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Send Us Your Comments

Oracle Service Contracts Implementation Guide, Release 12.2
Part No. E48995-02

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

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

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

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.
Preface

Intended Audience


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.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

1 Overview of Implementing Oracle Service Contracts
This chapter describes the setup steps before and for implementing Oracle Service Contracts.

2 Setting Up Oracle Service Contracts
This chapter describes the steps required to use Oracle Service Contracts.

3 Setting Up Service Pricing and Billing
This chapter describes the process for setting pricing and billing features in Oracle Service Contracts.

4 Setting Up Contract Events
This chapter describes events in Oracle Service Contracts.

5 Setting Up Automatic Renewals
This chapter describes the process of renewing a contract automatically.

6 Enabling Integrations within the Oracle E-Business Suite
This chapter describes the steps to enable integration of the Oracle Service Contracts features with other Oracle E-Business Suite applications.

A System Profiles
This appendix lists the profile options.

B Lookups
This appendix lists the lookup types.

C Concurrent Programs
This appendix lists the concurrent programs.

Related Information Sources

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

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

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

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

- PDF - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently.

- Online Help - Online help patches (HTML) are available on My Oracle Support.

- Release Notes - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

**Guides Related to All Products**


This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

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

**Guides Related to This Product**

**Oracle Advanced Pricing User's Guide**

Oracle Advanced Pricing calculates prices including promotional prices for Oracle Order Management and other Oracle Applications based on pricing rules, pricing relationships, item hierarchies, usage brackets, and deals and promotions.

**Oracle Bills of Material User's Guide**

Oracle Manufacturing and Oracle Order Management use bills of material to store lists of items that are associated with a parent item and information about how each item is related to its parent. Oracle Manufacturing supports standard, model, option class, and planning bills of material.

**Oracle Contracts Implementation and Administration Guide**

Oracle Contracts enable organizations to define the terms and conditions of a contract between the parties that are buying and selling products or services. These can be terms for pricing, shipment, payment, quality, and other business and legal obligations. Oracle Contracts provides the common infrastructure components for other contracts modules such as Oracle Sales Contracts, Oracle Procurement Contracts, Oracle Service Contracts, and Oracle Project Contracts.

**Oracle Depot Repair Implementation Guide**

For Oracle Depot Repair, you must first implement Oracle Contracts, Oracle HRMS, and the main modules of Oracle Financials, Supply Chain Management, and Service for
Marketing and Sales. Then, use this guide to set up service activities for a replacement order of spares or a return for repair, service activity billing and install base transaction types, business processes, and labor schedules. This guide also describes how to set up customer profiles, repair types, repair type statuses, service request types, and codes for repair reasons, diagnostics, message actions, and service,

**Oracle Installed Base User's Guide**

Oracle Installed Base is an item instance life cycle tracking application that facilitates enterprise-wide life cycle item management and tracking capability. Several Oracle Order Management transactions interact with Oracle Inventory and Oracle Installed Base.

**Oracle Inventory User's Guide**

This guide enables you to configure the Oracle Inventory structure to best represent your company's inventory sites and business units after you have defined your required ledger and key flexfields. You can also learn about centralized and decentralized inventory structures, and controls and reference options for using and maintaining inventory items such as categories, commodity codes, attributes, statuses, relationships, and picking rules.

**Oracle Knowledge Management Implementation and Administration Guide**

Oracle Knowledge Management is an information management system that enables you to create information solutions, submit the solution to an authoring flow for review and edit, and create solution groups for browse and search convenience. This guide describes how you can set up knowledge repositories for a service provider or service requester and control access levels of users to categories, solutions, and to statements within a solution.

**Oracle Order Management User's Guide**

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

**Oracle Service Contracts User Guide**

Oracle Service Contracts enables you to sell multiple types of services each with its own coverage, service and usage lines, price lists and billing schedules, and payment methods and warranties. You create contracts for these services, approve them, and manage the entire contract cycle to ensure timely service entitlement checks and minimize service revenue leakage. You can create a contract manually or automatically through Oracle Order Management or by creating a product that has a warranty in
Oracle TeleService Implementation and User Guide

This guide provides information on how to use Oracle TeleService. Oracle TeleService automates the call center and the resolution process from the time a customer calls in, sends an email, or enters a service request on the Web. Agents can use Oracle TeleService to update customer records, validate product ownership and contract coverage, provide proactive and personalized customer service, and resolve problems that arise from the initial contact using a knowledge base.

Oracle Territory Manager Implementation Guide

With Oracle Territory Manager, you can create geographic territories, account territories, and sales territories using predefined matching attributes to identify territories such as the geographic matching attribute of country. You can also create territory hierarchies to make the territory assignments and searches more efficient. Before you implement Oracle Territory Manager, you must define the purpose of defining territories for your business, the level of usage that the resources assigned to territories may require, and the requirement for overlays.

Installation and System Administration

Oracle Alert User's Guide

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

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

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

Oracle E-Business Suite Developer's Guide

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

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

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

**Oracle E-Business Suite Maintenance Guide**

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

**Oracle E-Business Suite Security Guide**

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

**Oracle E-Business Suite Setup Guide**

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

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

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

**Other Implementation Documentation**


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

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

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

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

Training and Support

Training

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

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

Support

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

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

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

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

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

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

This chapter describes the setup steps before and for implementing Oracle Service Contracts.

This chapter covers the following topics:

- Confirming Oracle Applications Setups
- About Oracle Service Contracts Setups

Confirming Oracle Applications Setups

Before you implement Oracle Service Contracts, confirm the following:

<table>
<thead>
<tr>
<th>Required</th>
<th>Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Set up System Administrator, page 1-2</td>
</tr>
<tr>
<td>Yes</td>
<td>Define Key Flexfields, page 1-2</td>
</tr>
<tr>
<td>Yes</td>
<td>Define Calendar, Currency, and Set of Books, page 1-3</td>
</tr>
<tr>
<td>Yes</td>
<td>Set up Organizations, page 1-4</td>
</tr>
<tr>
<td>Yes</td>
<td>Set up Employees, page 1-5</td>
</tr>
<tr>
<td>Yes</td>
<td>Set up Oracle Inventory, page 1-5</td>
</tr>
<tr>
<td>Optional</td>
<td>Set up Oracle Bills of Material, page 1-5</td>
</tr>
</tbody>
</table>
**Step 1: Set Up System Administrator**

Perform the following setups:

- Set up printers (optional). See the topic about setting up printers in *Oracle E-Business Suite Setup Guide*.

**Step 2: Define Key Flexfields**

Coordinate the flexfield setup among other applications such as Oracle Human Resources Management Systems and Oracle Inventory, before defining the key flexfields for Oracle Service Contracts. You should not modify flexfields frequently. For more information, see *Oracle E-Business Suite Flexfields Guide*.

For each key flexfield, perform the following tasks (some are optional):

- Define the flexfield structure
- Define value sets

<table>
<thead>
<tr>
<th>Required</th>
<th>Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optional</td>
<td>Set up Oracle Work in Process, page 1-5</td>
</tr>
<tr>
<td>Yes</td>
<td>Set up Oracle Order Management, page 1-5</td>
</tr>
<tr>
<td>Yes</td>
<td>Set up Oracle Advanced Pricing, page 1-6</td>
</tr>
<tr>
<td>Optional</td>
<td>Set up Oracle TeleService, page 1-6</td>
</tr>
<tr>
<td>Optional</td>
<td>Set up Oracle Knowledge Management, page 1-6</td>
</tr>
<tr>
<td>Optional</td>
<td>Set up Notes, page 1-6</td>
</tr>
<tr>
<td>Yes</td>
<td>Set up Resources, page 1-6</td>
</tr>
<tr>
<td>Yes</td>
<td>Set up Install Base, page 1-6</td>
</tr>
<tr>
<td>Optional</td>
<td>Set up Oracle Depot Repair, page 1-6</td>
</tr>
<tr>
<td>Optional</td>
<td>Set up Oracle Contracts, page 1-6</td>
</tr>
</tbody>
</table>
• Define flexfield segments
• Define flexfield segment values
• Define security rules
• Assign security rules
• Define roll-up groups
• Define cross-validation rules

Set up the following Accounting flexfield (you may not need to perform this step if you have already installed and set up Oracle General Ledger or performed a common-applications setup. For additional information, see Oracle General Ledger User Guide.

Set up the following Human Resources key flexfields (you may not need to set up these key flexfields if you have already installed and set up Oracle Human Resource Management Systems or performed a common-applications setup. For additional information, see Oracle Human Resources Management Systems Implementation Guide.

• Grade
• Job
• Position
• People Group

Step 3: Define Calendars, Currencies, and Set of Books

If you defined your calendars, currencies, and set of books for other Oracle Applications, proceed to the next step.

Note: If you are performing a Multi-Org implementation, you may optionally create more than one calendar, currency, or set of books. See: Multiple Organizations in Oracle Applications.

Perform the following tasks:
• Set up calendars. See Defining Calendars in Oracle General Ledger User Guide.
• Define period types. See Defining Period Types in Oracle General Ledger User Guide.
• Define accounting calendar. See Defining Calendars in Oracle General Ledger User Guide.
• Define transaction calendar. See Defining Transaction Calendars in Oracle General


*Ledger User Guide.* (Optional)

- Define workday calendar. See Overview of Workday Calendar in *Oracle Bills of Material User’s Guide.* (Optional)

- Define exception templates. See Creating a Workday Exception Template in *Oracle Bills of Material User’s Guide.* (Optional)


- Define conversion rate types. See Defining Conversion Rate Types in *Oracle General Ledger User Guide.*

- Assign your set of books to a responsibility. See Assigning Responsibility to Set of Books in *Oracle General Ledger User Guide.*

- Set up currency rates.

- Set up accounting code combinations. See Setting up Accounting Code Combinations in *Oracle General Ledger User Guide.*

- Open and close accounting periods. See Opening and Closing Accounting Periods in *Oracle General Ledger User Guide.*

**Step 4: Set Up Organizations**

You may not need to perform this step if you have installed and set up Oracle Inventory or performed an Oracle Common Application Components setup. For the following tasks relating to setting up organization, see the *Oracle Human Resources Management Systems Implementation Guide.*

- Define organization QuickCodes

- Define business groups

- Define organizations

- Define human resources organizations

- Define legal entities organizations

- Define Oracle users for operating–unit organizations

- Assign operating units to legal entities

- Set up inventory organizations. For the tasks relating to setting up inventory organizations, see *Oracle Inventory User’s Guide*
• Define organization hierarchies. See *Oracle Human Resources Management Systems Implementation Guide*

• Assign business groups and operating units to responsibilities (make sure that the profile option *HR: Business Group* is set at the responsibility level to the business group for that responsibility. See *Oracle Human Resources Management Systems Implementation Guide*.

• Define profile options:
  • MO: Security Profile
  • Top Reporting Level

**Step 5: Set Up Employees**

You enter and maintain employees in Oracle Human Resources Management Systems. If you do not install Oracle Human Resources Management Systems with Oracle Depot Repair, you can use the Enter Employee form to define and maintain employees in Oracle Purchasing.

**Step 6: Confirm Setup of Oracle Inventory**

Confirm the setup of Oracle Inventory. If your company sells services but does not sell goods you will still need to set up contract items in Oracle Inventory. See the *Oracle Inventory User’s Guide*.

**Note:** Prior to setting up Items in Oracle Inventory, you must set up Coverage Templates, *Oracle Service Contracts User Guide* and Subscription Templates, *Oracle Service Contracts User Guide*.

**Step 7: Confirm Setup of Oracle Bills of Material**

Confirm the setup of Oracle Bills of Material. If your company sells services but does not sell goods you do not need to perform this setup. See the *Oracle Bills of Material User’s Guide*.

**Step 8: Confirm Setup of Oracle Work in Process**

Confirm the setup of Oracle Work in Process. If your company sells services but does not sell goods you do not need to perform this setup. See the *Oracle Work in Process User’s Guide*.

**Step 9: Confirm Setup of Oracle Order Management**

Confirm the setup of Oracle Order Management. See the *Oracle Order Management User’s Guide*.
Step 10: Confirm Setup of Oracle Advanced Pricing
Oracle Service Contracts uses Oracle Advanced Pricing for discounts and pricing. In addition, the APIs which Oracle Service Contracts calls for pricing covered products are part of Oracle Advanced Pricing. Oracle Advanced Pricing is required to implement that feature. Confirm the setup of Oracle Advanced Pricing. See the Oracle Advanced Pricing User’s Guide.

Note: There are limited situations where a customer would not use Oracle Advanced Pricing when implementing Oracle Service Contracts.

Step 11: Confirm Setup of Oracle TeleService
Confirm the setup of Oracle TeleService. See the Oracle TeleService Implementation and User Guide.

Step 12: Confirm Setup of Oracle Knowledge Management
Confirm the setup of Oracle Knowledge Management. See Oracle Knowledge Management Implementation Guide.

Step 13: Set Up Notes
Set up Notes. See the Oracle Common Application Calendar Implementation Guide.

Step 14: Set Up Resources
Set up Resources. See the Oracle Trading Community Architecture Administration Guide.

Step 15: Confirm Setup of Oracle Install Base
Confirm the setup of Oracle Install Base. See the Oracle Install Base Implementation Guide.

Step 16: Confirm Setup of Oracle Depot Repair
Confirm the setup of Oracle Depot Repair. See the Oracle Depot Repair Implementation Guide.

Step 17: Confirm Setup of Oracle Contracts
Confirm the setup of Oracle Contracts. See the Oracle Contracts Implementation and Administration Guide.

About Oracle Service Contracts Setups
The following table provides an overview of this guide, and highlights procedures and appendices that you will use in your implementation. It also lists whether a setup is
Implementations of Oracle Service Contracts are required, optional, or not applicable (NA) for warranty lines, extended warranty lines, subscription lines, and usage lines.

<table>
<thead>
<tr>
<th>Implementation Setups</th>
<th>Warranty Lines</th>
<th>Extended Warranty Lines</th>
<th>Subscription Lines</th>
<th>Usage Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setting Up Oracle Service Contracts - General Setups</td>
<td>The following lists the required Oracle Service Contracts setups for warranty lines:</td>
<td>The following lists the required Oracle Service Contracts setups for extended warranty lines:</td>
<td>The following lists the required Oracle Service Contracts setups for subscription lines:</td>
<td>The following lists the required Oracle Service Contracts setups for usage lines:</td>
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<tr>
<td>Extend lookup codes, page 2-1</td>
<td>Required</td>
<td>Required</td>
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</tr>
<tr>
<td>Map time units of measure, page 2-2</td>
<td>Required</td>
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<td>Required</td>
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<tr>
<td>Set up status and operations, page 2-2</td>
<td>Required</td>
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<td>Register a new source as a JTF object, page 2-7</td>
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<td>Optional</td>
<td>Optional</td>
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</tr>
<tr>
<td>Define a process, page 2-8</td>
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<td>Although optional, this setup is generally part of most implementations</td>
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<tr>
<td>Define quality assurance checklists, page 2-10</td>
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<td>Optional</td>
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<td>Although optional, this setup is generally part of most implementations</td>
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<td>Implementation Setups</td>
<td>Warranty Lines</td>
<td>Extended Warranty Lines</td>
<td>Subscription Lines</td>
<td>Usage Lines</td>
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<td>-----------------------------------------------------------</td>
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</tr>
<tr>
<td>Define roles and role sources, page 2-11</td>
<td>NA</td>
<td>Optional</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>Set up categories, page 2-13</td>
<td>Required</td>
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<td>Assumes you have set up your own responsibilities</td>
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<tr>
<td>Define coverage types, page 2-15</td>
<td>Required</td>
<td>Required</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Define standard coverage and subscription templates, page 2-15</td>
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**Setting Up Service Pricing and Billing**

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### Implementation Setups

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### Setting Up Automatic Renewals

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Create a process definition for renewals, page 5-2

Define independent conditions for the renewal, page 5-3
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<td><strong>Enabling Integrations within the Oracle E-Business Suite</strong></td>
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<td><strong>Appendix: Lookups</strong></td>
<td>You must set up Lookups for warranty lines.</td>
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<td><strong>Appendix: Concurrent Programs</strong></td>
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This chapter describes the steps required to use Oracle Service Contracts.

This chapter covers the following topics:

- Extending Lookup Codes
- Mapping Time Units of Measure
- Setting Up Statuses and Operations
- Registering a New Source as a JTF Object
- Defining a Process
- Defining Quality Assurance Checklists
- Defining Roles and Role Sources
- Setting Up Categories
- Defining Coverage Types
- Defining Standard Coverage and Subscription Templates
- Creating Contract Items in Oracle Inventory
- Defining Contract Groups
- Setting Up Autonumbering
- Defining Service Availability
- Defining Service Cotermination
- Setting Up Multi-Org Access Control (MOAC)
- Setting Up the Approvals Management Engine (AME)

**Extending Lookup Codes**

There are lookup codes that you can define. These are listed in an Appendix within this guide. See Defining Lookups, page B-1.
Mapping Time Units of Measure

Oracle Service Contracts defines unit of measure conversion for time differently than other Oracle applications. This helps ensure that the scheduling is more accurate than a simple conversion such as 1 month = 30 days, which is only correct for 5 out of the 12 months. To define your own time unit conversions for extending a contract or for scheduling, you must define your own time unit conversions.

There are six internal base time units: seconds, minutes, hours, days, months, and years. Make sure to map each time unit you want to use in Oracle Service Contracts. An example of a mapping: Day (your definition) = 1 day (base definition).

Prerequisite:
Define new unit of measure code with class code Time in the Units of Measures form before mapping it to Service Contracts Base Time Units

To map time units of measure:

1. Select the Service Contracts Manager responsibility. Navigate to Setup: Service Contracts: Time Units, and then select Time Units of Measure.
2. From the toolbar select the New icon (plus sign).
3. Select a user unit from the User Unit LOV. You should have previously defined this in Unit of Measures form.
4. Select the base unit of measure from the Base Unit LOV.
5. Enter conversion information.
6. Optionally, enter a description.
7. Save.

Caution: After you save, definitions cannot be deleted or updated.

Setting Up Statuses and Operations

You can control the operations performed on a contract, such as whether a contract can be updated online. Operations are dependent upon the contract category you choose (Service Agreement), as well as the status of the contract.

The application comes with status types that each have associated statuses. For example, the Active status type contains several statuses, including Active and Booked. Some seeded statuses are not used by Oracle Service Contracts, but are used by other
Contracts applications within the Oracle E-Business Suite.

Each status contains allowed operations, which are associated with contract categories. For example, the Active status contains the Update Online operation for the Service Agreement category. This indicates that for Active contracts you can update Service Agreements online.

