOCUMENT_STATUS' and language  = userenv('lang')
                              and enabled_flag = 'Y'),
```

```
'VENDOR_SITE_ID', (select vendor_site_code from po_vendor_sites_all
                         where vendor_site_id = col_value),
   'VENDOR_CONTACT_ID', (select last_name ||', '||prefix||'
'||first_name
                            from po_vendor_contacts where
vendor_contact_id  = col_value),
   'SUPPLIER_NOTIF_METHOD', (select meaning from fnd_lookup_values
                             where lookup_code  = col_value and
lookup_type = 'DOCUMENT_COMMUNICATION_METHOD' and language =
userenv('lang')
                             and enabled_flag = 'Y'),
   'AGENT_ID', (select full_name from per_all_people_f
                  where person_id = col_value and trunc(sysdate) between
effective_start_date and effective_end_date),
   'CLM_AWARD_ADMINISTRATOR', (select full_name from per_all_people_f
where person_id = col_value
                                 and trunc(sysdate) between
effective_start_date and effective_end_date),
   'CONFIRMING_ORDER_FLAG', (select meaning from fnd_lookups where
lookup_code = col_value and lookup_type = 'YES_NO'),
   'TERMS_ID', (select name from ap_terms where term_id  = col_value),
   'SHIP_TO_LOCATION_ID', (select location_code from hr_locations_all
where location_id  = col_value),
   'FREIGHT_TERMS_LOOKUP_CODE', (select meaning from fnd_lookup_values
where lookup_code = col_value and lookup_type  = 'FREIGHT TERMS'
                                    and language = userenv('lang') and
enabled_flag = 'Y'),
   'SHIPPING_CONTROL', (select meaning from fnd_lookup_values where
lookup_code  = col_value
                           and lookup_type = 'SHIPPING CONTROL' and
language = userenv('lang') and enabled_flag = 'Y'),
      'SHIP_VIA_LOOKUP_CODE' ,      (  select nvl(ofc.freight_code_tl,
col_value)
                                      from  org_freight_tl ofc
                                      where ofc.freight_code = col_value
                                      and ofc.organization_id = org_id
                                       and ofc.language =
userenv('lang') )  ,
                  null) col_desc
from po_header_unpivot_data
unpivot include nulls
( col_value
  for col_name in
  (
TOTAL_AMOUNT,
ACCEPTANCE_REQUIRED_FLAG,
ACCEPTANCE_DUE_DATE,
CLM_NOOFCOPIES,
CLM_CONTRACT_OFFICER,
USER_DOCUMENT_STATUS,
VENDOR_SITE_ID,
VENDOR_CONTACT_ID,
SUPPLIER_NOTIF_METHOD,
FAX,
EMAIL_ADDRESS,
CLM_EXTERNAL_IDV,
CLM_VENDOR_OFFER_NUMBER,
CLM_EFFECTIVE_DATE,
AGENT_ID,
CLM_AWARD_ADMINISTRATOR,
COMMENTS,
```

```
CONFIRMING_ORDER_FLAG,
TERMS_ID,
CLM_NO_SIGNED_COPIES_TO_RETURN,
SHIP_TO_LOCATION_ID,
SHIP_VIA_LOOKUP_CODE,
FREIGHT_TERMS_LOOKUP_CODE,
SHIPPING_CONTROL,
NOTE_TO_VENDOR,
NOTE_TO_RECEIVER,
CHANGE_STATUS));
```

Technical Considerations while customizing SGD

Configuration table

The difference generator framework gets its input from the configuration table PO_DIFF_CONFIG. This configuration table controls the source and attribute that are eligible for reporting the differences. Refer to e-TRM to obtain a detailed explanation of the columns of this table. Multiple sources are supported for a given document type-entity combination. For a given document type and entity, you can define multiple sources to get the required information.

Following are some of the common actions (with sample sql) that you will need to perform on the configuration table:

- To query seeded values from configuration table:

  ```
  select *
  from po_diff_config
  where diff_config_id < 10000
  order by document_type, entity_name, sub_entity_name,
  display_seq_number
  ```

- To enable/disable seeded attribute differences from being reported, you need to set the IS_PRINTABLE_FLAG to Y/N for a given attribute, document type, and entity in the configuration table:

  ```
  update po_diff_config
    set  IS_PRINTABLE_FLAG = 'Y' ,
         last_update_date = to_date(('17-JAN-12','DD-MON-RR'),
         last_updated_by = &your_login
    where document_type = &required_doc_type
    and entity_name = &required_entity_name
    and mod_doc_source_name = &mod_doc_source_name
    and COLUMN_NAME = &required_column_name;
  ```

- To enable/disable seeded attribute differences from being reported as rolled-up values, you need to set the ROLLUP_ELIGIBILITY_FLAG to Y/N for a given attribute, document type, and entity in the configuration table:

```
update po_diff_config
  set
       ROLLUP_ELIGIBILITY_FLAG = 'N' -- set to 'Y'/'N' based on the
setting you need
       last_update_date = to_date(('17-JAN-12','DD-MON-RR'),
       last_updated_by = &your_login
  where document_type = &required_doc_type
  and entity_name = &required_entity_name
  and mod_doc_source_name = &mod_doc_source_name
  and COLUMN_NAME = &required_column_name;
```

- To override existing source and replace with custom sources for reporting the differences for a document type, entity: set the IGNORE_SOURCE_FLAG for all entries in the configuration table for the given document type and entity:

```
update po_diff_config
  set ignore_source_flag = 'Y' ,
       last_update_date = to_date(('17-JAN-12','DD-MON-RR'),
       last_updated_by = &your_login
  where document_type = &required_doc_type
  and entity_name = &required_entity_name
  and mod_doc_source_name = &mod_doc_source_name; --(if a specific
source is to be overridden)
```

- To insert values into the configuration table:

  Given below is a sample insert for AWARD document type and DISTRIBUTION entity name:

```
INSERT INTO PO_DIFF_CONFIG(
    DIFF_CONFIG_ID          ,
    DOCUMENT_TYPE           ,
    ENTITY_NAME             ,
    MOD_DOC_SOURCE_NAME     ,
    COLUMN_NAME             ,
    BASE_DOC_SOURCE_NAME    ,
    SUB_ENTITY_NAME         ,
    CMP_FILTER_PRED_FLAG    ,
    IS_PRINTABLE_FLAG       ,
    ROLLUP_ELIGIBILITY_FLAG,
    DISPLAY_SEQ_NUMBER      ,
    DISP_DATA_TYPE          ,
    LABEL_MESSAGE_CODE      ,
    IGNORE_SOURCE_FLAG      ,
    CREATED_BY              ,
    CREATION_DATE           ,
    LAST_UPDATED_BY         ,
    LAST_UPDATE_DATE        ,
    LAST_UPDATE_LOGIN )
  VALUES (
    PO_DIFF_CONFIG_S.nextval         ,
    'AWARD'                          ,
    'DISTRIBUTION'                   ,
    'PO_SGD_CUSTOM_MOD_DIST_V'       ,
    'FUNDED_VALUE'                   ,
    'PO_SGD_CUSTOM_DIST_V'           ,
    'BILLING'                        ,
    'N'                              ,
    'Y'                              ,
    'N'                              ,
    1                                ,
    'M'                              , -- data type (C, D, N, M)
    'PO_SGD_AMT_FUNDED'              , -- required if
IS_PRINTABLE_FLAG ='Y'
    NULL                             ,
    1314                             , -- User id from fnd_user
    to_date('17-JAN-12','DD-MON-RR'),
    1314                             ,  -- User id from fnd_user
    to_date('17-JAN-12','DD-MON-RR'),
    0);
```

The differences generated are inserted into PO_ENTITY_DIFFERENCES table. Once the configuration table is configured, the values are automatically populated into PO_ENTITY_DIFFERENCES table. Refer to e-TRM for details on the columns of this table.

Based on this table entry, you can fetch data into the BI Publisher data template for a given document type and entity which will appropriately generate XML.

Data XML and Print templates

Please refer to the Appendix for a list of data definitions and print templates used for SGD.

- New and deleted records are not identified via difference generator framework. The new and deleted records are easier to identify without the difference generator. The difference generator reports the updated records and attributes only. This has to be done in the BI Publisher data template.

- It is not essential to use the difference generator always to obtain the required differences in XML. If the differences can be obtained from a custom source, then BI Publisher data template can be customized to pick the appropriate values.

- To customize the BI publisher data template, refer to the *Oracle Business Intelligence Publisher User's Guide* for more details on the usage of data templates.

- To customize the BI Publisher RTF template, refer to the *Oracle Business Intelligence Publisher Report Designer's Guide* for detailed instructions.

12

Profile Options in CLM for Public Sector

Profile Options

A user profile is a set of changeable options that affects the way your application runs. You can set user profiles at different levels. The levels used by the standard Security hierarchy type are as follows:

- **Site level:** These settings apply to all users at an installation site
- **Application level:** These settings apply to all users of any responsibility associated with the application
- **Responsibility level:** These settings apply to all users currently signed on under the responsibility.
- **User level:** These settings apply to individual users, identified by their application usernames.

Values set at a higher level cascade as defaults to the lower levels. The lower level value overrides the higher level value, unless otherwise specifically mentioned.

Suggestion: Set site-level options first to ensure that all options have a default. If a profile option does not have a default value, it might cause errors when you use windows, run reports, or run concurrent requests

Profile Options Summary

The table below indicates whether users of the system can view or update the profile option, and at which levels (either user, responsibility, application, or site) the profile options can be updated. These levels are included in the table as Site, Application, Responsibility, and User.

For the User column, Yes indicates that you can update the profile, View Only indicates that you can view the profile but you cannot update it, and No indicates that you can neither view nor update the profile.

A Required profile option requires you to provide a value. Otherwise, the profile option already provides a default value, so you only need to change it if you do not want to accept the default.

For details of profile options applicable to all Oracle Applications, see: Profile Options in Oracle Applications Object Library

Summary of Profile Options

Profile Option	Admin Update Levels	User	Required	Value
PO: Contracting Officer's Electronic Signature Required	Obsolete			
PO: Enable FPDS-NG Reporting	Obsolete			
PO: FPDS-NG Agency ID	Obsolete			
PO: FPDS-NG Contracting Office Agency ID	Obsolete			
PO: FPDS-NG Award XML Source	Obsolete			
PO: FPDS-NG Award Mod XML Source	Obsolete			
PO: FPDS-NG IDV XML Source	Obsolete			
PO: User to Notify for Award Release Check Failure	Obsolete			

Profile Option	Admin Update Levels	User	Required	Value
PO: Default Distribution	Obsolete			
FND: Industry ID	Site	No	Yes	Public Sector - National Government
PO: CLM Enabled	Responsibility	No	Yes	Yes/No
PO: CLM Installed	Site	No	Yes	Yes/No
PO: Enable IDV In Document Builder	Site Responsibility User	Yes	No	Yes/No
PO: FPDS-NG User Account for contract action reporting	Responsibility, User	Yes	Yes	
PO: FPDS-NG User Account for viewing contract action report	Responsibility, User	Yes	Yes	
PO: OA_HTML Absolute Path	Site	No	Yes	No default value
CLM: Enable ORCA	Site, Organization	No	Yes	Yes/No
CLM: ORCA USER ID	Site, Organization	No	Yes	No default value
CLM: ORCA PASSWORD	Site, Organization	No	Yes	No default value

Profile Option	Admin Update Levels	User	Required	Value
PON: FedBizOpps Username	Site, Organization	Yes	Yes	No default value
PON: FedBizOpps Password	Site, Organization	Yes	Yes	No default value
PON: FedBizOpps XML Directory	Site,Responsibility, Application, User	Yes	Yes	No default value
PON: FedBizOpps government agency URL	Site, Organization	Yes	No	No default value
PO: Validate GL Period	Site	No	No	Yes, Redefault
PO: Display the Autocreated Document	Site, Application, Responsibility, User	Yes	No	Yes
PO: Use Need-by Date for Default Autocreate Grouping	Site, Application, Responsibility, User	Yes	No	No default value
PO: Use Ship-to for Default Autocreate grouping	Site, Application, Responsibility, User	Yes	No	No default value
PO: AutoCreate GL Date Option	Site, Application, Responsibility, User	Yes	No	No default value

Profile Options Description

Please note that some profile options are obsolete and are replaced with controls (in the CLM Controls region of the Purchasing Options page). If the profile values are already specified, then the profile option values are migrated automatically by the system to the CLM Controls region.

