

# Oracle Fusion Cloud Sales Automation

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## **Implementing Enterprise Contracts**



Oracle Fusion Cloud Sales Automation  
Implementing Enterprise Contracts

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

## Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

## Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

## Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!



# 1 About This Guide

## Audience and Scope

This guide provides information on how implementors and administrators can configure and set up Oracle Enterprise Contracts. It is designed as a reference to configuring required common application features as well as summarizing specific setup tasks for Enterprise Contracts.

This guide assumes your Oracle applications are up and running at a basic level.

## Related Guides

In addition to this guide, here's a table that provides summary information about other guides that may be important references to understand more about the business flows and functionality covered in this guide.

Guide	Description
<i>Oracle Fusion Cloud Sales Automation: Implementing Sales</i>	Covers the implementation of Digital Sales (Next Gen Sales) application and contains concepts and procedures you need to implement a sales force automation solution using key sales features.
<i>Oracle Fusion Cloud Applications: Using Functional Setup Manager</i>	Describes how to use the Setup and Maintenance work area when implementing and configuring your sales application.
<i>Oracle Fusion Cloud Sales Automation: Implementation Reference</i>	Provides a reference to conceptual information and procedures required to implement components and features for your cloud service.
<i>Oracle Fusion Cloud Sales Automation: Using Customer Contracts</i>	Contains information about creating and managing customer contracts.
<i>Oracle Fusion Cloud Sales Automation: Using Sales</i>	Contains information to help sales managers, salespeople, and other sales end users when using sales application to perform their day-to-day tasks.
<i>Oracle Fusion Cloud Applications: Configuring Applications Using Application Composer</i>	Describes how to create and enhance objects and configure the user interfaces and navigation menus.
<i>Oracle Fusion Cloud Customer Experience: Understanding Import and Export Management for CX Sales and B2B Service</i>	Contains information to help those charged with exporting and importing object data.
<i>Oracle Fusion Cloud Customer Experience: Securing Sales and Fusion Service</i>	Contains information to help setup users and sales administrators configure access to sales functionality and data.

Guide	Description
<i>Oracle Fusion Cloud Customer Experience: Creating and Administering Analytics for Sales and Fusion Service</i>	Contains information about supplied reports and analytics, as well as how to create your own reports.

You can find these guides on *Oracle Help Center*.

Keep in mind that you may need to consult other guides other than those shown here.

# 2 Implementation Overview

## Common Implementation Overview

Common implementation involves performing setup tasks that are common and available within multiple offerings. The Application Extensions and other functional areas comprise these common setup and implementation tasks.

### Application Extensions

Use the Application Extensions functional area to configure common business objects. For example, you can do these tasks:

- Configure workflow tasks, for example to identify how and to whom approvals are routed.
- Review and manage objects, for example currencies and reference data sets shared across applications.
- Configure common reference objects, such as flexfields, document sequences, and profile options that affect the functionality and look of Oracle Applications Cloud.

### Other Functional Areas

Other functional areas contain several tasks to manage common functions that apply to the entire implementation. Examples of such functional areas include Legal Structures, Users and Security, and Enterprise Profile. Here are a few examples of tasks you can do using these functional areas:

- Set up security, enterprise structures, geographies, and business units.
- Create and maintain user accounts and sync the list of users and roles stored in Lightweight Directory Access Protocol (LDAP).

### Create Implementation Users

You must have at least one implementation user. To ensure segregation of critical duties, multiple implementation users are recommended. For example, one implementation user typically performs functional setup tasks and another performs security setup tasks. When you create implementation users, you also assign predefined job roles to them directly. The job roles vary with the tasks that the implementation users perform.

See *How do I create and manage users?* for more information.

### Enable Features to Access Common Setup Tasks

To access various common setup tasks, you need to enable these features in the Offerings work area.

**Note:** Apart from the features listed below, you might also need to enable other features to use other common tasks within Application Extensions and in other functional areas.

- **Maintain Common Reference Objects:** You can enable this feature to implement common functionality, such as reference data sets, languages, or general preferences. After enabling this feature, you can use tasks available in the Application Extensions functional area to manage common reference objects that are defined centrally and shared across applications.

Here's a list of tasks you can use after enabling this feature:

- Manage Taxonomy Hierarchy
- Manage Reference Data Sets
- Manage Set Assignments for Set Determinant Type
- Manage Reference Data Set Data Access for Users
- Manage Currencies
- Manage ISO Languages
- Manage Territories
- Manage Languages
- Manage Industries
- Manage Natural Languages
- Manage Time Zones
- Manage Data Security Policies
- Set User General Preferences
- Manage Audit Policies
- Manage Applications Core Messages
- Manage Applications Core Standard Lookups
- Manage Applications Core Profile Options
- Manage Applications Core Administrator Profile Values
- Manage Applications Core Profile Categories
- Manage Applications Core Value Sets
- Manage Applications Core Descriptive Flexfields
- Manage Applications Core Attachment Entities
- Manage Applications Core Attachment Categories
- Manage Applications Core Global Search Configurations
- Manage Applications Core Global Search Suggestion Groups
- Migrate Enterprise Roles and Assignments to PaaS Identity Store
- Manage Configuration Set Migration Target Security Policy
- Manage User Identity Synchronization to PaaS Identity Store
- Manage Read-Only Schema Column Masking for Users
- Configure Guided Learning

- **Application Toolkit Component Maintenance:** You can enable this feature to implement the Reports and Analytics panel tab and the Watchlist.

Here's a list of tasks available in the Application Extensions functional area after you enable the Application Toolkit Component Maintenance feature:

- Map Reports to Work Areas
- Set Watchlist Options
- Manage Application Toolkit Administrator Profile Values

## Oracle Fusion Cloud Applications System Requirements

Before using Fusion Applications in browsers and on your mobile devices, check the operating systems, supported browsers, and other computer requirements.

Here are the minimum versions you need for your browsers.

Browser	Minimum Version
Apple Safari	18.0
Google Chrome	129
Microsoft Edge	129
Mozilla Firefox	131

Oracle supports all the platforms that the browser vendor supports, as indicated in this table. For mobile device operating systems, Oracle supports only the most recent browser.

Operating System	Apple Safari	Google Chrome	Microsoft Edge	Mozilla Firefox
Android	Not applicable	Supported (Chrome for Android only, not native Android browser)	Not applicable	Not supported
iOS/iPadOS	Supported	Not supported	Not supported	Not supported
Mac OS X	Supported	Supported	Not supported	Supported
Windows	Not supported	Supported	Supported	Supported

## Other Requirements

To use the Oracle ADF Desktop Integration add-in for Excel, you need the appropriate Windows and Excel versions. See: [Supported Platforms for ADF Desktop Integration \(Doc ID 2242428.1\)](#).





# 3 Contracts Setup Overview

## Initial Setup Tasks Overview

Here's a summary of the basic tasks that you must do to set up Enterprise Contracts, before you begin configuring the application.

**Note:** This playbook covers setup concepts at a very high level. For the initial setup steps for Enterprise Contracts, see [How do I configure Enterprise Contracts?](#).

- Create an implementation project
- Enable the Enterprise Contracts offering
- Configure the Enterprise Contracts offering
- Enter setup data using assigned tasks
- Opt in to features
- Select functional areas

### Related Topics

- [Plan Your Implementation](#)

## Levels of Editing Privileges for Contract Authoring

The level of editing a contract author can perform on contract terms depends on the privileges granted to them during security setup. Administrators can assign a contract author privileges ranging from the basic to advanced.

### Privilege Levels and What They Permit

This table lists the privileges that grant different levels of editing abilities from the basic to the most advanced. Each privilege adds additional authoring capabilities to the privileges before it, but the privileges aren't cumulative. The contract author with a higher privilege must be granted privileges for the lower levels too. For example, a contract author with a level 3 privilege must be granted the level 1 and level 2 privileges as well.

Level	Privilege	Description
1	Author Standard Contract Terms and Conditions	Restricts contract authoring to applying contract terms templates, validating the contract, and running Contract Expert when required. It includes the ability to change the template or attach the contract terms as a file.
2	Author Additional Standard Contract Terms and Conditions	Adds the ability to add, delete, and move the standard clauses and sections after the contract

Level	Privilege	Description
		terms template is applied. This includes the ability to select alternate clauses.
3	Author Nonstandard Contract Terms and Conditions	Allows authoring of nonstandard terms and conditions in the contract. This includes editing standard clauses, creating nonstandard clauses, removing contract terms, and importing edits made offline in Microsoft Word.
4	Override Contract Terms and Conditions Controls	Adds the ability to edit protected clauses and delete required clauses and sections in contract terms.

## Contracts Business Units and User Access

The Contracts security model provides different levels of access to administrative and nonadministrative users. Administrative users can edit contracts in all the business units (BUs) they're authorized in. See the *How do I create and manage users?* playbook for more information.

BUs and team member security can determine which contracts a user has access to. Contract security works this way:

- Users must be a sales resource to create or edit a contract.
- Only a sales resource or sales resource organization can be team members on a contract.

The BUs that a user can access is based on the resource organization the user is mapped to as a resource.

Here's how administrative and nonadministrative user access to contracts is determined in the UI:

- Administrative users can create or edit contracts in all the BUs they're authorized in.
- Nonadministrative users can create contracts in all the BUs they're authorized in. They also have access to contracts based on team membership, as follows:
  - They can view and edit contracts of other BUs provided they're team members in those contracts.
  - All the managers of the organization in the upward resource hierarchy of a team member can also access the contract. For example, if User A is the manager of User B, User A will can edit the contract of User B. User A can access this contract irrespective of whether they're listed as a contract team member.
  - All the users below the hierarchy are also authorized on the contract.

**Tip:** The real power of team security can be seen when you're talking about users who don't have access to particular BUs. For example, take User C, who doesn't have access to the BU that User D is using. Add User C as a team member of the contract. User C can access the contract, even though he doesn't have access to the BU.

This table illustrates the user access scenario:

Contract Privilege	Administrative User	Non-Administrative User
Create contracts	Can create contracts in all the BUs that the user is authorized in, based on their resource/resource organization mapping.	Can create contracts in all the BUs that the user is authorized in, based on their resource/resource organization mapping.
Edit contracts	Can edit all the contracts of the BUs that the user is authorized to.	<p>Can edit all the contracts in which the user is a team member.</p> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• Even if a user is authorized in a BU, the user might not be authorized for all contracts in that BU.</li> <li>• Users can access contracts even if they're not authorized in its BU, provided they're on the contract team.</li> </ul>

**CAUTION:** Be sure to give team member-type roles to nonadministrative users and not any roles that give contract administrator or contract manager-type privileges. Otherwise, users will be able to see contracts that are created in other BUs.

## Overview of the Contracts Offering

Using the Enterprise Contracts business process area, your organization can review and define the setup for managing project and procurement contracts, and define the setup configuration and tasks related to importing and exporting contract data.

Before you begin, use the Offerings page in the Setup and Maintenance work area to access reports for each offering, including full lists of setup tasks, descriptions of the options and features you can select when you configure the offering, and lists of business objects and enterprise applications associated with the offering.

The first implementation step is to configure the offerings in the Setup and Maintenance work area by selecting the offerings and options that you want to make available to implement. For the Enterprise Contracts offering, you can select any of these options:

- Procurement Contracts
- Sales Contracts

**Note:** Service contracts have been replaced with subscription contracts. See the *Oracle Subscription Management* area of Oracle Help Center for more information.

Next, create one or more implementation projects for the offerings and options that you want to implement first, which generates task lists for each project. The application implementation manager can configure the task list and assign and track each task.

If you select all of the options, the generated task list for this offering contains these groups of tasks:

- Define Common Applications Configuration for Contracts
- Define Contracts Common Configuration
- Define Service Contracts Configuration
- Define Procurement Contracts Configuration
- Define Sales Contracts Configuration
- Define Contract Terms and Clause Library Configuration
- Contracts: Define Import Management
- Manage Bulk Data Export
- Define Transactional Business Intelligence Configuration
- Define Extensions for Contracts

## Define Common Applications Configuration for Contracts

Use this task list to manage definitions used across offerings, typically applying to multiple products and product families. These definitions include enterprise structures, security, and approval rules.

You can find other information that supports the common implementation tasks by searching Oracle Applications Help using the task name.

## Define Contracts Common Configuration

Define and manage the setup for common functions within the Oracle Enterprise Contracts set of business processes.

## Define Service Contracts Configuration

Define and manage the setup related to service contracts.

## Define Procurement Contracts Configuration

Define and manage the setup related to procurement contracts.

## Define Sales Contracts Configuration

Define and manage the setup related to sales contracts.

## Define Contract Terms and Clause Library Configuration

Define and manage the setup to support creation and verification of contract terms.