You can also set up new statuses and add operations for different contract categories. For example, if you define a status called Agreement in Full for the status type Active, then you must make sure that you specifically allow operations such as Update Online for the contract categories for which you wish to perform the operation. If you create a status without specifying any allowed operations, then you implicitly allow no operations for this contract status.

In order for the concurrent program Status Change to automatically update contract statuses, you must define a default status for each status type. You can activate and deactivate operations by selecting or clearing the Allowed check box.

The following table provides a listing of the seeded status types, the corresponding seeded default statuses, and the operations allowed for the Service Agreement, Subscription Agreement, and the Warranty and Extended Warranty categories.

**Note:** In the following table, (C) indicates the allowed operation affects the contract level and (L) indicates the allowed operation affects the line level.

---

### Seeded Status Types, Statuses, and Allowed Operations

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<th>Allowed Operations for Subscription Agreement Category</th>
<th>Allowed Operations for Warranty and Extended Warranty Category</th>
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<th>Eligible for Invoicing (L)</th>
<th>Update Online (C)</th>
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Terminated  TERMINATED  
- Update via Change Request (C)  
- Eligible for Invoicing (L)  
- Update Online (C)  
- Update via Change Request (C)  
- Eligible for Invoicing (L)  
- Update Online (C)  

To add a new status:

1. From the Navigator, navigate to **Setup: Service Contracts**, and then select **Status and Operations**.
2. Navigate to the Statuses region.
3. Query a status type, such as Active.
4. From the toolbar, select the **New** icon (plus sign).
5. Enter a status, such as ACTIVE.
6. Enter a meaning.
7. Optionally, enter a description.
8. Confirm the start date.
9. Optionally, enter an end date.
10. To make this the default status for the status type, select the **Default** check box.

   **Note:** Each status type can have only one default.

11. Save.

To add a new operation:

1. Select a status, such as Active.
2. From the toolbar, select the **New** icon (plus sign).
3. In the Allowed Operations by Category region, place your cursor in the Category field and select a Category from the LOV, such as Service Agreement.

4. Select an Operation from the LOV, such as Update by Change Request.

5. Select the **Allowed** check box.

6. Save.

**Registering a New Source as a JTF Object**

You can implement Oracle Service Contracts to pick up data from sources other than those seeded with the application. You can use these sources when defining: role sources and process definitions. For example, contacts on the contract can be sourced from your own legacy applications. The process of making any kind of data available as sources consists of two procedures:

- Defining a view.
- Integrating the view into a JTF object.

**Note:** This setup is not required for all implementations. There are only certain situations when you must perform this setup.

**To define a view:**

To define a view that can be integrated into a JTF object, the view must have the format outlined in the following table:

<table>
<thead>
<tr>
<th>Name</th>
<th>Null</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID1</td>
<td>NOT NULL</td>
<td>NUMBER</td>
</tr>
<tr>
<td>ID2</td>
<td>NOT NULL</td>
<td>NUMBER</td>
</tr>
<tr>
<td>Name</td>
<td>NOT NULL</td>
<td>VARCHAR2(11)</td>
</tr>
<tr>
<td>DESCRIPTION</td>
<td>NOT NULL</td>
<td>VARCHAR2(31)</td>
</tr>
<tr>
<td>PRIMARY_UOM_CODE</td>
<td>NOT NULL</td>
<td>VARCHAR2(0)</td>
</tr>
<tr>
<td>STATUS</td>
<td>NOT NULL</td>
<td>CHAR(1)</td>
</tr>
</tbody>
</table>
ID1 and ID2 ensure the uniqueness of the rows. If ID1 is selective enough to be unique, you can fill in a dummy character like '#' as ID2.

**Note:** For line items, you need the column `primary_uom_code` only if you want to price the line.

---

**To integrate the view into a JTF Object:**

This procedure gives you an example for the typical case of registering a view as a JTF object. You can also use this procedure for creating a source for process definition parameters.

1. Select the **CRM Administrator** responsibility, then navigate to **Task and Escalation Manager**. Select **Setup**, and then select **Objects Meta-data**. The **Task Setup: Object Types** window appears.

2. Enter a name.

3. Enter a description.

4. Enter a unique object code that will be used for internal identification.

5. Enter a start date.

6. In the Select Statement Details section, enter a value (view defined previously confirming standard format) for the From field.

7. Enter a value for the Where field.

8. In the Order by field, enter the object code name and column name you want to order by.

9. In the Usage section, select an Object User from the LOV.

10. Save.

---

**Defining a Process**

Use this section to define a system routine procedure that can be invoked by either: an outcome, a function, a quality assurance checklist, auto numbering, a change request
process, or to approve or renew. A process may be either an Oracle Workflow process or procedure, either packaged or standalone.

**Note:** If you define your own procedures or functions, they are not supported.

**Prerequisites:**
- Create the Oracle Workflow processes or procedures and packages first.
- To use a source for a process definition, create the source first. See Registering a New Source as a JTF Object, page 2-7.

**To define a process:**

1. Select the **Service Contracts Manager** responsibility. Navigate to Setup: Service Contracts, and then select **Process Definition**.

2. Enter a unique name.

3. Enter the description.

4. Confirm effective dates (from and to).

5. Select a purpose from the list, such as Approve

6. Select a type from the list such as, PL/SQL, Workflow, Alert, Script.
   - If you select PLSQL, then enter the names for Package and Procedure.
   - If you select Workflow, then enter the Workflow Name and Workflow Process.

7. Click **Validate Name**.

8. In the Parameter region, choose the **Basic** tab and enter or select the following attributes:
   - Name
   - Data Type
   - Description

9. In the advanced region, when you choose the purpose **outcome** or **function**, you can define the parameters as a value from the document such as contract number (Object Name: OKC_K_HEADERS and Column Name: CONTRACT_NUMBER)
In the Parameters region, choose the Advanced tab and enter the following attributes:

- **Object Name**: (Optional) Enter an appropriate object source. This defines the source for lists of values for Function and Outcome parameters in the Condition form.

- **Column Name**: (Required when Object Name is used) This allows users to select a column from the specified source as the parameter values for function and outcome for a condition line.

- **Description Column**: (Optional) Allows users to add description column to the dynamically created LOV used when creating condition lines.

10. Save.

### Defining Quality Assurance Checklists

The application validates a contract before you can submit it for approval using a quality assurance (QA) checklist. Each checklist consists of one or more processes.

In addition to the seeded QA checklist, you can define additional checklists. The seeded QA checklist is executed automatically for any contract, in addition to any other checklist you may wish to run against the contract. You can modify or delete processes that contain the User access level. If you create an additional checklist and would like it to default to your contracts during authoring, set the profile option OKS: Default QA Checklist.

#### To define a quality assurance checklist:

1. Select the **Service Contracts Manager** responsibility. Navigate to Setup: Service Contracts, and then select **Quality Assurance**.

2. Enter a name.

3. Enter a description.

4. In the Processes region:
   1. Enter a value in the Run Sequence field.
   2. Select a process to include on the QA checklist from the Name LOV.
   3. Check the **Active** check box.
   4. From the Severity list, select one of the following levels:
• **Warning**: A warning appears in the QA results but the contract requires no changes to continue to the approval process.

• **Stop**: The contract does not pass QA if this process fails. An error appears in the QA results. This error must be corrected in the contract in order to pass the QA process and continue to the approval process.

5. Optionally, select an access level.
   - **Extensible**: Only new child records can be added in a parent-child hierarchy.
   - **System**: Data cannot be updated or deleted. In a parent-child hierarchy, the addition of child level records cannot be done.
   - **User**: All operations are possible.

6. Confirm the start date.

7. Optionally, enter an end date.

5. Optionally, override the default values for the Parameters region. This region passes parameters to process.

6. Save.

**Defining Roles and Role Sources**

Oracle Service Contracts provides party roles such as Vendor or Customer and contact roles such as Buyer or Salesperson. You can add your own roles to track relationships on the contract such as Partner or Service Agent. You can extend the lookups for:

- Party roles
- Contact roles

You can also define the LOVs that appear as sources for your roles.

**To define party roles:**

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Service Contracts: Categories and Sources**, and then select **Party Roles**.

   The Application Object Library: CONTRACT PARTY ROLES Lookups window appears.
2. Select the **New** icon (plus sign) from the toolbar.

3. To add a new party role, enter the following fields:
   - **Code**
   - **Meaning**
   - **Description**
   - **Effective Dates**
   - **Enabled** check box.

4. Save.

To define contact roles:

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Service Contracts: Categories and Sources**, and then select **Contact Roles**.
   
   The Application Object Library: Contact Role Lookups window appears.

2. Select the **New** icon (plus sign) from the toolbar.

3. To add a new contact role, enter the following fields:
   - **Code**
   - **Meaning**
   - **Description**
   - **Effective Dates**
   - **Enabled** check box.

4. Save.

To define role sources:

You can modify the source of seeded party or contact roles with the access level User. You can also define the source for new party or contact roles that you set up. You cannot delete a source from a role, after you define it.

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Service Contracts: Categories and Sources**, and then select **Role Sources**.
2. Select a party role, such as Contract Customer.

3. In the Party Source tab, select a source from the Source LOV.

4. Service Contracts are always managed from the perspective of the vendor. Select **Sell** from the Intent list.

5. Confirm the start date.

6. Optionally, enter an end date.

7. Select a value from the Access LOV.

8. Select the **Contact Source** tab, and click the **New** icon (plus sign) in the toolbar.

9. Select a contact role from the LOV.

10. Select a source.

11. Select **Sell** from the Intent list.

12. Confirm the start date.

13. Optionally, enter an end date.

14. Select a value from the Access LOV.

15. Save.

### Setting Up Categories

A category is a type of contract, such as a service agreement, subscription agreement, or warranty. Contract categories are seeded in Oracle Service Contracts and do not need to be set up. User defined categories are not supported for Service Contracts because certain processes in the application are dependent upon data being present that may be missing in a user defined category. In addition, new line types cannot be added to Service Contracts categories. You must assign access to a category in order for a given responsibility to read or modify contracts. Optionally, you can add new party roles that you have defined to a seeded category.

### To set up categories:

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Service Contracts: Categories and Sources**, and then select **Categories**.

2. Query the **Service Agreement** class.
Note: Complete the following steps for each category you use within the Service Agreement class.

3. Select the Responsibilities tab.

4. Select the responsibility to provide access from the Name LOV.

5. Select an access level.

6. Confirm the start date.

7. Save.

Note: When determining what level of access to grant a user for an individual contract, the application checks both the level of access granted in the Define Categories form and the level of access granted in the Security section of the contract and gives the highest level of access. It does not work in a hierarchical fashion. For example, if the user is given Modify access to the Warranty and Extended Warranty contract category but is only given Read Only access on a particular extended warranty contract, the user will still be able to modify that contract based on the fact the highest level of access granted is Modify.

To add party roles to categories

8. Select the Service Contracts Manager responsibility. Navigate to Setup: Service Contracts: Categories and Sources, and then select Categories.

9. Query the Service Agreement class.

Note: Complete the following steps for each category you use within the Service Agreement class.

10. Select the Party Roles tab.

11. Select the party role to add from the Role LOV.

12. Confirm the start date.

13. Save.
Defining Coverage Types

You can use the Coverage Types window to define coverage types.

To define coverage types:

1. Select the Service Contracts Manager responsibility. Navigate to Setup: Service Offerings, and then select Coverage Types.

2. Enter a unique alphanumeric code, such as G.

3. Enter a name for the coverage type, such as Gold.

4. Enter a description for the coverage type.

5. Enter the importance level (numeric value). In the Coverage window the importance level automatically appears, after the Coverage Type is selected.

6. Confirm the effective dates.

7. Select the Enabled check box.

8. Save.

Defining Standard Coverage and Subscription Templates

Oracle Service Contracts enables you to define a standard set of templates, to create offerings for a common set of agreements used by your organization, and modify them to meet your customers’ requirements. You must set up standard coverage and subscription templates, before you can define the service and subscription items to sell.

See Overview of Standard Coverage and Subscription Templates, Oracle Service Contracts User Guide.

Creating Contract Items in Oracle Inventory

You must create contract items in Oracle Inventory to sell to your customers. See About Contract Item Types, Oracle Service Contracts User Guide.

Defining Contract Groups

You can set up contract groups, both Public and Private, to help you organize contracts more effectively. Public groups are available to all users, while Private groups are available to the user who creates them.
Setting Up Autonumbering

Autonumbering Contracts consists of the following topics:

• Overview of Autonumbering, page 2-16
• Understanding Autonumbering Features, page 2-17
• Understanding Autonumbering Examples, page 2-18
• Understanding the Truth Table, page 2-18
• To set up autonumbering, page 2-20
• To set up a user function, page 2-21

Overview of Autonumbering

Autonumbering functionality automatically populates the contract number when you create it. Autonumbering provides greater flexibility in defining how contracts are numbered.

Contract numbers can be either sequential numbers or a combination of defined prefix and suffix alpha-numeric characters to classify a contract based on its attributes. These attributes include: site, business group, operating unit, class, and category.

You can set up auto-number classification using a prefix and suffix with a contract number. For example, you can number a service contract originating in the United States as US-9999-SRV. Use of a prefix and suffix is optional. The numeric part of the contract number will be formatted to the length specified for that sequence. For example number 99 will be formatted as 00099 if the length is specified as five digits.

Autonumbering of contracts is helpful in a scenario when contracts are entered or imported from an external source or system, built from another document, or when contract data is entered manually. From the Contracts Launchpad, a contract number can be automatically generated when you create a new contract by:

• Launching Contracts and selecting New from the Tools drop-down menu.
• Navigating to the Contract Navigator tab, selecting a contract group from the list, highlighting a contract from the right column, and either right clicking the mouse and selecting Copy or selecting Copy from the Tools drop-down menu. In the Copy form, the New Contract check box must be selected.

You can manually override the system generated number, assuming the Allow Manual check box is selected during setup. In addition, if there is no setup defined, manual numbering is assumed and the Contract Number field is not protected from update.
When a contract is created as a result of running a concurrent program, the contract number is automatically generated even if the Sequential Numbering profile option is not set up. That is the profile option is set to Always Used at the session level when a contract is created from a concurrent program.

**Understanding Autonumbering Features**

You can use the Autonumbering form to set up contract numbering. In the top section, you decide how to number the contracts. There is only one header level record for the entire installation. In case of a user-defined function, there will be no details required and the Sequence Details region is grayed out.

**Site**

A sequence number can be by installation site. One row is active in the Sequence Details region. This selection allows entry of Prefix, Suffix, Sequence Number From, Sequence Number To, Format Length, and Allow Manual override in the Sequence Details region. Business Group, Operating Unit, Class, and Category A sequence number can be generated for any of the preceding attributes. These attributes are selected from an LOV. Please refer to the Truth table for possible combinations of contract attributes for generating sequence numbers automatically.

**User Function**

A user defined function offers the flexibility to build in more logic for generating a sequence number. For example, you can have the contract number reflect the date and sequence when the contract becomes active, such as 03222001001. Refer to the Truth table for possible combinations of contract attributes for generating a sequence number automatically.

**Enforcing Number Generation**

The Allow Manual check box indicates whether the contract number is a protected field or not. When this check box is not selected, the number is generated automatically and this field is protected. If you select this check box the contract number is automatically generated only when the contract number field is left blank.

**Prefix and Suffix**

Free form fields help provide classification coding to a contract. You can use these fields to add a separator or delimiter. These values are characters only.

**Sequence Numbers**

You may choose to specify a starting and ending number for the numeric part of the contract number sequence. If the contract number exceeds the specified range, depending on the selection of the Allow Manual check box, you are prompted to extend the range or enter a unique contract number.

**Format Length**

You can specify a formatting length for the numeric part of the contract number sequence. The total contract number length (concatenated suffix, number prefix) cannot
exceed 120 characters.

**Template**

When a contract is created from a template, it generates a number automatically.

**Copy** When a contract is copied to a new contract, the attributes pertinent to the contract such as class and category do not change. The attributes such as Business Group and Operating Unit are based on the responsibility from which the copy is being created and not those of the source contract. A new number is generated accordingly.

### Understanding Autonumbering Examples

The following table shows examples of the First Number based on the various combinations selected.

<table>
<thead>
<tr>
<th>Bus Unit</th>
<th>Op Unit</th>
<th>Class</th>
<th>Cat</th>
<th>Prefix</th>
<th>Suffix</th>
<th>Seq From</th>
<th>Seq To</th>
<th>Length</th>
<th>First Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>Service</td>
<td>--</td>
<td>US-</td>
<td>-SRV</td>
<td>99</td>
<td>10000</td>
<td>5</td>
<td>US-0009 9-SRV</td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>Service</td>
<td>--</td>
<td>UK-</td>
<td>-SRV</td>
<td>1</td>
<td>20000</td>
<td>5</td>
<td>UK-0000 1-SRV</td>
<td></td>
</tr>
</tbody>
</table>

### Understanding the Truth Table

Depending on which autonumbering attribute you select, the Sequence Details fields are selectively enabled. For example, if you only select the Business Group, then Operating Unit, Class, Category sequence details are disabled. The following table (Truth Table) shows the possible sequences:

<table>
<thead>
<tr>
<th>Description</th>
<th>User Function</th>
<th>Site</th>
<th>Business Group</th>
<th>Operating Unit</th>
<th>Class</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>User, no other attributes can be selected</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Site, no other attributes can be selected</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td></td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>------------------------</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Business Group can be selected with Class</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Business Group can be selected with Category</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Business Group can be selected without Class or Category</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Operating Unit can be selected with Class</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>Operating Unit can be selected with Category</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td>Y</td>
</tr>
<tr>
<td>Operating Unit can be selected without Class or Category</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
<td>N</td>
</tr>
<tr>
<td>Class can be selected without Business Group/Operating Unit</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>N</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>
To set up autonumbering:

**Prerequisites**

Enable the OKC: Document Sequence Name profile option. This profile option is used to define a text literal, for example, OKC_DOC to be used for naming Sequences created.

Set the Sequential Numbering profile option to *Always Used* for Oracle Service Contracts. By default, this profile is not set up. This profile is set at the application level. This means that Service Contracts users may use sequential numbering.

If Sequential Numbering Profile is set to *Always Used* and the Allow Manual check box is not selected in the AutoNumbering setup, you cannot manually enter a contract number when copying a contract to a new contract. It disables the Contract Number and Contract Number Modifier fields for the target contract.

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Service Contracts**, and then select **Autonumbering**.

2. Select the attribute type, such as Site, User Function, or Operating Unit. If you select the User Function, choose a Process Name from the LOV.

3. Select the Sequence Details. Depending on attribute selected see, the Truth Table for attribute combinations from the LOV in the Sequence Details region.