PO: Contracting Officer's Electronic Signature Required: This profile is obsolete. It has been replaced by the control Contracting Officer's Electronic Signature Required in the CLM Controls region, page 4-2.

PO: Enable FPDS-NG Reporting: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

PO: FPDS-NG Agency ID: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

PO: FPDS-NG Contracting Office Agency ID: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2

PO: FPDS-NG Award XML Source: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

PO: FPDS-NG Award Mod XML Source: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

PO: FPDS-NG IDV XML Source: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

PO: FPDS-NG IDV Mod XML Source: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

PO: User to Notify for Award Release Check Failure: This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

PO: Default Distribution This profile option is obsolete. It has been replaced by a control in the CLM Controls region, page 4-2.

FND: Industry ID: For CLM, you must set this profile option to Public Sector - National Government to enable federal nomenclature. The federal nomenclature works based on this particular profile value.

PO: CLM Enabled: Determines if the application is enabled for the responsibility. Set this profile option to Yes to enable CLM for the responsibility. If you set this profile option to No, then CLM features will not display for any CLM responsibility. If you set the profile option to Yes, then for the responsibility to display CLM features, both this profile option and the PO: CLM Installed profile option must be set to Yes.

> **Note:** CLM enabled document styles display only for those responsibilities for which this profile option is set to Yes.

PO: CLM Installed: Determines if CLM is installed on the instance.

PO: Enable IDV In Document Builder: Set this profile to yes to enable referencing IDV without lines as the source document in the document builder.

PO: FPDS-NG User Account for contract action reporting: This user is registered with the FPDS-NG site and has read/write (edit mode) access to the Contract Action Reports

(CARs).

PO: FPDS-NG User Account for viewing contract action report: This user is registered with the FPDS-NG site and has read-only (view mode) access to the Contract Action Reports (CARs).

PO: OA_HTML Absolute Path: You need to specify the value of this profile option (absolute path) in order for the approval workflow to function. Navigate to an OA Framework page in the application, and click the About this Page link. Then click the Java System Properties tab and search for the value of the attribute OA_HTML. The value should be the value for this profile option. (for e.g. /slot/ems1797/appmgr/apps/apps_st/comn/webapps/oacore/html).

CLM: Enable ORCA Set this value to Yes if you wish to integrate with ORCA. If this profile option value is set to No, users will not be able to extract ORCA details.

CLM: ORCA USER ID This profile option stores the user name that will be used to access the ORCA site.

CLM: ORCA PASSWORD This profile option stores the password for the user account that will be used to access the ORCA site.

PON: FedBizOpps Username This profile stores the authentication username that is needed while invoking FBO web service.

PON: FedBizOpps Password This profile stores the authentication password that is needed while invoking FBO web service.

PON: FedBizOpps XML Directory This profile stores the directory name where the xml file is saved.

PON: FedBizOpps government agency URL This profile stores the government agency URL that will be sent in the notices.

PO: Validate GL Period This profile option controls the validation of the Encumbrance (General Ledger) Date field. If the value of the profile option is Yes, an error message is displayed if the Encumbrance Date is invalid and you need to modify the date to reflect a valid date. If the value of the profile option is Redefault, the system automatically corrects an invalid date to reflect the current date.

PO: Display the Autocreated Document Yes or No indicates whether CLM Purchasing should automatically display the autocreated award.

PO: Use Need-by Date for Default Autocreate grouping Yes indicates that the need-by date on the requisition is included with the defaults to group requisition lines.

PO: Use Ship-to for Default Autocreate grouping Yes indicates that the ship-to organization and location on the requisition is included with the defaults to group requisition lines.

PO: AutoCreate GL Date Option Indicates the date used on purchase orders generated by AutoCreate:

- AutoCreate Date: The autocreate date is used as the award date.

- Requisition GL Date: The GL Date on the requisition distribution is used as the award date.

13

Reports

Setting Up Request Groups

When you use reports, you might have any or all or the following requirements based on your implementation plan:

- Link any of the predefined Request Groups to a Custom responsibility you use - refer Step 8.
- Define a new Request Group - refer Step 7.
- Customize predefined reports or add new reports - refer Steps 1 - 8.

To update any of the existing predefined reports, or if you have created a new responsibility to which you need to link the predefined request groups, or you require to create a new concurrent program, then you need to complete the following steps:

1. Use the XML Publisher Administrator responsibility to navigate to the Data Definitions window. In the Search region, enter the name of an existing Data Definition, for example, CCR Compliance Report. Make a note of the Code and Data Template. Click the Data Template to download it. You can now edit this to include or exclude fields per your requirements. Rename this file.

2. Navigate back to the Data Definitions page and click Create Data Definition. On the Create Data Definition page that displays, enter a name for the Data Definition, for example, CCR Compliance - Custom. Enter the Code for example, CUS_POXAWDCCR_XML. Select the Application, and optionally enter a start and end date. Click Apply. In the Files region, click Add File next to the Data Template field and browse and select the file you updated in step 1.

3. Navigate to the Template tab, and search for an existing template, for example CCR Compliance Report. In the Files region, click Download to download the RTF file and make the necessary updates to it. Rename this file, for example CUS_POXAWDCCR_XML.rtf.

4. Navigate to the Template tab, and click Create Template. Enter a Name for the new template, for example CCR Compliance - Custom Report. Enter the Code for example, CUS_POXAWDCCR_XML. Select the Application. Select the Data Definition you created in step 2. Select the Type. By default, this is RTF. Enter the Start Date and End Date, and select Yes or No in the Subtemplate field, as required. Select the Default Output Type, and enter a Description for the new template. In the Template File region, click Browse next the File field and select the RTF file you modified in Step 3. Select a Language and Territory. Select the Translatable check box if required. Click Apply.

5. Navigate to the Concurrent Programs window using the Application Developer responsibility. Enter a name for the Program. Enter a Short Name for the program. Ensure the short name is exactly identical to the Code you defined in step 4. In the example here, this is CUS_POXAWDCCR_XML. Enter the Application, and a Description. In the Executable region, select XDODTEXE as the Name. The Method is Java Concurrent Program. Select XML as the Format. Save your work. When you run the report, using the Submit Request window, the concurrent manager invokes the java concurrent program, which in turn calls the BI Publisher API's to display the required output in RTF format.

6. Repeat the above steps for all reports that you require to update or create.

7. Navigate to the Request Groups window using the System Administrator responsibility. You can use any of the predefined request groups, which are All CLM Reports, Sourcing CLM Group, and CLM Reports. Alternatively, you can create a new request group. To do this, enter a Name for the request group. Select the Application. Add a description. In the Requests region, select Program as the Type, and the Name of your report. The Application displays by default.

8. Navigate to the Responsibilities window, and search for the responsibility to which you want to attach the Request Group you created. In the Request Groups region, select the Name of the Request Group you created, and save your work.

   For information on customizing the template, see: Viewing and Updating a Template in the Oracle XML Publisher User's Guide.

A

Predefined Lookups in CLM

Predefined Lookups in CLM

Lookups provide lists of valid values for certain items of information. This has two key advantages:

- It ensures that all users use the same terminology, which makes it easier to inquire and report on the information.
- It speeds up data entry because you can enter just enough to identify the value, and the system completes the entry.

Predefined Lookup Types

A number of lookup types are included in CLM. Some contain codes as startup data. You can never delete these codes, but you can change their meaning. For some lookup types, you can also disable the codes that are supplied. Your ability to disable codes and add new codes is determined by the access level of the lookup type:

- **User** - You can add codes and you can disable supplied codes.
- **Extensible** - You can add new codes, but you cannot disable supplied codes because the system uses them.
- **System** - You can neither add codes nor disable supplied codes. You can only change the meaning or description of supplied codes.

You define lookups from the Purchasing Lookups window.

(N) Setup : Purchasing > Lookup Codes

The table below lists the predefined user/extensible lookups available in CLM

Predefined User/Extensible Lookups in CLM

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_AGENCY_IDENTIFIER	PO CLM Agency Identifier	Define the lookup codes per your requirement.	
PO_CLM_ALLOWED_RANGE	PO CLM Allowed Serial Range	Define the lookup codes per your requirement.	
PO_CLM_CUSTOMER_PROJECT_CODE	Customer Project Codes	Define the lookup codes per your requirement.	
PO_CLM_HAZMAT	HAZMAT Codes	Define the lookup codes per your requirement.	