## Contracts: Define Import Management

Define mappings between contract attributes and import files, and schedule import jobs.

## Manage Bulk Data Export

Review and manage export objects and schedule export processes to export business objects to external data files.

## Define Transactional Business Intelligence Configuration

Define the configuration for Oracle Transactional Business Intelligence to enable business intelligence reporting with the Oracle Fusion Applications.

**Note:** Although this task list appears in the Oracle Contracts offering, Contracts doesn't include business intelligence reporting. If you're implementing another offering where business intelligence reporting is available, then see that offering's implementation guide for help with this set of tasks.

## Define Extensions for Contracts

Define and manage the setup related to extensions for contracts.

# Perform Contracts Setup Tasks

For most setup activities, you access the setup pages associated with the component or feature by first going into the Setup and Maintenance work area and finding the task or task list associated with the feature or component.

Here's how to access the Setup and Maintenance work area:

1. Sign in as a user with access to the setup areas, such as the initial user, another setup user, or the administrator.

**CAUTION:** The administrator doesn't have the same setup permissions as a setup user. He has permissions required to set up and administer features and components, but not the higher-level permissions required to implement enterprise and security features. For more information on setting up users, see the *How do I create and manage users?* playbook.

2. Navigate to **Setup and Maintenance**.
3. In the Setup and Maintenance work area, go to the Enterprise Contracts offering.
4. Select the applicable functional area and task.
5. Click the task link for the task you want.

The setup page for the task appears.

**Note:** Contract renewal functionality supports buy or sell contract with no lines.

## Downloading Task Lists and Setup Reports

You might also want to download lists of tasks and task lists and other documents related to the Enterprise Contracts offering. Here's how:

1. Sign in as a user with access to the setup areas, such as the initial user, another setup user, or the administrator.
2. On the Setup page, select **Go To Offerings** from the Task list.
3. On the Offerings page, click the **Enterprise Contracts** offering icon.
  - Use the Related Documents link to access reports for the offering, including full lists of setup tasks, descriptions of the options and features you can select when you configure the offering, and lists of business objects and enterprise applications associated with the offering.

4. View the reports in various formats, such as .pdf, html, and .xls. Use the reports to guide you in your setup activities.
5. When you're ready to start implementing a feature or functionality, you can optionally create one or more implementation projects for the offerings and options that you want to implement. For more information on creating implementation projects, see the help, using keywords "implementation project".

For more information on using the Setup and Maintenance work area to implement and configure Oracle Enterprise Contracts, see the *Using Functional Setup Manager* guide.

# 4 Common Applications Configurations

## Users and Security

### Overview of Defining Setup Users

One of your first tasks when setting up the application is the creation of users who can perform setup tasks.

Oracle creates an initial user for you when your environment is provisioned. This initial user is configured to perform security tasks, such as creating other users and granting additional privileges. As an initial user you can create users, known as setup users, to help with application setup. The setup user performs the tasks in implementation projects, sets up enterprise structures, creates application users, and administers security.

Use the Manage Users task in the Setup and Maintenance work area to create setup users. You can access this task in the Setup and Maintenance work area by selecting these options:

- Offering: Customer Data Management
- Functional Area: Users and Security
- Task: Manage Users

### Overview of Setting Up Users and Security

Since you followed the *Implementing Sales* guide steps to set up your initial set of users, then you already know that Oracle applications use a role-based access control security model to secure access to functionality and data.

In a role-based access control security model, users are assigned roles, and roles are assigned access privileges to protected system resources.

Sales and Service users who access the transactional UI, for example sales representatives or service representatives working in leads or service requests, are created as resources and are known as resources.

### Default Preferences

To set up default preferences for users and roles, access the Security Console as a setup user or other user with the IT Security Manager job role. Only setup users, or other users with the IT Security Manager job role, can access the Security Console. See the *Securing Fusion Sales and Service* guide for more information.

### User Identity Store

The Lightweight Directory Access Protocol (LDAP) identity store is a repository of user identity data. Your LDAP directory stores definitions of LDAP user accounts. In general, changes you make to user accounts are automatically synchronized between the sales application and your LDAP directory server. However, you must also run processes on a daily basis to manage the information exchange between your application and the LDAP directory server. For information, see the chapter about setting up application security in the *Securing Fusion Sales and Service* guide.

## Setup Tasks in the UI and Other Setup Options

As a setup user, you use multiple different tasks in Setup and Maintenance to create and maintain users. You also have more setup options to consider. The following table describes these tasks and setup options.

Setup Task or Option and Navigation	Description
<p>Manage Job Roles Task</p> <p>Navigation: Setup and Maintenance &gt; Sales Offering &gt; Users and Security functional area</p>	<p>Oracle provides many predefined job roles. The relevant sales roles are listed in the <i>Implementing Sales</i> guide.</p> <p>You perform the Manage Job Roles task to:</p> <ul style="list-style-type: none"> <li>Review the role hierarchy of a job or abstract role.</li> <li>Create custom job and abstract roles.</li> <li>View the roles assigned to a user and list the users who have a specific role.</li> </ul> <p>This task opens the Roles tab of the Security Console.</p>
<p>Manage Duties Task</p> <p>Manage Sales and Service Access Management Task</p> <p>Navigation: Setup and Maintenance &gt; Sales Offering &gt; Users and Security functional area</p>	<p>You perform the Manage Duties task to:</p> <ul style="list-style-type: none"> <li>Review the duties of a job or abstract role.</li> <li>Manage the duties of a custom job or abstract role.</li> <li>Create custom duty roles.</li> </ul> <p>This task opens the Roles tab of the Security Console.</p>
<p>Manage Data Security Policies Task</p> <p>Manage Sales and Service Access Task</p> <p>Navigation: Setup and Maintenance &gt; Sales Offering &gt; Users and Security functional area</p>	<p>You use the Manage Data Security Policies task to manage the data security policies that determine grants of entitlement to a user or role on an object or attribute group. This task opens the Roles tab of the Security Console.</p> <p>You can also use the Manage Sales and Service Access task to review and configure data security. This task opens the Sales and Service Access Management work area. For information, see the <i>Securing Fusion Sales and Service</i> guide.</p>
<p>Manage Users Task</p> <p>Navigation: Navigator &gt; Users and Roles item or Setup and Maintenance &gt; Sales Offering &gt; Users and Security functional area</p>	<p>You create application users in the UI using the Manage Users task. A user with the IT Security Manager job role performs the Manage Users tasks.</p> <p><b>Note:</b> You can also create sales users by importing users. For information on the user import options available, see the <i>Understanding Import and Export Management for Fusion Sales and Service</i> and <i>Implementing Sales</i> guides.</p>
<p>Manage HCM Role Provisioning Rules Task</p> <p>Navigation: Setup and Maintenance Sales Offering &gt; Users and Security functional area</p>	<p>Oracle provides predefined role mapping rules for provisioning many of the standard job roles included with the application. However, using the Manage HCM Role Provisioning Rules task, you can create any additional role mappings you need to, to control the provisioning of roles to application users. For example, you can create a role mapping to provision the Channel Sales Manager role automatically to specific sales managers.</p>
<p>Import and Export Management</p>	<p>You can import users in bulk using data files. For information on the user import options available, see the <i>Understanding Import and Export Management for Fusion Sales and Service</i> and <i>Implementing Sales</i> guides.</p>



Setup Task or Option and Navigation	Description
Import Partner Users Task	You can also import partner contact data using the Import Partner Users task. For more information, see the <a href="#">Getting Started with Your Partner Relationship Management Implementation</a> guide.
Single Sign-On Authentication	Single sign-on authentication is optionally available for user authentication. If your enterprise has moved from a traditional on-premises environment to an Oracle Cloud implementation, you might want to use your existing identity management solution for authenticating your employees, and you might also want to provide a single sign-on experience. Implementing federated single sign-on lets you provide users with single sign-on access to applications and systems located across organizational boundaries. For additional information, see Oracle Applications Cloud Service Entitlements (Doc ID 2004494.1) on <a href="#">My Oracle Support</a> at <a href="https://support.oracle.com">https://support.oracle.com</a> .
Resetting User Passwords	Setup users provisioned with the IT Security Manager job role can use the Users tab in the Security Console work area to reset passwords for all application users. Users who can't access the Security Console can reset only their own passwords using the Set Preferences link in the Settings and Actions menu available by clicking their user name in the application or by using the Forgot Password link on the sign-in page. See the <a href="#">Implementing Sales</a> guide for more information.
Updating Email Addresses	Use the Users tab in the Security Console work area to change user email addresses. You can use the procedure described in this topic to update addresses of both setup users and sales users. If you're updating the email addresses of sales users, then you can also use the same import process you use to create them. See the <a href="#">Implementing Sales</a> guide for more information.

**Note:** Other data security tasks listed in the Users and Security functional area task list don't apply to the sales applications. Follow the guidance in the [Implementing Sales](#) and [Securing Fusion Sales and Service](#) guides.

#### Related Topics

- [Set General Preferences for All Users](#)
- [Subject Areas for Adoption Reporting](#)

## About Sales Resources

Users who do day-to-day sales transactional activities like managing opportunities and leads are known as "sales resources". During implementation, you create sales resources and build your resource organization at the same time.

After implementation, you maintain sales resources, such as by modifying their organization assignments.

You can create users directly in the user interface or you can import them from a file.

For more information about creating and maintaining users (both setup users and resources), see the following guides:

- [Implementing Sales](#)
- [Securing Sales and Service](#)

## Additional Options for Resource Setups

After you get your users established, you also have these options for setup:

Setup Option	Where To Find More Information
<b>Proxy Users</b>  Sales resources can designate another resource as a proxy to sign in to the applications and perform tasks on their behalf. This functionality is also called "impersonation".	Topics about proxy users and impersonation
<b>Restricted Users</b>  You may want some users to access information but not be able to modify it. In this case, create restricted sales resources.	Topics about sales restricted users
<b>Records Transfer Between Users</b>  If needed, you can move records, such as opportunities or leads, from one sales resource to another using the Mass Transfer feature.	Topics about transferring records between users

# Multiple Currencies

## Overview

### Overview of Setting Up Multiple Currencies for Sales

The applications support multiple currencies, multiple daily rates, and currency rate conversion. If you're going to use multiple currencies, at a minimum you need to:

- Specify corporate currency
- Import or enter daily currency conversion rates
- Enable the currencies you're going to use, if you previously disabled them

Optionally, you can let salespeople select different currencies in leads and opportunities.

The applications also support different currency conversion rate types, allowing your business to maintain different conversion rates between currencies for the same period. Examples of conversion rate types are supplied: Spot, Corporate, User, and Fixed.

#### Related Topics

- [Set Up Multiple Currencies for Sales](#)

# Implementation Tasks

## Set Up Multiple Currencies for Sales

You must complete several steps to enable salespeople to select multiple currencies in the applications.

**Note:** Perform these steps as a setup user (for example, a user with the Application Implementation Consultant job role).

Here are the high-level steps to enable multiple currencies:

Step	Description	Where to Find More Information
Set the default currency profile options.	Set the two profile options that specify default corporate currency and rate type.	See the Set Default Currency Profile Options section in this topic.
Check the setting of the default currency profile option.	Check the setting of the default currency profile option. This currency is the default used for salespeople in the transactional pages. The default currency is also used in a salesperson's forecast.	See the Check Default Currency Profile Option Setting in this topic.
Ensure currencies are enabled and verify precision.	Ensure that all of the currencies you plan to use are enabled for use and verify the precision.	See the Ensure Currencies are Enabled and Verify Precision section in this topic.
Set the multicurrency profile option for opportunities.	By default, one currency is set for an opportunity and its product lines. This default currency is a salesperson's preferred currency. If you want to enable multiple currencies for opportunities, set the multicurrency profile option.	See the Enable Multiple Currencies for Opportunity Product Lines topic in this chapter.
Let salespeople select the currency when editing leads and opportunities.	In the opportunity and lead edit pages, the Currency list of values is read-only by default. If you have enabled multiple currencies, you can let users pick a different currency at the header level by making the Currency field editable.	See the How do I allow salespeople select a different currency in Opportunities and Leads? topic in this chapter.
Enter currency daily rates.	To load daily rates, you can use a spreadsheet or web services.	See the Download the Desktop Integration Installer section in this topic.
Define and maintain daily currency conversion rates and conversion rate types.	The conversion rate is the ratio between two currencies; it shows how much of one money exchanges for another. Conversion rates are also known as foreign exchange rates. You define and maintain different conversion rates between currencies for the same period using conversion rate types.	See the Overview of Defining Daily Currency Conversion Rates section in this topic. Also see the topic, Enter Daily Rates Using the Daily Rates Spreadsheet, in this chapter.