4. Optionally, enter Sequence Numbers From or To.

5. Optionally, enter the Format Length for the contract number.

6. Enter Prefix or Suffix values.

7. To manually override the system-generated contract number, select the **Allow Manual** check box.

8. Save.

9. Select the **Service Contracts Manager** responsibility, and then navigate to **Contract Administration: Launchpad**. From the **Tools** menu, select **New**.
10. Select a Contract Category from the LOV.

11. Click Create.

12. Verify that the contract number is correct based on your setup.

**Note:** If you try to change any of Autonumbering attributes, for example from Class to Category attribute, a Decision window displays the following warning: *You are changing the current contract numbering setup. Existing current numbering rules will no longer be effective. Do you want to continue?* If you click Yes, another window opens and asks: *Do you want to delete existing sequence numbering rules?* If you click Yes, the existing sequence numbering rules are deleted and there is no way you can retrieve these sequence numbering rules. If you click No, the existing sequence numbering rules will be kept in the system. If later on you want to revert to the original attribute, such as Class attribute in the preceding example, the sequence numbering rules appear when you change the attribute from Category to Class.

**To set up a user function:**

A User Defined Function is a database procedure and must have the following parameters:

- `x_contract_number OUT NOCOPY Varchar2`
- `x_return_status OUT NOCOPY Varchar2`

**Note:** Parameter `x_contract_number` should return the generated unique contract number. Parameter `x_return_status` should be: S if the program succeeds and return a contract number, E in case of error, and U for unexpected errors.

Use of NOCOPY is recommended for performance.

These two parameters should not be defined in the Process Definition but instead should be included in the user-defined procedure.

1. A User Defined Function must be registered in the Process Definition form. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Service Contracts**, and then select **Process Definition**.

2. Select **Auto Numbering** from the Purpose list, and **PLSQL** from the Type list. Then enter the Package and Procedure you want to define.

3. Enter the following parameters:
• Site
• Business Group
• Operating Unit
• Class
• Category
• Contract Currency
• Contract Amount
• Contract Party Information

4. Select the **Service Contracts Manager** responsibility, navigate to **Setup: Contract** and then **Autonumbering**.

5. Select the **User Function** check box and select the user-defined process in the Process Name field.

   If you select the User Function check box in the Autonumbering form to generate contract number, you cannot select any sequence details in the Autonumbering form. The associated procedure takes care of autonumbering using any prefix, suffix, and formatting.

6. To allow manual override, select the **Allow Manual** check box.

7. Save.


9. Select a Contract Category from the LOV.

10. Click **Create**.

11. Verify contract number is correct based on your setup.

**Defining Service Availability**

Service availability are services that can be sold to certain parties or to cover certain products. As well as defining those services that are available. Exceptions can be listed to identify those services that are not available for parties or for products. The Generally Available check box determines whether the entries in Product and Party tabs are inclusions or exclusions. By selecting the Generally Available check box for a service, all
Setting Up Oracle Service Contracts

products and parties listed are excluded from receiving that service. By leaving the Generally Available check box cleared, the products and parties listed are the only ones eligible to receive that service.

**Note:** You should perform this setup for each operating unit.

**Prerequisites:**
- Define service items and serviceable products in Oracle Inventory.
- Define parties in Oracle Receivables.

**To define service availability:**

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Service Offerings**, and then select **Service Availability**.

2. Select an Operating Unit from the LOV.

3. Select a service item from the Name LOV.

4. From the Party tab, select the Generally Available check box if applicable.

5. Enter the effective dates.

6. Select a Party from the LOV.

7. Enter the start and end dates.

8. Select the **Product** tab and select the **Generally Available** check box, if applicable.

9. Enter the effective dates.

10. Select a Product from the LOV.

11. Enter the low and high item revision numbers if applicable.

   **Note:** Oracle Service Contracts does not check revision level. The application checks whether service is available for that product or not.

12. Enter the start and end dates.

13. Save.
Defining Service Cotermination

You can set any or all of a customer's service lines to end on a predetermined day of the year. For example, some customers may require that any services that are sold to them at any time during the year all end on December 31st, so that they can review and negotiate their renewals at a single point each year.

Party Level Cotermination: For a coterminate day and month for services sold to a specific party, you must set up from Oracle Service Contracts. When you sell a service to that party, either in Service Contracts or in Order Management, the end date of the services can optionally be set to the established cotermination date. You can do this in Oracle Service Contracts by clicking the Coterminate or Coterminate All buttons on the Lines tab and Effectivities subtab. See Oracle Order Management User's Guide for guidance on how to coterminate service sold on sales orders.

Prerequisite:
Define parties and their customer accounts.

To define service cotermination for a party:

1. Select the Service Contracts Manager responsibility. Navigate to Setup: Service Offerings, and then select Service Cotermination.

2. Select a Party from the LOV.
   The corresponding customer accounts for the party appears in the Cotermination region.

3. Enter the cotermination day.

4. Enter the cotermination month.

5. Save.

Setting Up Multi-Org Access Control (MOAC)

The Multi-Org Access Control (MOAC) feature, also known as Security by Operating Unit, enables you to access secured data in one or more operating units, within one responsibility. You can author contracts and contract templates in multiple operating units without switching responsibilities. The application maintains data security using security profiles that you define for a list of operating units and then determines the data access privileges for users. You can search and update contracts associated with your security profile from the Service Contracts Authoring form, the Mass Change form, Contracts Search form, as well as the Contract Navigator and Launchpad. Many reports include operating unit as a parameter.
**Note:** Entitlement search lists contracts information in the search results across all operating units. However, it restricts users from opening contracts to which they do not have access.

The following diagram shows the high level setups necessary to enable MOAC. For detailed information about implementing MOAC, refer to the *Oracle E-Business Suite Multiple Organizations Implementation Guide*.

The following describes the preceding diagram:

1. Define operating units.
2. Determine if an operating unit hierarchical structure exists.
3. If yes, define the organization hierarchy. This setup must be done in Oracle Human Resource Management System applications. If no, skip to the next step.
4. Define security profiles and assign operating units. This setup must be done in Oracle Human Resource Management System applications.

5. Run the Security List Maintenance program.

6. Set up MO: Security Profile at the responsibility level.

7. Set up the default operating unit for the user (profile).

### Setting Up the Approvals Management Engine (AME)

Prior to setting up the AME, refer to the *Oracle Approvals Management Implementation Guide*.

The standard contract approval workflow integrates with Oracle AME to drive the approval process. Key attributes are seeded within AME for the Oracle Service Contracts approval setup. The following table lists these seeded attributes:

<table>
<thead>
<tr>
<th>Published Header Attributes</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CONTRACT_OPERATING_UNIT</td>
<td>Number</td>
<td>Service Contract Operating Unit</td>
</tr>
<tr>
<td>CUSTOMER_PARTY</td>
<td>Number</td>
<td>Service Contract Customer Party</td>
</tr>
<tr>
<td>CONTRACT_CATEGORY</td>
<td>String</td>
<td>Contract Category</td>
</tr>
<tr>
<td>CONTRACT_AMOUNT</td>
<td>Number</td>
<td>Amount of the Contract</td>
</tr>
<tr>
<td>CURRENCY_CODE</td>
<td>String</td>
<td>Contract Currency</td>
</tr>
</tbody>
</table>

You can use an existing attribute or create a new attribute. In order to use AME for Oracle Service Contracts, you must:

1. Define an AME Condition based on the attributes.

2. Define an action type for the actions.

3. Define an action in AME. This is done by defining AME Approval Groups containing approvers as members.

4. Define a rule based on conditions and actions.

5. Test approval rules. (This is optional).
**Important:** Setting up AME is mandatory. There are no migration paths provided for approvers set up earlier.

Attributes can be created by the following process:

**Note:** Attributes should be based on the header level.

**Prerequisite:** In order to get the Approval Management Business Analyst responsibility to appear, you must run the concurrent program Approvals Management Post Upgrade Process. Select Migrate All from the MIGRATION_TYPE parameter LOV. This is a one time setup, which you can access from the System Administrator responsibility.

**To create new Oracle Service Contract Attributes in AME:**
2. In the Transaction Types region, click the Setup icon for the Service Contracts Internal Approval transaction type.
3. Click the attributes link to access the seeded attributes you want to review.
   **Note:** The following attributes are seeded for defining conditions: Contract ID, Operating Unit, Customer Party, Contract Category, and Contract Amount.
4. Alternatively, click the Create button to create a new rule.

**To define an AME Condition based on the attributes:**
1. Access the defined conditions by selecting the Conditions subtab.
2. Click Create.
3. Select condition type as Ordinary or Exception.
4. Select a contract attribute, such as CONTRACT_AMOUNT.
   In the Expression region, select a value from the Operator LOV, such as is equal to and enter a value.
5. Click Apply. A confirmation message appears indicating the condition has been created.
To define an action type for the actions:
1. Select the Action Types subtab.
2. Click Use Existing Action Type
3. Select approval-group chain of authority.
   Note: Optionally, you can use other AME seeded action types or create your own type.
4. Click Continue.
5. Click Finish.

To define an AME Approval Group containing approvers as members:
1. Select the Approver Groups subtab.
2. Click Create.
   The Create New Approver Group page appears.
3. Enter a name.
4. Enter a description.
5. Enter an order number.
6. Optionally, select a Voting Method from the LOV.
7. Optionally, select a Usage Type from the LOV.
   Note: If you select Dynamic, you must enter a SQL statement in the Query field. You can check this statement by clicking Validate.
8. Click Apply.
9. In the Group Members Region, click Add Another Row.
10. Select HR People from the Approver Type list.
11. To select an approver, click the Search and Select icon in the Approver field, which is represented by a magnifying glass.
12. Click Apply. A confirmation appears, indicating the group has been created.
To define a rule based on conditions and actions:
1. Select the Rules tab.
2. Click Create. The Create New Rule: Enter Rule Details page appears.
3. Enter a name.
4. Select a rule type.
5. Enter a start and end date.
7. Click Add Condition.
8. Select the check box next to the condition you wish to add.
9. Click Continue.
11. Click Add Action.
12. Select and action. You can search for an action, by clicking the search icon (magnifying glass) next to the Action field.
14. Review the rule and click Finish.

To test approval rules:
1. Select the Test Workbench tab.
2. Click Create.
3. Enter the value for the attribute or attributes that meet the condition defined in the preceding procedures.
4. Click Run Test Case.
Setting Up Service Pricing and Billing

This chapter describes the process for setting pricing and billing features in Oracle Service Contracts.

This chapter covers the following topics:

- Creating Billing Profiles
- Enabling Invoice Level Loading
- Enabling Invoice Previewing
- Setting Up Transaction Types
- Setting Up Batch Transaction Sources
- Setting Up Transaction Flexfield Segments
- Pricing Service, Subscription, and Usage Items
- Enabling Multi-Currency Price List Support
- Enabling Advanced Attribute Sourcing
- Running the Build Attribute Mapping Rules for Pricing Qualifiers and Attributes
- Defining Sales Territories to Assign Vendor Contacts
- Executing Billing Through Concurrent Programs
- Enabling Credit Card Support
- Setting Up Partial Period Attributes within Global Contracts Defaults

Creating Billing Profiles

You can set up multiple, ad hoc billing profiles in Oracle Service Contracts. Billing profiles include information about accounting and invoicing rules, type of billing, and its frequency. Invoices are generated according to the billing profile attributes.

You can create billing profiles for a specific customer, a specific customer bill to site, or a generic one for all customers and sites.
Enabling Invoice Level Loading

The Service Contracts Main Billing process utilizes Invoice Level Loading, a parallel program to assign groups of invoices to different concurrent programs. The program first determines the count for all of the contract lines that qualify for the master request submission. If the count is greater than the threshold value (currently set to 500) the program splits up the master request into sub requests. There is no setup for this functionality other than to enable the profile option. For more details, see the OKS: Parallel Worker profile option, page A-1.

Enabling Invoice Previewing

Before sending billing transactions directly to Oracle Receivables, you can preview the invoice information to ensure accuracy. When initiating the billing process, you can set up the application to place the transactions into a separate set of Service Contracts tables. These tables mirror the billing transaction tables used during the normal billing process.

Guidelines:

If necessary, you can create a simple report to access the required information in these tables.

The tables used for Invoice Preview are:

oks_bcl_pr
oks_bsl_pr
oks_btn_pr
oksbsd_pr
oks_btl_pr

The preview process runs in much the same way as the normal billing process. It includes only those contracts that meet the same criteria that must be included in the actual contract billing process. For example, status is eligible for invoicing, bill on date is due.

If potential billing errors are found during the preview, you can make adjustments manually in the appropriate application, for example, Oracle Service Contracts or Oracle Install Base, and re-run the pre-invoice report. This iterative process would continue until the pre-invoice process gives the expected results, at which point you may choose to run the actual billing process.

The billing process uses the latest data in calculating the invoices, so it should be recognized that the actual invoices created may be different from those included in the last pre-invoice process, if there is sufficient delay between running the process and the
actual billing process. Changes can occur such as counters updated, contracts terminated, new products added to coverage, which affect the actual invoices created from the Contracts application.

The process includes the same information normally sent to Oracle Receivables during the actual billing process. Service Contracts sends either detailed or summary information to Oracle Receivables, depending on the value of the OKS: Summary Transactions profile option.

Setting Up Transaction Types

Transaction types define the accounting for the debit memos, charge backs, commitments, and invoices you create in Oracle Receivables. Transaction types also determine whether your transaction entries update your customer's balances and whether Oracle Receivables posts these transactions to your general ledger. To bill from Service Contracts, transaction types must be defined for invoices and credit memos.

To set up invoice transaction types:

1. Select the Receivables responsibility. Navigate to Setup, select Transactions, and then select Transaction Types.

2. Enter a transaction name: Invoice-OKS (this OKS transaction type is case sensitive and must be entered as: Invoice-OKS). Optionally, enter a description.

3. Select Invoice as transaction from the Class LOV.

4. Select the Open Receivable check box.
   This updates your customer balances each time you create a complete debit memo, chargeback, or on-account credit with this transaction type. Oracle Receivables also includes these transactions in the standard aging and collection processes.

5. Select the Post To GL check box to allow posting to general ledger.

6. Choose a default Printing Option for transactions with this transaction type. Select Print or Do Not Print. You can override this value when entering transactions.

7. Choose a Transaction Status of Open, Closed, Pending, or Void. Use these statuses to implement your own invoice approval system.

8. Optionally, select the Allow Freight check box to allow freight to be entered for transactions with this transaction type.

9. Select the Tax Calculation check box to let Oracle Receivables calculate tax for transactions with this transaction type.
10. Choose a Creation Sign. If you are using the Cash Basis accounting method, your transaction’s creation sign must be either Positive or Negative. You cannot update this field after you enter transactions with this type.

11. To restrict the direction in which items with this transaction type can be updated by applications entered against them, select the **Natural Application Only** check box. If you select this box, Oracle Receivables sets Allow Overapplication to No. You cannot update this option after you save this transaction type.

12. Optionally, select an Application Rule Set for this transaction type from the LOV. An Application Rule Set determines the default payment steps when you use the Applications window or AutoLockbox to apply receipts to transactions using this type. If you do not enter a rule set, Oracle Receivables uses the rule set in the System Options window as the default.

13. If you did not select the Natural Application Only check box, choose whether to **Allow Overapplication** against items with this transaction type by selecting or clearing this box. If you select this check box, Oracle Receivables sets Natural Application to No and you cannot update it after you save this transaction type. If you use the Cash Basis accounting method, the default value is No and you cannot change it.

14. Enter the Credit Memo Type to use when crediting items with this transaction type (optional). When you enter a credit memo against an invoice with this transaction type, the value you enter here is the default credit memo transaction type.

15. Enter the Receivable Account for transactions with this transaction type. Oracle Receivables uses this information, along with your AutoAccounting definition, to determine the receivable accounts for transactions with these types. Oracle Receivables creates a transaction record using this account so you can transfer to your general ledger and create a journal entry if the Post To GL check box is selected for this transaction type.

16. Enter a Freight Account for transactions with this transaction type. Oracle Receivables uses this information, along with your AutoAccounting definition to determine the freight account for transactions with this transaction type. Oracle Receivables skips this field if the Allow Freight check box is not selected.

17. Enter a Revenue Account for transactions with this transaction type. Oracle Receivables skips this field if the Allow Freight is not selected. Oracle Receivables uses this information, along with your AutoAccounting definition, to determine the revenue account for transactions with this transaction type.

18. Enter a Clearing Account for transactions with this transaction type. Oracle Receivables uses this account to hold any difference between the revenue amount specified for the Revenue Account and the selling price times the quantity for imported invoice lines. Oracle Receivables only uses the Clearing Account if you
have enabled this feature for transaction sources that you use for your imported transactions.

19. Enter an Unbilled Receivable Account. When you use the Bill In Arrears invoicing rule, Oracle Receivables uses this information, along with your AutoAccounting definition, to determine the Unbilled Receivable account for transactions with this transaction type.

20. Enter an Unearned Revenue Account. Oracle Receivables uses this information, along with your AutoAccounting definition, to determine the unearned revenue account for transactions with this transaction type. Oracle Receivables only uses this account when your transaction's invoicing rule is Bill In Advance.

21. Enter a Tax Account. Oracle Receivables uses this information along with your AutoAccounting definition to determine the tax account for transactions with this transaction type.

22. Enter the range of dates that this transaction type will be active. The default Start Date is today's date, but you can change it. If you do not enter an End Date, this transaction type will be active indefinitely.

23. Save.

To set up credit memo transaction types:

1. Select the Receivables responsibility. Navigate to Setup, select Transactions, and then select Transaction Types.

2. Enter a transaction name: Credit-OKS (this OKS transaction type is case sensitive and must be entered as: Credit-OKS). Optionally enter a description.

3. Select Credit Memo from the Class LOV.

4. Select the Open Receivable check box. This updates your customer balances each time you create a complete debit memo, chargeback, or on-account credit with this transaction type. Oracle Receivables also includes these transactions in the standard aging and collection processes.

5. Select the Post To GL check box to be able to post transactions with this type to your general ledger.

6. Choose a default Printing Option for transactions with this transaction type. Select Print or Do Not Print. You can override this value when entering transactions.

7. Choose a Transaction Status of Open, Closed, Pending, or Void. Use these statuses to implement your own invoice approval system.
8. Optionally, select the **Allow Freight** check box to allow freight to be entered for transactions with this transaction type.

9. Optionally, select the **Tax Calculation** check box to let Oracle Receivables calculate tax for transactions with this transaction type.

10. Choose a Creation Sign. If you are using the Cash Basis accounting method, your transaction’s creation sign must be either Positive or Negative. You cannot update this field after you enter transactions with this type.