PO_AWARD_STD_FORM	Award Standard Form	DD1155	DD1155
PO_AWARD_STD_FORM	Award Standard Form	OF347	OF347
PO_AWARD_STD_FORM	Award Standard Form	SF1442	SF1442
PO_AWARD_STD_FORM	Award Standard Form	SF33	SF33
PO_AWARD_STD_FORM	Award Standard Form	SF1449	SF1449
PO_AWARD_STD_FORM	Award Standard Form	SF252	SF252
PO_AWARD_STD_FORM	Award Standard Form	SF26	SF26
PO_AWARD_STD_FORM	Award Standard Form	SF1447	SF1447

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CHG_SUMM_OUTPUT_FORMAT	PO Change Summary Output	PDF	PDF
PO_CHG_SUMM_OUTPUT_FORMAT	PO Change Summary Output	HTML	HTML
PO_CLM_ADMIN_SCD	Admin SCD	C	C
PO_CLM_ADMIN_SCD	Admin SCD	B	B
PO_CLM_ADMIN_SCD	Admin SCD	A	A
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	10_2304(C)(6)	National Security (10 U.S.C. 2304(c)(6))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	10_2304(C)(1)	1Resp Src & No Other Supp Will Satisfy(10 U.S.C. 2304(c)(1))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	NONE	None
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	41_253(C)(7)	Public Interest (41 U.S.C. 253(c)(7))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	41_253(C)(6)	National Security (41 U.S.C. 253(c)(6))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	41_253(C)(5)	Authorized or Required by Statute (41 U.S.C. 253(c)(5))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	41_253(C)(4)	International Agreement (41 U.S.C. 253(c)(4))

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	41_253(C)(3)	Ind Mob; Eng, Dev,Research Cap; Exp Ser(41 U.S.C. 253(c)(3))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	41_253(C)(1)	1Resp Src & No Other Supp Will Satisfy(41 U.S.C. 253(c)(1))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	41_243(C)(2)	Unusual and Compelling Urgency (41 U.S.C. 243(c)(2))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	10_2304(C)(7)	Public Interest (10 U.S.C. 2304(c)(7))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	10_2304(C)(2)	Unusual and Compelling Urgency (10 U.S.C. 2304(c)(2))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	10_2304(C)(3)	Ind Mob; Eng, Dev, Research Cap;Exp Ser(10 U.S.C. 2304(c)(3))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	10_2304(C)(4)	International Agreement (10 U.S.C. 2304(c)(4))
PO_CLM_AUTH_OTR_FULL_OPEN_COMP	Authority for other than Full and Open Competition	10_2304(C)(5)	Authorized or Required by Statute (10 U.S.C. 2304(c)(5))
PO_CLM_AWD_TYPE_BPA	Award Types - IDV with Lines	DQ	Definite Quantity
PO_CLM_AWD_TYPE_BPA	Award Types - IDV with Lines	BOA	Basic Ordering Agreement
PO_CLM_AWD_TYPE_BPA	Award Types - IDV with Lines	IQ	Indefinite Quantity

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_AWD_TYPE_BPA	Award Types - IDV with Lines	REQ	Requirements
PO_CLM_AWD_TYPE_CPA	Award Types - IDV without Lines	BA	Basic Agreement
PO_CLM_AWD_TYPE_CPA	Award Types - IDV without Lines	BPA	Blanket Purchase Agreement
PO_CLM_AWD_TYPE_ORD_OFF_IDV	Award Types - Order Off IDV	BPA_CALL	BPA Call
PO_CLM_AWD_TYPE_ORD_OFF_IDV	Award Types - Order Off IDV	DELIVERY_ORD	Delivery Order
PO_CLM_AWD_TYPE_SPO	Award Types - Purchase Order	NEG_AGMNT	Negotiated Agreement
PO_CLM_AWD_TYPE_SPO	Award Types - Purchase Order	PURCH_ORD	Purchase Order
PO_CLM_AWD_TYPE_SPO	Award Types - Purchase Order	AWARD	Award
PO_CLM_BOND_REQUIRED_YN	Bond Required	YES	Yes
PO_CLM_BOND_REQUIRED_YN	Bond Required	NO	No
PO_CLM_CAR_ACTIONS	PO: CLM CAR Actions	08_APPROVE_CAR	Approve CAR
PO_CLM_CAR_ACTIONS	PO: CLM CAR Actions	07_DELETE_CAR	Delete CAR
PO_CLM_CAR_ACTIONS	PO: CLM CAR Actions	06_AUTHENTICATE_CAR	Authenticate CAR
PO_CLM_CAR_ACTIONS	PO: CLM CAR Actions	05_EDIT_CAR	Edit CAR

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_CAR_ACTIONS	PO: CLM CAR Actions	09_REMOVE_CAR_LINK	Remove CAR Link
PO_CLM_CAR_ACTIONS	PO: CLM CAR Actions	03_CHANGE_PIID	Change PIID
PO_CLM_CAR_ACTIONS	PO: CLM CAR Actions	02_LINK_CAR	Link CAR
PO_CLM_CAR_ACTIONS	PO: CLM CAR Actions	01_CREATE_CAR	Create CAR
PO_CLM_CAR_ACTIONS	PO: CLM CAR Actions	04_VIEW_CAR	View CAR
PO_CLM_CAR_EXEMPT_REASON	PO: CLM CAR Exempt Reason	NON_APPROPRIATED_FUNDS	Non-Appropriated Funds
PO_CLM_CAR_EXEMPT_REASON	PO: CLM CAR Exempt Reason	PURCH_CARD_MICRO_PURCH	Purchase Card for Micro-Purchase
PO_CLM_CAR_EXEMPT_REASON	PO: CLM CAR Exempt Reason	INTER_AGENCY_TRANSFER	Inter-Agency Transfer
PO_CLM_CAR_EXEMPT_REASON	PO: CLM CAR Exempt Reason	CONTINGENCY	Contingency
PO_CLM_CAR_EXEMPT_REASON	PO: CLM CAR Exempt Reason	CLASSIFIED	Classified
PO_CLM_CAR_EXEMPT_REASON	PO: CLM CAR Exempt Reason	BELOW_MIN_THRESHOLD	Below Minimum Reporting Threshold
PO_CLM_CAR_REL_WO_REP_REASON	PO: CLM CAR Release Without Reporting Reason	URGENT_ACTION	Urgent and Compelling Action
PO_CLM_CAR_REL_WO_REP_REASON	PO: CLM CAR Release Without Reporting Reason	TECHNICAL_FAILURE	Technical/Connectivity Failure

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_CAR_REL_WO_REP_REASON	PO: CLM CAR Release Without Reporting Reason	PREVIOUSLY_REPORTED	Previously Reported
PO_CLM_CAR_REL_WO_REP_REASON	PO: CLM CAR Release Without Reporting Reason	FPDS_NOT_UPD_FOR_REQS	FPDS-NG not Updated to Reflect Requirements
PO_CLM_CAR_REL_WO_REP_REASON	PO: CLM CAR Release Without Reporting Reason	AUTOMATED_RELEASE	Automated Release
PO_CLM_CAR_TXN_TYPES	PO: CLM CAR Transaction Types	VIEW_CAR	View CAR
PO_CLM_CAR_TXN_TYPES	PO: CLM CAR Transaction Types	REMOVE_CAR_LINK	Remove CAR Link
PO_CLM_CAR_TXN_TYPES	PO: CLM CAR Transaction Types	LINK_CAR	Link CAR
PO_CLM_CAR_TXN_TYPES	PO: CLM CAR Transaction Types	EDIT_CAR	Edit CAR
PO_CLM_CAR_TXN_TYPES	PO: CLM CAR Transaction Types	DELETE_CAR	Delete CAR
PO_CLM_CAR_TXN_TYPES	PO: CLM CAR Transaction Types	CREATE_CAR	Create CAR
PO_CLM_CAR_TXN_TYPES	PO: CLM CAR Transaction Types	CHANGE_PIID	Change PIID
PO_CLM_CAR_TXN_TYPES	PO: CLM CAR Transaction Types	APPROVE_CAR	Approve CAR
PO_CLM_CAR_TXN_TYPES	PO: CLM CAR Transaction Types	AUTHENTICATE_CAR	Authenticate CAR
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	CLASSIFIED_CONTRACTSS	Classified Contracts

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	EMERGENCY_OPERATIONS	Emergency Operations
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	FOREIGN_VEND_OUTSIDE_US	Foreign Vendors Performing outside US
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	GOV_COM_PUR_CARD	Government-wide Commercial Purchase Card
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	UNUSUAL_COMPELLING_NEEDS	Unusual or Compelling Needs
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	MICRO_PURCHASE_NO_EFT	Micro-purchases that do not use the EFT
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	MILITARY_OPERATIONS	Military Operations
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	NA	Not Applicable
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	TECH_CONN_ISSUE	Technical/Connectivity Issue
PO_CLM_CCR_EXP_REASON	CCR Exception Reason	MANUALLY_SYNC	Manually Synchronized
PO_CLM_CONTRACT_CATEGORY	Contract Categories	SERVICES	Services
PO_CLM_CONTRACT_CATEGORY	Contract Categories	SUBSTCE	Subsistence
PO_CLM_CONTRACT_CATEGORY	Contract Categories	SUPP	Supplies
PO_CLM_CONTRACT_CATEGORY	Contract Categories	TE	Test and Evaluation

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_CONTRACT_CATEGORY	Contract Categories	UTIL	Utilities
PO_CLM_CONTRACT_CATEGORY	Contract Categories	AE	Architect and Engineering
PO_CLM_CONTRACT_CATEGORY	Contract Categories	BR	Basic Research
PO_CLM_CONTRACT_CATEGORY	Contract Categories	CNSTRN	Construction
PO_CLM_CONTRACT_CATEGORY	Contract Categories	DB-CNSTRN	Design and Build (Construction)
PO_CLM_CONTRACT_CATEGORY	Contract Categories	DEM-DIS-REP	Demolish, Dismantle or Replace
PO_CLM_CONTRACT_CATEGORY	Contract Categories	ER	Equipment Rentals
PO_CLM_CONTRACT_CATEGORY	Contract Categories	IRAN	Inspect and Repair as Necessary
PO_CLM_CONTRACT_CATEGORY	Contract Categories	IT	Information Technology
PO_CLM_CONTRACT_CATEGORY	Contract Categories	MA	Modification or Alteration
PO_CLM_CONTRACT_CATEGORY	Contract Categories	OVRHL	Overhaul
PO_CLM_CONTRACT_CATEGORY	Contract Categories	RD	Research and Development
PO_CLM_CONTRACT_CATEGORY	Contract Categories	REPAIR	Repair
PO_CLM_CONTRACT_CATEGORY	Contract Categories	SB	Shipbuilding

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_DOC_FORMAT	CLM Document Formats	UCF	UCF
PO_CLM_DOC_FORMAT	CLM Document Formats	SGD	SGD
PO_CLM_DOC_FORMAT	CLM Document Formats	CSI	CSI
PO_CLM_DOC_FORMAT	CLM Document Formats	COM	COM
PO_CLM_DOC_TYPES	CLM Document Types	PO_SOL_AMEND_STD_FORM	Solicitation Amendment
PO_CLM_DOC_TYPES	CLM Document Types	PO_MOD_STD_FORM	Modification
PO_CLM_DOC_TYPES	CLM Document Types	PO_IDV_STD_FORM	IDV
PO_CLM_DOC_TYPES	CLM Document Types	PO_DEL_ORD_STD_FORM	Order Off IDV
PO_CLM_DOC_TYPES	CLM Document Types	PO_SOL_STD_FORM	Solicitation
PO_CLM_DOC_TYPES	CLM Document Types	PO_AWARD_STD_FORM	Award
PO_CLM_DPAS_RATING	DPAS Ratings	DOF2	DOF2
PO_CLM_DPAS_RATING	DPAS Ratings	DOF3	DOF3
PO_CLM_DPAS_RATING	DPAS Ratings	DOH1	DOH1
PO_CLM_DPAS_RATING	DPAS Ratings	DOH5	DOH5

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_DPAS_RATING	DPAS Ratings	DOH6	DOH6
PO_CLM_DPAS_RATING	DPAS Ratings	DOH7	DOH7
PO_CLM_DPAS_RATING	DPAS Ratings	DOH8	DOH8
PO_CLM_DPAS_RATING	DPAS Ratings	DOK1	DOK1
PO_CLM_DPAS_RATING	DPAS Ratings	DON1	DON1
PO_CLM_DPAS_RATING	DPAS Ratings	DON2	DON2
PO_CLM_DPAS_RATING	DPAS Ratings	DON3	DON3
PO_CLM_DPAS_RATING	DPAS Ratings	DON4	DON4
PO_CLM_DPAS_RATING	DPAS Ratings	DON5	DON5
PO_CLM_DPAS_RATING	DPAS Ratings	DON6	DON6
PO_CLM_DPAS_RATING	DPAS Ratings	DON7	DON7
PO_CLM_DPAS_RATING	DPAS Ratings	DON8	DON8
PO_CLM_DPAS_RATING	DPAS Ratings	DXA1	DXA1
PO_CLM_DPAS_RATING	DPAS Ratings	DXA2	DXA2

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_DPAS_RATING	DPAS Ratings	DXA3	DXA3
PO_CLM_DPAS_RATING	DPAS Ratings	DXA4	DXA4
PO_CLM_DPAS_RATING	DPAS Ratings	DXA5	DXA5
PO_CLM_DPAS_RATING	DPAS Ratings	DXA6	DXA6
PO_CLM_DPAS_RATING	DPAS Ratings	DXA7	DXA7
PO_CLM_DPAS_RATING	DPAS Ratings	DXB1	DXB1
PO_CLM_DPAS_RATING	DPAS Ratings	DXB8	DXB8
PO_CLM_DPAS_RATING	DPAS Ratings	DXB9	DXB9
PO_CLM_DPAS_RATING	DPAS Ratings	DXC1	DXC1
PO_CLM_DPAS_RATING	DPAS Ratings	DXC2	DXC2
PO_CLM_DPAS_RATING	DPAS Ratings	DXC3	DXC3
PO_CLM_DPAS_RATING	DPAS Ratings	DXC9	DXC9
PO_CLM_DPAS_RATING	DPAS Ratings	DXE1	DXE1
PO_CLM_DPAS_RATING	DPAS Ratings	DXE2	DXE2

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_DPAS_RATING	DPAS Ratings	DXE3	DXE3
PO_CLM_DPAS_RATING	DPAS Ratings	DXF1	DXF1
PO_CLM_DPAS_RATING	DPAS Ratings	DXF2	DXF2
PO_CLM_DPAS_RATING	DPAS Ratings	DXF3	DXF3
PO_CLM_DPAS_RATING	DPAS Ratings	DXH1	DXH1
PO_CLM_DPAS_RATING	DPAS Ratings	DXH5	DXH5
PO_CLM_DPAS_RATING	DPAS Ratings	DXH6	DXH6
PO_CLM_DPAS_RATING	DPAS Ratings	DXH7	DXH7
PO_CLM_DPAS_RATING	DPAS Ratings	DXH8	DXH8
PO_CLM_DPAS_RATING	DPAS Ratings	DXK1	DXK1
PO_CLM_DPAS_RATING	DPAS Ratings	DXN1	DXN1
PO_CLM_DPAS_RATING	DPAS Ratings	DXN2	DXN2
PO_CLM_DPAS_RATING	DPAS Ratings	DXN3	DXN3
PO_CLM_DPAS_RATING	DPAS Ratings	DXN4	DXN4

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_DPAS_RATING	DPAS Ratings	DXN5	DXN5
PO_CLM_DPAS_RATING	DPAS Ratings	DXN6	DXN6
PO_CLM_DPAS_RATING	DPAS Ratings	DXN7	DXN7
PO_CLM_DPAS_RATING	DPAS Ratings	DXN8	DXN8
PO_CLM_DPAS_RATING	DPAS Ratings	DOA1	DOA1
PO_CLM_DPAS_RATING	DPAS Ratings	DOA2	DOA2
PO_CLM_DPAS_RATING	DPAS Ratings	DOA3	DOA3