Step	Description	Where to Find More Information
Set up cross rate rules and overrides.	<p>If you want to use combinations of cross rates across many currencies, you must:</p> <ul style="list-style-type: none"> <li>• Enable cross rates and allow cross-rate overrides</li> <li>• Maintain cross-rate rules</li> </ul>	See the topic, Guidelines for Creating Conversion Rate Types, in this chapter.

After you have enabled multiple currencies, salespeople can set their preferred currency for the transactional pages and for business intelligence. For more information, see the related topic on setting general user currency.

## Set Default Currency Profile Options

Your first step in the setup is to specify the default corporate currency and rate type by setting the Corporate Currency Default and Exchange Rate Type Default profile options.

Here's how you set the profile options:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Company Profile
  - o Task: Manage Currency Profile Options
2. On the Manage Currency Profile Options page, click **ZCA\_COMMON\_CORPORATE\_CURRENCY** and set it to your default corporate currency. The display name for this profile option is Corporate Currency Default. It stores configured corporate currency used across the applications.
3. Save your changes.
4. Click **ZCA\_COMMON\_RATE\_TYPE** and set it to the default currency rate type. The display name for this profile option is Exchange Rate Type Default. It stores the default currency exchange rate type.

## Check Default Currency Profile Option Setting

You also need to check the setting of the profile option that specifies default currency for users in the applications. The profile option, Default Currency (FND\_CURRENCY), not only specifies the default currency in the transactional pages, it's also used in a salesperson's forecast. By default, the profile option is set to US dollar. You can set this profile option at site level (affecting all users of the environment), at product level, or at user level.

**Note:** Users can set their own currency preference in the Personalization screens available in the user name menu in the global header. The setting users set for themselves override the settings that you make in the profile options screens at site or product level.

Here's how to check the default currency setting:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values

**Note:** If you can't find this profile option, search for it from the main Sales offering page, using the search available in the Tasks widget available on the right side of the page.

2. On the Manage Applications Core Administrator Profile Values page, search for and select the profile option name, Default Currency, or the code, FND\_CURRENCY.
3. Ensure the profile option value is set to your environment's default currency at site level.

To set the profile option for a specific user, create a new row in the table and enter the values as needed.

## Ensure Currencies are Enabled and Verify Precision

By default, all currencies are enabled. But it's a good idea to double-check that all of the currencies you plan to use are enabled and that their precision levels are set correctly. Precision is the number of digits placed after the decimal point. For example, set USD to precision 2 to display one dollar as \$1.00 in the UI.

Here's how to check:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Company Profile
  - o Task: Manage Currencies
2. On the Manage Currencies page, click **Search** to search for all currencies, without entering any search criteria.
3. Check that the **Enabled** option is set for each currency you plan to use.
4. Check that the **Precision** is set consistently for each currency you plan to use.

**Note:** When setting currency precision, be sure to set it correctly for all currencies you plan to use. This best practice ensures that decimal places are shown consistently in the UI for all the currencies you're using.

5. If you made any changes, save your work.

## Overview of Defining Daily Currency Conversion Rates

You have a few options for defining daily currency conversion rates, and you can maintain daily currency conversion rates between any two currencies. You can also enter daily conversion rates for specific combinations of foreign currency, date, and conversion rate type. The ways you can load currency rates are:

- Load them manually using the Create Daily Rates spreadsheet.
- Load them automatically using web services.

For more information, see the related topics and the topics later in this chapter.

#### *Related Topics*

- [What's the difference between precision, extended precision, and minimum accountable unit for a currency?](#)
- [Enter Daily Rates Using the Daily Rates Spreadsheet](#)
- [Currency and Exchange Rate Settings for Analytics](#)
- [Load Daily Rates Automatically Using Web Services](#)
- [Set General User Currency](#)

## Considerations for Defining Currencies

Consider these points about entering the currency code, date range, or symbol for the currency, when you create or edit currencies.

### Currency Codes

You can't change a currency code after you enable the currency, even if you later disable that currency.

### Date Ranges

You can enter transactions denominated in the currency only for the dates within the specified range. If you don't enter a start date, then the currency is valid immediately. If you don't enter an end date, then the currency is valid indefinitely.

### Symbols

Some applications support displaying currency symbols. You may enter the symbol associated with a currency so that it appears along with the amount.

#### *Related Topics*

- [What's the difference between precision, extended precision, and minimum accountable unit for a currency?](#)
- [What's a statistical unit currency type?](#)
- [Euro Currency Derivation](#)

## Guidelines for Running the Revalue Opportunity Currency Process

The Revalue Opportunity Currency process manages the effects of revaluation of currency exchange rates on opportunity revenue.

Opportunity revenue is stored in the user-entered currency (also called transaction currency) in the revenue model. The revenue model also stores two exchange rates:

- The exchange rate between the entered revenue currency and the configured corporate currency, as specified in the global configuration during the implementation. This rate facilitates construction of materialized views that roll up revenue metrics along the territory hierarchy.
- The exchange rate between entered revenue currency and the entered opportunity-level currency. This rate calculates the opportunity summary revenue amounts as the sum of line revenue amounts. Opportunity line revenue amounts can be entered in currencies that are different from the currency specified at the opportunity level.

The process works in combination with these two profile options that store corporate currency and rate type:

- **Corporate Currency Default:** Stores configured corporate currency.
- **Exchange Rate Type Default:** Stores configured rate type.

Also keep in mind the following impact of the process:

- The process can also be triggered when corporate currency, configured rate type, or exchange rate (or any combination of these) is modified, either directly through administrator intervention or when these currency parameters change in the general ledger.
- Only product lines in Open status are targeted by the batch process.
- When updating product lines, the process doesn't consider whether the revenue is already included in a forecast.
- Forecasting activity is paused when this process executes.

## Run the Process

Run the Revalue Opportunity Currency process from the job process screen available from the **Scheduled Processes** option on the Navigator menu. Select the job name Revalue Opportunity Currency.

Here are the steps to run the process in basic mode:

1. Sign in as a sales administrator or as a setup user.
2. From the Navigator, select **Scheduled Processes** (within the Tools category).  
The Scheduled Processes overview page appears.
3. Click **Schedule New Process**.
4. In the search dialog box, search for and select the **Revalue Opportunity Currency** PROCESS.  
The Process Details page appears.
5. Click **Submit**.

This table shows the logical parameters expected by the batch process:

Parameter	Default	Description
CRM Common Currency	Stored in the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY)	<ul style="list-style-type: none"> <li>• Configured corporate currency.</li> <li>• Passed if corporate currency changes.</li> <li>• Program doesn't check against profile for a match.</li> </ul>
CRM Common Currency Rate Type	Stored in the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE)	<ul style="list-style-type: none"> <li>• Configured rate type.</li> <li>• Passed if there is a requirement to reevaluate the conversion rate against a different rate type.</li> <li>• If no value is passed, the program uses the profile option value.</li> </ul>
Business Unit Organization ID	No default	Leave blank, and all business units are targeted. Otherwise, provide the specific business unit ID.
Number of Opportunities per Database Update	500	Oracle recommends that you leave this parameter at the default value or blank (and program uses default value).
Last Batch Job Run Time Stamp	See Description column	This parameter can be used for batch program reruns. When a few opportunities have failed,

Parameter	Default	Description
		the log reflects all the failed opportunities, as well as provides a time stamp for "Start Batch Job Time Stamp". Enter this time stamp on the second run of the batch program to limit the scope of the batch job to only the failed opportunities.
Effective Date	System date	Date passed to general ledger (using an API) to calculate the conversion rate. The program doesn't validate that the date must be in the future, so, in effect, any date can be passed.

## Impact of Process on Revenue Attributes

The Revalue Opportunity Currency process impacts several revenue attributes, as shown in this table.

Revenue Model Attribute	Attribute Description/Function	Batch Process Update
<ul style="list-style-type: none"> <li>CRM_CURRENCY_CODE</li> <li>CRM_CONVERSION_RATE_TYPE</li> <li>CRM_CONVERSION_RATE</li> </ul>	<p>These attributes store the exchange rate between revenue line currency and the corporate currency, and are used to construct the materialized views for Closed, Pipeline and Unforecasted revenue metrics along the territory hierarchy. For lines in status category of Open, these attributes are updated whenever a revenue line is created or updated or whenever an opportunity with revenue is updated or saved.</p> <ul style="list-style-type: none"> <li>The default for CRM_CURRENCY_CODE is taken from the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY).</li> <li>The default for CRM_CONVERSION_RATE_TYPE is taken from the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE).</li> <li>CRM_CONVERSION_RATE is calculated using a GL API.</li> </ul>	CRM_CURRENCY_CODE and CRM_CONVERSION_RATE_TYPE are updated based on a parameter to the batch program. If these two parameters are passed in, the program uses them to update the revenue tables. If these values aren't passed in, the application retrieves the profile option values and updates the revenue tables with them.
REVN_AMT_CURCY_CODE	Currency of the revenue (summary or line)	Entered currency. Not updated.
<ul style="list-style-type: none"> <li>CONVERSION_RATE_TYPE</li> <li>CONVERSION_RATE</li> </ul>	These attributes store the exchange rate between revenue line currency and the summary revenue (opportunity level) currency and are used to convert the revenue line amounts to opportunity level currency. For lines in a status category of Open, these attributes are updated whenever the revenue is created or updated or whenever an opportunity with revenues is updated or saved.	<ul style="list-style-type: none"> <li>CONVERSION_RATE_TYPE is updated based on a parameter to the batch program.</li> <li>CONVERSION_RATE is updated. Changes if corporate rate types change. Rate is obtained using (conversion_rate_type, line_currency_code, summary_currency_code, and system date).</li> </ul>
<ul style="list-style-type: none"> <li>REVN_AMT</li> </ul>	For summary revenue amounts, these amounts are calculated as the sum of line revenue	<ul style="list-style-type: none"> <li>Line revenue isn't updated.</li> </ul>



Revenue Model Attribute	Attribute Description/Function	Batch Process Update
<ul style="list-style-type: none"> <li>• DOWNSIDE_AMT</li> <li>• UPSIDE_AMT</li> </ul>	amounts. These amounts are converted to the opportunity-level currency before calculating the sum. The exchange rate stored in the CONVERSION_RATE attribute is used to perform the conversion.	<ul style="list-style-type: none"> <li>• Summary revenue is recalculated.</li> </ul>
LAST_UPDATE_DATE	WHO column	Updated.
USER_LAST_UPDATE_DATE	Functional WHO column	Not updated.

#### Related Topics

- [Considerations for Setting Up Opportunity Revenue](#)

## Enter Daily Rates Using the Daily Rates Spreadsheet

You are required to enter the daily rates for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for 5 days.

To load rates using the Create Daily Rates Spreadsheet, you must first install Oracle ADF Desktop Integration client software. Oracle ADF Desktop Integration is an Excel add-in that enables desktop integration with Microsoft Excel workbooks. You can download the installation files from the Tools work area by selecting Download Desktop Integration Installer.

### Entering Daily Rates

1. From the General Accounting work area, select the **Period Close** link.
2. From the Tasks panel, click the **Manage Currency Rates** link.

Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.

3. Click the Daily Rates tab.

Use the Daily Rates tab to review and enter currency rates.

4. Click the **Create in Spreadsheet** button.

Use the Create Daily Rates spreadsheet to enter daily rates in a template that you can save and reuse.

5. Click in the **From Currency** field. Select the GBP - Pound Sterling list item.
6. Click in the **To Currency** field. Select the USD - US Dollar list item.
7. Click in the **Conversion Rate** field. Select the Spot list item.
8. Click in the **From Conversion** field. Enter a valid value: 10/2/2017.
9. Click in the **To Conversion Date** field. Enter a valid value: 10/6/2017.
10. Click in the **Conversion Rate** field. Enter a valid value: 1.6.
11. Click **Submit** and click **OK** twice.
12. Review the **Record Status** column to verify that all rows were inserted successfully.
13. Save the template to use to enter daily rates frequently. You can save the spreadsheet to a local drive or a shared network drive.
14. Optionally, edit the rates from the Daily Rates user interface or resubmit the spreadsheet.

### *Related Topics*

- [Examples of Using Conversion Rate Types in a Journal](#)
- [Guidelines for Using Desktop Integrated Excel Workbooks](#)
- [Update Currency Rates](#)

## Update Currency Rates

You're required to change today's daily rates that were already entered. The rates you're changing are for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for your company InFusion America.

Currency conversion rates were entered by an automatic load to the Daily Rates table. They can also be entered through a spreadsheet.