11. If you want to restrict the direction in which items with this transaction type can be updated by applications entered against them, select the **Natural Application Only** check box. If you select this box, Oracle Receivables sets Allow Overapplication to No. You cannot update this option after you save this transaction type.

12. Enter an Application Rule Set for this transaction type or select one from the list of values (optional). An Application Rule Set determines the default payment steps when you use the Applications window or AutoLockbox to apply receipts to transactions using this type. If you do not enter a rule set, Oracle Receivables uses the rule set in the System Options window as the default.

13. If you did not select the Natural Application Only check box, choose whether to **Allow Overapplication** against items with this transaction type by selecting or clearing this box. If you select this check box, Oracle Receivables sets Natural Application to No and you cannot update it after you save this transaction type. If you use the Cash Basis accounting method, the default value is No and you cannot change it.

14. Enter the range of dates that this transaction type will be active. The default Start Date is today’s date, but you can change it. If you do not enter an End Date, this transaction type will be active indefinitely.

15. Enter the Receivable Account for transactions with this transaction type. Oracle Receivables uses this information, along with your AutoAccounting definition, to determine the receivable accounts for transactions with these types. Oracle Receivables creates a transaction record using this account so you can transfer to your general ledger and create a journal entry, if the Post To GL check box is selected for this transaction type.

16. Enter a Freight Account for transactions with this transaction type. Oracle Receivables uses this information, along with your AutoAccounting definition to determine the freight account for transactions with this transaction type. Oracle Receivables skips this field if the Allow Freight check box is not selected.

17. Enter a Revenue Account for transactions with this transaction type. Oracle Receivables skips this field if the Allow Freight is not selected. Oracle Receivables uses this information, along with your AutoAccounting definition, to determine the
revenue account for transactions with this transaction type.

18. Enter an Unbilled Receivable Account. When you use the Bill In Arrears invoicing rule, Oracle Receivables uses this information, along with your AutoAccounting definition, to determine the Unbilled Receivable account for transactions with this transaction type.

19. Enter an Unearned Revenue Account. Receivables uses this information, along with your AutoAccounting definition, to determine the unearned revenue account for transactions with this transaction type. Receivables only uses this account when your transaction's invoicing rule is Bill In Advance.

20. Enter a Tax Account. Receivables uses this information along with your AutoAccounting definition to determine the tax account for transactions with this transaction type.

21. Save.

**Setting Up Batch Transaction Sources**

Batch sources control the standard transaction type assigned to a transaction and determine whether Oracle Receivables automatically numbers your transactions and transaction batches. Active transaction batch sources appear as list of values choices in the Transactions, Transactions Summary, and Credit Transactions windows.

You can define two types of transaction batch sources:

- **Manual**: Use manual batch sources with transactions that you enter manually in the Transaction and Transactions Summary windows.

- **Imported**: Use imported batch sources to import transactions into Oracle Receivables using AutoInvoice. Batches are automatically numbered with the batch source name - request ID.

You can make a batch source inactive by clearing the Active check box and saving your work. Oracle Receivables does not display inactive transaction batch sources as list of values choices or let you assign them to your transactions.

**Suggestion**: If you have installed multiple organization support (multi–org), define an imported batch source with the same name in each organization. These sources can have the same or different settings. This enables you to import order lines that belong to different organizations in Oracle Order Management into Oracle Receivables.

For more information on setting up transaction batch source, transaction types, refer *Oracle Receivables User Guide*.
To set up batch transaction sources:

1. Select the **Receivables** responsibility. Navigate to **Setup: Transactions**, and then select **Sources**.

2. Enter **OKS_CONTRACTS** as the name.

3. Select **Imported** as the type.

4. Select the **Batch Source** tab.

5. Enter a description.

6. Enter the range of effective dates for this source. The Start date is the current date, but you can change it. If you do not enter an end date, this transaction batch source will be active indefinitely.

7. Select the **Automatic Transaction Numbering** check box and enter a Last Number to automatically number new transactions you create using this source. You can use automatic transaction numbering with both Imported and Manual sources.

8. Optionally, select the **Copy Document Number to Transaction Number** check box to use the same value for both the document number and the transaction number for transactions assigned to this source.

9. Select **Invoice-OKS** as the Standard Transaction Type for this batch source. When you choose a batch source during transaction entry, this is the default transaction type. You can define new transaction types in the Transaction Types window.

10. Select the **AutoInvoice Options** tab.

11. Specify how AutoInvoice handles imported transactions that have Invalid Tax Rates. An invalid tax rate is one in which the imported transaction’s tax rate does not match its tax code. Select **Correct** from the Invalid Tax Rate LOV, for AutoInvoice to automatically update the tax rate that you supplied to the one that you defined previously for the tax code. Select **Reject** if you want AutoInvoice to reject the transaction.

12. Specify how AutoInvoice handles imported transactions with Invalid Lines by selecting either **Reject Invoice** or **Create Invoice** from the Invalid Line LOV.

13. Specify how AutoInvoice handles imported transactions that have lines in the Interface Lines table that are in a closed period. To have AutoInvoice automatically adjust the GL dates to the first GL date of the next open or future enterable period, select **Adjust** from the GL Date in a Closed Period LOV. Alternatively, select **Reject** to reject these transactions.
14. Optionally, select a Grouping Rule to use for a transaction line from the Grouping LOV. If you do not enter a grouping rule, AutoInvoice uses the following hierarchy to determine which rule to use:
   
   - The grouping rule specified in the Transaction Sources window for the batch source of the transaction line.
   
   - The grouping rule specified in the Customer Profile Classes window for the bill–to customer and bill–to site of the transaction line.
   
   - The grouping rule specified in the Customer Profile Classes window for the bill–to customer of the transaction line.
   
   - The default grouping rule specified in the System Options window.

15. For AutoInvoice to require that the revenue amount for each transaction line is equal to the selling price times the quantity specified for that line, select the Create Clearing check box. Use this option to distribute revenue on a transaction in an amount that is not equal to the transaction line amount. If you select this check box, AutoInvoice puts any difference between the revenue amount and the selling price times the quantity for a transaction into the AutoInvoice Clearing account that you have defined. Otherwise, AutoInvoice requires that the revenue amount be equal to the selling price times the quantity for all of the transactions it is processing. Define your clearing account in the Automatic Accounting window.

16. Indicate whether sales credits can be entered for transactions using this source by selecting or clearing the Allow Sales Credit check box. This option and the Require Salesreps option in the System Options window determine whether sales credits are optional or required.

17. Select the Customer Information tab.

18. Select Id for each option to indicate that AutoInvoice validates your customer information for this batch source using an identifier. Choose Value if you use this source to import data from a non–Oracle system.

19. Select the Accounting Information tab.

20. Select Id to indicate how AutoInvoice validates your Invoice and Accounting Rule data for this batch source.

21. Select Id to indicate whether AutoInvoice validates the identifier for this batch source.

22. Select the Derive Date check box to derive the default rule start date and default GL date from the ship date, rule start date, order date and the default date that you supply when you submit AutoInvoice. If Oracle Inventory is installed, this must be
selected.

23. Select **Id** to indicate that AutoInvoice validates your Payment Terms for this batch source using identifiers.

24. Select **Percent** to indicate that AutoInvoice validates your Revenue Account Allocation data for this batch source.

25. Select the **Other Information** tab.

26. Select **Id** to validate other data except for Agreement, Sales Territory, and Related Document.

27. Select the **Sales Credit Validation** tab.

28. Select **Id** for the first two options to validate information using identifiers for this batch source.

29. Select **Percent** to validate sales credits based on percent.

30. Save.

**Setting Up Transaction Flexfield Segments**

Transaction flexfields are descriptive flexfields that AutoInvoice uses to uniquely identify transaction lines. Oracle Receivables lets you determine how to build your transaction flexfield structure and what information you want to capture. To define the line-level Transaction Flexfield, query "Line transaction Flexfield" in the title field of the Descriptive Flexfield Segments window and enter the text and segments associated with this transaction flexfield.

The following table shows the values for the transaction flexfields.

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Segment Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE1</td>
<td>CONTRACT_NUMBER</td>
</tr>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE2</td>
<td>CONTRACT_MODIFIER</td>
</tr>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE3</td>
<td>INSTANCE_NO</td>
</tr>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE4</td>
<td>BILLED_FROM</td>
</tr>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE5</td>
<td>BILLED_TO</td>
</tr>
<tr>
<td>Column Name</td>
<td>Segment Name</td>
</tr>
<tr>
<td>-------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE6</td>
<td>AMOUNT</td>
</tr>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE7</td>
<td>BILLED_FROM_DATE</td>
</tr>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE8</td>
<td>START_DATE</td>
</tr>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE9</td>
<td>LINE_TYPE</td>
</tr>
<tr>
<td>INTERFACE_LINE_ATTRIBUTE10</td>
<td>BILL_INSTALLMENT_NUMBER</td>
</tr>
</tbody>
</table>

**To set up transaction flexfield segments:**

1. Select the **System Administrator** responsibility. Navigate to **Application**, and then select **FlexField**. Select **Descriptive**, and then select **Segments**.

2. Enter or query **Oracle Receivables** as the application and Line Transaction Flexfield for the title.

3. Clear the **Freeze Flexfield Definition** check box (otherwise you cannot create a new record).

4. Select **OKS CONTRACTS** in the Context Field Values region.

5. Click **Segments** to edit the definition.

6. Enter the values listed in the previous table.

   **Note:** These must be entered in upper case.

7. Compile the flexfield by clicking **Compile**.

8. Select the **Freeze Flexfield Definition** check box to freeze the definition.

**Pricing Service, Subscription, and Usage Items**

There are a number of setups you may perform related to pricing.

- **Adding Items to a Price List**

  For any items that you create, you must add them to a price list. See the Adding Items to a Price List procedure in the *Oracle Advanced Pricing User’s Guide*. 
• Creating Price Breaks for Usage Items
  You can set special price breaks for usage items.

• Setting Up Price Adjustments
  You can adjust prices of service, subscription, and usage lines in your contract by applying adjustments set up by the application administrator. See Entering Price Adjustments, Oracle Service Contracts User Guide and Getting Help in Picking Adjustments, Oracle Service Contracts User Guide.

Enabling Multi-Currency Price List Support
You can set up multi-currency price lists. For example, a customer that operates in 40 countries may want three price lists, each with a different currency. Rather than administering 120 price lists (three price lists in each currency), multi-currency price lists allow the customer to maintain three price lists that handle all of the currency conversions.

Prerequisite:

To enable multi-currency price list support:
1. Set the system profile QP:Multi Currency Installed to Yes.
2. Run the concurrent program Update Price Lists with Multi-Currency Conversion Criteria.
3. Set the system profile QP: Multi Currency Usage to Yes at Application Level.
4. If the currency on the contract is changed, conversion rate used to calculate price is based on the date that is specified in the OKS: Default Pricing Date profile option, but not the date that is entered in the Pricing/Billing tab. Based on the value, this profile option identifies a conversion entry in the currency daily rates window, which references the From and To currencies that are specified in the Pricing/Billing tab.

  Note: After you run the concurrent program, you cannot revert your price lists back to single-currency price lists. Oracle does not support changing the profile QP: Multi Currency Installed back to No.

To price a contract on a multiple currency price list, the transactional or functional currency must be either the same as the price list base currency or must be specified on
the conversion list attached to the price list.

Enabling Advanced Attribute Sourcing

Oracle Service Contracts integrates with Oracle Advanced Pricing to price services. A Service Contracts request type is seeded in Advanced Pricing to allow Service Contracts to leverage Attribute Management capabilities in Advanced Pricing. See the Oracle Advanced Pricing User’s Guide for more information on Attribute Management. You can map pricing attributes and qualifiers to the Service Contracts request type in Advanced Pricing. After you complete the mapping, pricing calls from Service Contracts can automatically source the attributes that are used for determining price. For instance, a service provider that employs a price list with special pricing for the company’s top five customers can now automatically pass the customer name from Service Contracts to Advanced Pricing as a pricing qualifier.

To enable advanced attribute sourcing:

1. Select the Pricing Manager responsibility. Navigate to Setup, and then select Attribute Management. Select Pricing Transactions Entity Associations. The Pricing Transaction Entity window appears.

2. Select ORDFUL from the Name LOV.

3. Confirm that the Enabled check box associated with OKS is selected.

4. Save and close.

5. Navigate to Setup, select Attribute Management, and then Context and Attributes. The Context Setup window appears.


7. Verify that PARTY_ID code is available and enabled.

8. Save and close.


10. Select Order Fulfillment (ORDFUL) from the Pricing Transaction Entity LOV.

11. Select Qualifier Context from the Context Type LOV.

13. Click Link Attributes.


15. Click Attribute Mapping.

16. In Application Name field, select Service Contracts.

17. In User Source Type field, select PL/SQL API.

18. In User Value String, enter

   OKS_QPATTRIB_PVT.G_CONTRACT_HDRREC.PARTY_ID for Header and
   OKS_QPATTRIB_PVT.G_CONTRACT_LINREC.PARTY_ID for Line.

19. Save and close.

Running the Build Attribute Mapping Rules for Pricing Qualifiers and Attributes

After creating pricing qualifiers and attributes you must run the Build Attribute Mapping Rules concurrent program to ensure that the pricing engine uses only the qualifier and pricing attributes used in the price lists, modifiers, and formulas that are relevant to each call, rather than all attribute mapping rules.

You can run this program using the Oracle Pricing Manager responsibility.

For information see the Oracle Advanced Pricing User’s Guide.

Defining Sales Territories to Assign Vendor Contacts

You can set up sales territories using Oracle Territory Manager to automatically:

- Assign sales agents as vendor contacts to new contracts created from Oracle Order Management orders.
  
  You can use sales territories to assign sales agents to a contract. This is useful if your company uses different organizations for selling and renewing service contracts.

- Assign new sales agents to contracts after personnel changes and reorganizations.
  
  For contracts in the active, signed, and hold statuses, there is a concurrent program that makes the new sales agent assignments and end-dates any existing sales agents in the contract. For contracts in the entered status, the concurrent program simply replaces the existing sales agents with those derived from the territories.

When the application cannot assign a resource from the territory, for example for new or dormant customers that have no territories set up for them, the application looks for
the individual to notify in OKS: Contract Administrator and, if none is set, then in OKC: Contract Approver

Prerequisite:
Set up sales territories for Oracle Service Contracts as described in the Oracle Territory Manager Implementation Guide. Use the following guidelines during your setup:

To define sales territories to assign vendor contacts:

1. Select the CRM Administrator responsibility. Navigate to Territory Manager, and then select Territory Administration.

2. Enable Oracle Service Contracts qualifiers:
   1. Choose Setup Qualifiers from the Administration menu.
   2. Choose Oracle Service Contracts from the Usage LOV.
   3. Click Find.
   The application displays the list of qualifiers available for use in Oracle Service Contracts:
      • Country
      • Customer Name
      • Customer Range
      • State
   4. Select the respective Enabled check box to enable each qualifier.
   5. Click Update Qualifiers.
   6. Close the window.

3. Navigate to the Oracle Service Contracts folder in the territory manager Navigator and create your territories. For each territory:
   1. From the Overview tab, choose Contract Renewal as the Transaction Type.
   2. From the Transaction Qualifiers tab, choose the qualifiers using the Name LOV.
   3. Enter the qualifier values for the territory.
   4. From the Resources Tab, choose the resource using the Name LOV. Enter the name of one resource.
4. Run the concurrent program Generate Territory Packages with the following parameters:
   1. Usage: Oracle Service Contracts
   2. Transaction Type: Contract Renewal

5. To have the application use the sales territories to automatically assign a resource as a vendor contact in contracts created through Oracle Order Management orders:
   1. Set the system profile OKS: Territory Sales Person for First Year Contracts to **Derive** at the site level. (By default this system profile is set to Retain, causing the application to copy the sales person on the order to be the vendor contact or type Salesperson on the contract).
   2. Confirm the following system profiles are set to the resource to notify if the application cannot assign a sales person to the contract based on the territory setup.
      
      In this case, the following hierarchy is used to send the notification when the application cannot assign a resource from the territory:
      1. OKS: Contract Administrator
      2. OKC: Contract Approver

6. To reassign sales agents to contracts based on the sales territories, for example, as a result of personnel changes or reorganizations, run the concurrent program **Service Contracts Concurrent Program for Reassigning Resources**. The profile option value of OKS: Use Territories to Default Sales Person should be set to **Yes** either at the user level or site level.

   This program reassigns sales agents to in Entered, Active, Signed and Hold statuses. For contracts in the Entered status, the application replaces all vendor contacts of role Salesperson with the resource supplied by the territory. For contracts in the Active, Signed, and Hold statuses, the application end-dates (system date -1) the current vendor contact(s) of role Salesperson and appends the resource supplied by the territory. The application sets the new sales person’s start date to the system date. You can restrict the scope of the concurrent program’s assignment by entering any of the following parameters:
   - **Contract Number**
   - **Contract Status**
   - **Organization**
   - **Sales Person** (sales person within that organization)
Note: If you do not enter any of these parameters, the program reassigns sales agents to all contracts.

Executing Billing Through Concurrent Programs

The procedures for executing service contract billing involve the following concurrent requests:

- **Service Contracts Main Billing:** According to pricing and billing schedule in the contract, running this request generates transactions in the Service Contracts billing tables and the Oracle Receivables interface table.

- **Autoinvoice Import Program:** Running this request picks records from the Oracle Receivables interface table and process billing.

- **Service Contracts Fetch Receivables Info for Billing:** Running this request fetches the invoice number and tax from Oracle Receivables and updates the contract billing history.

These processes should be set to run on a periodic basis, the frequency of which is dependent on your billing policy. You may find it useful to run these requests as a request set. You may also consider running the QA process within this set to ensure that information in the contract is still accurate prior to running the billing process. See Executing Billing Through Concurrent Programs, Oracle Service Contracts User Guide.

Enabling Credit Card Support

When you enter a credit card within the Oracle Service Contracts Authoring form, the application integrates with Oracle Payment to verify credit card details, such as the validity of the card number and the security code. It also determines if the card appears masked within the application, for example, 4444XXXXXXXXXXXX.

Verify the following setups for integration with Oracle Payment:

- Verify Oracle Payment setups for masking credit card numbers. Masking determines how entered credit cards appear within the application, for example, 4444XXXXXXXXXXXX or 4444000012345678.

- Verify Oracle Payment setups for security codes. You can require security codes for new credit cards.