PO_CLM_DPAS_RATING	DPAS Ratings	DOA4	DOA4
PO_CLM_DPAS_RATING	DPAS Ratings	DOA5	DOA5
PO_CLM_DPAS_RATING	DPAS Ratings	DOA6	DOA6
PO_CLM_DPAS_RATING	DPAS Ratings	DOA7	DOA7
PO_CLM_DPAS_RATING	DPAS Ratings	DOB1	DOB1
PO_CLM_DPAS_RATING	DPAS Ratings	DOB8	DOB8
PO_CLM_DPAS_RATING	DPAS Ratings	DOB9	DOB9

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_DPAS_RATING	DPAS Ratings	DOC1	DOC1
PO_CLM_DPAS_RATING	DPAS Ratings	DOC2	DOC2
PO_CLM_DPAS_RATING	DPAS Ratings	DOC3	DOC3
PO_CLM_DPAS_RATING	DPAS Ratings	DOC9	DOC9
PO_CLM_DPAS_RATING	DPAS Ratings	DOE1	DOE1
PO_CLM_DPAS_RATING	DPAS Ratings	DOE2	DOE2
PO_CLM_DPAS_RATING	DPAS Ratings	DOE3	DOE3
PO_CLM_DPAS_RATING	DPAS Ratings	DOF1	DOF1
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(J)	FAR 32.1103 (j)
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(H)	FAR 32.1103 (h)
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(G)	FAR 32.1103 (g)
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(F)	FAR 32.1103 (f)
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(A)	FAR 32.1103 (a)
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(E)_(1)	FAR 32.1103 (e) (1)

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(D)	FAR 32.1103 (d)
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(C)	FAR 32.1103 (c)
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(B)	FAR 32.1103 (b)
PO_CLM_EFT_EXCLUSION_REASON	EFT Exclusion Reason	FAR_32.1103_(E)_(2)	FAR 32.1103 (e) (2)
PO_CLM_EFT_INDICATOR	EFT Indicator	YES	Yes
PO_CLM_EFT_INDICATOR	EFT Indicator	NO	No
PO_CLM_FOB_VALUES	FOB value	WGL	Worldwide Geographic Location
PO_CLM_FOB_VALUES	FOB value	TERM	Terminal
PO_CLM_FOB_VALUES	FOB value	DEST	Destination
PO_CLM_FOB_VALUES	FOB value	FOBP	FoB Point
PO_CLM_FOB_VALUES	FOB value	POL	Port of Loading
PO_CLM_FOB_VALUES	FOB value	I-FOBP	Intermediate FoB Point
PO_CLM_FOB_VALUES	FOB value	OAL	Origin (after Loading)
PO_CLM_FOB_VALUES	FOB value	OSP	Origin (Shipping Point)

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_FOB_VALUES	FOB value	OTH	Other
PO_CLM_FOB_VALUES	FOB value	GFP	Government Furnished Property (GFP)
PO_CLM_FPDS_AWARD_TYPE	PO: CLM Award Type for FPDS System	C	C - Delivery Order
PO_CLM_FPDS_AWARD_TYPE	PO: CLM Award Type for FPDS System	D	D - Standalone Contract
PO_CLM_FPDS_AWARD_TYPE	PO: CLM Award Type for FPDS System	B	B - Purchase Order
PO_CLM_FPDS_AWARD_TYPE	PO: CLM Award Type for FPDS System	A	A - BPA Call
PO_CLM_FPDS_IDV_TYPE	PO: CLM IDV Type for FPDS System	D	D - BOA
PO_CLM_FPDS_IDV_TYPE	PO: CLM IDV Type for FPDS System	B	B - IDC
PO_CLM_FPDS_IDV_TYPE	PO: CLM IDV Type for FPDS System	A	A - GWAC
PO_CLM_FPDS_IDV_TYPE	PO: CLM IDV Type for FPDS System	F	F - Multi-Agency Contract
PO_CLM_FPDS_IDV_TYPE	PO: CLM IDV Type for FPDS System	E	E - BPA
PO_CLM_FPDS_IDV_TYPE	PO: CLM IDV Type for FPDS System	C	C - FSS

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_INSPECTION_LOC	Inspection Location	SRC	Source
PO_CLM_INSPECTION_LOC	Inspection Location	DEST	Destination
PO_CLM_INSPECTION_LOC	Inspection Location	OTH	Other
PO_CLM_INSPECTION_RESP	Inspection Responsibilities	GOV	Government
PO_CLM_INSPECTION_RESP	Inspection Responsibilities	CON	Contractor
PO_CLM_INSPECTION_RESP	Inspection Responsibilities	OTH	Other
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	101 H-1 UPGRADE	101 USMC H-1 Upgrade
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	148 PATRIOT PAC-3	148 Patriot PAC-3
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	161 CVN 68	161 CVN 68
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	166 NAVSTAR GPS	166 Navstar GPS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	176 EELV	176 EELV
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	178 TRIDENT II MISSILE	178 Trident II Missile
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	180 DDG 51	180 DDG 51
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	185 AMRAAM	185 AMRAAM

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	191 MH-60R	191 MH-60R
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	197 DD(X) / DD 21 (SC-21)	197 DD(X) / DD 21 (SC-21)
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	198 F-35 (JSF)	198 F-35 (JSF)
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	200 C-17A	200 C-17A
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	203 DMSP	203 DMSP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	210 SBIRS HIGH	210 SBIRS High
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	212 V22	212 V22
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	217 LHD 1	217 LHD 1
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	219 ATIRCMS/CMWS	219 ATIRCMS/CMWS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	220 C130-J	220 C130-J
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	223 CVN(X)	223 CVN(X)
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	233 SINCGARS	233 SINCGARS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	234 STANDARD MISSILE 2 (SM 2)	234 STANDARD MISSILE 2 (SM 2)
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	237 GBS	237 GBS

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	239 NPOESS	239 NPOESS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	240 T 45TS	240 T 45TS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	246 HMMLTV	246 HMMLTV
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	248 MINUTEMAN III PRP	248 MINUTEMAN III PRP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	252 GLOBAL HAWK	252 GLOBAL HAWK
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	254 COMANCHE	254 COMANCHE
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	258 SSN 21	258 SSN 21
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	260 GMLRS	260 GMLRS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	261 AEHF	261 AEHF
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	265 F-22	265 F-22
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	270 TITAN IV	270 TITAN IV
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	274 JSTARS	274 JSTARS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	276 E-2C REPRODUCTION	276 E-2C REPRODUCTION
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	278 CH-47F CARGO HELICOPTER	278 CH-47F CARGO HELICOPTER

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	280 JAVELIN	280 JAVELIN
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	282 MH-60S	282 MH-60S
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	284 JTRS WAVEFORM	284 JTRS WAVEFORM
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	285 CHEM DEMIL	285 CHEM DEMIL
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	287 LAND WARRIOR	287 LAND WARRIOR
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	288 B1-B CMUP	288 B1-B CMUP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	289 TACTICAL TOMAHAWK	289 TACTICAL TOMAHAWK
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	293 MP RTIP	293 MP RTIP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	294 FBCB2	294 FBCB2
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	295 ADV WIDEBAND	295 ADV WIDEBAND
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	296 WIN-T	296 WIN-T
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	297 HAEUAV	297 HAEUAV
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	298 C-130 AMP	298 C-130 AMP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	299 STRYKER (IAV)	299 STRYKER (IAV)

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	301 FCS	301 FCS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	302 MINUTEMAN III GRP	302 MINUTEMAN III GRP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	326 WIDEBAND GAPFILLER	326 WIDEBAND GAPFILLER
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	327 C-5 RERP	327 C-5 RERP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	329 CSAR	329 CSAR
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	330 AESA	330 AESA
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	333 LHA (R)	333 LHA (R)
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	334 MMA	334 MMA
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	335 MPF	335 MPF
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	337 SSGN	337 SSGN
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	339 JSIMS	339 JSIMS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	341BLACK HAWK UPGRADE (UH-60M)	341BLACK HAWK UPGRADE (UH-60M)
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	345 MUOS	345 MUOS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	347 GCSS ARMY	347 GCSS ARMY

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	349 GCSS-AF	349 GCSS-AF
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	352 HPCM	352 HPCM
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	354 SMALL DIAMETER BOMB	354 SMALL DIAMETER BOMB
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	358 SBR	358 SBR
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	360 JTRS CLUSTER I	360 JTRS CLUSTER I
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	362 BMDS	362 BMDS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	364 E-2 (RMP) ADVANCED HAWKEYE	364 E-2 (RMP) ADVANCED HAWKEYE
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	365 COBRA JUDY REPLACEMENT	365 COBRA JUDY REPLACEMENT
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	366 EXCALIBUR	366 EXCALIBUR
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	367 HIMARS	367 HIMARS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	368 AGM-88E AARGM	368 AGM-88E AARGM
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	369 AOC-WS	369 AOC-WS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	370 COMMON MISSILE	370 COMMON MISSILE

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	371 ACS	371 ACS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	372 JLENS	372 JLENS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	373 BAMS	373 BAMS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	374 LCS	374 LCS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	375 T-AOE(X)	375 T-AOE(X)
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	376 B-2 RPP	376 B-2 RPP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	377 MC2A	377 MC2A
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	378 E/A-18G	378 E/A-18G
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	379 AIR FORCE TANKER REP	379 AIR FORCE TANKER REP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	380 JTRS CLUSTER 3	380 JTRS CLUSTER 3
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	503 JDAM	503 JDAM
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	515 AAAV	515 AAAV
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	516 SSN 774	516 SSN 774
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	524 AWACS RSIP (E-3)	524 AWACS RSIP (E-3)

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	530 AV-8B REMANUFACTURE	530 AV-8B REMANUFACTURE
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	537 NAS	537 NAS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	541 LONGBOW HELLFIRE	541 LONGBOW HELLFIRE
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	542 LPD 17	542 LPD 17
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	545 ATACMS BAT	545 ATACMS BAT
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	549 F/A-18 E/F	549 F/A-18 E/F