### Updating Currency Rates

1. Navigate to the Period Close work area.  
Use the Period Close work area to link to close processes and currency process.
2. Click the Manage Currency Rates link.  
Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.
3. Click the Daily Rates tab.  
Use the Daily Rates tab to review and enter currency rates.
4. Click the From Currency list. Select the GBP - Pound Sterling list item.
5. Click the To Currency list. Select the USD - US Dollar list item.
6. Enter the dates for the daily rates that you are changing. Enter today's date.
7. Click the Rate Type list. Select the Spot list item.
8. Click the Search button.
9. Click in the Rate field. Enter the new rate of 1.7 in the Rate field.
10. Click in the Inverse Rate field. Enter the new inverse rate of 0.58822 in the Inverse Rate field.
11. Click the Save button.

### *Related Topics*

- [Guidelines for Using Desktop Integrated Excel Workbooks](#)

# 5 Common Implementation Overview

Common implementation involves performing setup tasks that are common and available within multiple offerings. The Application Extensions and other functional areas comprise these common setup and implementation tasks.

## Application Extensions

Use the Application Extensions functional area to configure common business objects. For example, you can do these tasks:

- Configure workflow tasks, for example to identify how and to whom approvals are routed.
- Review and manage objects, for example currencies and reference data sets shared across applications.
- Configure common reference objects, such as flexfields, document sequences, and profile options that affect the functionality and look of Oracle Applications Cloud.

## Other Functional Areas

Other functional areas contain several tasks to manage common functions that apply to the entire implementation. Examples of such functional areas include Legal Structures, Users and Security, and Enterprise Profile. Here are a few examples of tasks you can do using these functional areas:

- Set up security, enterprise structures, geographies, and business units.
- Create and maintain user accounts and sync the list of users and roles stored in Lightweight Directory Access Protocol (LDAP).

## Create Implementation Users

You must have at least one implementation user. To ensure segregation of critical duties, multiple implementation users are recommended. For example, one implementation user typically performs functional setup tasks and another performs security setup tasks. When you create implementation users, you also assign predefined job roles to them directly. The job roles vary with the tasks that the implementation users perform.

See *How do I create and manage users?* for more information.

## Enable Features to Access Common Setup Tasks

To access various common setup tasks, you need to enable these features in the Offerings work area.

**Note:** Apart from the features listed below, you might also need to enable other features to use other common tasks within Application Extensions and in other functional areas.

- **Maintain Common Reference Objects:** You can enable this feature to implement common functionality, such as reference data sets, languages, or general preferences. After enabling this feature, you can use tasks available in the Application Extensions functional area to manage common reference objects that are defined centrally and shared across applications.

Here's a list of tasks you can use after enabling this feature:

- Manage Taxonomy Hierarchy
- Manage Reference Data Sets
- Manage Set Assignments for Set Determinant Type
- Manage Reference Data Set Data Access for Users
- Manage Currencies
- Manage ISO Languages
- Manage Territories
- Manage Languages
- Manage Industries
- Manage Natural Languages
- Manage Time Zones
- Manage Data Security Policies
- Set User General Preferences
- Manage Audit Policies
- Manage Applications Core Messages
- Manage Applications Core Standard Lookups
- Manage Applications Core Profile Options
- Manage Applications Core Administrator Profile Values
- Manage Applications Core Profile Categories
- Manage Applications Core Value Sets
- Manage Applications Core Descriptive Flexfields
- Manage Applications Core Attachment Entities
- Manage Applications Core Attachment Categories
- Manage Applications Core Global Search Configurations
- Manage Applications Core Global Search Suggestion Groups
- Migrate Enterprise Roles and Assignments to PaaS Identity Store
- Manage Configuration Set Migration Target Security Policy
- Manage User Identity Synchronization to PaaS Identity Store
- Manage Read-Only Schema Column Masking for Users
- Configure Guided Learning

- **Application Toolkit Component Maintenance:** You can enable this feature to implement the Reports and Analytics panel tab and the Watchlist.

Here's a list of tasks available in the Application Extensions functional area after you enable the Application Toolkit Component Maintenance feature:

- Map Reports to Work Areas
- Set Watchlist Options
- Manage Application Toolkit Administrator Profile Values

## Contracts Common Configurations

### Party Contact Roles

#### Set Up Party Contact Roles Lookups

Contact party roles let users specify the roles that contacts play in a contract. Your application provides predefined lookup types for the contact roles. These roles are available in lists of values in the contracts application. You can set up more contact roles and use them to represent different parties in a contract.

This topic:

- Lists the predefined contact roles that appear in lists of values and explains how you can add your own.
- Explains how you associate the contact roles with party roles and contact role sources.

#### Predefined Contact Roles

The application provides these predefined contact roles in the extensible lookup type OKC\_PARTY\_CONTACT\_ROLE:

Lookup Code	Meaning
BUYER	Buyer
CONTRACT_ADMIN	Contract administrator
EMPLOYEE	Employee
PARTNER_CONTACT	Partner contact
PARTY_CONTACT	Customer contact
RESOURCE	Resource
RESOURCE_ORG	Resource organization
SALESPERSON	Salesperson

Lookup Code	Meaning
VENDOR_CONTACT	Supplier contact

You can add more contact roles using the Manage Contract Contact Roles task in Setup and Maintenance. To access the task, navigate to the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

## Making Contact Roles Available for Use in Contracts

For a contact role to be available for use in contracts, you must navigate to the Manage Contract Role Sources page using the **Party Role and Contact Sources** task in the Contracts work area.

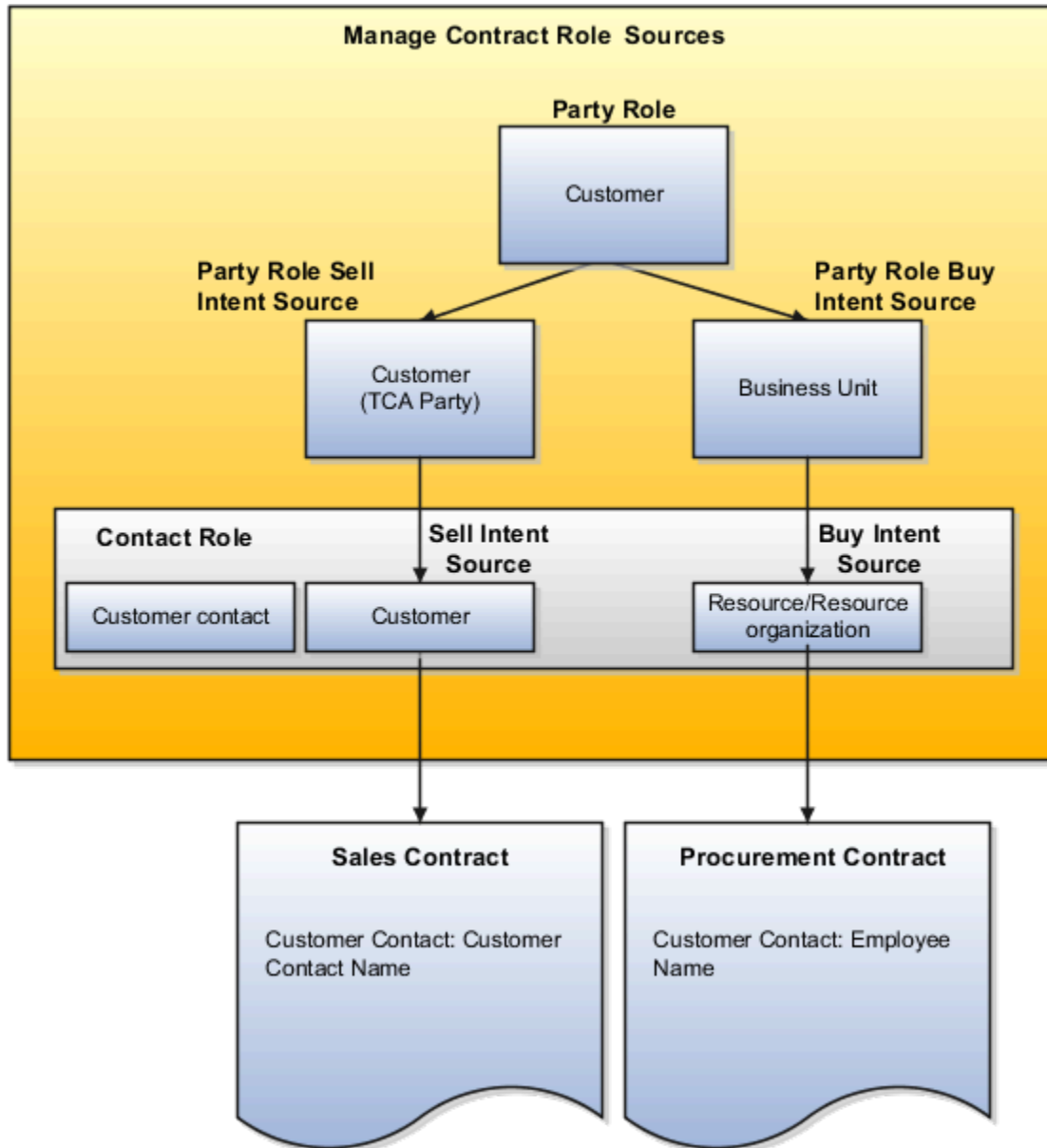
Make these entries for each party role where you want the contact role to be available:

1. Select the party role.
2. Add the contact role.
3. Enter the sell-intent contact source or the buy-intent contact source, or both. The contact sources you can enter depends on the party source settings for the party role.

These contact sources are predefined in the application in the lookup type OKX\_PARTY\_CONTACT\_SOURCE. You can't edit the contract role sources or add more.

Lookup Code	Meaning	Description
OKX_PARTNER_CONTACT	Partner contact	Used exclusively for Oracle Fusion Partner Management contracts.
OKX_PCONTACT	Customer contact	Contacts of parties in the Trading Community Architecture where the party usage is External Legal Entity.
OKX_RESOURCE	Resource	The internal resource.
OKX_RESOURCE_ORG	Resource organization	The internal resource organization.
OKX_VCONTACT	Supplier contact	Contacts of parties in TCA where the party usage is Supplier.

This figure illustrates the setup required to make a contact role available in both customer and supplier contracts. The party role Customer is associated with both a sell intent and buy intent source. In a sales contract, a Customer party is a TCA party (party source Customer). In a buy-intent contract, the Customer is an internal business unit. You make the contact role available in both customer and supplier contracts by specifying the Sell Intent Source as Customer contact and the Buy Intent Source as Resource or Resource organization. In sales contracts, customer contacts are now TCA party contacts. In procurement contracts, customer contacts are resources.



## Contract Party Roles and Sources

### How You Set Up Contract Party Roles

Using the following setups, you can make party roles available for use in contracts and view the primary parties on the Create Contract page.

Party roles provide a way of specifying the roles of different parties in the contract. For example, a sales contract might include the customer, a partner, and the internal business unit selling the product and service. The application comes with predefined party roles, but you can create more roles and specify how the roles are used in sales, purchasing, and project contracts.

## Manage Party Roles

The application includes predefined party role names in the lookup type OKC\_PARTY\_ROLE. You can add more lookup codes in Setup and Maintenance using **Enterprise Contracts offering > Enterprise Contracts Base functional area > Manage Contract Party Roles task**.

Lookup Code	Meaning
CUSTOMER	Customer
INTERCOMPANY	Internal party
PARTNER	Partner
SUPPLIER	Supplier
THIRD_PARTY	Third party

## Make Party Roles Available for Use in Contracts

To make party roles available for use in contracts, you must:

1. Associate each party role with the appropriate party source using the Manage Contract Roles Sources task in the Contracts work area in Setup and Maintenance.
2. While managing contract types using the Manage Contract Types task, add each party role to the contract types where you want the party role to be used. You can add a party role as either one of the two primary contract parties (the Buyer Role and the Seller Role) or as a secondary party. You can only have one Seller Role and one Buyer Role in a contract. You can have multiple secondary parties with the same role.