For more information on setting up masking and security features in Oracle Payment, see the Oracle Payment Implementation Guide.
Setting Up Partial Period Attributes within Global Contracts Defaults

You can define how the application calculates partial periods for pricing, billing and termination amounts. A partial period is any billing period or service effective duration that is not in multiples of Billing/Pricing Period unit of measure (UOM). For information on setting up partial period attributes within the Global Contracts Defaults, see Entering Contract Defaults, Oracle Service Contracts User Guide.
Setting Up Contract Events

This chapter describes events in Oracle Service Contracts. This chapter covers the following topics:

- Overview of Events
- Defining Condition Templates
- Using Query Conditions
- Reviewing Errors from Asynchronous Processing
- Using the Events Controller
- Enabling Service Request Creation based on Contract Events
- Starting the Event and Outcome Listeners
- Starting the Workflow Background Process
- Running the Date Assembler
- Troubleshooting the Events Process

Overview of Events

You can set up events to execute a specific outcome if certain conditions are met. For example, you could set up contracts of a specific type to renew 90 days prior to expiration. An event can be action based, such as contract signed, or date based such as renew contract 90 days prior to expiration.

In order to set up an event you must have the following:

- **Action** (an action can be action-based or date-based).
- **Condition**
- **Outcome**
After you define an action the following occurs:

- If the condition is true, the system executes the outcome. If the outcome is successful, the system sends a success notification. If the outcome fails, the system sends failure notification.

- If the condition is false, the outcome is not executed, and a notification is not sent.

**Note:** This group of procedures covers the Contract Events menu assigned to the Service Contracts Manager responsibility, except for the following:

The procedure for creating processes is covered in Defining a Process, page 2-8.

The procedure for creating independent conditions is covered in Creating Independent Conditions for the Renewal, page 5-3

**Caution:** Custom events and actions are not supported. If you customize events, you are doing so at your own risk. Oracle Support cannot help you create or debug actions, functions, or outcomes. If you encounter problems with customizations and wish to obtain support, you must recreate the problem using standard Oracle objects.

---

### Defining Condition Templates

You can use condition templates to define multiple samples of conditions. The templates can then be used to define independent conditions or conditions attached to a contract.

**Prerequisite**

Create an outcome.

**To define a condition template:**

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Contract Events**, and then select **Condition Template**.

2. Enter a name and a description.

3. Check the **Create a Task** check box, to create a task for the Schedule tab in the execution overview.

4. Enter the task owner.
5. Select Action or Date.

6. To create an action condition, select an action.

7. To create a date condition, enter the date information.

8. Build your condition lines.

   **Note:** When using the LIKE operator, do not use quotes. For example, when building a condition, where contract_number like '%-2000%', your right value must be %-2000 and not "%-2000".

9. To enter fixed values for parameters for a function, click Parameters and enter the information

10. Click Show Condition to display all condition lines and check their syntactical validity.

    If the condition has validated successfully, then Condition Valid is automatically selected.

11. Select Outcomes.

12. To assign fixed values or action attribute values to the outcome parameters, click Parameters and enter the information.

13. Select Notifications.

14. Select a success notifier from the LOV.

15. Select a failure notifier from the LOV.

16. Save.

**Using Query Conditions**

You can search all conditions, including independent conditions, condition templates, and instances created by condition templates.

**To use query conditions:**

1. Select the Service Contracts Manager responsibility. Navigate to Setup: Contract Events, and then select Condition Search.

2. From the View menu, select Query By Example and choose Enter.
You can query any of the fields that are blue. These are the only fields that are active.

3. Enter or select your criteria. You can use wildcards such as %.

4. From the View menu, select **Query By Example** and choose **Run**. The window is populated with the conditions that match the criteria that you entered.

5. Press the **Page Down** button on your keyboard to see additional conditions that match your search criteria.

**Reviewing Errors from Asynchronous Processing**

The Events Component is dependent on asynchronous processing. It uses Advanced Queuing System. This system is transparent to the user. The messages processed may encounter exceptions and as a result the messages are rolled back and will be reprocessed again at a specified time. There is a need to record any exceptions encountered. Hence whenever an exception is encountered, the Evaluator writes the details of the exceptions to a table OKC_AQERRORS and the error stack to OKC_AQMSGSTACKS tables. The Asynchronous Errors window displays all error messages of advanced queueing processes that have failed. This window displays Queue Name, Message ID, and the Message Text. This window is generally used by your support representative to resolve issues.

**To review errors from asynchronous processing:**

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Contract Events**, and then select **Condition Errors**.

   The following provides a description of the attributes:

   • **Source Name**: Provides source name.

   • **Begin Date**: Provides begin date.

   • **Queue Name**: Identifies name of the Advanced Queue.

   • **Message ID**: Provides message ID.

   • **Retry Count**: Displays number of times the queue tried to dequeue the message.

   • **Queue Contents**: Displays queue content.

   • **Message Text**: Displays error message text.
Using the Events Controller

The Events Controller is a tool for the system administrator to debug any environment problems related to the queues. This is a query only form which gives the system administrator the provision to check common problems related to advanced queues, for example whether the listeners are running, queue objects are valid, or if there are any errors thrown by the queues. This form provides a more convenient method of viewing more information from one location. The Events Controller has a start and stop option for queues and concurrent programs. The queues must always be enabled (started). The listeners will be running as scheduled and will show an error if the queues are disabled (stopped). The start and stop option is an extra DBA provision provided to the system administrator and can also be used when debugging certain queue problems. If the Events Controller is used to stop queues, it will automatically terminate any Listener for Events/Outcome concurrent programs. You can start the queues again and restart the listeners. This will not cause any data loss from the queues.

Note: The Asynchronous window form only displays queue errors.

To use the events controller:

1. Select the Service Contracts Manager responsibility. Navigate to Setup: Contract Events, and then select Events Controller.

2. Select the Background Process tab.

This tab displays the events and outcome listeners that are running in the background and the workflow background process. In the event of an error, this tab provides you with the ability to access the Errors window which describes the error and the cause.

The following provides a description of the attributes:

- **Request ID**: Provides ID of the submitted concurrent program.

- **Listener/Program**: Identifies the name of the event, outcome, or workflow background process.

- **Phase**: Provides update, such as Pending, Running, or Completed.

- **Status**: Displays Normal or Error. When a program has been completed with an Error status, you can click Diagnostics to view the error details returned by the concurrent program.

- **Request Date**: Provides date submitted.

- **Requestor**: Identifies user who submitted the request.
3. Select the **Queue Content** tab.

This tab displays the Queue Messages and Queue Errors that have occurred. If an event is launched (such as contract signed) you can expect to see the queue content within this tab. If there is nothing in the queue, then the Queue Status tab is used to check the queue status and also to check if all queue objects are valid.

The following provides a description of the attributes:

- **Queue Name**: Identifies name of the Advanced Queue.
- **Correlation**: Identifies the correlation ID of an action such as KSIGN and KEXTEND.
- **Consumer**: Describes the program which parses and consumes the message in the queue.
- **Enqueue Time**: Shows when message was placed in queue.
- **Queue Content**: Displays queue content.
- **Source Name**: Shows source of error.
- **Retrys**: Displays number of times the queue tried to dequeue the message.
- **Begin Date**: Shows date when error occurred.
- **Error Details** (Button): Enables you to view the details of queue errors.

4. Select the **Queue Status** tab.

This tab displays the queue names, queue objects, and their status (valid or invalid). The following provides a description of the attributes:

- **Queue Name**: Identifies name of the Advanced Queue.
- **Queue Table**: Shows table name.
- **Queue Type**: Displays the queue type such as Normal and Exception.
- **Enqueue Enabled**: Yes/No.
- **Dequeue Enabled**: Yes/No.
- **Start Queue/Stop Queue** (Buttons): Enables you to stop or start queue.
- **Queue Objects**: Names all the advance queue objects.
- **Object Name**: Provides name of object.
• **Object Type**: Displays type of object such as Table and View.

• **Status Type**: Shows whether object is valid or invalid.

• **Last Modified**: Displays date last modified.

• **Details (Button)**: Shows details for rules and subscriber objects.

---

**Enabling Service Request Creation based on Contract Events**

You can set up Oracle Contracts Service to automatically create a service request. This occurs when the updated value of a service counter that is attached to a service line, satisfies an event condition, that is attached to the service line as well. When a condition template is created for a service item with condition lines based on the counters associated to the service item, the OKSEVENT-CREATE_SR process, which has been set up as a workflow in the process definition, can be used as an outcome. After you capture a counter for the contract line and the condition is satisfied, the system creates a service request and notifies the user defined in profile OKS: Service Request Creator.

For example, a service provider that checks atmospheric humidity every ten days, sets up a time based counter and associates the counter to service item. After they create a contract for the service item, the counters time-based engine tracks the number of days. On the tenth day, the system creates a service request and notifies the user set up in the OKS: Service Request Creator profile with the service request number.

**Note:** This functionality is limited to service counters, not product counters. To implement product counters based service request creation, please refer to Preventive Maintenance Setup Steps section in the Oracle Field Service Implementation Guide.

**Prerequisites:**

• Set the following profile options:

  • **Service: Default Service Request Type**

  • **Service: Default Service Request Status**

  • **Service: Default Service Request Severity**

• **OKS: Service Request Creator** (set it at site level)

  **Note:** If the profile Service: Use SR Type - Responsibility Mapping is set to Yes, then the responsibility mapped to default service request type must also be added to the application user as set up in
profile OKS: Service Request Creator. The default service request type is set up in the profile Service: Default Service Request Type. To leverage the service security, schedule the listener concurrent processes and the contract alert workflow background processes from the same responsibility, which has access to the service request type set in the profile Service: Default Service Request Type. For Service application security related setup, refer to *Oracle TeleService Implementation and User Guide*.

- Define a contact for the Customer Party type of the Contract. Refer to Adding Contact Points for a Customer and Adding Contact Points for a Customer site in the *Oracle TeleService Implementation and User Guide*. The service request creation process requires a customer contact point.

- Schedule the following concurrent programs:
  - Listener for Events Queue
  - Listener for Outcome Queue
  - Workflow Background process for workflow item type Contract Alert

- Define a Condition for the Service item

  When defining the Condition for the service item, make sure to select Counter group updated as an Action and attach the OKSEVENT-CREATE_SR process as an outcome. Also, select the K_LINE_ID as the parameter.

  **Note:** If you requery the parameter, it appears as SOURCE OBJECT ID, not K_LINE_ID, which is the same.

**To enable service request creation based on contract events:**

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Contract Events**, and then select **Condition Template**.

2. Enter a name.

3. In the condition type region, select **Counter Group Updated** from the Action LOV.

4. Select the **Counter** tab, and select **Service** from the Item/Product list.

5. From the Description LOV, select a service.

6. In the Left Counter Value field, select a counter.
7. Select an operator and enter a value in the Right Counter Value field.

8. From the Outcomes secondary tab, select OKSEVENT-CREATE_SR from the Outcomes LOV.

9. Select the Notifications secondary tab and choose the individual(s) to send the Success Notifiers and the Failure Notifiers.

10. Select Parameters.
    The Parameters window appears, the value K_LINE_ID is the default.
    Click OK.

11. Select an action attribute for K_LINE_ID and click OK The K_LINE_ID represents the contract line id, which is passed to the OKSEVENT-CREATE_SR workflow process, for fetching the contract and the service line information that is needed for service request creation.

12. Save.

13. From the Navigator, select Launch Contracts and create a Service Agreement.
    Make sure the party role is Customer and that you select the contact you set up in the Contact Center. Enter a service line with the service you selected in the condition template.

14. Select the Lines tab and Event subtab.
    You should see the condition that you created in the Events region.

15. Select the Lines tab and Counters subtab.

16. From the Actions menu select Counter Capture. Enter the counter reading to trigger the event.
    After the counter is captured for the contract line, and if the condition evaluates to true, the condition creates a service request. Subsequently, the service request creator gets the notification of the service request creation that can be viewed from the Inbox the Launch Contracts window.

Starting the Event and Outcome Listeners

For events other than automatic renewals to work, there are two concurrent programs that must be scheduled to run. These are:

- Listener for Events Queue
- Listener for Outcome Queue
Use the concurrent request set to start both programs. After submitting the Listener request set, each concurrent program should end with a normal completion status.

If the database or the concurrent managers have been restarted, verify these two processes are restarted.

There are two profile options to set the work load of the listeners: OKC: Event Listener Iterations and OKC: Outcome Listener Iterations. These profiles control the number of messages the listeners will dequeue for every run. The profiles can be set at the site and application levels.

If the preceding profiles are not set, OKC Event and Outcome listeners will keep checking the queue messages, even if there is no message in the queue. This check is CPU extensive and uses memory resources.

If these profiles are set, the listeners stop checking the queue if there are no messages and resume checking the next time listeners are scheduled to run (based on the schedule parameter you set when running the concurrent request for Event and Outcome Listeners).

The default load value is set to 100, which is recommended. This number can be changed to suit the Advanced Queue load. The minimum should be greater than 1 and the maximum should not exceed 1,000.

This number should be set to a higher value for systems that have larger work loads. Setting a higher value for the profile options, results in longer running and more resource CPU intensive listener processes.

Submit requests to start both listeners using a Periodic schedule. The suggested period is every three to five minutes. Failure to run the Listeners on a regular schedule will severely limit functionality in Contracts and other applications using the Contracts Events System. It will also cause Events system Advanced Queue to become back logged.

Listeners run and complete rather than running indefinitely. In order to process messages in the queue, you must set the listeners to run on a regular schedule. Increase or decrease the interval/period at which the Listener process run according to your system load. The sleep parameter seen when submitting a request is now redundant.

You should balance these processes with the iterations and request schedule. Use both these methods to fine tune your listener processes.

**Note:** You should stop these concurrent requests if you are applying product upgrades or performing system maintenance. Terminating the concurrent request will not stop the listener process.

The following procedure describes the Events Controller, which has a role in starting and stopping listeners. See Using the Events Controller, page 4-5.
To start the event listener:

1. Select the Service Contracts Manager responsibility. Navigate to Requests, and then select Run.
   The Submit a New Request window appears.

2. Select Single Request and click OK.
   The Submit Request window appears.

3. From the Name LOV select Listener for Events Queue.
   The Parameters window appears.

4. Enter a value for the following parameters:
   - Wait
     Click OK.

5. Click Schedule.
   The Schedule window appears.

6. Select Periodically from Run the Job block.

7. From the Re-run Every field, enter 5 and select Minutes.

8. Click OK.

9. Click Submit.
   Make a note of the Request ID.

To start the outcome listener:

1. Select the Service Contracts Manager responsibility. Navigate to Requests, and then select Run.
   The Submit a New Request window appears.

2. Select Single Request and click OK.
   The Submit Request window appears.

3. From the Name LOV select Listener for Outcome Queue.
   The Parameters window appears.

4. Enter a value for the following parameters:
• Wait

Click OK.

5. Click Schedule.

The Schedule window appears.

6. Select Periodically from Run the Job block.

7. From the Re-run Every field, enter 5 and select Minutes.

8. Click OK.

9. Click Submit.

Make a note of the Request ID.

Starting the Workflow Background Process

If you are using Oracle Workflow with other applications, the program Workflow Background Processes is most likely running in recurring intervals. If the Workflow Background Processes is not scheduled to run, the system administrator must start this process to run regularly, such as every five minutes.

To start the Workflow Background Process:

1. Select the Service Contracts Manager responsibility. Navigate to Requests, and then select Run.

   The Submit a New Request window appears.

2. Select Single Request and click OK.

   The Submit Request window appears.

3. From the Name LOV select Workflow Background Process.

   The Parameters window appears.

4. Select a value for the following parameters:

   • Contract Alert from the Item Type LOV.

   • Yes from the Process Deferred LOV.

   • Yes from the Process Timeout LOV.

   Click OK.
5. Click **Schedule**.
   The Schedule window appears.

6. Select **Periodically** from Run the Job block.

7. From the Re-run Every field, enter 5 and select **Minutes**.

8. Click **OK**.

9. Click **Submit**.
   Make a note of the Request ID.

---

**Running the Date Assembler**

You should run the Date Assembler concurrent program once every day, preferably later in the evening.

The Date Assembler checks if the end date of the contract is between the last_rundate + variance and sysdate + variance. So, if the last_rundate is 4-Jan-2005 and sysdate is 5-Jan-2005 and variance is 90 days, then Date Assembler renews all contracts expiring on 5-Apr-2005.

**Important:** For a condition with Organization set as a criterion, the Date Assembler must be run from a responsibility that has access to contracts for all Organizations.

---

**To run the Date Assembler:**

1. Select the **Service Contracts Manager** responsibility. Navigate to **Requests**, and then select **Run**.
   The Submit a New Request window appears.

2. Select **Single Request** and click **OK**.
   The Submit Request window appears.

3. From the Name LOV select **Date Assembler**.

4. Select **Submit**.

**Renewing High Volume Contracts**

To renew a service contract, the Date Assembler concurrent program inserts the details into an interface table and then a specific number of workflow processes are created to
process the renewal. The Service Contracts Date Assembler Workflow Manager concurrent program obtains data from the interface table and creates the workflow processes for service contract renewals. The OKS: Date Assembler Workflow Queue Size profile option determines the number of records to be fetched.

Prerequisites

- Set the OKS: Stop Workflow Launch From Date Assembler profile option to Yes
- Set the OKS: Date Assembler Workflow Queue Size profile option to a value based on the business requirement, for example: 10

To run the Service Contracts Date Assembler Workflow Manager:
1. Submit the Date Assembler concurrent program, which will insert data into the OKS_DA_INTERFACE_B interface table.
2. Submit the Service Contracts Date Assembler Workflow Manager concurrent program, which will create workflow process for all the eligible contracts to be renewed based on the value set for the OKS: Date Assembler Workflow Queue Size profile option.

Troubleshooting the Events Process

Verify that you have confirmed the procedures covered in the preceding group of procedures. If you are still experiencing problems, the following may help you to troubleshoot issues with events.

Validate that Date Assembler Found Eligible Contracts

The Date Assembler evaluates each Independent Condition. Contracts that satisfy the criteria defined in the condition appear in the output log file.

Possible causes for the Date Assembler to fail to find eligible contracts include:
- Independent Condition has an end-date prior to the current date
- Independent Condition is invalid (verify that the Condition Valid check box is enabled)
- Desired contract does not meet defined condition

Confirm Error Messages

From the Service Contracts Manager responsibility, you can navigate to Contract Events, and then Query Asynchronous Error Message. If this does not return errors, you can use the following details to help you troubleshoot:
- Messages are placed in two tables OKC_AQERRORS and OKC_AQMSGSTACKS.
You can find the contract id from OKC_AQERRORS and specific error messages from OKC_AQMSGSTACKS.

- The following conditions prevent records from being placed in the error tables:
  - The Listener for Outcomes did not run.
  - The Independent Condition did not fire.
  - A problem with the (Success or Failure) notification prevented processing from completing correctly.