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	551 NESP	551 NESP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	554 MIDS-LVT	554 MIDS-LVT
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	555 JASSM	555 JASSM
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	560 JPATS	560 JPATS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	568 SMART-T	568 SMART-T
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	575 ABRAMS UPGRADE	575 ABRAMS UPGRADE
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	581 AIM-9X	581 AIM-9X
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	582 CEC	582 CEC

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	592 T-AKE	592 T-AKE
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	601 BRADLEY UPGRADE	601 BRADLEY UPGRADE
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	724 MCS (ATCCS)	724 MCS (ATCCS)
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	746 FMTV	746 FMTV
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	766 JSOW	766 JSOW
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	831 LONGBOW APACHE	831 LONGBOW APACHE
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	CAA CAA	CAA CAA
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M01 GCCS-J	M01 GCCS-J
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M05 DPPS	M05 DPPS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M06 DJAS	M06 DJAS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M09 JCALS	M09 JCALS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M10 TRAC2ES	M10 TRAC2ES
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M11 RCAS	M11 RCAS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M12 TC-AIMS II	M12 TC-AIMS II

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M13 CHCS II	M13 CHCS II
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M14 DMLSS	M14 DMLSS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M15 DMS	M15 DMS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M17 FAS	M17 FAS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M21 SWPS	M21 SWPS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M22 GTN	M22 GTN
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M23 NSIPS	M23 NSIPS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M26 DIMHRS	M26 DIMHRS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M31 TADLP	M31 TADLP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M33 GCSS-AT	M33 GCSS-AT
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M49 DTS	M49 DTS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M52 GCCS-A	M52 GCCS-A
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M73 TBMCS	M73 TBMCS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M85 BSM	M85 BSM

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M90 GCCS-M	M90 GCCS-M
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M92 CCMS	M92 CCMS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M93 DCD/DCW	M93 DCD/DCW
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M94 TELEPORT	M94 TELEPORT
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M96 TBMMP	M96 TBMMP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	M98 PKI	M98 PKI
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	N02 DJC2	N02 DJC2
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	ZBC BRAC	ZBC BRAC
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	ZDE DERP	ZDE DERP
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	ZOP ENVIRONMENTAL PROGRAMS	ZOP ENVIRONMENTAL PROGRAMS
PO_CLM_MDAPS/MAIS	MDAPS/MAIS Codes	ZSE EPA SUPERFUND	ZSE EPA SUPERFUND
PO_CLM_PERIOD_STATUS	Period Statuses	MANDATORY	Mandatory
PO_CLM_PERIOD_STATUS	Period Statuses	NEGOTIABLE	Negotiable

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_PERIOD_STATUS	Period Statuses	MANDATORY	Mandatory
PO_CLM_PERIOD_STATUS	Period Statuses	NEGOTIABLE	Negotiable
PO_CLM_PERIOD_STATUS	Period Statuses	MANDATORY	Mandatory
PO_CLM_PERIOD_STATUS	Period Statuses	NEGOTIABLE	Negotiable
PO_CLM_PERIOD_STATUS	Period Statuses	NEGOTIABLE	Negotiable
PO_CLM_PERIOD_STATUS	Period Statuses	MANDATORY	Mandatory
PO_CLM_PERIOD_STATUS	Period Statuses	NEGOTIABLE	Negotiable
PO_CLM_PERIOD_STATUS	Period Statuses	MANDATORY	Mandatory
PO_CLM_PERIOD_STATUS	Period Statuses	NEGOTIABLE	Negotiable
PO_CLM_PERIOD_STATUS	Period Statuses	MANDATORY	Mandatory
PO_CLM_PERIOD_STATUS	Period Statuses	MANDATORY	Mandatory
PO_CLM_PERIOD_STATUS	Period Statuses	NEGOTIABLE	Negotiable
PO_CLM_PERIOD_STATUS	Period Statuses	MANDATORY	Mandatory
PO_CLM_PERIOD_STATUS	Period Statuses	NEGOTIABLE	Negotiable

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_PRECIOUS_METAL_CODE	Precious Metal Codes	E	E
PO_CLM_PRECIOUS_METAL_CODE	Precious Metal Codes	B	B
PO_CLM_PRECIOUS_METAL_CODE	Precious Metal Codes	C	C
PO_CLM_PRECIOUS_METAL_CODE	Precious Metal Codes	D	D
PO_CLM_PRECIOUS_METAL_CODE	Precious Metal Codes	A	A
PO_CLM_PRIORITY_CODE	Priority Codes	5	5
PO_CLM_PRIORITY_CODE	Priority Codes	3	3
PO_CLM_PRIORITY_CODE	Priority Codes	7	7
PO_CLM_PRIORITY_CODE	Priority Codes	8	8
PO_CLM_PRIORITY_CODE	Priority Codes	9	9
PO_CLM_PRIORITY_CODE	Priority Codes	2	2
PO_CLM_PRIORITY_CODE	Priority Codes	15	15
PO_CLM_PRIORITY_CODE	Priority Codes	14	14
PO_CLM_PRIORITY_CODE	Priority Codes	13	13

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_PRIORITY_CODE	Priority Codes	12	12
PO_CLM_PRIORITY_CODE	Priority Codes	11	11
PO_CLM_PRIORITY_CODE	Priority Codes	10	10
PO_CLM_PRIORITY_CODE	Priority Codes	1	1
PO_CLM_PRIORITY_CODE	Priority Codes	4	4
PO_CLM_PRIORITY_CODE	Priority Codes	6	6
PO_CLM_PROGRAM_CODES	Program Codes	A1A	A1A
PO_CLM_PROGRAM_CODES	Program Codes	A1B	A1B
PO_CLM_PROGRAM_CODES	Program Codes	A1C	A1C
PO_CLM_PROGRAM_CODES	Program Codes	A20	A20
PO_CLM_PROGRAM_CODES	Program Codes	A30	A30
PO_CLM_PROGRAM_CODES	Program Codes	A4A	A4A
PO_CLM_PROGRAM_CODES	Program Codes	A4B	A4B
PO_CLM_PROGRAM_CODES	Program Codes	A50	A50

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_PROGRAM_CODES	Program Codes	A60	A60
PO_CLM_PROGRAM_CODES	Program Codes	A70	A70
PO_CLM_PROGRAM_CODES	Program Codes	A8A	A8A
PO_CLM_PROGRAM_CODES	Program Codes	A8B	A8B
PO_CLM_PROGRAM_CODES	Program Codes	A8C	A8C
PO_CLM_PROGRAM_CODES	Program Codes	A90	A90
PO_CLM_PROGRAM_CODES	Program Codes	B10	B10
PO_CLM_SECURITY_CLR_REQ_INDIC	Security Clearance Required indicators	TOP_SECRET	Top Secret
PO_CLM_SECURITY_CLR_REQ_INDIC	Security Clearance Required indicators	SECRET	Secret
PO_CLM_SECURITY_CLR_REQ_INDIC	Security Clearance Required indicators	NONE	None
PO_CLM_SECURITY_CLR_REQ_INDIC	Security Clearance Required indicators	CONFIDENTIAL	Confidential
PO_CLM_SECURITY_CLR_REQ_INDIC	Security Clearance Required indicators	UNCLASSIFIED	Unclassified
PO_CLM_SET_ASIDE_STATUS	Set Aside Statuses	SET_ASIDE	* Set Aside
PO_CLM_SET_ASIDE_STATUS	Set Aside Statuses	UNRESTRICTED	* Unrestricted

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	SMALL_BUSINESS	* Small Business
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	HUBZONE_SMALL_BUSINESS	* HUBZone Small Business
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	EMERGING_SMALL_BUSINESS	* Emerging Small Business
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	8(A)	8(A) **Note:** * Competitive 8(A) for FedBizOpps
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	SDVO_SMALL_BUSINESS	* Service-Disabled Veteran-Owned Small Business
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	PARTIAL_HBCU_MI	* Partial HBCU / MI
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	PARTIAL_SMALL_BUSINESS	* Partial Small Business
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	TOTAL_HBCU_MI	* Total HBCU / MI
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	VETERAN_SMALL_BUSINESS	* Veteran-Owned Small Business
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	WOMAN_OWNED_SMALL_BUSINESS	* Woman Owned Small Business
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	ECO_DISADVTG_WOMAN_OWNED	* Economically Disadvantaged Woman Owned Small Business

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	NA	* N/A
PO_CLM_SET_ASIDE_TYPE	Set Aside Types	TOTAL_SMALL_BUSINESS	* Total Small Business
PO_CLM_SHIPMENT_MODES	Shipment Modes	TAS	Tow away Service
PO_CLM_SHIPMENT_MODES	Shipment Modes	TK-T	Tank Truck
PO_CLM_SHIPMENT_MODES	Shipment Modes	USPS	U.S. Postal Service
PO_CLM_SHIPMENT_MODES	Shipment Modes	V-L	Vessel, Lake
PO_CLM_SHIPMENT_MODES	Shipment Modes	V-O	Vessel, Ocean
PO_CLM_SHIPMENT_MODES	Shipment Modes	W/P(IMM)	Water or Pipeline Inter-modal Movement
PO_CLM_SHIPMENT_MODES	Shipment Modes	AIR	Air
PO_CLM_SHIPMENT_MODES	Shipment Modes	AIR-C	Air Charter
PO_CLM_SHIPMENT_MODES	Shipment Modes	AIR-E	Air Express
PO_CLM_SHIPMENT_MODES	Shipment Modes	AIR-F	Air Freight
PO_CLM_SHIPMENT_MODES	Shipment Modes	AIR-FF	Air Freight Forwarder

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_SHIPMENT_MODES	Shipment Modes	ARFCOS	Armed Forces Courier Service (ARFCOS)
PO_CLM_SHIPMENT_MODES	Shipment Modes	BARGE	Barge
PO_CLM_SHIPMENT_MODES	Shipment Modes	BH	Back-haul
PO_CLM_SHIPMENT_MODES	Shipment Modes	BP	Book Postal
PO_CLM_SHIPMENT_MODES	Shipment Modes	BUS	Bus
PO_CLM_SHIPMENT_MODES	Shipment Modes	BW(SO)	Best Way (Shippers Option)
PO_CLM_SHIPMENT_MODES	Shipment Modes	CAB	Cab (Taxi)
PO_CLM_SHIPMENT_MODES	Shipment Modes	CIC	Common Irregular Carrier
PO_CLM_SHIPMENT_MODES	Shipment Modes	CON-CAR	Contract Carrier
PO_CLM_SHIPMENT_MODES	Shipment Modes	CONS	Consolidation
PO_CLM_SHIPMENT_MODES	Shipment Modes	CONT-OC	Containerized Ocean
PO_CLM_SHIPMENT_MODES	Shipment Modes	CONV-OC	Conventional Ocean
PO_CLM_SHIPMENT_MODES	Shipment Modes	CP	Customer Pickup

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_SHIPMENT_MODES	Shipment Modes	CP/CE	Customer Pickup or Customers Expense
PO_CLM_SHIPMENT_MODES	Shipment Modes	DA/TA/TOA	Drive-away, Truck-away, Tow-away
PO_CLM_SHIPMENT_MODES	Shipment Modes	DR-SER	Drive-away Service
PO_CLM_SHIPMENT_MODES	Shipment Modes	E/P-DS	European or Pacific Distribution System
PO_CLM_SHIPMENT_MODES	Shipment Modes	EXP-T	Expedited Truck
PO_CLM_SHIPMENT_MODES	Shipment Modes	FAA-AAT	FAA Approved Air Taxi
PO_CLM_SHIPMENT_MODES	Shipment Modes	FLY	Flyaway
PO_CLM_SHIPMENT_MODES	Shipment Modes	GR	Geographic Receiving
PO_CLM_SHIPMENT_MODES	Shipment Modes	GR/S	Geographic Receiving/Shipping
PO_CLM_SHIPMENT_MODES	Shipment Modes	GS	Geographic Shipping
PO_CLM_SHIPMENT_MODES	Shipment Modes	HGT	Household Goods Truck
PO_CLM_SHIPMENT_MODES	Shipment Modes	IM(P)	Inter-modal (Piggyback)
PO_CLM_SHIPMENT_MODES	Shipment Modes	IW	Inland Waterway

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_SHIPMENT_MODES	Shipment Modes	LA	Log-air
PO_CLM_SHIPMENT_MODES	Shipment Modes	LTL	Less Than Trailer Load (LTL)
PO_CLM_SHIPMENT_MODES	Shipment Modes	MAIL	Mail
PO_CLM_SHIPMENT_MODES	Shipment Modes	MITAS	Military Intra-theater Airlift Service
PO_CLM_SHIPMENT_MODES	Shipment Modes	MOM	Military Official Mail
PO_CLM_SHIPMENT_MODES	Shipment Modes	MOT	Motor
PO_CLM_SHIPMENT_MODES	Shipment Modes	MOT-BC	Motor (Bulk Carrier)
PO_CLM_SHIPMENT_MODES	Shipment Modes	MOT-CC	Motor (Common Carrier)
PO_CLM_SHIPMENT_MODES	Shipment Modes	MOT-F	Motor (Flatbed)
PO_CLM_SHIPMENT_MODES	Shipment Modes	MOT-PC	Motor (Package Carrier)
PO_CLM_SHIPMENT_MODES	Shipment Modes	MOT-V	Motor (Van)
PO_CLM_SHIPMENT_MODES	Shipment Modes	OC	Ocean