The application includes these party sources, which you can't modify:

Party Source Code	Name	Description
OKX_PARTY	Customer	Parties in Customer Data Management where the party usage is External Legal Entity
OKX_OPERUNIT	Business Unit	Internal business units
OKX_VENDOR	Supplier	Parties in Customer Data Management where the party usage is Supplier
OKX_INT_COMP_PARTY	Internal party	Internal parties available for Oracle Fusion Projects inter-project billing
OKX_PARTNER	Partner	Partners. This source is reserved for Oracle Fusion Partner Relationship Management



## Reuse the Same Party in Buy and Sell Contracts

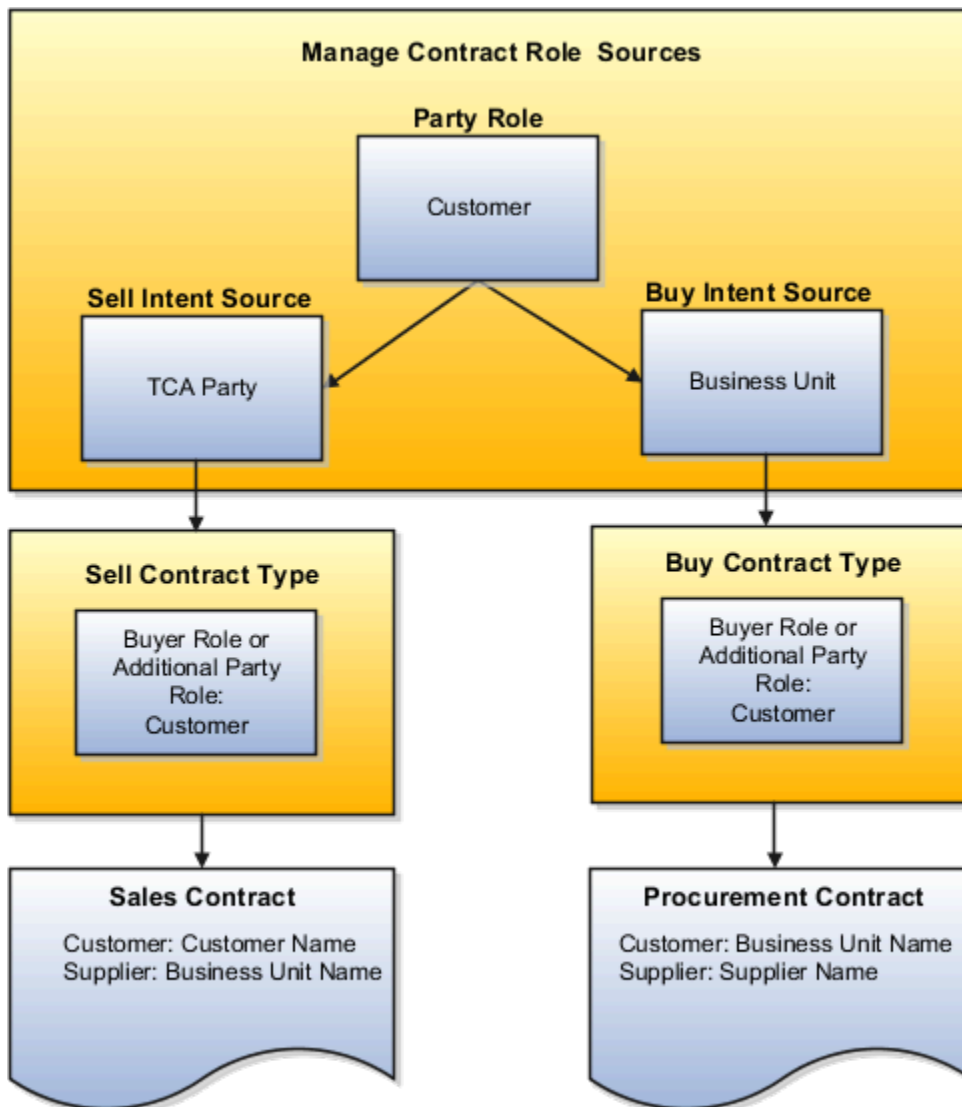
You can use the same party role for both buy-intent and sell-intent contracts by associating the party role with different sources. This figure shows how you can reuse the role, Customer, in both buy and sell contracts. The customer for sales contracts is a Customer Data Management (formerly known as Trading Community Architecture, or TCA) party (customer). The customer for buy contracts is an internal business unit.

To reuse the same party in buy and sell contracts, you:

1. Select the Customer party role in the Manage Contract Role Sources page.
2. Set the Sell Intent Source to Customer and the Buy Intent Source to Business Unit.

To use the party role in a contract, you must also enter it in contract types where you want to use it as one of the primary contact parties or as a secondary party.

The setup in this figure has the following effect: When you create a sales contract, the Customer list of values lists external parties. When you create a purchasing contract, the Customer list of values lists business units.



## View Primary Parties

You can view the primary parties on the Create Contract page by adding External Legal Entity usage to the party. You can use Usage Assignments to define how entities are used across the application. You can manage usage assignments for an entity from the Edit Organization entity's Edit page.

To view the parties while creating contracts:

1. Navigate to **Customer Data Management** and select the Organization work area.
2. Search for and select the record.
3. Click **Usage Assignments** in the Party Center.
4. On the Usage Assignment tab, you can update the **External Legal Entity** usage for an organization from a party of interest to a customer.

## Contract Types

### Contract Types

A contract type is a category your contract belongs to. The contract type selected decides the nature of the contract. For example, contract type determines whether a contract is a project contract, purchasing contract, or simple nondisclosure or employment agreement.

The contract type specifies what kind of information you can enter and what contract lines, parties, and party contacts are allowed.

The contract type also specifies whether an electronic signature is required for contract acceptance and activation. If required, then you need to use the standard email format to notify the signers. In turn, the requirement for electronic signature means that you must designate contacts as signers on the contract. It also means that more statuses and contract header actions are available.

This topic provides an overview of the superset of contract type setups for a broad range of contracts. When setting up individual contract types, only a subset of the fields listed here are visible. For example, the project billing option entries are visible only in contract types with a sell-intent, and the notifications fields appear only for contract types with a buy-intent.

Create contract types using the Manage Contract Types task in Setup and Maintenance. The task is in the Enterprise Contracts offering in the Enterprise Contracts Base functional area. You can also create contract types in the Contracts work area by selecting **Contract Types** in the Setup task heading.

For each contract type you can:

- Specify document numbering sequences for the category of global, ledger, legal entity, or business unit level to enable automatic contract numbering on contracts.
- Specify whether the contract includes lines and what can be entered into them.
- Specify whether external item masters can be referenced.
- Make it required to manually capture customer acceptance after internal contract approval.
- If electronic acceptance is required, enable the contract for electronic signature integration.
- Specify what primary and secondary parties can be entered during contract creation.
- Specify if one or more contacts on the contract must be designated as signers for electronic signature acceptance.

- Specify the layout templates that will be used for printing the contract and the contract terms.
- Specify if and when the contract owner should be notified before the contract expires.
- Specify the billing options for project contracts.
- Enable the capture of contract risks.
- Enable the ability to relate a contract to other contracts.
- Allow the authoring of contract terms using the Contract Terms Library.

**Note:** Contract renewal functionality supports buy or sell contracts with no lines.

## Common Contract Type Entries

This table describes common contract type entries:

Field or Option	Description
Class	<p>Indicates the category of the contract you're authoring. The class assigned to a contract type controls whether contract lines are allowed, and what types, on a contract.</p> <ul style="list-style-type: none"> <li>• Enterprise Contract: Used for authoring both buy and sell contracts where you're buying or selling items and services. Examples of contracts of this class include contract agreements (buy or sell intent), project contracts, and repository contracts.</li> <li>• Agreement: Used for authoring a buy or sell intent contract to create a sales agreement.</li> <li>• Partner Agreement: Used for Oracle Partner Management.</li> </ul> <p>You can't change the class after the contract type is created.</p>
Set	Determines the data security for contracts of this type.
Name	<p>The name of the contract type that you select when authoring contracts.</p> <p>We recommend you to avoid using special characters when entering the contract type name. For example, <b>&amp;</b> <b>and</b> <b>@</b>.</p>
Description	Description that you can see when managing contract types.
Allow lines	<p>Selecting this option makes it possible for you to specify what line types can be added to the contract. You can't change the setting after the contract type is created.</p>
Line Class	<p>This applies only to the Enterprise Contract class and can be set to: Project, Service, Warranty. It controls the line types you can assign to a contract type. Each type of contract determines the line type that's associated with it. For example, you can only associate subscription and coverage line types to a contract type with the Line Class set to "Service", and warranty line type to a contract type with the Line Class set to "Warranty".</p>
Use external item master	<p>Selecting this option lets you reference items from an external item source master.</p> <p>This option is available only for sell intent contracts if you selected the available Allow lines option.</p>
Pricing Integration	Controls how sales agreements are priced and can be selected for contract types assigned to the class "Agreement".

Field or Option	Description
	You can set the integration to use pricing functionality available within Oracle Order Management or Oracle CX Sales. Only contracts using Oracle Order Management pricing integration will be available when creating a sales order in Order Management.
Allow pricing during billing	Allows pricing of subscription services during contract billing rather than contract authoring. This attribute can be set when the class is Enterprise Contracts and the Line Class is Service.
Enable Automatic Numbering	Enables automatic numbering of contract lines during contract authoring.  For more information, see the Define Document Sequences topic.
Requires Signature	Determines if customer signature is required for contract acceptance before this type of contract can become active. After approval, the contract is set to the Pending Signature status and requires you or the signer to enter the date of customer approval to make the contract active.  If you plan to use the <i>Enable Electronic Signature</i> option, you can disable this feature at the individual contract level. Even if you disable this option at the contract level, the contract will still require manual signature.
Enable Electronic Signature	Determines if designated signers must sign the contract before the contract becomes active. In this case, after approval, the contract moves to the Pending Signature status, and when the contract is sent for signature, the contract moves to the Sent for Signature status.
Contract Numbering Method, Contract Numbering Level, and Contract Sequence Category	Specifies if you must enter the contract number manually or if it's generated automatically based on the numbering level and the document sequence category that you specify.
Intent	Contracts can have either a sell intent (project contracts and partner agreements) or buy intent (purchase contracts).  You can't change the intent after the contract type is created.
Buyer Role	The party role of the recipient of the goods and services in the contract. For a sales or a project contract, this is the role you set up for the customer. For a purchasing contract, it's the role you set up for the business units in your organization. You can't edit the entry in this field after contract type creation. For sell-side contracts, the source of party role can be Customer, Internal Party or All Eligible Customers.
Seller Role	The party role of the party delivering the goods and services covered by the contract. For a sales or a project contract, this is the role you set up for one of the internal business units. For a purchasing contract, it's the role you set up for the supplier. You can't edit this field after contract type creation.
Contract Owner Role	The contact role assigned to the owner of the contract. Contract ownership is automatically assigned to the employee who creates the contract. The owner is automatically assigned the role you specify here.
Buyer Contact Role	The role you specify in this field specifies the role of the buyer that will be copied from the contract header to the contract fulfillment lines created for contract lines. This option is available for purchase contracts only:
Requester Contact Role	In purchase contracts only: The role of employee who will be used as the creator of a requisition in Oracle Fusion Purchasing.

Field or Option	Description
Contract Layout Template	The Oracle Analytics Publisher template that's used to print the entire contract. This option isn't available if you enabled Use external item master.
Terms Layout Template	The Oracle Analytics Publisher template used to print the contract terms. This option isn't available if you enabled Use external item master.
Notify Before Expiration, Days to Expiration, and Contact Role to be Notified	<p>Selecting this option sends a notification before contract expiration to the individual with the role specified in the Contact Role to Be Notified. The number of days is specified the Days to Expiration field.</p> <p>These options aren't available if you enabled Use external item master.</p> <p>For the notifications to appear, the process "Send Contract Expiration Notifications" must be running. When you run Send Contract Expiration Notifications, three people receive the expiration notification:</p> <ul style="list-style-type: none"> <li>• The person who submits the process</li> <li>• The contract owner of the contract that's expiring</li> <li>• The contract contact who has the role you have selected in the Contract Type Expiry notification setup</li> </ul>

## Line Types

You can enter the line types allowed by the class you selected for the contract type. You can only do this if you selected the **Allow Lines** option during the contract type creation.

This table describes the possible line types:

Line Type	Description	Line Type Source
Free-form	Enables entry of items not tracked in inventory for purchasing. You can create master agreements in the purchasing application from lines of this type.	Free-form, buy agreement
Free-form	Enables entry of items not tracked in inventory for purchasing. You can create purchase orders in the purchasing application from lines of this type.	Free-form, buy
Item	Enables entry of inventory items for purchasing. You can create master agreements in the purchasing application from lines of this type.	Item, buy agreement
Item	Enables entry of inventory items for purchasing. You can create purchase orders in the purchasing application from lines of this type.	Item, buy
Free-form, project	Enables entry of items not tracked in inventory and displays project-related tabs and fields in a contract. You can associate and bill the line to a project in Oracle Fusion Projects.	Free-form, project-based, sell

Line Type	Description	Line Type Source
Item, project	Enables entry of inventory items and displays project-related tabs and fields in a contract. You can associate and bill the line to a project in Oracle Fusion Projects.	Item, project-based, sell
Subscription	Enables the sale of subscription items that are tracked in inventory. These are the sale of recurrent items or services over a period of time.	Subscription, sell
Coverage	Enables the coverage of covered assets within a line in a service contract.	Coverage, sell
Warranty	Enables entry of items tracked in the inventory. It includes the sale of included and extended services in the contract.	Warranty
Product	Enables entry of a line representing the negotiated terms for future sale of an item.	Product, sell agreement, standalone
Product	Enables entry of a line representing the negotiated terms for future sale of an item.	Product, sell agreement, integrated
Group	Enables entry of a line representing the negotiated terms for future sale of a product group.	Group, sell agreement

See *Guidelines for Setting Up Contract Types for Different Contracts* for more information.