- You can use the following query to confirm that errors were detected by the Listener for Outcomes or Listener for Events:
  ```sql
  SELECT SOURCE_NAME, Q_NAME, RETRY_COUNT, QUEUE_CONTENTS, CREATION_DATE FROM OKC_AQERRORS
  ```

- You can use the following query to view the specific errors detected for each contract:
  ```sql
  SELECT AQE_ID, MSG_SEQ_NO, MESSAGE_TEXT FROM OKC_AQMSGSTACKS
  ```

- You can write additional queries by matching the column ID from OKC_AQERRORS to the column AQE_ID from OKC_AQMSGSTACKS. For example:
  ```sql
  SELECT QUEUE_CONTENTS, MESSAGE_TEXT FROM OKC_AQMSGSTACKS MSG, OKC_AQERRORS ERR WHERE ERR.ID = MSG.AQE_ID
  ```

  If the query returns values, you can conclude that the Advanced Queuing worked at least one time.

### Validate Queues Exist

The Date Assembler places messages in the queue. The Listener for Outcomes and Listener for Events dequeues these messages.

You can use the following queries to establish that the queues are defined correctly and that the Advanced Queuing process is functioning correctly:

1. ```sql
   SELECT NAME, QUEUE_TABLE, QID, QUEUE_TYPE, ENQUEUE_ENABLED, DEQUEUE_ENABLED FROM DBA_QUEUES WHERE QUEUE_TABLE = "OKC_AQ_EV_TAB"
   ```
   This query should return three rows. Take note of the values for QID as they are needed in the second query.

   Expected queue names and queue types are as follows:
   - OKC_AQ_EV_QUEUE (NORMAL_QUEUE)
   - OKC_AQ_OC_QUEUE (NORMAL_QUEUE)
   - AQ$_OKC_AQ_EV_TAB_E (EXCEPTION_QUEUE)

   The results of the query indicate whether records are in the queue (column ENQUEUE = YES), and whether records have been processed by the Listener for
Outcomes and Listener for Events, (column ENQUEUE = YES).

<table>
<thead>
<tr>
<th>NAME</th>
<th>QUEUE_TABLE</th>
<th>QID</th>
<th>QUEUE_TYPE</th>
<th>ENQUEUE</th>
<th>DEQUEUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKC_AQ_EV_QUEUE</td>
<td>OKC_AQ_EV_TAB</td>
<td>108816</td>
<td>NORMAL_QUEUE</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>OKC_AQ_OC_QUEUE</td>
<td>OKC_AQ_EV_TAB</td>
<td>108817</td>
<td>NORMAL_QUEUE</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>AQ$_OKC_AQ_EV_TAB_E</td>
<td>OKC_AQ_EV_TAB</td>
<td>108815</td>
<td>EXCEPTION_QUEUE</td>
<td>NO</td>
<td>YES</td>
</tr>
</tbody>
</table>

2. SELECT * FROM V$AQ WHERE QID IN (queue id #1, queue id #2, queue id #3)

Note: Replace queue id #1, queue id #2, and queue id #3 with the QID values returned in the first query.

Check Status of Messages in Queue

You can use this query to find the number of non-expired messages in the queues:

SELECT MSG_STATE,CORR_ID,CONSUMER_NAME,COUNT(*) FROM OKC.AQ$OKC_AQ_EV_TAB WHERE MSG_STATE <> 'EXPIRED' GROUP BY MSG_STATE,CORR_ID,CONSUMER_NAME ORDER BY 1,2

You can use this query to find the number of times the messages were retried:

SELECT CORR_ID,RETRY_COUNT,COUNT(*) FROM OKC.AQ$OKC_AQ_EV_TAB WHERE RETRY_COUNT >=1 AND MSG_STATE = 'READY' GROUP BY CORR_ID,RETRY_COUNT ORDER BY 1,2

Check Status of Queue

You can run this query to verify that Advanced Queuing is working for the queue OKC_AQ_EV_TAB:

SELECT STATE FROM OKC_AQ_EV_TAB

AQ Message States:

Queue tables are created using the procedure DBMS_AQADM.CREATE_QUEUE_TABLE and can be listed using the dictionary view DBA_QUEUE_TABLES. <queue_table>.state is a NUMBER column containing value in [0,1,2,3].

- **0 'READY'**: Message is ready for dequeue.
- **1 'WAITING'**: The delay specified by message_properties_t.delay while executing dbms_aq.enqueue has not been reached.
- **2 'RETAINED'**: The message has been successfully processed (dequeued) but will remain in the queue until the retention_time specified for the queue while executing dbms_aqadm.create_queue has been reached.
- **3 'EXPIRED'**: The message was not successfully processed (dequeued) in either: the time specified by message_properties_t.expiration while executing dbms_aq.enqueue or; the maximum number of dequeue attempts (max_retries).
specified for the queue while executing dbms_aqadm.create_queue.

**Note:** Consult with a qualified DBA if the query returns no rows, or if the result of the query is 3. If the query returns no rows, this may indicate that your Success and Failure Notifiers have not been defined for the Independent Condition. Define these values and retest.

**Check Contract Alert Workflow**

Use the System Administrator login and responsibility and navigate to Workflow, and then Find Processes.

1. Enter a Query for Item Type, Contract Alert.
2. Find one of your processes (probably one of the more recent processes).
3. Select View Diagram to see where the process failed.

   The workflow process branches in five directions from the initial process, Version. If it branches through leg 5, Generic Function, and the Loop Prompt and Loop Counter are highlighted in green, this is an indication that the notification process failed. This failure could prevent error messages from being placed in the table OKC_AQERRORS.

4. Verify that the Success and Failure notifiers are identified in the Independent Condition.
5. More detailed information can be obtained by selecting the option Advanced Options before selecting View Diagram. Enable all of the Activity Type check boxes, then select the Filter Activities button and select View Diagram.

**Confirm Packages and Procedures**

The following packages are used by the Date Assembler, Listener for Outcomes and Queuing. You should be prepared to provide the package version numbers if you continue to experience problems and contact Oracle Support.

<table>
<thead>
<tr>
<th>Package</th>
<th>Filename</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKC_AQ_PVT</td>
<td>OKCRAQB.pls</td>
<td>Listener for Outcomes executable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Listener for Events executable</td>
</tr>
<tr>
<td>OKC_AQ_PUB</td>
<td>OKCPAQB.pls</td>
<td>Standard API for advanced queuing</td>
</tr>
<tr>
<td>Oracle Date Assembler Program</td>
<td>OKCPDASB.pls</td>
<td>Date Assembler program</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>OKC_CONDITIONS_PUB</td>
<td>OKCPCNHB.pls</td>
<td>Public API for inserting, updating, validating and deleting records for Condition Headers and others</td>
</tr>
<tr>
<td>OKC_EXP_DATE_ASMBLR_PVT</td>
<td>OKCREDAB.pls</td>
<td>Contracts expiry date assembler</td>
</tr>
<tr>
<td>NA</td>
<td>OKCCINDX.sql</td>
<td>Creates composite index on queue table</td>
</tr>
<tr>
<td>NA</td>
<td>OKCCQUET.sql</td>
<td>Creates queue table, queues and subscribers</td>
</tr>
<tr>
<td>NA</td>
<td>OKCQGRNT.sql</td>
<td>Create grants/synonyms on queue objects (tables and sequences)</td>
</tr>
<tr>
<td>NA</td>
<td>OKCSTQUE.sql</td>
<td>Adds rule based subscribers and starts queues</td>
</tr>
</tbody>
</table>
Setting Up Automatic Renewals

This chapter describes the process of renewing a contract automatically. This chapter covers the following topics:

- Overview of Automatic Renewals Setup
- Creating Process Definitions for Renewals (Outcomes List of Values)
- Creating Independent Conditions for the Renewal
- Confirming Renewal Defaults
- Starting the Workflow Background Process for Renewals
- Running the Date Assembler for Renewals
- Confirming the Automatic Renewal
- Creating and Enabling Templates for E-Mails to Customers
- Troubleshooting the Automatic Renewals Process

Overview of Automatic Renewals Setup

You can set up the application so that users can specify a period of time prior to expiration for renewing a contract. You can define actions that are related to a certain point in time, such as the date when contracts are about to expire, or a customer’s anniversary date within the specified period.

Users can specify how a contract is renewed. For information on contract renewals, see Understanding Contract Renewals, Oracle Service Contracts User Guide.

To set up automatic renewals you must:

- Create a process definition
- Create an independent condition
- Start Workflow Background Process
Run Date Assembler

If the contract is renewed successfully, the application notifies the resource attached to the contract, such as the sale representative when the Workflow Background Process next runs.

**Note:** Oracle Service Contracts customers can review and accept their renewal contracts from a self-service web page. The Electronic Renewal process in Oracle Service Contracts places renewed contracts in Entered status and sends a notification to both the sales representative and the customer. The customer receives an e-mail notification with a username and password, as well as a link to a web page. Customers can review the quote and accept, reject, or request changes to the contract renewal from this web page.

To support this process, the application uses the person id for the Quote-To contact in FND_USER and creates a randomly generated password. If there is no record for the contact in FND_USER, the application creates a new user with the customer's Quote-To Contact e-mail address. In addition, the application assigns the Service Contracts Electronic Renewals responsibility to the user. This is a required step to allow access to the external facing Customer Acceptance Java Server Pages. The user is associated with STANDARD security group and a profile option Self Service Personal Home Page mode is set to Personal Home Page for this user.

The following profile options must be set up in order to use the e-mail Quote functionality:

- OKS SMTP Host
- OKS: SMTP Port

## Creating Process Definitions for Renewals (Outcomes List of Values)

You can set up Process Definitions to define the seeded or custom processes that should be used for certain situations. For Contract Renewals, the following stored PL/SQL procedure can be used to renew contracts: OKS_EVTREN_PUB.RENEW.

The following procedure provides an example of how you can create a process definition for the Outcomes LOV within the Condition form.

**Note:** You can also refer to the generic procedure, Defining a Process, page 2-8.
To create a process definition for Renewals (Outcomes List of Values):

1. Select the Service Contracts Manager responsibility. Navigate to Setup: Service Contracts, and then select Process Definition.

2. Enter a name for your renewal process.

3. Select Outcome from the Purpose LOV.

4. Select PLSQL from the Type LOV.

5. Enter OKS_EVTREN_PUB in the Package field.

6. Enter RENEW in the Procedure field.

7. Enter the values in Parameter region.

<table>
<thead>
<tr>
<th>Name</th>
<th>Data Type</th>
<th>Default Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P_CONTRACT_ID</td>
<td>NUMBER</td>
<td>--</td>
<td>Contract ID</td>
</tr>
</tbody>
</table>

8. Select the Required check box for the P_CONTRACT_ID parameter.

   Note: If the P_DURATI0N and P_UOM_CODE parameters are not specified they will come from the original contract.

9. Save.

Creating Independent Conditions for the Renewal

You can set up independent conditions that must be met before an outcome is processed for an event.

The Last Occurrence field of the Independent Condition is updated when the Date Assembler successfully runs, which means that not only does Date Assembler find eligible contracts, but it also completes the event, such as a renewal. For example, if you define a condition specifying that a renewed contract should be created 90 days before contract expiration, then the Last Occurrence should be the current date + 90.

The following procedure provides an example of how you can set up an independent condition that you can use to autorenew contracts.
To create an independent condition for the renewal:

1. Select the Service Contracts Manager responsibility. Navigate to Contract Events, and then select Independent Condition.

2. Enter a name for the independent condition, such as Auto Renewal for Contracts.

3. Enter the effective dates.

4. In the Condition Type region:
   1. Select the Date radio button
   2. Enter a value in the Number of Days field, such as 90.
   3. Select Before from the Before/After list.
   4. Select a value from the Date LOV, such as Contract Expiration.

5. From the Expression tab enter the expressions.
   - For example:
     - **Example**
       - 10 (Contract Class = Service Agreement) AND
       - 20 (Contract Status Code = Active) AND
       - 30 (Contract Category = Service Agreement)

6. From the Outcomes tab, select the process definition for renewals from the Outcomes LOV.

7. Click the Enabled check box.

8. Select Parameters.
   - The Parameter window appears.

9. Enter an action for the P_CONTRACT_ID parameter:
   1. Highlight the P_CONTRACT_ID.
   2. Right click and choose Populate selected rows in PARAMETERS from the menu.
   3. In the Parameters window enter the following values:
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Data Type</th>
<th>Account Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>P_CONTRACT_ID</td>
<td>NUMBER</td>
<td>CONTRACT_ID</td>
<td>--</td>
</tr>
</tbody>
</table>

**Important:** The list of parameters in the Independent Condition must be the same as the parameters set to Required within the Process Definition. If not, the renewal will fail.

4. Click **OK**.

10. From the Notifications tab:
   - Select a name from the Success Notifier LOV.
   - Select a name from the Failure Notification LOV.

11. Save.

### Confirming Renewal Defaults

Renewal and pricing attributes are maintained in the individual contracts and apply to the contract categories Warranties and Extended Warranties, Service Agreements and Subscriptions. Renewal Defaults for Warranties and Extended Warranties contracts are set at the contract level in the Contract Details form within Order Management. See Specifying Renewal and Other Details for a New Contract Created for Your Order, *Oracle Service Contracts User Guide*. If renewal options are not specified in contract, the renewal and pricing attributes are retrieved from the renewal event or from the global defaults. Attributes are retrieved from the renewal event or from the global defaults in the following order of precedence:

**Event:** Events can be used for Contract Renewal. By entering values for the parameters in either the Outcome or the Independent Condition window you can default contract information when using Events to automatically renew contracts.

**Party:** Defaults can be set for a Party in the Renewal Rule Defaults window.

**Organization:** Defaults can be set for organizations in your company. Organizations defined as Operating Units are eligible to be selected for renewal defaults.

**Global:** Global Defaults are located at the top of the Renewal Rule Defaults window. If default values have not been specified in earlier checks (Contract, Event, Party or Organization), the defaults defined here are used.

You can set up contracts to renew using different renewal types. For an understanding of renewal types, see Understanding Contract Renewals, *Oracle Service Contracts User Guide*.
The following procedures explain how to specify renewal rules:

**Default Renewal Rules using Global Contract Defaults**


**Default Renewal Rules at the Contract Header Level**


**Default Renewal Rules at the Line and Subline Level**

You can also set renewal defaults at the line and subline level. See Specifying How a Contract Line is to Be Renewed, *Oracle Service Contracts User Guide*.

**Starting the Workflow Background Process for Renewals**

This procedure is covered in the Events group of topics.

See Starting the Workflow Background Process, page 4-12.

**Running the Date Assembler for Renewals**

This procedure is covered in the Events group of topics.

See Running the Date Assembler, page 4-13.

**Confirming the Automatic Renewal**

To find out if the contracts were renewed successfully you can check for renewed contracts in Contract Navigator.

You can also check the date in the Last Occurrence field of the Independent Condition window. This date should be updated whenever the Date Assembler runs and is successful in picking up and renewing contracts. For example, if you defined an independent condition specifying that a contract should be picked up and renewed if its expiration date is 45 days before contract expiration and this is successful, then the Last Occurrence is the current date + 45.

**Creating and Enabling Templates for E-Mails to Customers**

This topic is covered in About Templates for E-Mails to Customers, *Oracle Service Contracts User Guide*.
Troubleshooting the Automatic Renewals Process

Verify that you have confirmed the procedures covered in the preceding group of procedures. If you are still experiencing problems, the following may help you to troubleshoot issues with the automatic renewal of contracts.

**Validate that Date Assembler Found Eligible Contracts**

The Date Assembler evaluates each Independent Condition. Contracts that satisfy the criteria defined in the condition appear in the output log file.

From the following sample log, we the CREATE RENEWAL EVENT condition was executed. Two contracts met the conditions defined in this condition.

- Contracts Nominated for Expiry Date Action Assembler
- Condition -CREATE RENEWAL EVENT is processed
- Contract -10096 is processed
- Contract -10097 is processed

Possible causes for the Date Assembler to fail to find eligible contracts include:

- Independent Condition has an end-date prior to the current date
- Independent Condition is invalid (verify that the Condition Valid check box is enabled)
- Desired contract does not meet defined condition
This chapter describes the steps to enable integration of the Oracle Service Contracts features with other Oracle E-Business Suite applications.

This chapter covers the following topics:

- Enabling the Quick Menu
- Defining the Contract Terms Library
- Migrating Clauses to the Contract Terms Library
- Setting Up Defaults for Services Affected by Oracle Install Base Ownership Transfers
- Personalizing HTML Views

**Enabling the Quick Menu**

You can set up the Quick Menu to navigate to windows in other applications without having to change responsibility and query the customer. The Quick Menu is available as a selection on the Tools menu.

For example, an agent working on a contract for Business World can access the Contact Center from the Service Contracts Authoring window, by selecting Quick Menu from the Tools menu, and choosing to open the Contact Center. The agent can modify customer information, including addresses, accounts, and other details, and then switch back to the contract without switching responsibilities.

**To enable the quick menu:**

1. Select the **Application Developer** responsibility. Navigate to **Application**, and then select **Menu**.

2. Query the submenu **OKS_QUICKMENU** and add the forms to use in the menu.
You can add forms from any application, but only forms that are Quick Menu-enabled pass the customer context from the contract. For a complete list, query the seeded Quick Menu for Customer Support CSX_CUSTOMER_SUPPORT_QM.

3. Query the OKS_MANAGER_TOP_MENU

4. Verify that you added the Quick Menu for Service Contracts to OKS_MANAGER_TOP_MENU as a submenu.

5. Set the system profile Customer Care: Start Menu for Quick menu to Quick Menu for Service Contracts at the Responsibility level.

   **Note:** By default, this system profile is set to Quick Menu for Customer Support at the Site level.

---

**Defining the Contract Terms Library**

This topic is covered in the *Oracle Contracts Implementation and Administration Guide*. See Setting Up Contract Terms Library in the *Oracle Contracts Implementation and Administration Guide*.

**Migrating Clauses to the Contract Terms Library**

This topic is covered in the Migrating Clauses to Contract Terms Library, *Oracle Contracts Implementation and Administration Guide*.

**Setting Up Defaults for Services Affected by Oracle Install Base Ownership Transfers**

Within Oracle Install Base, you can transfer ownership of an item instance, which can impact service contracts. If there is service associated with the item instance, you can:

- keep the service with the original owner.
- terminate the service.
- transfer the service to a new owner.