PO_CLM_SHIPMENT_MODES	Shipment Modes	OC-CC	Ocean Conference Carrier

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_SHIPMENT_MODES	Shipment Modes	OC-NCC	Ocean Non-Conference Carrier
PO_CLM_SHIPMENT_MODES	Shipment Modes	PA	Pooled Air
PO_CLM_SHIPMENT_MODES	Shipment Modes	PC	Private Carrier
PO_CLM_SHIPMENT_MODES	Shipment Modes	PIP	Pipeline
PO_CLM_SHIPMENT_MODES	Shipment Modes	PP	Pooled Piggyback
PO_CLM_SHIPMENT_MODES	Shipment Modes	PPS	Private Parcel Service
PO_CLM_SHIPMENT_MODES	Shipment Modes	PR	Pooled Rail
PO_CLM_SHIPMENT_MODES	Shipment Modes	PT	Pooled Truck
PO_CLM_SHIPMENT_MODES	Shipment Modes	PTP	Pool to Pool
PO_CLM_SHIPMENT_MODES	Shipment Modes	PV	Private Vessel
PO_CLM_SHIPMENT_MODES	Shipment Modes	RD-RL	Road railer
PO_CLM_SHIPMENT_MODES	Shipment Modes	RL	Rail
PO_CLM_SHIPMENT_MODES	Shipment Modes	RL-LC	Rail, Less than Carload

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_SHIPMENT_MODES	Shipment Modes	S/A	Sea/Air
PO_CLM_SHIPMENT_MODES	Shipment Modes	SA	Shipper Agent
PO_CLM_SHIPMENT_MODES	Shipment Modes	SA-T	Shipper Agent (Truck)
PO_CLM_SHIPMENT_MODES	Shipment Modes	SASS	Shipper Association
PO_CLM_SHIPMENT_MODES	Shipment Modes	ST-S	Steamship
PO_CLM_SHIPMENT_MODES	Shipment Modes	ST-T	Stack Train
PO_CLM_SHIPMENT_MODES	Shipment Modes	SUP-T	Supplier Truck
PO_CLM_SIZE_STANDARD	Size Standards	$10M-$17M	$10,000,001 - $17,000,000
PO_CLM_SIZE_STANDARD	Size Standards	$1M-$2M	$1,000,001 - $2,000,000
PO_CLM_SIZE_STANDARD	Size Standards	$2M-$3.5M	$2,000,001 - $3,500,000
PO_CLM_SIZE_STANDARD	Size Standards	$3.5M-$5M	$3,500,001 - $5,000,000
PO_CLM_SIZE_STANDARD	Size Standards	$5M-$10M	$5,000,001 - $10,000,000
PO_CLM_SIZE_STANDARD	Size Standards	101-250_EMP	101-250 employees
PO_CLM_SIZE_STANDARD	Size Standards	LT_TH_50EMP	less than 50 employees

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_CLM_SIZE_STANDARD	Size Standards	501-750_EMP	501-750 employees
PO_CLM_SIZE_STANDARD	Size Standards	51-100_EMP	51-100 employees
PO_CLM_SIZE_STANDARD	Size Standards	751-1000_EMP	751-1000 employees
PO_CLM_SIZE_STANDARD	Size Standards	GT_TH_$17M	greater than $17,000,000
PO_CLM_SIZE_STANDARD	Size Standards	GT_TH_1000_EMP	greater than 1000 employees
PO_CLM_SIZE_STANDARD	Size Standards	LT_TH_$1M	less than $1,000,000
PO_CLM_SIZE_STANDARD	Size Standards	251-500_EMP	251-500 employees
PO_CLM_VENDOR_SIZE	Vendor Size	SMALL	Small
PO_CLM_VENDOR_SIZE	Vendor Size	OTHER	Other Than Small
PO_DEL_ORD_STD_FORM	Order off IDV Standard Forms	DD1155	DD1155
PO_DEL_ORD_STD_FORM	Order off IDV Standard Forms	SF1449	SF1449
PO_DEL_ORD_STD_FORM	Order off IDV Standard Forms	OF347	OF347
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	AWARD_FEE	FEE

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	TIME_MATERIALS	T&M
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	COST_PLUS_AWARD_FEE	CPAF
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	COST_PLUS_FIXED_FEE	CPFF
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	COST_PLUS_INCENTIVE_FEE	CPIF
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	COST_SHARING	CS
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	FP_AWARD_FEE	FPAF
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	FP_ECONOMIC_PRICE_ADJ	FP-EPA
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	FP_FIRM	FFP
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	FP_INCENTIVE_FIRM_TARGET	FPI-FIRM
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	FP_INCENTIVE_SUCCESSIVE_TARGET	FPI-SUC

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	FP_LEVEL_EFFORT	FP-LOE
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	FP_PROSPECTIVE_REDETERMINATION	FP-PPR
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	FP_RETRO_REDETERMINATION	FCP-RPR
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	LABOR_HOUR	LH
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	OTHER_DIRECT_COSTS	ODC
PO_FEDERAL_CONTRACT_TYPES_AMT	PO Federal Contract Types for Complex Pricing Amount Lines	COST_CONTRACT	COST
PO_IDV_STD_FORM	IDV Standard Forms	SF1442	SF1442
PO_IDV_STD_FORM	IDV Standard Forms	SF1447	SF1447
PO_IDV_STD_FORM	IDV Standard Forms	SF33	SF33
PO_IDV_STD_FORM	IDV Standard Forms	SF252	SF252
PO_IDV_STD_FORM	IDV Standard Forms	SF26	SF26
PO_IDV_STD_FORM	IDV Standard Forms	SF1449	SF1449
PO_MOD_STD_FORM	Modification Standard Form	SF30	SF30
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	COTR_OFFICE	COTR Office

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	INV_OFFICE	Invoice Office
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	ISSUING_OFFICE	Issuing Office
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	SBA_OFFICE	SBA Office
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	MOD_ISSUING_OFFICE	Modification Issuing Office
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	PAY_OFFICE	Payment Office
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	PRO_ADMIN_OFFICE	Property Administration Office
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	REQ_OFFICE	Requesting Office
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	ADMIN_OFFICE	Administration Office
PO_MOD_UDA_ADDRESS_TYPES	PO Mod UDA Address Types	MOD_ADMIN_OFFICE	Modification Adminstration Office
PO_SOL_AMEND_STD_FORM	Solicitation Amendment Standard Form	SF30	SF30
PO_SOL_STD_FORM	Solicitation Standard Forms	SF1447	SF1447
PO_SOL_STD_FORM	Solicitation Standard Forms	SF18	SF18
PO_SOL_STD_FORM	Solicitation Standard Forms	SF33	SF33

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_SOL_STD_FORM	Solicitation Standard Forms	SF1442	SF1442
PO_SOL_STD_FORM	Solicitation Standard Forms	SF1449	SF1449
PO_UDA_ADDRESS_TYPES	PO UDA Address Types	INV_OFFICE	Invoice Office
PO_UDA_ADDRESS_TYPES	PO UDA Address Types	COTR_OFFICE	COTR Office
PO_UDA_ADDRESS_TYPES	PO UDA Address Types	ADMIN_OFFICE	Administration Office
PO_UDA_ADDRESS_TYPES	PO UDA Address Types	SBA_OFFICE	SBA Office
PO_UDA_ADDRESS_TYPES	PO UDA Address Types	REQ_OFFICE	Requesting Office
PO_UDA_ADDRESS_TYPES	PO UDA Address Types	PRO_ADMIN_OFFICE	Property Administration Office
PO_UDA_ADDRESS_TYPES	PO UDA Address Types	PAY_OFFICE	Payment Office
PO_UDA_ADDRESS_TYPES	PO UDA Address Types	ISSUING_OFFICE	Issuing Office
PO_UDA_MOD_AUTHORITY	Po Uda Modification Authority	SUPPLEMENTAL_AGREE_PURSUANT	This supplemental agreement is entered into pursuant to the authority of:
PO_UDA_MOD_AUTHORITY	Po Uda Modification Authority	OTHER_AUTHORITY	Other Authority:

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_UDA_MOD_AUTHORITY	Po Uda Modification Authority	ADMIN_CHANGE_PURSUANT_TO	This modification is issued to reflect admin changes pursuant to FAR43.103(b)
PO_UDA_MOD_AUTHORITY	Po Uda Modification Authority	CHANGE_PURSUNT_TO	This change order is issued pursuant to :
PO_USER_DOCUMENT_STATUS	User Document Status	TERMINATED FOR CONVENIENCE	Terminated for convenience
PO_USER_DOCUMENT_STATUS	User Document Status	TERMINATED FOR CAUSE	Terminated for Cause
PO_USER_DOCUMENT_STATUS	User Document Status	NOCOSTCANCEL	No Cost Cancel
PO_USER_DOCUMENT_STATUS	User Document Status	TERMINATED FOR DEFAULT	Terminated for default
PON_FBO_EMAIL	Email of FedBizOpps	EMAIL_CC	test2@localhost
PON_FBO_EMAIL	Email of FedBizOpps	EMAIL_TO	test1@localhost
PON_GROUP_TYPE	Group Types for Auction Lines	LOT	Lot
PON_GROUP_TYPE	Group Types for Auction Lines	GROUP	Group
PON_GROUP_TYPE	Group Types for Auction Lines	LOT_LINE	Lot Line
PON_GROUP_TYPE	Group Types for Auction Lines	LINE	Line
PON_GROUP_TYPE	Group Types for Auction Lines	GROUP_LINE	Group Line

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PON_HEADER_ATTRIBUTE_GROUPS	Sourcing Requirement Sections	GENERAL	General
PON_LINE_ATTRIBUTE_GROUPS	Sourcing Line Attribute Groups	GENERAL	General
PON_MOVE_TYPE	Move Types for Auction Lines	AFTER	Move after selected line
PON_MOVE_TYPE	Move Types for Auction Lines	WITHIN	Move as subline(s) under selected line
PON_MOVE_TYPE	Move Types for Auction Lines	BEFORE	Move before selected line
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	B_AWARD_APPROVAL_APPROVED	Award Approval: Approved
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	B_AWARD_APPROVAL_REJECTED	Award Approval: Rejected
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	S_RESP_DISQ_SUPPLIER	Response Disqualification to Disqualified Suppliers
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	S_RESP_DISQ_INVITEE_RESPONDENT	Response Disqualification to Other Invitees and Respondents
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	S_OD_MESSAGE_SENT	Online Discussion Message Sent to Supplier
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	S_NEW_ROUND_EXCLUDED_SUPP	New Round to Excluded Suppliers
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	S_NEG_EXTENSION	Negotiation Extension

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	S_NEG_EARLY_CLOSE	Negotiation Early Close
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	S_NEG_CANCEL	Negotiation Cancellation
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	S_AWARD_DECISION	Award Decision
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	B_RESPONSE_SUBMITTED	Response Submitted
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	B_OD_MESSAGE_SENT	Online Discussion Message Sent to Buyer
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	B_NEG_OPEN	Negotiation Open
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	B_NEG_APPROVAL_REJECTED	Negotiation Approval: Rejected
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	B_NEG_APPROVAL_APPROVED	Negotiation Approval: Approved
PON_NOTIF_SUBSCRIPTIONS	Notification Groups Definition	B_COLLAB_TEAM_TASK_COMPLETED	Collaboration Team Task Completed
PON_PF_TYPE_ALLOWED	PON: Price Factor Type Allowed	BOTH	Buyer & Supplier
PON_PF_TYPE_ALLOWED	PON: Price Factor Type Allowed	BUYER	Buyer
PON_PF_TYPE_ALLOWED	PON: Price Factor Type Allowed	NONE	None
PON_PF_TYPE_ALLOWED	PON: Price Factor Type Allowed	SUPPLIER	Supplier

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PON_PRICE_FACTOR_TYPE	PON: Price Factor Type	SUPPLIER	Supplier
PON_PRICE_FACTOR_TYPE	PON: Price Factor Type	BUYER	Buyer
PON_REM_NOTIF_PARAMS	Reminder Notification Parameters	BEFORE_CLOSE_DATE	Before close date
PON_REM_NOTIF_PARAMS	Reminder Notification Parameters	AFTER_OPEN_DATE	After open date
PON_REM_NOTIF_PARAMS	Reminder Notification Parameters	AFTER_PREVIEW_DATE	After preview date
PON_SOLICITATION_TYPE	PON: SOLICITATION TYPE	RFQ	RFQ
PON_SOLICITATION_TYPE	PON: SOLICITATION TYPE	IFB	IFB
PON_SOLICITATION_TYPE	PON: SOLICITATION TYPE	RFP	RFP
PON_SUPPLIER_VIEW_TYPE	PON: Supplier View Type	UNTRANSFORMED	Untransformed
PON_SUPPLIER_VIEW_TYPE	PON: Supplier View Type	TRANSFORMED	Transformed
ICX_AMENDMENT_TYPE	Amendment Type	ADDED	Added
ICX_AMENDMENT_TYPE	Amendment Type	CHANGED	Changed

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
ICX_AMENDMENT_TYPE	Amendment Type	CANCELLED	Cancelled
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	ACQUISITION_FOREIGN_GOVT	* Acquisition for foreign government
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	CLASSIFIED	* Disclosure of Classified Information
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	DEFENSE_OUTSIDE_US	* Defense contract performed outside U.S.