**Note:** If you enable **Use external item master** when creating a contract type, you can create only the Bundle line type. Bundle lines type are for sell contracts, They describe the sale of bundled items tracked in inventory. Bundles can include other bundles or items. Line type sources for this line type are: bundle and sell.

## Add Party Roles

You can add party roles that can be added to a contract in addition to the primary parties specified in the Buyer Role and Seller Role fields. You can add multiple more parties with the same role to the contract.

## Set Project Billing Options

For contract types created for projects (sales-intent contract types of class Enterprise Contract and at least one project line type), you can set the project billing options, as described in this table:

Option	Description
Intercompany	Enables project billing between internal organizations.

Option	Description
Interproject	Enables billing to other projects.
Enable Billing Controls and Billing Limit Type	Enables billing controls for each contract line, thus letting users set a hard limit or a soft limit as the Billing Limit Type. A soft limit warns you if the billing limit is reached. A hard limit prevents you from billing above the limit.

## Enable Contract Fulfillment Notifications for Purchase Contracts

For purchase contracts, you can use the Notifications tab to specify which contract fulfillment notifications will be sent to which contact role. Available notifications are slightly different for each type of contract:

**Note:** For the notifications to appear, the process Send Contract Fulfillment Notifications must be running.

For contracts with purchase order fulfillment lines, you can notify contacts with a specific role:

- A specified number of days before or after the fulfillment due date
- When a purchase order is created from a fulfillment line
- When a purchase order can't be created from a fulfillment line
- When a fulfillment line is placed on hold
- When purchasing activity is complete on a fulfillment

For contracts with blanket purchase agreement fulfillment lines or contract purchase agreement fulfillment lines, you can notify:

- When an agreement is created from a fulfillment line
- When an agreement can't be created from a fulfillment line
- When purchasing activity is complete on a fulfillment
- When an agreement is placed on hold
- A specified number of days before or after the agreement end date

## Enable Contract Terms Authoring and Other Advanced Options

If you don't enable **Use external item master**, you can enable contract terms authoring and other advanced contract terms authoring options on the Advanced Authoring Options tab.

**Note:** If you enable Use external item master, the Advanced Authoring Options tab isn't available but Related Contracts option is automatically enabled.

The advanced authoring options are described in this table:

Option	Description
Enable Terms Authoring	Displays the Contract Terms tab in contracts and enables contract terms authoring using contract terms templates from the Contract Terms Library. You must set up the content of the library from the Terms Library work area before you can take advantage of this feature.

Option	Description
	<b>Note:</b> When this option is disabled, you can attach contract terms along with other supporting documents.
Enable Risk Management	Enables the entry of contract risks.  You must set up contract risks using the Manage Contracts Risks task in Setup and Maintenance.
Enable Related Contracts	Lets users relate contracts to each other.

## Enable Electronic Signatures

For a contract created from a contract type that's enabled for electronic signatures, the contract must be signed by all designated signers on the contract before the contract can become active. Before enabling a contract type for electronic signatures, you must have used the Manage Electronic Signature setup task to set up contract user accounts with the electronic signature solution provider.

You can then select the predefined terms layout template appended with signature tags as the default template for the contract type and enable the contract for signatures. In the e-Signature tab, you can further enable the contract type for electronic signatures and optionally create the standard email to be used when sending the contract document to signers and recipients during the integrated electronic signature process.

On the contract that you create from a contract type enabled for electronic signatures, you must designate one or more contacts on the contract as signers. Only users with edit privileges on the contract can manage the signature process. This includes sending the contract for signatures, editing the contract, sending the contract out again, withdrawing the contract from the signature process, and canceling a contract sent for signatures.

**Note:** See *Set Up Electronic Signature* for steps to set up electronic signature functionality.

### Related Topics

- *Define Document Sequences*

## Contract Line Types

Use the Manage Contract Line Types task to rename the types of lines available for selection when you create contract types. This optional implementation task is available in the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Procurement Contracts functional area.

### Line Types

Line types are names you give to the contract lines.

Associate each line type name with one of the fixed set of predefined line sources. A line source determines what item you can enter in a contract line and enables functionality of one of the integrated applications to that line. For example, project line sources expose Oracle Fusion Projects fields in contracts and make it possible for contract authors to relate lines to projects. Buy sources make it possible to create contract deliverables for the line and use those contract deliverables to create and manage purchase orders and purchase agreements in Oracle Fusion Purchasing or other integrated purchasing systems.



The application includes a set of predefined line type names for all available line sources. You can create additional names for use in different contract types. The predefined line types names are the same as the line source names they're associated with.

## Line Type Sources

The application includes these predefined line type sources, which you can't change or extend. If you don't enable the Use external item master option, you can create only those line type sources as described in this table:

Line Type Source	Description
Free-form, buy agreement	Enables entry of items not tracked in inventory. You can create master agreements in the purchasing application from lines of this type.
Item, buy agreement	Enables entry of inventory items. You can create master agreements in the purchasing application from lines of this type.
Free-form, buy	Enables entry of items not tracked in inventory. You can create purchase orders in the purchasing application from lines of this type.
Item, buy	Enables entry of inventory items. You can create purchase orders in the purchasing application from lines of this type.
Free-form, project-based, sell	Enables entry of items not tracked in inventory. You can associate and bill the line to a project in Oracle Fusion Projects.
Item, project-based, sell	Enables entry of inventory items. You can associate and bill the line to a project in Oracle Fusion Projects.
Group, sell agreement	Enables grouping of items with shared negotiated terms for the future sale of that product group. The sales are tracked by group in the sales catalog.
Product, sell agreement, standalone	Enables entry of inventory products. You can create sales agreements from lines of this type.
Product, sell agreement, integrated	Enables entry of inventory products. You can create sales agreements from lines of this type with pricing information derived from Oracle Fusion Pricing.

If you enable Use external item master, you can create only those line type sources as described in this table:

Line Type Source	Description
Subscription, sell	This line type applies to sell contracts and describes the sale of subscription items that are tracked in inventory.
Bundle, sell	This line type applies to sell contracts and describes the sale of bundled items tracked in inventory. Bundles can include other bundles or items.

## Guidelines for Setting Up Contract Types for Different Contracts

Learn how to set up contract types for different kinds of enterprise contracts.

Your contract type setup depends on the type of contract you're setting up. The main types are:

- Customer Contracts

Your organization is selling goods and services.

- Supplier Contracts

Your organization is purchasing goods and services.

For these types of contracts, the key contract type settings are based on these questions:

- Are you selling or buying?

For Intent, you select either **Sell** or **Buy**.

- Are you buying or selling now or negotiating a long-term contract with terms, such as pricing, that will govern a future purchase or sale?

For Class, select **Enterprise Contract** if you're buying or selling now. If you're negotiating a future purchase or sale, select one of the agreement classes, for instance **Purchase Agreement** for a future purchase.

- Does the contract involve the purchase or sale of specific items?

If the contract involves the purchase or sale of specific items, then you can specify how those items are entered into contract lines by adding different line types to the contract type. The Line Class assigned to the contract type controls the line types you can assign to a contract. Some line types in project contracts and sales agreements permit contract authors to select items tracked in inventory; others permit the entry of any item as text, for example, for free-form services. Similarly, you can only associate subscription or coverage to a contract type with the Line Class set to "Service".

Some of the line types support integration with other Oracle applications, for example, project line types support the billing of items through Oracle Project Billing. Buy-intent lines allow the capture of pricing information and support integrations to purchasing systems to create POs or blanket purchase agreements.

The combination of answers to these questions result in the numbered cases in this figure and are described in the different sections of this topic.

There are other special kinds of contracts where these questions are less relevant or don't apply. These include:

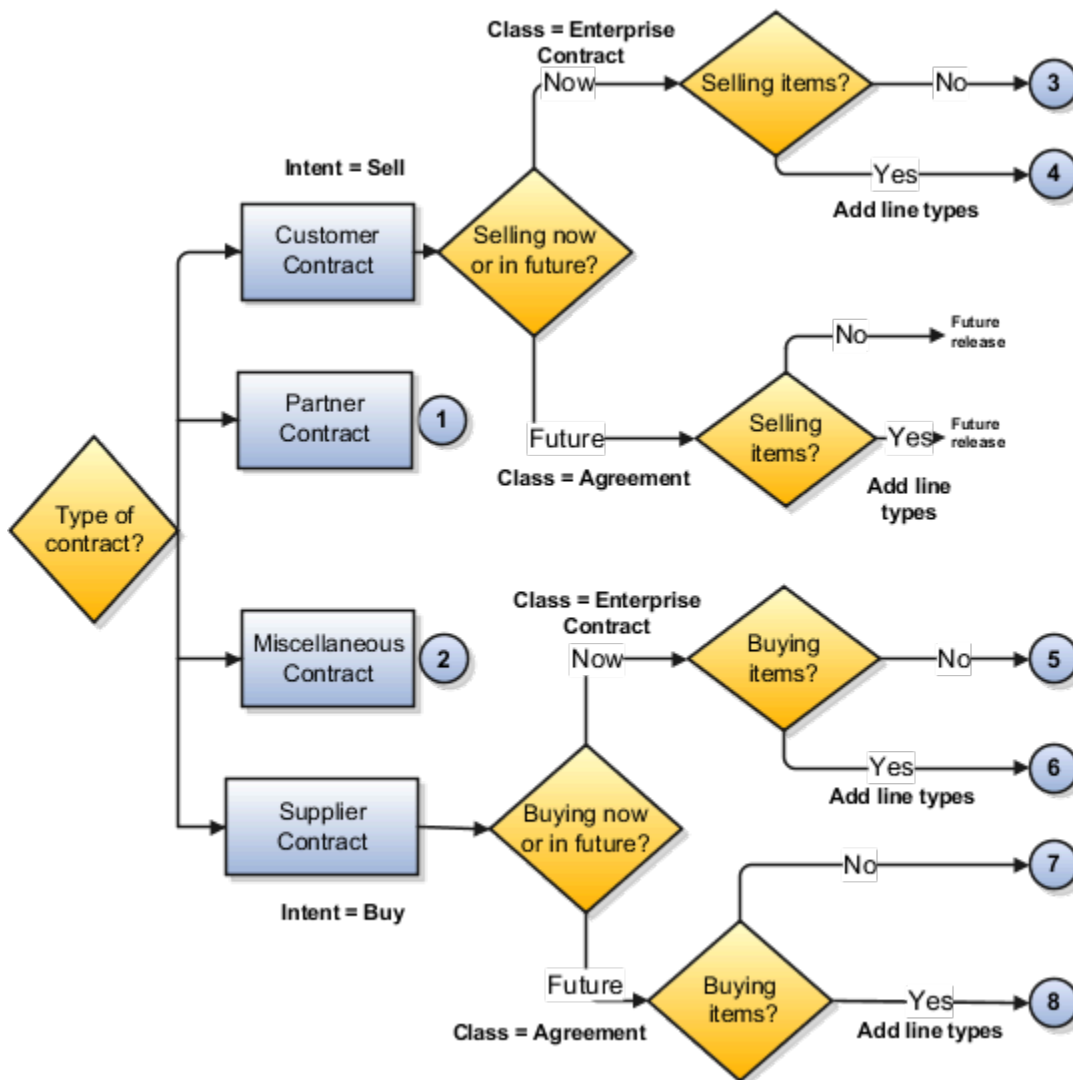
- Partner Agreements

Contracts with partners.

- Miscellaneous Contracts

Contracts such as nondisclosure agreements.

The following figure shows the decision flow when you wither buy or sell.



## Customer Contracts

This section describes the settings for sell-intent contracts. For the sell intent contracts to be available for selection, you must enable the customer contract management in the Assign Business Unit function. Case numbers correspond to diagram that follows.

### Case 3: Customer Contracts with No Lines

These table describes how you can use the contract type settings to create simple sales contracts with no lines.

Purpose of Contract	Contract Type Settings
Simple customer contract with no lines.	<ul style="list-style-type: none"> <li><b>Class:</b> Enterprise Contract</li> <li><b>Intent:</b> Sell</li> <li><b>Allow Lines</b> option: Deselected</li> </ul>

## Case 4: Customer Contracts with Lines

This table describes the key contract type settings for sell-intent contracts for items or services. In this release, you can add lines for selling items and services that are executed as part of a project (for example, project manufactured items or professional services) or lines for services.