If you transfer the service to a new owner, the application creates a new contract to cover the item instance. The new contract appears in Oracle Service Contracts application with the transferred instance as a subline, and includes the same service as the original contract. You can view the contract by querying the instance within the Products tab of the Order Reprocessing form. For Mass Instance Updates, you can view...
the new Contracts by clicking a completed transfer batch.

The new contract includes values that default from Global Contracts Defaults, Billing Profiles, as well as the profile option, OKS: Transferred Contract Identifier. The OKS: Transferred Contract Identifier profile option adds a modifier to the transferred contract, which differentiates the transfer contract from the original contract.

**Note:** The application honors GCD settings for partial periods during instance transfer. If you do not set up the GCD, then during transfer the old instance transfers to the new owner; the application terminates contracts associated with the old instance and creates a new contract with the transferred instance. The application honors the setting in the profile OKS: Raise Credit Memo for Install Base Transactions and all other values are stamped as null.

**Note:** Credit amount is not generated for imported contracts that are billed at source.

For more information on transferring ownership of an item instance, see Transferring Ownership, *Oracle Install Base User’s Guide*.

**Note:** The Mass Update process in Oracle Install Base allows you to view and, in some cases, determine the impact that the mass update has on associated service contracts. For information on Mass Updates, see Entering and Viewing Contract Options, *Oracle Install Base User’s Guide*.

To set up defaults for services affected by Oracle Install Base ownership transfers:

1. Select the **Service Contracts Manager** responsibility. Navigate to **Setup: Service Contracts**, and then select **Global Contracts Defaults**. The following Global Contracts Defaults attributes affect new contracts that Oracle Install Base generates during ownership transfers:

   1. **Return Credit**: Determines default value for Credit Option on Contract Options page. Values include Calculated, Full, or None.
   2. **QA Checklist**: Determines the default QA checklist for new contracts for the transferred service.
   3. **Approval Workflow**: Determines the default approval workflow for new contracts for the transferred service.
   4. **New Contract Group**: Determines the default contract group for new contracts for the transferred service.
For more information on Global Contracts Defaults, see Entering Contract Defaults, *Oracle Service Contracts User Guide*.

2. Set the billing profiles by navigating to **Setup: Service Contracts**, and then select **Billing Profiles**. New contracts use the Accounting Rule, Invoicing Rule, and the Billing Level set on the billing profile for the new party. If you specify a billing profile in the Contracts Options page of Mass Instance Update, the accounting rule, invoice rule, and billing level come from the billing profile, otherwise, the accounting rule sets to Immediate, the invoice rule to Advanced, and the billing level to One time billing.

For more information on Billing Profiles see Creating Billing Profiles, *Oracle Service Contracts User Guide*.

3. Switch the responsibility to **System Administrator**, navigate to **Profile**, and then **System**. Set the profile option OKS: Transferred Contract Identifier to specify the modifier prefix for new contracts created for the transferred service at the site level, for example, *xfr*.

---

**Personalizing HTML Views**

Oracle Service Contracts contains several HTML pages, that you can personalize to address specific business flows. You can access HTML pages from the Oracle Service Contracts Administrator Workbench, the Oracle Install Base Mass Update Workbench, the Oracle Install Base Instance Details page, and the Oracle Sales Online Customer Details page.

For information on viewing the personalizable HTML pages or regions and also steps for personalizing HTML pages, refer to the *Oracle E-Business Suite Framework Personalization Guide*.

This appendix lists the profile options. This appendix covers the following topics:

• Setting Up System Profile Options

**Setting Up System Profile Options**

Use this list to identify profile options you need to change for your implementation. You can set profile options in any order and at the following levels, as indicated in the table:

• Site (S)

• Application (A)

• Responsibility (R)

• User (U)

You can access the Find System Profile Values window by logging into the **System Administrator** responsibility and navigating to **Profile**, and then **System**. To change profile options, follow the standard procedure outlined in the *Oracle E-Business Suite User’s Guide*.

<table>
<thead>
<tr>
<th>Option</th>
<th>Sample Values</th>
<th>Level</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Configuration</th>
<th>Status</th>
<th>Characters</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sequential Numbering</td>
<td>Always Used</td>
<td>S,A,R</td>
<td>Y</td>
<td>Assigns numbers to documents created by Oracle Financial products and provides a method of checking whether documents have been posted or lost. Set this option at the application level to Always Used. Do not set this option at the Responsibility level.</td>
</tr>
<tr>
<td>CSI: Display Impacted Contracts</td>
<td>Optional</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Determines whether or not a user must review a page to view impacted contracts before committing a change to an item instance in Oracle Installed. The two profile values are Optional (user has option to view the impacted contract page at any time when updating an item instance by clicking the View Impacted Contracts button) and Mandatory (user still has option to view impacted contracts at any time; however, when clicking the Apply button to commit a change to an item instance, the user must view the impacted contracts page and explicitly indicate whether to proceed with or cancel the change.</td>
</tr>
<tr>
<td>OKC: Change Request Approver</td>
<td>SYSADMIN</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Identifies the default change request approver, which overrides the workflow approver.</td>
</tr>
<tr>
<td>Profile</td>
<td>Value</td>
<td>Setting</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-------</td>
<td>---------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>OKC: Error Message Recipient</td>
<td>Able, Ms. Marsha</td>
<td>S, N</td>
<td>Identifies the resource (person) to notify in case the outcome execution has failed. This value can be overwritten in case the user selects another person to be notified when entering the outcome condition.</td>
<td></td>
</tr>
<tr>
<td>OKC: Event Listener Iterations</td>
<td>100</td>
<td>S, A, N</td>
<td>Allows System Administrators to set the work load of the listeners. The default load (listener its/iterations) is set to 100.</td>
<td></td>
</tr>
<tr>
<td>OKC: Global Update Privilege</td>
<td>Yes</td>
<td>S, N</td>
<td>If set to Yes, an active contract will have the status QA Hold when you open the contract. The Open for Update button will not appear if the profile is set to Yes.</td>
<td></td>
</tr>
<tr>
<td>OKC: Number of days to retain a message on the exception queue</td>
<td>30</td>
<td>S, N</td>
<td>In case of any exceptions encountered while running events, messages are thrown into the exception queues. This profile determines the retention period (in days) of such messages.</td>
<td></td>
</tr>
<tr>
<td>OKC: Outcome Listener Iterations</td>
<td>100</td>
<td>S, A, N</td>
<td>Allows System Administrators to set the work load of the listeners. The default load (listener its/iterations) is set to 100.</td>
<td></td>
</tr>
<tr>
<td>OKC: Public Group Creator</td>
<td>--</td>
<td>R, U, N</td>
<td>Set this profile option to Yes at the user level, to enable users to create public groups in Oracle Service Contracts.</td>
<td></td>
</tr>
<tr>
<td>Feature</td>
<td>Period</td>
<td>Measure</td>
<td>Type</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>--------</td>
<td>---------</td>
<td>------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>OKC: Renewed Contract Identifier</td>
<td>R</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Provides prefix identifier, which is attached to the system date and shown as a modifier on the renewed contract.</td>
</tr>
<tr>
<td>OKC: Schedule Rule Alert Window</td>
<td>--</td>
<td>R,U</td>
<td>N</td>
<td>Determines the number of days before a task is due when the user is notified of an upcoming task.</td>
</tr>
<tr>
<td>OKC: Schedule Rule Escalate</td>
<td>1</td>
<td>R,U</td>
<td>N</td>
<td>Determines the number of days after an incomplete task's due date when escalation begins.</td>
</tr>
<tr>
<td>OKC: Time UOM Class</td>
<td>Time</td>
<td>S</td>
<td>Y</td>
<td>Limits the units in the Map Time Units window. Note: This is case sensitive and <strong>Time</strong> should be entered using the exact case.</td>
</tr>
<tr>
<td>OKC: View Contracts By Organization</td>
<td>No</td>
<td>S,R</td>
<td></td>
<td>Set this profile option to <strong>Yes</strong> at the user level, to provide users visibility to contracts authored in the operating unit associated with their responsibility.</td>
</tr>
</tbody>
</table>
OKS: Accounting Duration Basis  GL Calendar  S  N

Indicates how accounting durations are calculated for variable accounting rules for service lines. If **Monthly** is selected, then the accounting rule duration calculation is based on the number of months that are in the billed service duration. Set the profile to monthly when service revenue is always recognized on a monthly basis. If the profile is set to **GL Calendar**, the accounting duration is determined by calling a GL API to determine the number of fiscal periods that are spanned by the billed service duration. The period used for the duration calculation is specified on accounting rule attached to the service line.

**Note:** If daily rate accounting rule is attached to the service being billed, then this profile is not referenced and Oracle Service Contracts instead passes both the rule start date and rule end date and allows Oracle Receivables to calculate the accounting rule duration.
<table>
<thead>
<tr>
<th>OKS: Billing Report and Log</th>
<th>Yes</th>
<th>S,A,R,U</th>
<th>N</th>
<th>Determines whether or not log messages are spooled to output and log files. For companies with a large contract base, the output and log files can be very large when running Service Contracts Main Billing program.</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKS: Billing Schedule Level</td>
<td>Top Level</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Defines the default level for billing schedules. You can:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Define billing periods with complete control of dates and amount (Equal Amount).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Define billing periods so that Oracle Service Contracts calculates the amount (Top Level).</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Define billing dates and amounts to be charged for each period for each covered level (Covered Level).</td>
</tr>
<tr>
<td>OKS: Cascade Attributes Using Concurrent Request</td>
<td>Yes, No</td>
<td>S, A, R, U</td>
<td>Y</td>
<td>Specifies attributes to be cascaded to all sublines in the Cascading Attribute window. If the profile option value is set to Yes and if the count of lines or sublines is more than the value mentioned in the OKS: SubLine Threshold Value to Launch a Concurrent Program profile option, then cascading attributes from Headers to Lines and Lines to Sublines is done in the background mode. A concurrent request is launched for this and the concurrent request ID is displayed to track the request.</td>
</tr>
<tr>
<td>OKS: Category for Order Management Originated Contracts</td>
<td>Warranty</td>
<td>S</td>
<td>N</td>
<td>Determines the contract category for Order Management originated contracts. If set to Service, the service ordered interfaces to Contracts with category as Service Agreement and the line type Service. If set to Warranty, the contract created is of the Warranty/Extended Warranty category with the line type Extended Warranty. If set to Subscription, the Contract category created for the service ordered is Subscription Agreement and the line type Service.</td>
</tr>
<tr>
<td>OKS: Check Coverage Match</td>
<td>No</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Set this profile option to <strong>Yes</strong>, to force the renewal consolidation process to preserve differences in coverage between source and target contracts.</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----</td>
<td>---------</td>
<td>---</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>OKS: Consolidate Warranty for Multiple Orders</td>
<td>Yes</td>
<td>S</td>
<td>Y</td>
<td>Determines if an order for products with multiple warranties, sold in Order Management, should be consolidated when the service contract is created. Similar warranties are grouped on a single contract rather than creating separate contracts.</td>
</tr>
<tr>
<td>OKS: Contact Center Date Range</td>
<td>10</td>
<td>S,A,R,U</td>
<td>Y (for viewing contracts from the Contact Center)</td>
<td>Controls the date range of contracts that can be viewed from the Contact Center. Enter the number of days prior to the current date.</td>
</tr>
</tbody>
</table>
OKS: Contracts Validation Source

Install Base  S,A,R,U  N

Allows the user to define the organization information that should be referenced when automatically creating a contract. You can set the profile as follows:

- **Ship From Org - Order Management**
- **Sold From Org - Order Management**
- **Install Base**
- **Master Org**

The organization that sells the product may be different from the organization that ships the product. If the selling organization has the relationship with the customer, and has agreed to make the sale, it may be that the selling organization should be the one to honor any warranty associated with that product, rather than the organization that shipped the product. In this case, the profile option could be set to **Sold From Org - Order Management**. The organization information is obtained by the sales order line information.

<table>
<thead>
<tr>
<th>OKS: Copy Notes</th>
<th>Yes</th>
<th>S,A,R,U</th>
<th>--</th>
</tr>
</thead>
</table>

Allows notes to be copied.

<table>
<thead>
<tr>
<th>OKS: Credit Card Minimum Authorized Amount</th>
<th>50</th>
<th>S,A,R,U</th>
<th>N</th>
</tr>
</thead>
</table>

Determines the minimum amount that is authorized against a credit card.
<p>| OKS: Credit Card Validation Level | Validate | S,A,R,U | N | Determines whether or not to authorize the credit card. The amount authorized is determined by the profile OKS: Credit Card Minimum Authorized Amount. Credit Card authorization is initiated when the QA process runs for a contract. |
| OKS: Date Assembler Workflow Queue Size | 10 | S | N | Determines the number of contracts to be fetched by the Service Contracts Date Assembler Workflow Manager concurrent program to create the OKCALERT workflow process for a contract that can be renewed. |
| OKS: Debug Error Log | No | S,A,R,U | N | Set to Yes to generate a debug file. Should remain set to No, unless directed by a support analyst. |
| OKS: Default Contract Status for Transfers | Active | S | N | Determines the status of the new contract created for the new party. |
| OKS: Default Line Style | Service | S,A,R,U | Y | Defines the default line style of a service contract. Only Service, Extended Warranty, Warranty, Subscription, and Usage line styles are supported for Oracle Service Contracts. |
| OKS: Default Order Type for Subscriptions | Mixed | S,A,R,U | Y (if using tangible subscription) | Defines order type for subscription line orders. |</p>
<table>
<thead>
<tr>
<th>OKS: Default Pricing Date</th>
<th>Sysdate</th>
<th>S,A,R,U</th>
<th>N</th>
<th>Defines the date used to determine the correct price list and pricing effectivity.</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKS: Default QA Checklist</td>
<td>Default Quality Assurance Check List</td>
<td>S,A,R,U</td>
<td>Y</td>
<td>Specifies the QA default when authoring new contracts. This profile option applies only to new contracts that are created during authoring.</td>
</tr>
<tr>
<td>OKS: Default Sales Person for Renewal</td>
<td>Taylor, Mr. Phillip Charles</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Sets the default sales person for sales credits on a renewed contract. It also populates this name in the Vendor Contact in the Party Contact Role. If the profile option OKS: Use Territories to Default Sales Person is set to Yes, the sales representative is retrieved from resource management instead of this profile option. If OKS: Enable Sales Credits profile option is set to Drop, this profile option is ignored.</td>
</tr>
<tr>
<td>OKS: Default Time Zone</td>
<td>Pacific/Pitcairn</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Determines the default time zone for business process during Coverage template definition.</td>
</tr>
<tr>
<td>OKS: Delete Renewed Contract Lines or Sublines</td>
<td>Yes, No</td>
<td>S</td>
<td>N</td>
<td>Determines whether or not to delete the renewed contract lines or sublines.</td>
</tr>
<tr>
<td>OKS: Display Subscription Contracts in Entitlements</td>
<td>Yes, No</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Displays service lines added in a subscription agreement in entitled region.</td>
</tr>
<tr>
<td>OKS: Enable Grace Period</td>
<td>Yes/No</td>
<td>S, A, R, U, N</td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------</td>
<td>---------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Indicates whether users should be able set up a Grace Period, when authoring or updating a contract. This site level profile option default is <strong>No</strong>, which causes Grace Period fields on the Contracts Authoring form to be grayed out. If set to <strong>Yes</strong>, users can populate the Grace Duration and Grace Period fields. In addition, entitlements processing honors the grace period.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OKS: Enable Install Base Integration Notifications</th>
<th>Yes/No</th>
<th>S, A, R, U, N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determines if notifications are to be sent for any contract creation or updates based on Install Base operations.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
OKS: Enable Sales Credits  Retain  S,A,R,U  N

Determines how Sales Person, Revenue Type Distribution, Revenue Type, and Vendor Contact are derived during contract renewal. The options are:

- **Drop**: no sales credit or vendor contact details are assigned to the renewal contract
- **Retain**: sales credit or vendor contact details are copied from the previous contract
- **Derive**: sales credit or vendor contact details from previous contract are dropped. The revenue credit recipient and vendor contact derived as indicated by the following profiles:
  - Sales Person (unless OKS: Use Territories to Default Sales Representative is set to Yes)
  - Revenue Type Distribution
  - Revenue Type
  - Vendor Contact.
  - **Derive for Revenue Type and Retain Other**: sales credit or vendor contact details from previous contract are
dropped. The revenue credit recipient and vendor contact derived as indicated by the profiles noted in Derive in the preceding list. Other types of revenue credit are copied from the previous contract.

<table>
<thead>
<tr>
<th>OKS: Full Credit for Product Return</th>
<th>Y</th>
<th>S</th>
<th>N</th>
<th>Determines if a full or partial credit should be issued when a subline is terminated as a result of a customer product return.</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKS: Intangible Subscription Pricing Method</td>
<td>Subscription Based</td>
<td>S</td>
<td>N</td>
<td>Determines the pricing method for Intangible Subscription items. Pricing method can be set to Effectivity based or Subscription based.</td>
</tr>
<tr>
<td>OKS: Item Display Preference</td>
<td>Name</td>
<td>S,A,R,U</td>
<td>Y</td>
<td>Specifies the display order in the list of values for Inventory items when selecting Covered Products or Covered Items, while creating a subline in the Authoring form.</td>