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	EXPERT_LITIGATION	* Expert litigation services
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	INDEFINITE_DELIVERY	* Indefinite Delivery Contract Order
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	INTER_GOVT_AGENCY	* Inter-government agency purchase
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	UTILITY_SERVICES	* Utility Services
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	PREVIOUSLY_SYNOPSIZED	* Action under previously synopsized contract
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	SIMPLE_ACQUISTION_GPE	* Simplified Acquisition Procedures through GPE
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	SMALL_BUSINESS	* Small Business Innovation award
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	SOLE_SOURCE	* Sole source for industrial mobilization, authorized by statute

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	UNSOLICITED_RESEARCH	* Unsolicited Research Proprietary Proposal
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	URGENCY	* Unusual and compelling urgency
PON_FEDERAL_PUBLICATION	PON: Federal Publication Exception	PERISHABLE_SUBSISTENCE	* Perishable subsistence supplies
CLM_SPEC_CONTRACT_TYPE	Clm Special Contract Type	CONTINGENCY_CONT	Contingency Contract
CLM_SPEC_CONTRACT_TYPE	Clm Special Contract Type	OBLIGATION_DOC	Obligation Document
CLM_SPEC_MOD_TYPE	Clm Special Modification Type	CONTINGENCY_MOD	Contingency Modification
CLM_CONTRACT_FINANCING	Contract Financing	ADVANCE_PAYMENTS	Advance Payments
CLM_CONTRACT_FINANCING	Contract Financing	CUSTOMARY_CONTRACT_FINANCING	Customary Contract Financing
CLM_CONTRACT_FINANCING	Contract Financing	INTERIM_PAYMENTS	Interim Payments
CLM_CONTRACT_FINANCING	Contract Financing	UNUSUAL_CONTRACT_FINANCING	Unusual Contract Financing
CLM_CONTRACT_FINANCING	Contract Financing	LOAN_GUARANTEES	Loan Guarantees
CLM_CONTRACT_FINANCING	Contract Financing	PRIVATE_WITHOUT_GOVT_GUARANTEE	Private Financing without Government Guarantees
CLM_CONTRACT_FINANCING	Contract Financing	PROGRESS PAYMENTS	Progress Payments

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
CLM_CONTRACT_FINANCING	Contract Financing	PERFORMANCE_PAYMENTS	Performance Payments
CLM_DELIVERY_EVENT	Delivery Event Code	ADC	After Date of Contract
CLM_DELIVERY_EVENT	Delivery Event Code	AFATA	After First Article Test Approval
CLM_DELIVERY_EVENT	Delivery Event Code	AFPLA	After Production Lot Test Approval
CLM_DELIVERY_EVENT	Delivery Event Code	ANA	After Notice of Award
CLM_DELIVERY_EVENT	Delivery Event Code	ADNPR	After Date of Notice to Proceed Receipt
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	CANCEL_CONTRACT	Cancel Document
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	CREATE_NEW_VERSION	Create New Revision
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	DELETE	Delete
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	DUPLICATE	Duplicate
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	MANAGE_APPROVERS	Manage Approvers
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	SIGN_CONTRACT	Submit For Signature
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	SUBMIT_FOR_APPROVAL	Submit For Approval
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	UPDATE	Update

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	VIEW_ACTION_HISTORY	View Action History
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	VIEW_APPROVERS	View Approvers
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	VIEW_PDF	View PDF
OKC_REP_CON_ACTIONS_SBCR	Repository Contracts Actions for SBCR	WITHDRAW	Withdraw
OKC_REP_SBCR_ACQ_SET_ASIDE	SBCR Set Aside Acquisition History	PREV_HBCUMI	HBCU/MI Set-Aside
OKC_REP_SBCR_ACQ_SET_ASIDE	SBCR Set Aside Acquisition History	PREV_OTHER	Other
OKC_REP_SBCR_ACQ_SET_ASIDE	SBCR Set Aside Acquisition History	PREV_RESPSB	Two or more responsive SB offers on prior acquisition
OKC_REP_SBCR_ACQ_SET_ASIDE	SBCR Set Aside Acquisition History	PREV_RESPSDB	One or more responsive SDB offers within 10% of award price
OKC_REP_SBCR_ACQ_SET_ASIDE	SBCR Set Aside Acquisition History	PREV_SB	SB Set-Aside
OKC_REP_SBCR_ACQ_SET_ASIDE	SBCR Set Aside Acquisition History	PREV_SDB	SDB Set-Aside
OKC_REP_SBCR_ACQ_SET_ASIDE	SBCR Set Aside Acquisition History	PREV_SDVSB	Service-Disabled Veteran SB
OKC_REP_SBCR_ACQ_SET_ASIDE	SBCR Set Aside Acquisition History	PREV_SECTION8A	Section 8(a)
OKC_REP_SBCR_ACQ_SET_ASIDE	SBCR Set Aside Acquisition History	PREV_WOSB	Women Owned SB

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	EPFORSDB	Evaluation Preference for SDBs
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	ESB	Emerging Small Business Set-Aside
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	HBCUMI	HBCU/MI Set-Aside
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	HUBZONE	Hubzone Set-Aside
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	HZPEPREF	Hubzone Price Evaluation Preference
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	HZSOLESRC	Hubzone Sole Source
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	SB	Small Business (SB) Set-Aside
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	SDB	Small Disadvantaged Business (SDB) Set-Aside
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	SEC8ACOMPETITIVE	Section 8(a) Competitive
OKC_REP_SBCR_REC_SET_ASIDE	SBCR Recommendations for Set Aside	SEC8ASOLESOURCE	Section 8(a) Sole Source
PO_RETENTION_UOM	Retention UOM	DAYS	Days

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
PO_RETENTION_UOM	Retention UOM	YEARS	Years
PO_RETENTION_UOM	Retention UOM	WEEKS	Weeks
PO_RETENTION_UOM	Retention UOM	MONTHS	Months
CCS_SIGN_TYPE	CCS Signature Type	SELF	Self
CCS_SIGN_TYPE	CCS Signature Type	ACKNOWLEDGE	Acknowledge
CLOSEOUT_ACTIONS	Manage Closeout Page Actions	VIEW_CHECKLIST	View Checklist
CLOSEOUT_ACTIONS	Manage Closeout Page Actions	MANAGE_TASKS	Manage Tasks
CLOSEOUT_ACTIONS	Manage Closeout Page Actions	MANAGE_CHECKLIST	Manage Checklist
CLOSEOUT_ACTIONS	Manage Closeout Page Actions	VIEW_CT_PDF	View Checklist PDF
CLOSEOUT_ACTIONS	Manage Closeout Page Actions	VIEW_CCS_PDF	View Contract Completion PDF
OKC_DEL_CATEGORIES	Deliverable Categories	CDRL	Data Deliverable
OKC_DEL_CATEGORIES	Deliverable Categories	MILESTONE	Milestone
OKC_DEL_CATEGORIES	Deliverable Categories	TASK	Task

* - indicates that the lookup is used in FedBizOpps.

The system lookups in CLM are as follows:

System Lookups

Lookup Type	Lookup Type Display
PO_CLM_ACO_NUM_CONSTANTS	PO CLM ACO Number Constants
PO_CLM_PCO_NUM_CONSTANTS	PO CLM PCO Number Constants
PO_CLM_SERIAL_NUM_CONSTANTS	PO Lookup for Document Serial Number

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
CLM_PAYMENT_INST	Payment Instruction	BY_CANCELLATION_DATE	By Cancellation Date
CLM_PAYMENT_INST	Payment Instruction	BY_FISCAL_YR	By Fiscal Year
CLM_PAYMENT_INST	Payment Instruction	SINGLE_FUNDING	Single Funding
CLM_PAYMENT_INST	Payment Instruction	KO_SPECIFIED	Contracting Officer Specified
CLM_PAYMENT_INST	Payment Instruction	SEQ_ACRN_ORDER	Sequential ACRN Order
CLM_PAYMENT_INST	Payment Instruction	BY_PRORATION	By Proration
CLM_PERIOD	Period	DAYS	Days
CLM_PERIOD	Period	WEEKS	Weeks
CLM_PERIOD	Period	MONTHS	Months
OKC_REP_SBCR_COOR_TYPE	Coordination Type for SBCR Contracts	INITIAL	Initial Contact

Lookup Type	Lookup Type Display	Lookup Code	Lookup Code Display
OKC_REP_SBCR_COOR_TYPE	Coordination Type for SBCR Contracts	MODIFICATION	Modification
OKC_REP_SBCR_COOR_TYPE	Coordination Type for SBCR Contracts	WITHDRAWN	Withdrawal
OKC_DEL_SCHEDULE_TYPE	Deliverable Schedule Type	NONE	Nonschedulable
OKC_DEL_SCHEDULE_TYPE	Deliverable Schedule Type	SYSTEM	System
OKC_DEL_REPEAT_FREQ	Deliverable Repeat Frequency	MTH	Months
OKC_DEL_REPEAT_FREQ	Deliverable Repeat Frequency	WK	Weeks
OKC_DEL_REPEAT_FREQ	Deliverable Repeat Frequency	DAY	Days

B

List of XML Publisher Templates associated with Standard Forms and Document Formats

XML Publisher Templates for Standard forms for Awards/IDVs/Solicitations

The following tables list the pre-defined XML Publisher templates corresponding to each of the supported standard face page and continuation format grouped against the respective document types.

Document	Supported Standard Forms	Description	Seeded XML Template Code / Name
Solicitation	SF18	Request for Quotation	PONSOLSF18
	SF33	Solicitation, Offer and Award	PONSOLSF33
	SF1442	Solicitation, Offer and Award(Construction, Alteration or Repair)	PONSOLSF1442
	SF1447	Solicitation/Contract	PONSOLSF1447
	SF1449	Solicitation, Contract, Order for Commercial Items	PONSOLSF1449

Document	Supported Standard Forms	Description	Seeded XML Template Code / Name
Solicitation Amendment	SF30	Amendment of Solicitation	PONAMENDSF30
Award	SF26	Award/Contract	POAWDSF26
	SF33	Solicitation, Offer and Award	POAWDSF33
	SF252	Architect-Engineer Contract	POAWDSF252
	SF1442	Solicitation, Offer and Award(Construction, Alteration or Repair)	POAWDSF1442
	SF1447	Solicitation/Contract	POAWDSF1447
	SF1449	Solicitation, Contract, Order for Commercial Items	POAWDSF1449
	DD1155	Order for Supplies or Services	POAWDDD1155
	OF347	Order for Supplies or Services	POAWDOF347
IDV	SF26	Award/Contract	POIDVSF26
	SF33	Solicitation, Offer and Award	POIDVSF33
	SF252	Architect-Engineer Contract	POIDVSF252
	SF1442	Solicitation, Offer and Award(Construction, Alteration or Repair)	POIDVSF1442
	SF1447	Solicitation/Contract	POIDVSF1447

Document	Supported Standard Forms	Description	Seeded XML Template Code / Name
	SF1449	Solicitation, Contract, Order for Commercial Items	POIDVSF1449
Order Referencing IDV	SF1449	Solicitation, Contract, Order for Commercial Items	PODELSF1449
	DD1155	Order for Supplies or Services	PODELDD1155
	OF347	Order for Supplies or Services	PODELOF347
Modification	SF30	Modification of Contract	POMODSF30

XML Publisher Templates and Document Formats for Awards/IDVs/Solcitations

Document	Supported Document Format	Description	Seeded XML Template Code / Name
PO Award Document Formats	UCF	Unified Contract Format	POUCFAWARD
	COM	Commercial Format	POCOMAWARD
	CSI	Construction Format	POCSIAWARD
PO IDV Document Formats	UCF	Unified Contract Format	POUCFIDV
	COM	Commercial Format	POCOMIDV
	CSI	Construction Format	POCSIIDV

Document	Supported Document Format	Description	Seeded XML Template Code / Name
PO Mod Document Formats	SGD	System Generated Description	POMODSGD
PON Solicitation Document Formats	UCF	Unified Contract Format	PONUCFSOL
	COM	Commercial Format	PONCOMSOL
	CSI	Construction Format	PONCSISOL
PON Amendment Document Formats	SGD	System Generated Description	PONAMDSGD

XML Publisher Data Definitions for Awards/IDVs/Solicitations

Document Type	BI Publisher Data Definition Code	BI Publisher Data Definition Name
Award Modification	PO_STD_MOD_DT	Modification Data template
IDV Modification	PO_STD_MOD_DT	Modification Data template
Solicitation Amendment	PON_AMEND	Amendment Data template
Award	PO_STD_PO	Award Data template
IDV	PO_BPA	IDV Data template
Solicitation	PON_SOLICIT	Solicitation Data template

Other XML Publisher Templates

This table lists the XML Publisher Templates used in printing various documents within CLM.