Purpose of Contract	Contract Type Settings
Sell items and services that are tracked and billed.	<ul style="list-style-type: none"> <li>• <b>Class: Enterprise Contract</b></li> <li>• <b>Intent: Sell</b></li> <li>• <b>Allow Lines</b> option: Selected</li> <li>• You can add two types of lines when the Class is set to Enterprise contract and the Line Class is set to Project: <ul style="list-style-type: none"> <li>○ <b>Free-form, project</b> For selling items not tracked in inventory.</li> <li>○ <b>Item, project</b> For selling inventory items.</li> </ul> </li> <li>• You can add two types of lines when the Class is set to Enterprise Contract and the Line Class is set to Service: <ul style="list-style-type: none"> <li>○ <b>Coverage</b> For selling services provided on covered assets.</li> <li>○ <b>Subscription</b> For selling recurrent items or services.</li> </ul> </li> <li>• You can add line Warranty when the Line Class is set to Warranty.</li> <li>○ For selling included and extended services.</li> <li>• On the Advanced Options tab, leave the <b>Contract Terms Authoring</b> option not enabled for project line types.</li> </ul> <p><b>Note:</b> If you use Contract Terms Library, then there is no functional link between the contract terms and the Oracle Fusion Projects application. Therefore you can't monitor the adherence of a project to the terms in the contract.</p>

## Case 5: Contracts for Future Sales Without Lines

This table describes the key contract type setups for future-sale contracts without lines.

Purpose of Contract	Contract Type Settings
Contract for future sales, without specifying the goods and services as contract lines.	<ul style="list-style-type: none"> <li>• <b>Class: Agreement</b></li> <li>• <b>Intent: Sell</b></li> <li>• <b>Allow Lines</b> option: Leave not enabled</li> </ul>

## Case 6: Contracts for Future Sales with Lines

This table describes the key contract type setups for future-sale contracts with lines.

Purpose of Contract	Contract Type Settings
<p>Create this type of contract when you know the detail of the goods or services you plan to sell to a specific customer in a period, but you don't yet know the detail of your delivery schedules. You can use this type of contract, sometimes called a blanket sales agreement, a standing order, or a blanket order, to specify negotiated prices for your items before actually selling them. Use this type of contract when the customer has negotiated volume discounts and want to create releases against these negotiated volumes, or commits to specific items, quantities, or amounts.</p> <p><b>Note:</b> Only contracts using Oracle Order Management pricing integration will be available when creating a sales order in Order Management.</p>	<ul style="list-style-type: none"> <li>• <b>Class:</b> Agreement</li> <li>• <b>Intent:</b> Sell</li> <li>• <b>Allow Lines</b> option: Selected</li> <li>• You can add the following types of lines: <ul style="list-style-type: none"> <li>◦ Group</li> <li>◦ <b>Product</b></li> </ul> </li> </ul>

## Supplier Contracts

This section describes contract type settings for buy-intent contracts. For the buy intent contracts to be available for selection, you must enable the procurement contract management in the Assign Business Unit function.

## Case 7: Supplier Contracts Without Lines

This table describes the key contract type setups for supplier contracts where you're negotiating purchase of items or services without specifying the actual items to be purchased.

Purpose of Contract	Contract Type Settings
<p>Contract where you negotiate specific terms and conditions or a purchase without specifying the goods and services as contract lines. Contract authors can create a corresponding purchase agreement within Oracle Fusion Purchasing or another integrated purchasing application by adding a contract deliverable for the contract. You can use the deliverable to monitor the status of the agreement, but purchase orders are created and tracked in purchasing.</p>	<ul style="list-style-type: none"> <li>• <b>Class:</b> Enterprise Contract</li> <li>• <b>Intent:</b> Buy</li> <li>• <b>Allow Lines</b> option: Leave not enabled</li> </ul>

## Case 8: Supplier Contracts with Lines

This table describes the key contract type setups for supplier contracts for immediate purchase of specific items or services.

Purpose of Contract	Contract Type Settings
Purchase goods and services. This type of contract makes it possible for contract authors to create purchase orders in Oracle Fusion Purchasing or another integrated purchasing application from individual contract lines by adding contract deliverables. You can monitor the status of each purchase order directly from the deliverables.	<ul style="list-style-type: none"> <li>• <b>Class: Enterprise Contract</b></li> <li>• <b>Intent: Buy</b></li> <li>• <b>Allow Lines</b> option: Selected</li> <li>• You can add two types of lines: <ul style="list-style-type: none"> <li>○ <b>Free-form</b> For items not tracked by inventory.</li> <li>○ <b>Item</b> For items tracked by inventory.</li> </ul> </li> </ul>

## Case 9: Contracts for Future Purchases Without Lines

This table describes the key contract type setups for future-purchase contracts without lines.

Purpose of Contract	Contract Type Settings
Contract for future purchases, without specifying the goods and services as contract lines. This type of contract makes it possible for contract authors to create a contract purchase agreement. Contract authors can create contract purchase agreements with suppliers to agree on specific terms and conditions without indicating the goods and services.	<ul style="list-style-type: none"> <li>• <b>Class: Agreement</b></li> <li>• <b>Intent: Buy</b></li> <li>• <b>Allow Lines</b> option: Leave not enabled</li> </ul>

## Case 10: Contracts for Future Purchases with Lines

This table describes the key contract type setups for future-purchase contracts with lines.

Purpose of Contract	Contract Type Settings
Create this type of contract when you know the detail of the goods or services you plan to buy from a specific supplier in a period, but you don't yet know the detail of your delivery schedules. You can use this type of contract, sometimes called a blanket purchase agreement, a standing order, or a blanket order, to specify negotiated prices for your items before actually purchasing them. Use this type of contract when you have negotiated volume discounts and want to	<ul style="list-style-type: none"> <li>• <b>Class: Agreement</b></li> <li>• <b>Intent: Buy</b></li> <li>• <b>Allow Lines</b> option: Selected</li> <li>• You can add the following types of lines: <ul style="list-style-type: none"> <li>○ <b>Free-form</b> To purchase items not tracked by inventory.</li> <li>○ <b>Item</b></li> </ul> </li> </ul>

Purpose of Contract	Contract Type Settings
<p>create releases against these negotiated volumes, or when you commit to specific items, quantities, or amounts. You can issue a blanket release against a blanket purchase agreement to place the actual order (as long as the release is within the blanket agreement effectivity dates).</p> <p>Contract authors can automatically create corresponding agreements in Oracle Fusion Purchasing or other integrated purchasing applications by adding contract deliverables and monitor the execution of those agreements from the deliverables.</p>	To purchase items tracked by inventory.

## Special Contracts

This section describes the settings you want to use for partner agreements and for miscellaneous contracts.

### Case 1: Partner Agreements

Use this contract type settings for partner agreements in Oracle Partner Relationship Management.

Purpose of Contract	Contract Type Settings
Partner enrollment agreement	<p>Oracle Fusion Partner Relationship Management uses contract types only for applying contract terms templates with boilerplate contracts, so most of the contract type entries don't apply or have no effect.</p> <ul style="list-style-type: none"> <li>• <b>Class: Partner Agreement</b></li> <li>• <b>Intent: Sell</b></li> <li>• You must enable contract terms authoring by selecting the <b>Enable Terms Authoring</b> option.</li> </ul>

### Case 2: Miscellaneous Contracts

This table lists the key contract type settings for nondisclosure and other simple contracts.

Purpose of Contract	Contract Type Settings
Nondisclosure agreement	<ul style="list-style-type: none"> <li>• <b>Class: Enterprise Contract</b></li> <li>• <b>Intent: Sell</b></li> <li>• <b>Allow Lines</b> option: Leave not enabled</li> </ul>

#### Related Topics

- [Contract Types](#)
- [Contract Line Types](#)

## Why can't I delete a contract type?

You can't delete a contract type after it's used to create a contract. However, you can enter an end date to prevent its use in future contracts.

## Do I have to create contract types to author contract terms on purchase orders or sourcing documents such as RFQs?

To author contract terms on individual purchase orders or other Oracle Fusion Sourcing documents, such as RFQs, you aren't required to set up contract types. This is because no enterprise contracts are created.

The documents themselves are the contracts. All setups to enable contract terms templates and contract terms authoring are done from within Oracle Fusion Purchasing and Sourcing applications.

# Contract Risks

## How can I set up contract risk?

You select the Manage Contract Risks task from the Setup and Maintenance work area, as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area. Contract authors use this task during contract authoring to record contract risks.

Recording contract risks helps your organization prepare for potential problems. It doesn't affect contract processing.

**Note:** Risk names must be unique.

### *Related Topics*

- [How can I specify contract risk?](#)

## How can I specify contract risk?

Select the risk type, probability of such risk occurring, impact of such a risk, and any other relevant comments.

You can record the occurrence of any of these contracts risks by entering the date of occurrence for the contract risk, at any point of time.

Recording contract risks helps your organization prepare for potential problems. It doesn't affect contract processing.

**Note:** Entering or editing contract risk information doesn't require you to amend the contract.



# Contract Relationships

## Contract Relationships

Contract relationships are associations between contracts. Contract relationships provide supporting and referential information for negotiating contracts. For example, a software sales contract can be related to a hardware purchase contract, so that software pricing discounts can be calculated based on the volume of hardware purchases.

You can add, update, and remove contract relationships. You can use the Manage Contract Relationship Types task in the Setup and Maintenance work area to view and add the lookup codes for contract relationships. The lookup codes you add in this task are displayed to a contract author on the edit contract page. A contract author can then access these values by clicking **Related Contracts** > **Add Related Contracts** > **Relationship** drop-down list.

Before you define a contract relationship, you must set the Enable Related Documents option in the contract type. You can create relationships only at the header level, and not at the line level.

**Note:** You can create or update relationships only for valid contracts.

### Related Topics

- [Contract Types](#)

# Contract Scheduled Processes

## Overview of Contracts Scheduled Processes

Enterprise Contracts provides many predefined scheduled processes. The processes can be set up to run automatically at periodic intervals using the Scheduled Processes task from the Navigator.

**Note:** See [Manage Contracts Scheduled Processes](#) learn how to view and schedule Contracts scheduled processes.

This table lists the predefined scheduler processes and summarizes when they're needed:

Scheduled Process	Description	Related Feature	Recommended Frequency
Acquires Usage Data from an External Web Service	Name of the process used to get usage information from an external web service.	Usage Billing	Align with shortest billing period or whenever the consumption data is available
Adopt Global Clauses for a New Business Unit	Adopts all approved global clauses for use in a new local business unit.	Terms Library Clause Adoption	Daily
Assign Contract Owner	Assigns a new contract owner or replaces an existing contract owner.	Contract Assignees	As needed

Scheduled Process	Description	Related Feature	Recommended Frequency
Automatically Renew Eligible Contracts and Contract Lines	Name of the process that's used to find and renew eligible contract lines.	Basic Automated Contract Renewal	Daily to weekly
Build Keyword Search Index for Contract Clauses	Enables clause searches in the Contract Terms Library using the Keyword field by building an index of the Clause Title, Display Title, Description, and Text fields.	Terms Library Search Clauses	Daily
Build Keyword Search Index for Contract Terms Templates	Enables contract terms template searches in the Contract Terms Library using the keyword field by building an index of the Terms Template Name and Description fields.	Terms Library Search Terms Templates	Daily
Fetch Pricing Information for Service Contracts	Name of the process that prices usage charges and reprices future periods for recurring charges on lines marked as Price During Billing. For example, Let's assume that you've already billed \$100 per month for January to April. Now you change the price to \$150 per month, so from May onward your customer will be billed at \$150.	Service Contract Pricing	Daily
Fetch Service Contract Invoice Information from Receivables	Name of the process used to retrieve the service contract line invoice and credit memo information from accounts receivables.	Service Contract Billing	Daily
Generate Contract PDFs for Text Search	Used to generate PDF documents for all draft contracts to enable indexing of terms for text search.	Service Contract Billing	Daily
Import Contract Clauses from Interface Table	Validates clauses and variables in the open interface table and imports the valid clauses into the Contract Terms Library.	Terms Library Clause Import	As needed
Import Contract Clauses from XML File	Validates clauses and variables from an XML spreadsheet and imports the spreadsheet into the Contract Terms Library.	Terms Library Clause Import	As needed
Import Contract from External Systems	Imports contracts in bulk from external systems.	Contract Import	As needed
Import Default Coverage	Name of the process which is used to import default coverage.	Service Contracts Entitlements	As needed