</tr>
<tr>
<td>OKS: Mass change security level</td>
<td>Advanced</td>
<td>S,A,R,U</td>
<td>Y</td>
<td>Defines list of update levels available to the user when making mass change. If set to Basic, then only the Contract and Contract Group level can be selected for updates. If set to Advanced, users can perform mass change updates at all levels.</td>
</tr>
<tr>
<td>OKS: Merge System Transfers</td>
<td>Yes</td>
<td>S, N</td>
<td>Determines if contracts covering multiple products in a system are merged into a single new contract when an instance is transferred.</td>
<td></td>
</tr>
<tr>
<td>OKS: Minimum Service Duration</td>
<td>1</td>
<td>S, A, R, U, N</td>
<td>Defines the minimum duration of a service for cotermination. If a service program sets its cotermination date for duration less than the minimum service duration, then the service program honors the minimum service duration to determine the cotermination date.</td>
<td></td>
</tr>
<tr>
<td>OKS: Minimum Service Period</td>
<td>Months</td>
<td>S, A, R, U, N</td>
<td>Defines the minimum period of a service for cotermination. If a service program sets its cotermination date for duration less than the minimum service duration, then the service program honors the minimum service duration to determine the cotermination date.</td>
<td></td>
</tr>
<tr>
<td>OKS: Notify Contract Administrator</td>
<td>CONMGR</td>
<td>S, A, R, U</td>
<td>Required for reassignment of sales reps</td>
<td>Identifies the administrator to be notified if unable to reassign the sales representative on the contract.</td>
</tr>
<tr>
<td>OKS: Notify Sales Administrator</td>
<td>CONMGR</td>
<td>S, A, R, U</td>
<td>Required for reassignment of sales reps</td>
<td>Identifies the administrator to be notified if the sales representative setup is incomplete.</td>
</tr>
<tr>
<td>OKS: Notify Sales Administrator</td>
<td>CONMGR</td>
<td>S,A,R,U</td>
<td>Required for reassignment of sales reps</td>
<td>Identifies the administrator to be notified when territory setup is incomplete.</td>
</tr>
<tr>
<td>-------------------------------</td>
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<td>---------</td>
<td>---------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>OKS: Notify User of Install Base Integration Notifications</td>
<td>CONMGR</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Identifies the user to be notified whenever a warranty or extended warranty is created or updated in Install Base.</td>
</tr>
<tr>
<td>OKS: Parallel Worker</td>
<td>NO</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Defines how the Service Contracts Main Billing concurrent program is run for efficient performance. Set to Yes to spawn multiple concurrent requests for Service Contracts Main Billing program, when the billing load exceeds 500 lines.</td>
</tr>
<tr>
<td>OKS: Payment Method for AR Interface</td>
<td>Credit Card</td>
<td>S</td>
<td>N</td>
<td>Captures the payment method for a customer for integration with iPayment Server.</td>
</tr>
<tr>
<td>OKS: Raise Credit Memo for Install Base Transactions</td>
<td>YES</td>
<td>S</td>
<td>N</td>
<td>Determines if a credit memo is raised when a contract subline is terminated due to transfer, return, or termination of a customer product in Install Base.</td>
</tr>
<tr>
<td>OKS: Reprice Warning Message</td>
<td>YES</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Suppresses the warning message while repricing or manually overriding the final price. If set to No, the warning message “This action is irreversible. Do you wish to Continue?” is suppressed.</td>
</tr>
<tr>
<td>OKS: Revalue Contract Using Currency Conversion Rate</td>
<td>Yes, No</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Determines if the contract can be revalued. If the profile option value is set to Yes, the contract is revalued using conversion rates entered in the Contract Authoring window.</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>---------</td>
<td>---------</td>
<td>---</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>OKS: Revenue Type Distribution for Sales Credit</td>
<td>100</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Sets the credit percentage on a renewed contract for a sales representative. In order to pass QA, revenue distribution for a renewal contract must be 100%. If OKS: Enable Sales Credits is set to No, this profile option is ignored.</td>
</tr>
<tr>
<td>OKS: Revenue Type for Sales Credits</td>
<td>Quota Sales Credit</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Sets the Sales Credit type, for example quota or non-quota, for creating the sales credits during renewal. If OKS: Enable Sales Credits is set to Drop, this profile option is ignored.</td>
</tr>
<tr>
<td>OKS: Service Request Creator</td>
<td>EBUSINESS</td>
<td>S,A,R,U</td>
<td>Y</td>
<td>Sets default username for automated creation of service requests.</td>
</tr>
<tr>
<td>OKS: SMTP HOST</td>
<td>vissmtp02.vision corp.com</td>
<td>S,A,R,U</td>
<td>Required for e-mail quote</td>
<td>Identifies name of the outgoing mail server used to deliver external e-mail notifications.</td>
</tr>
<tr>
<td>OKS: SMTP PORT</td>
<td>25</td>
<td>S,A,R,U</td>
<td>Required for e-mail quote</td>
<td>Identifies SMTP port number used by the SMTP server defined in OKS: SMTP Host profile option.</td>
</tr>
<tr>
<td>OKS: Source for State and Country Territory Qualifiers</td>
<td>Customer Party, Vendor Party</td>
<td>S</td>
<td>N</td>
<td>Enables users to determine whether qualifiers are based on customer party or vendor party</td>
</tr>
<tr>
<td>OKS: Stop Workflow Launch From Date Assembler</td>
<td>Yes, No</td>
<td>S</td>
<td>N</td>
<td>Determines whether or not to initiate the workflow process for fetching the eligible contracts for renewal, using the Service Contracts Date Assembler Workflow Manager concurrent program.</td>
</tr>
<tr>
<td>OKS: Subscription Item Filter</td>
<td>Subscription</td>
<td>S</td>
<td>N</td>
<td>Determines which items the user can select in a subscription line under a subscription agreement. If the value is set to Subscription, only subscription items can be selected. If the value is set to All, the user can select any subscription or products (except service warranty and usage items) at the subscription line.</td>
</tr>
<tr>
<td>OKS: SubLine Threshold Value to Launch a Concurrent Program</td>
<td>Numeric value based on the requirement to launch reprice as a concurrent program</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Enables users to submit a concurrent program for repricing at contract header or line level from the Authoring window. The concurrent program for repricing is submitted only if the contract’s subline count exceeds the Threshold value defined for the profile option.</td>
</tr>
<tr>
<td>OKS: Summary Transactions</td>
<td>NO</td>
<td>S,A,R,U</td>
<td>Y</td>
<td>If summary transaction is unchecked at the contract header level, determines if the summary or detailed transactions are sent to Oracle Receivables.</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----</td>
<td>---------</td>
<td>---</td>
<td>-----------------------------------------------------------------</td>
</tr>
<tr>
<td>OKS: Territory Sales Person for First Year Contracts</td>
<td>Derive</td>
<td>S</td>
<td>N</td>
<td>Determines whether the application uses sales territories to assign sales agents (vendor contacts of role Salesperson) to new contracts created from orders in Oracle Order Management. A setting of <strong>Retain</strong>, causes the application to copy the sales person on the order. A setting of <strong>Derive</strong> uses sales territories to assign one resource as a vendor contact of type Salesperson to each contract.</td>
</tr>
<tr>
<td>OKS: Transfer Party Relationship</td>
<td>CUSTOMER/SELLER</td>
<td>S</td>
<td>Y</td>
<td>Specifies the relationship that would identify related parties during the transfer management process. If this relationship does not exist between the parties, the parties are considered unrelated.</td>
</tr>
<tr>
<td>OKS: Transferred Contract Identifier</td>
<td>T</td>
<td>S</td>
<td>N</td>
<td>Specifies the modifier prefix for new contracts created for a transferred service.</td>
</tr>
<tr>
<td>OKS: UOM Code</td>
<td>Each</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Sets the Unit of Measure (UOM) code for covered party, site, system, and customer.</td>
</tr>
<tr>
<td>OKS: Update Contract with Install Base Quantity</td>
<td>Yes</td>
<td>S, Y</td>
<td>Determines if the contract covered product quantity is updated as a result of an increase in the item instance quantity in Install Base. This does not apply to other transactions, such as a split quantity.</td>
<td></td>
</tr>
<tr>
<td>OKS: Update Invoice Text During Renewal</td>
<td>Yes, No</td>
<td>S, A, R, U, N</td>
<td>Determines whether or not to update invoice text during the renewal of a contract.</td>
<td></td>
</tr>
<tr>
<td>OKS: Usage Billing Calculation</td>
<td>Counter</td>
<td>S, Y</td>
<td>Determines readings to be considered in Usage billing computation.</td>
<td></td>
</tr>
<tr>
<td>OKS: Use Advanced Pricing for Manual Adjustment</td>
<td>YES</td>
<td>S, A, R, U, N</td>
<td>Controls integration with Advanced Pricing for manual override of the final price. If set to No, Advanced Pricing is not used to create or derive price adjustments. If set to Yes, Advanced Pricing is used to derive price adjustments. All adjustments is stored in Oracle Service Contracts and can be viewed from the pricing adjustment screen.</td>
<td></td>
</tr>
<tr>
<td>OKS: Use Bulk Loading for Line Reprice</td>
<td>YES, NO</td>
<td>S, A, R, N</td>
<td>Determines whether to use bulk feature to perform repricing faster. The default value of the profile option is No. If set to Yes bulk feature is used to perform repricing faster.</td>
<td></td>
</tr>
<tr>
<td>OKS: Use Inventory Org for Tax Calculations</td>
<td>YES</td>
<td>S, N</td>
<td>Determines whether to use the inventory organization for tax calculations.</td>
<td></td>
</tr>
<tr>
<td>OKS: Use Territories to Default Sales Person</td>
<td>YES</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Determines whether to use Territories to default the sales representative for a renewed contract. If set to No, the sales representative is retrieved from OKS: Default Sales Person for Renewal. If set to Yes, the application retrieves the sales person assigned by territory. Territories must be setup if this profile is set to Yes. This profile must be set to Yes if using Reassign Resources concurrent request. If OKS: Enable Sales Credits is set to Drop, this profile option is not used to populate the sales person renewal agreement.</td>
</tr>
<tr>
<td>OKS: Validate Reaction or Resolution Times</td>
<td>Yes, No</td>
<td>S,A,R,U</td>
<td>N</td>
<td>Respond By and Resolve By dates calculated using the coverage details are validated against the contract effectivity if the OKS: Validate Reaction or Resolution Times profile option is set to Yes. The default value of this profile option is Yes.</td>
</tr>
<tr>
<td>OKS: Vendor Contact Role</td>
<td>SALESPERSON</td>
<td>S,A,R,U</td>
<td>N</td>
<td></td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------</td>
<td>---------</td>
<td>---</td>
<td></td>
</tr>
<tr>
<td>Sets the role for creating contacts during contract renewal as well as during extended warranty creation. Select any role from the list of values to be added to the party role contacts, which will be copied from the expiring contract. This profile option populates only the role. The person assigned to this role is named in the profile option OKS: Default Sales Person for Renewal. The Concurrent Process for Reassigning Resources looks to the Vendor Contact Role of SalesPerson to validate the name of the sales rep indicated in the territory assignment. Therefore, consider setting this profile option to Salesperson. If OKS: Use Territories to Default Sales Person is set to Yes and the vendor contact role is Salesperson, this party role contact name may be changed to match the territory assignment. If OKS: Enable Sales Credit is set to No, this profile option will be ignored.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
This appendix lists the lookup types.

This appendix covers the following topics:

- Defining Lookups

**Defining Lookups**

The following table identifies lookups that you can define for your implementation. These lookups have one of the following access levels:

- **User**: Allows you to change the lookup code.

- **Extensible**: Allows you to add new lookup codes. However, you cannot modify seeded lookup codes.

  **Note**: Lookups with the System access level cannot be modified and are not included in this appendix.

You can enter lookups in any order by navigating to the Application Object Library Lookup window. For lookups beginning with the:

- **OKC prefix**, log into the Contracts Manager responsibility.

- **OKS prefix**, log into the Service Contracts Manager responsibility.

Navigate to **Setup: Service Contracts**, and then select **Lookups**.

Follow the standard procedure outlined in the *Oracle E-Business Suite User’s Guide*. 
<table>
<thead>
<tr>
<th>Lookup Types</th>
<th>Description</th>
<th>Lookup Meaning</th>
<th>Access Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKC_CONTINGENT_EVENTS</td>
<td>Defines contingent events</td>
<td>Acts of God</td>
<td>E</td>
</tr>
<tr>
<td>OKC_PRICE_TYPE</td>
<td>Defines pricing types</td>
<td>Firm Fixed</td>
<td>E</td>
</tr>
<tr>
<td>OKC_PROCESS_USAGE_TYPES</td>
<td>Defines process usage type</td>
<td>Approve Change Request</td>
<td>E</td>
</tr>
<tr>
<td>OKC_ROLE</td>
<td>Defines party contact roles</td>
<td>Customer</td>
<td>E</td>
</tr>
<tr>
<td>OKC_SUBJECT</td>
<td>Standard article subject types</td>
<td>Administration</td>
<td>E</td>
</tr>
<tr>
<td>OKS_AUTO_RENEW_STATUS</td>
<td>Defines status for autorenewal</td>
<td>Quote Accepted</td>
<td>U</td>
</tr>
<tr>
<td>OKS_BILLING_RATE</td>
<td>Defines types of billing rates</td>
<td>Overtime rate</td>
<td>U</td>
</tr>
<tr>
<td>OKS_BILL_ACTIONS</td>
<td>Defines billing action rules</td>
<td>Usage Averaging</td>
<td>U</td>
</tr>
<tr>
<td>OKS_CONTRACT_CATEGORY</td>
<td>Defines contract category from OM</td>
<td>Service</td>
<td>U</td>
</tr>
<tr>
<td>OKS_COVERAGE_SEARCH_TYPE_WEB</td>
<td>Defines Simple Search list in Coverage Template.</td>
<td>Name</td>
<td>U</td>
</tr>
<tr>
<td>Lookup Types</td>
<td>Description</td>
<td>Lookup Meaning Example</td>
<td>Access Code</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>OKS_CREDIT_AMOUNT</td>
<td>Defines credit amount types for service termination</td>
<td>Full</td>
<td>U</td>
</tr>
<tr>
<td>OKS_GLOBAL_WEB</td>
<td>Defines defaults global main Organization Defaults Overview</td>
<td></td>
<td>U</td>
</tr>
<tr>
<td>OKS_MEDIA_DEF</td>
<td>Defines invoice media definitions</td>
<td>Fax</td>
<td>U</td>
</tr>
<tr>
<td>OKS_MED_PRTY_TYPE</td>
<td>Defines subscription media/property type</td>
<td>Microfiche</td>
<td>U</td>
</tr>
<tr>
<td>OKS_ORG_WEB</td>
<td>Defines organization overview navigation</td>
<td>Global Defaults</td>
<td>U</td>
</tr>
<tr>
<td>OKS_PARTY_WEB</td>
<td>Defines party overview navigation</td>
<td>Global Defaults</td>
<td>U</td>
</tr>
<tr>
<td>OKS_PBL_PRORATE</td>
<td>Defines OKS locked price breaks prorate value</td>
<td>All</td>
<td>U</td>
</tr>
<tr>
<td>Lookup Types</td>
<td>Description</td>
<td>Lookup Meaning Example</td>
<td>Access Code</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------------------------------------------</td>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>OKS_REPORT_TYPE</td>
<td>Defines report types</td>
<td>Reminder Notice</td>
<td>U</td>
</tr>
<tr>
<td>OKS_REPROCESS_OPTIONS</td>
<td>Defines reprocess options</td>
<td>All</td>
<td>U</td>
</tr>
<tr>
<td>OKSRESOURCE_CLASS</td>
<td>Defines resource classes</td>
<td>Excluded</td>
<td>U</td>
</tr>
<tr>
<td>OKS_SALES_CREDITS</td>
<td>Defines sales credits</td>
<td>Derive</td>
<td>U</td>
</tr>
<tr>
<td>OKS_SALES_PERSON</td>
<td>Defines how to derive salesperson for territory</td>
<td>Retain</td>
<td>U</td>
</tr>
<tr>
<td>OKS_SC_DISTRIBUTION</td>
<td>Defines sales credit definition</td>
<td>Full</td>
<td>U</td>
</tr>
<tr>
<td>OKS_SC_YES_NO</td>
<td>Defines Service Contracts yes/no</td>
<td>Y</td>
<td>U</td>
</tr>
<tr>
<td>OKS_SUBS_ITEM_FLTR_VALUES</td>
<td>Defines subscription item filter values</td>
<td>Subscription</td>
<td>U</td>
</tr>
<tr>
<td>OKS_SUB_TYPE</td>
<td>Defines subscription type</td>
<td>Membership</td>
<td>U</td>
</tr>
<tr>
<td>OKS_SVC_PERIOD</td>
<td>Defines service periods</td>
<td>Day</td>
<td>U</td>
</tr>
<tr>
<td>OKS_TRANSFER_OPTIONS</td>
<td>Defines service contracts transfer option</td>
<td>Transfer If Not Related</td>
<td>U</td>
</tr>
<tr>
<td>OKS_TRANSFER_STATUS</td>
<td>Defines transfer status</td>
<td>Active</td>
<td>U</td>
</tr>
<tr>
<td>Lookup Types</td>
<td>Description</td>
<td>Lookup Meaning Example</td>
<td>Access Code</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>OKS_USAGE_BILLING_BASED_ON</td>
<td>Defines usage billing calculation methodology</td>
<td>Counter</td>
<td>U</td>
</tr>
<tr>
<td>OKS_USAGE_SEARCH_TYPE_WEB</td>
<td>Defines list box in Simple Search drop down within the Usage Template</td>
<td>Description</td>
<td>U</td>
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<tr>
<td>OKS_USAGE_TYPE</td>
<td>Defines billing types for usage items</td>
<td>Fixed Rate</td>
<td>U</td>
</tr>
<tr>
<td>OKS_YES_NO</td>
<td>Defines service contracts lookup code</td>
<td>Yes</td>
<td>U</td>
</tr>
</tbody>
</table>
This appendix lists the concurrent programs.

This appendix covers the following topics:

- Running Concurrent Programs

# Running Concurrent Programs

The following table provides a listing of the reports that you will run during your implementation of Oracle Service Contracts. These programs are described within the procedures covered in this guide and the *Oracle Service Contracts User Guide*.

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<tr>
<th>Concurrent Program</th>
<th>Responsibility</th>
<th>Description</th>
</tr>
</thead>
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<td>Build Attribute Mapping Rules</td>
<td>Oracle Pricing Manager</td>
<td>Generates the attribute mapping rules for all attributes that have the Attribute Mapping Enabled box selected. See the <em>Oracle Advanced Pricing Implementation Guide</em>.</td>
</tr>
<tr>
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<td>User/Role</td>
<td>Notes</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----------</td>
<td>-------</td>
</tr>
<tr>
<td>Date Assembler</td>
<td>Service Contracts Manager</td>
<td>See Running the Date Assembler for Renewals, page 4-13.</td>
</tr>
<tr>
<td>Generate Territory Packages</td>
<td>CRM Administrator</td>
<td>Updates changes made to territories. See the <em>Oracle Territory Manager Implementation Guide.</em></td>
</tr>
<tr>
<td>Listener for Events Queue</td>
<td>Service Contracts Manager</td>
<td>See Starting the Event and Outcome Listeners, page 4-9.</td>
</tr>
<tr>
<td>Listener for Outcome Queues</td>
<td>Service Contracts Manager</td>
<td>See Starting the Event and Outcome Listeners, page 4-9.</td>
</tr>
<tr>
<td>Service Contracts Date Assembler Workflow Manager</td>
<td>Service Contracts Manager</td>
<td>To create workflow processes for all the eligible contracts that need to be renewed based on the value set for the OKS: Date Assembler Workflow Queue Size profile option.</td>
</tr>
<tr>
<td>Service Contracts Reprice Program</td>
<td>Service Contracts Manager</td>
<td>This concurrent program is launched when submitting header or line level reprice from the Authoring window based on the threshold value defined for the OKS: SubLine Threshold Value to Launch a Concurrent Program profile option.</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>---------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Update Price Lists with Multi-Currency Conversion Criteria</td>
<td>Pricing Manager</td>
<td>Enables price list windows for multi-currency conversions. See the <em>Oracle Advanced Pricing Implementation Guide</em>.</td>
</tr>
<tr>
<td>Workflow Background Process</td>
<td>Service Contracts Manager</td>
<td>See Starting the Workflow Background Process, page 4-12.</td>
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