Use	Data Definition Code	Name	Template Code	Template Name	Description
Closeout Checklist PDF	POCLOSEOUTCT	Closeout Checklist Template	POCLOSEOUTCT	Closeout Checklist Template	Used to print the checklist used during the Award / IDV closeout process.
Closeout CCS PDF	POCLOSEOUTCCS	Closeout Contract Completion Statement	POCLOSEOUTCCS	Closeout Contract Completion Statement Layout	This template is used as the contract completion statement during the closeout process. The DD1594 form is used.
Exhibit PDF for Award	PO_STD_PO	Award Data template	POEXHIBIT	POEXHIBIT	This template is used to print the exhibit lines in an award. The face page printing the exhibit details are also part of the same template.
Exhibit PDF for IDV	PO_BPA	IDV Data template	POEXHIBIT	POEXHIBIT	This template is used to print the exhibit lines in an IDV. The face page printing the exhibit details are also part of the same template.

Use	Data Definition Code	Name	Template Code	Template Name	Description
Exhibit PDF for Solicitation	PON_SOLICIT	Solicitation data template	PONEXHIBIT	PON Exhibit template	This template is used to print the exhibit lines in a solicitation. The face page printing the exhibit details are also part of the same template.
Military Interdepartmental Purchase Request Report	ICXCLMREQ_XML	Military Interdepartmental Purchase Request Report	ICXMIPRDD448	ICXMIPRDD448	This template is used to print the Military Interdepartmental Purchase Request. The DD448 form is used.
Military Interdepartmental Purchase Request Report	ICXCLMREQ_XML	Military Interdepartmental Purchase Request Report	ICXMIPRDD4482	ICXMIPRDD4482	This template is used to print the Military Interdepartmental Purchase Request acceptance. The DD4482 form is used.
Military Interdepartmental Purchase Request Report	ICXCLMREQ_XML	Military Interdepartmental Purchase Request Report	ICXDD448SUB	ICXDD448SUB	This is a continuation sheet to the MIPR.
Military Interdepartmental Purchase Request Report	ICXCLMREQ_XML	Military Interdepartmental Purchase Request Report	ICXDD4482SUB	ICXDD4482SUB	This is a continuation sheet to the MIPR acceptance.

Use	Data Definition Code	Name	Template Code	Template Name	Description
DD2579	OKCCLMSB CRDT	Small Business Coordinati on Record Data Template	OKCCLMSB CRT	Small Business Coordination Record PDF Template	This template is used to print the Small Business Coordination Record. The DD2579 form is used.
CDRL	OKCCDRL	CDRL Data Template	OKCCDRL	CDRL PDF Template	This template is used to print the data deliverables that are marked as exhibits in Solicitations, Awards, IDVs. DD1423 form is used.
CDRL	OKCCDRL	CDRL Data Template	OKCCDRLF P	CDRL Face Page Template	This is the cover page printing exhibit details of CDRLs in an solicitation, award, IDV.

C

List of Federal Attributes used in Contract Expert

Federal Attributes in Contract Expert

Federal fields are modeled as UDA in procurement documents that can be used in Contract Expert. Seeded contract variables corresponding to federal fields are available. You can create rules using these variables, as you would for any other variables. At runtime, Procurement Contracts calls the UDA APIs to fetch the value corresponding to the federal fields for that document. The list of seeded variables is as follows:

Contract Variable Name	Attribute Group Name	Attribute Name
Set Aside Type	Competitive Information	Set Aside Type
Set Aside Status	Competitive Information	Set Aside Status
Set Aside Percentage	Competitive Information	Set Aside Percent
Size Standard	Competitive Information	Size Standard
CCR Exception Reason	Supplier Details	CCR Exception Reason
EFT Exclusion Reason	Supplier Details	EFT Exclusion Reason
Vendor Size	Supplier Details	Supplier Size
Authority for Other than Full and Open Competition	Award Categorization	No Competition Reason

Contract Variable Name	Attribute Group Name	Attribute Name
Administration Office Location Name	Addresses	Location
Administration Office Location Code	Addresses	Address Code
Administration Office Address Line1	Addresses	Address Details XML
Administration Office Address Line2	Addresses	Address Details XML
Administration Office City	Addresses	Address Details XML
Administration Office Country	Addresses	Address Details XML
Administration Office Postal Code	Addresses	Address Details XML
Administration Office State	Addresses	Address Details XML
Administration Office Contact Name	Addresses	Contact
Administration Office Contact Email	Addresses	Contact Details XML
Administration Office Contact Telephone Number	Addresses	Contact Details XML
Administration Office Contact Title	Addresses	Contact Details XML
COTR Office Location Name	Addresses	Location
COTR Office Location Code	Addresses	Address Code
COTR Office Address Line1	Addresses	Address Details XML
COTR Office Address Line2	Addresses	Address Details XML

Contract Variable Name	Attribute Group Name	Attribute Name
COTR Office City	Addresses	Address Details XML
COTR Office Country	Addresses	Address Details XML
COTR Office Postal Code	Addresses	Address Details XML
COTR Office State	Addresses	Address Details XML
COTR Office Contact Name	Addresses	Contact
COTR Office Contact Email	Addresses	Contact Details XML
COTR Office Contact Telephone Number	Addresses	Contact Details XML
COTR Office Contact Title	Addresses	Contact Details XML
Invoice Office Location Name	Addresses	Location
Invoice Office Location Code	Addresses	Address Code
Invoice Office Address Line1	Addresses	Address Details XML
Invoice Office Address Line2	Addresses	Address Details XML
Invoice Office City	Addresses	Address Details XML
Invoice Office Country	Addresses	Address Details XML
Invoice Office Postal Code	Addresses	Address Details XML
Invoice Office State	Addresses	Address Details XML
Invoice Office Contact Name	Addresses	Contact
Invoice Office Contact Email	Addresses	Contact Details XML
Invoice Office Contact Telephone Number	Addresses	Contact Details XML

Contract Variable Name	Attribute Group Name	Attribute Name
Invoice Office Contact Title	Addresses	Contact Details XML
Issuing Office Location Name	Addresses	Location
Issuing Office Location Code	Addresses	Address Code
Issuing Office Address Line1	Addresses	Address Details XML
Issuing Office Address Line2	Addresses	Address Details XML
Issuing Office City	Addresses	Address Details XML
Issuing Office Country	Addresses	Address Details XML
Issuing Office Postal Code	Addresses	Address Details XML
Issuing Office State	Addresses	Address Details XML
Issuing Office Contact Name	Addresses	Contact
Issuing Office Contact Email	Addresses	Contact Details XML
Issuing Office Contact Telephone Number	Addresses	Contact Details XML
Issuing Office Contact Title	Addresses	Contact Details XML
Payment Office Location Name	Addresses	Location
Payment Office Location Code	Addresses	Address Code
Payment Office Address Line1	Addresses	Address Details XML
Payment Office Address Line2	Addresses	Address Details XML
Payment Office City	Addresses	Address Details XML

Contract Variable Name	Attribute Group Name	Attribute Name
Payment Office Country	Addresses	Address Details XML
Payment Office Postal Code	Addresses	Address Details XML
Payment Office State	Addresses	Address Details XML
Payment Office Contact Name	Addresses	Contact
Payment Office Contact Email	Addresses	Contact Details XML
Payment Office Contact Telephone Number	Addresses	Contact Details XML
Payment Office Contact Title	Addresses	Contact Details XML
Property Administration Office Location Name	Addresses	Location
Property Administration Office Location Code	Addresses	Address Code
Property Administration Office Address Line1	Addresses	Address Details XML
Property Administration Office Address Line2	Addresses	Address Details XML
Property Administration Office City	Addresses	Address Details XML
Property Administration Office Country	Addresses	Address Details XML
Property Administration Office Postal Code	Addresses	Address Details XML
Property Administration Office State	Addresses	Address Details XML

Contract Variable Name	Attribute Group Name	Attribute Name
Property Administration Office Contact Name	Addresses	Contact
Property Administration Office Contact Email	Addresses	Contact Details XML
Property Administration Office Contact Telephone Number	Addresses	Contact Details XML
Property Administration Office Contact Title	Addresses	Contact Details XML
Requesting Office Location Name	Addresses	Location
Requesting Office Location Code	Addresses	Address Code
Requesting Office Address Line1	Addresses	Address Details XML
Requesting Office Address Line2	Addresses	Address Details XML
Requesting Office City	Addresses	Address Details XML
Requesting Office Country	Addresses	Address Details XML
Requesting Office Postal Code	Addresses	Address Details XML
Requesting Office State	Addresses	Address Details XML
Requesting Office Contact Name	Addresses	Contact
Requesting Office Contact Email	Addresses	Contact Details XML
Requesting Office Contact Telephone Number	Addresses	Contact Details XML

Contract Variable Name	Attribute Group Name	Attribute Name
Requesting Office Contact Title	Addresses	Contact Details XML
Small Business Administration Office Location Name	Addresses	Location
Small Business Administration Office Location Code	Addresses	Address Code
Small Business Administration Office Address Line1	Addresses	Address Details XML
Small Business Administration Office Address Line2	Addresses	Address Details XML
Small Business Administration Office City	Addreses	Address Details XML
Small Business Administration Office Country	Addresses	Address Details XML
Small Business Administration Office Postal Code	Addresses	Address Details XML
Small Business Administration Office State	Addresses	Address Details XML
Small Business Administration Office Contact Name	Addresses	Contact
Small Business Administration Office Contact Email	Addresses	Contact Details XML

Contract Variable Name	Attribute Group Name	Attribute Name
Small Business Administration Office Contact Telephone Number	Addresses	Contact Details XML
Small Business Administration Office Contact Title	Addresses	Contact Details XML

Following is the list of seeded variables (non-UDA) that are used as federal attributes in Contract Expert:

Contract Variable Name	Business document Mapping Table Name	Business document Mapping Column Name (Description)
Closing Date	PO_HEADERS_ALL	CLOSED_DATE (Closed Date)
Effective Date	PO_HEADERS_ALL	CLM_EFFECTIVE_DATE (Effective Date)
Referenced external IDV/GSA Schedule Number	PO_HEADERS_ALL	CLM_EXTERNAL_IDV (External IDV number)
Type	PO_HEADERS_ALL	CLM_AWARD_TYPE (Award Type)
Vendors Offer Number	PO_HEADERS_ALL	CLM_VENDOR_OFFER_NUMBER (Supplier Offer Number)
Format	PO_HEADERS_ALL	CLM_DOCUMENT_FORMAT (Document Format)

The file okcclmvar.sql contains the seeded variables and is part of the CLM feature pack.

D

Additional Resources

Related Information

Please refer to the following guides and whitepapers/notes for additional information on setting up, using and integrating with other products in Oracle e-Business Suite.

Related Guides in Oracle e-Business Suite

- Oracle Purchasing User's Guide
- Oracle iProcurement Implementation and Administration Guide
- Oracle Sourcing Implementation and Administration Guide
- Oracle iSupplier Portal Implementation Guide
- Oracle U.S. Federal Financials Implementation Guide
- Oracle Financials Implementation Guide
- Oracle Financials and Oracle Procurement Functional Upgrade Guide: Release 11i to Release 12
- Oracle Payables Implementation Guide
- Oracle HRMS Approvals Management Implementation Guide
- Oracle HRMS Configuring, Reporting, and System Administration Guide
- Oracle Procurement Contracts Implementation and Administration Guide
- Oracle Business Intelligence Publisher Report Designer's Guide

- Oracle Business Intelligence Publisher Administration and Developer's Guide

Related Whitepapers in My Oracle Support

- e-Business Suite CLM Integration with External Financial System

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