Scheduled Process	Description	Related Feature	Recommended Frequency
Optimize Keyword Search Index for Contract Clauses	Optimizes the clause text index to improve clause performance of searches using the Keyword field in the Contract Terms Library.	Terms Library Clause Search	Daily
Optimize Keyword Search Index for Contract Terms Templates	Optimizes the contract terms template text index to improve performance of terms template searches using the Keyword field in the Contract Terms Library.	Terms Library Terms Template Search	Daily
Perform Timed Contract State Transitions	Name of the process that performs the timed transition of contracts from one state to another.	User Statuses and Transitions	Daily
Process Contracts Consolidated Reminder Events	The name of the program that processes consolidated reminder events in contracts.	Event Notification Rules and Template Sets	Daily
Process Contracts Event Notifications	The name of the process that's used to process event notifications in contracts.	Event Notification Rules and Template Sets	Daily
Process Installed Base Updates	Name of the process which is used to create and update contracts based on Installed Base updates.	Service Contracts Installed Base Integration	Daily
Purge Contract Clause Import Tables	Purges data from the clause interface table after clause import has completed.	Terms Library Clause Import	As needed
Purge Contract Import Interface Tables	Purges error records of the contract import interface tables.	Contract Import	As needed
Purge Contract Temporary Tables	Purges all contract temporary tables.	NA	As needed
Send Contract Expiration Notifications	Sends contract expiration notifications to contract owners.	NA	Daily
Send Contract Fulfillment Notifications	Sends notifications to contract fulfillment notification recipients based on the notification rules set up for the fulfillment line.	NA	Daily
Send Contract Terms Deliverable Due Date Notifications	Sends due date notifications to the responsible party for the contract terms deliverable.	Contract Deliverables	Daily

Scheduled Process	Description	Related Feature	Recommended Frequency
Send Contract Terms Deliverable Escalation Notifications	Sends escalation notifications to the escalation contact, the internal contact, and the requester of contract terms deliverables. The requester is the internal employee who requested the deliverable.	Contract Deliverables	Daily
Send Contract Terms Deliverable Overdue Notifications	Sends overdue notifications to the requester and to the responsible party for a contract terms deliverable. When the responsible party is external, then the internal party is notified as well.	Contract Deliverables	Daily
Send Service Contract Billing Information to Receivables	Name of the process used to send the service contract line billing and credit information to accounts receivables.	Service Contract Billing	Daily
Track Electronic Signature Status	Track electronic signature status of contract.	Electronic Signature	Hourly
Track Purchasing Activity	Retrieve the number and the status of the purchasing documents created by the integrated procurement application from the contract fulfillment line.	NA	As needed
Update Contract Status	Updates the status of contracts that are dependent on time. For example, updates the status to expired when the end date is reached.	NA	Daily
Validate Imported Contract	Validates imported contract and updates bill and revenue plan details.	NA	As needed

**CAUTION:** Oracle recommends that you don't edit any existing scheduled processes.

#### Related Topics

- [What are scheduled processes?](#)

## Manage Contracts Scheduled Processes

To view and manage Contracts scheduled processes:

**Note:** See [Overview of Contracts Scheduled Processes](#) for a list of Contracts scheduled processes.

1. Select **Navigator > Scheduled Processes**.
2. In the overview page, select **Schedule New Process**.
3. In the Schedule New Process dialog box, in the Name field, click the drop-list icon and then click **Search**.
4. Search for a process using the entire name or a portion of the name of the process.
5. After you find the process, click the name and click **OK**. The Process Detail page appears automatically.
6. Use the Process Details window to:
  - See the process basic and advanced options
  - Schedule the process
  - Submit the process

#### Related Topics

- [What are scheduled processes?](#)

## Contract Approvals

### Predefined Approval Flows for Oracle Contracts

In Oracle Contracts, you can configure approval rules for the approval of contracts, clauses, and terms templates. To do this, you use the Approvals Management Extensions of the Oracle Service-Oriented Architecture (SOA) suite and Oracle Business Process Management Suite (BPM).

The BPM lets you administer approval rules. BPM Worklist administrators can access the approval rules in the BPM Worklist. Oracle Contracts provides predefined approval flows or approval tasks and predefined rule sets for them. You can use the BPM Worklist to configure the rules for a predefined approval task rule set and configure the approval group for each task. Using Oracle JDeveloper, you can edit this flow and create more approval flows for contracts with different approval requirements.

Contracts has three predefined approval flows or approval tasks, each with a predefined rule set that you can configure the rules and approval groups for:

Approval Task	Rule Set	Approval Group	Default Approver in Group	Purpose
<b>ContractsApproval</b> (1.0)	ContractApprovalStage: ContractsApproval	ContractApprovalGroup	customer_contract_ manager_vision_operations	To approve contract attributes or contract deviation attributes before using the contract
<b>ContractClauseApproval</b> (1.0)	ClauseApprovalStage: ContractClauseApproval	ClauseApprovalGroup	Business Practices Director Operations	To approve clause or term attributes before adding them to the Terms Library
<b>TemplateApprovalHuman</b> (1.0)	TermsTemplateApprovalStage: TemplateApproval	TemplateApprovalGroup	Business Practices Director Operations	To approve terms template attributes before using the terms template for a contract

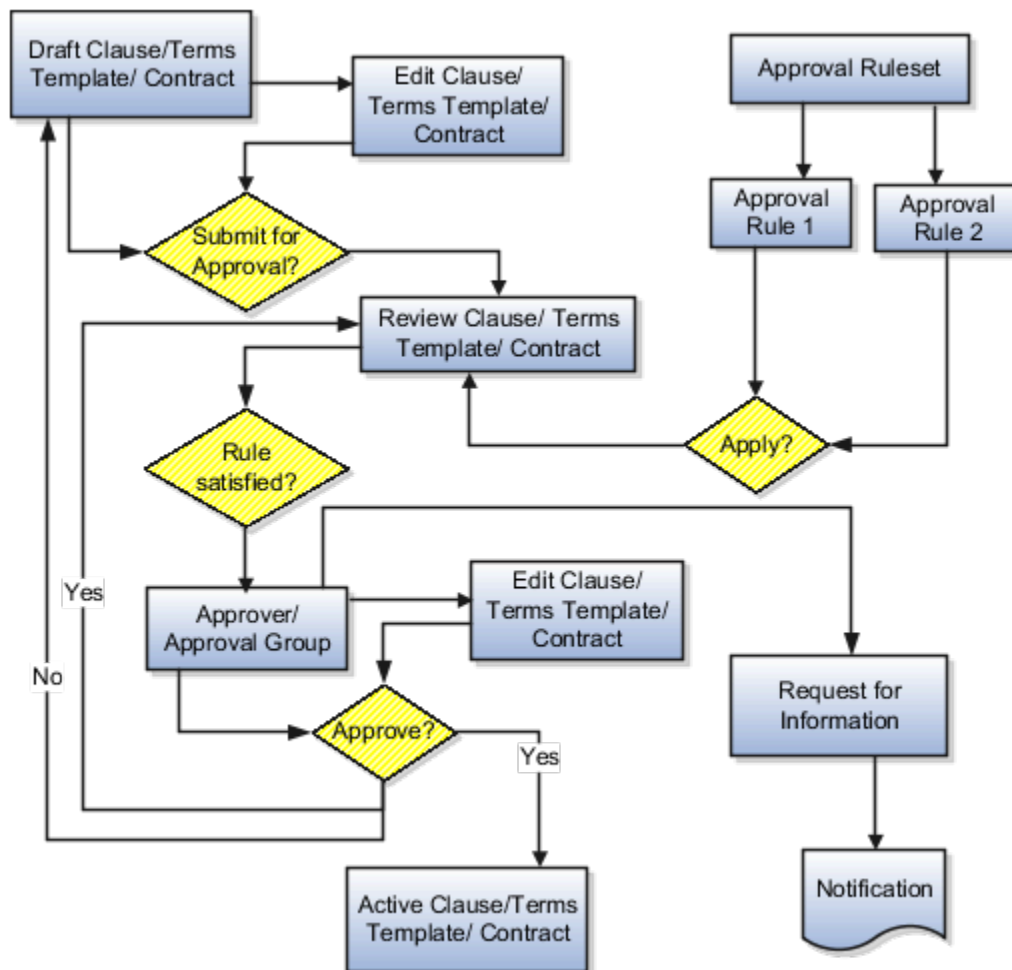
As a contract administrator, you can see an Administration link displayed in the BPM Worklist. To create new rules or change existing rules, click the Administration link, click the Task Configuration tab, select the required task in the side panel, click the Data Driven tab, and select the appropriate rule set.

To create or change approval groups:

1. Click **Administration** and then select the **Approval Groups** tab.
2. Select the required approval group.

The approval process is the same for a supplier contract and a customer contract. So, when you submit a clause, terms template, or contract for approval in Procurement or in Sales, the contract approval process starts, which in turn starts a set of approval rules created in AMX to build the list of approvers. AMX then sends out approval notifications to the first set of approvers and then again to the next set of approvers in the approval list every time it receives a response to an approval notification. This process is repeated until all approvals are complete.

This figure shows how each approval rule is applied in turn to the clause, terms template, or contract, and how at least one must be satisfied for the clause, terms template or contract to be approved and activated:



To configure approval rules for contracts, you can access approval tasks from the list of Tasks to be Configured:

1. Navigate to **Setup and Maintenance** and search for Approval Management tasks.
2. Expand **Define Approval Management for Customer Relationship Management** and click the **Go to Task** button in Manage Task Configurations for Customer Relationship Management.

3. Click the **Administration** link displayed in the BPM Worklist application and then click the **Task Configuration** tab.

The approval process is:

1. When the contract, clause, or terms template is submitted, based on whether it satisfies the task payload attributes of the approval rule and its conditions, it's routed to the approver or approval group specified in the approval rule. The approver or majority of approvers in the group can then do any of the following:
  - Approve the contract, clause, or terms template as is
  - A link for viewing the contract is included in contract notifications by default. However, the link can be hidden using personalization
  - Reject the contract, clause, or terms template

If approved and the contract, clause, or terms template satisfies other approval rule attributes and conditions, the approval process continues. If rejected, the approval process ends.

2. If the contract, clause, or terms template doesn't satisfy any further approval rules, based on the last approval rule result, the approval process either ends or the contract, clause, or terms template is activated.

AMX configuration options for Contracts determine most of the actions that are available to the participants in the approval process. For example, as an approver:

- You can reject the contract, clause, or terms template.
  - By default, the approval process stops when the contract, clause, or terms template is rejected and the contract, clause, or terms template returns to draft status for further editing and resubmission.
  - By default, the next approver or approval group of the next applicable approval rule is notified when you approve the contract, clause, or terms template.
  - You can also request more information from the other approver, the person who submits for approval, or both. Such requests don't affect control of the approval process, but the person from whom information is requested receives a worklist notification.
- You can't edit a contract in pending approval status. You can enter comments in the Notification Task Details page and reject it, so that the approval requester can edit it.
- You can perform ad hoc insertion of approvers.
- You can delegate your approval responsibilities to other approvers.
- You can claim the approval and respond. By default, the approval process stops at the first response and the response of the first approver that responds becomes the response for the approval group.

If you change the default settings of the AMX configuration options, then different actions or action outcomes become available to this approval flow.

The approval flows for Contracts contains the following predefined rule sets:

- Approval of contract based on estimated contract amount
- Approval by clause approval group based on contract intent
- Approval by template approval group based on contract intent

## Approval of Contract Based on Estimated Contract Amount

The predefined rule set for approval of contracts is called ContractApprovalStage: ContractsApproval rule set.

The predefined rules include the following:

- Approval for a contract with no estimated amount
- Approval for contracts with an estimated amount that's more than 30,000

- Approval for contracts with an estimated amount that's equal to or less than 30,000

You can change the predefined rules, delete the rules, or add additional rules as needed, as seen in this table:

Rule	Field	Predefined Value	Description
Estimate_Amount_Rule1	Condition	Task.payload.getContractHeaderRes	Applicable for a total estimated contract amount of 30,000 or less.
Estimate_Amount_Rule1	List Builder	Resource	The name of the approver
Estimate_Amount_Rule1	Response Type	Required	The approval notification requires a response.
Estimate_Amount_Rule1	Participants - Users	customer_contract_manager_vision_operations	The name or ID of the contract manager.
Estimate_Amount_Rule1	Participants - Groups	null	The group ID of the contract manager isn't required.
Estimate_Amount_Rule1	Participants - Apps Role	null	The role of the contract manager in the application isn't required.
Estimate_Amount_Rule2	Condition	Task.payload.getContractHeaderRes	Applicable for a total estimated contract amount of more than 30,000.
Estimate_Amount_Rule2	List Builder	Approval Group	Configurable list of approvers.
Estimate_Amount_Rule2	Response Type	Required	The approval notification requires a response.
Estimate_Amount_Rule2	Approval Group	ContractApprovalGroup	The group of approvers configured to approve the contract.
Estimate_Amount_Rule2	Allow empty groups	True	The group may have only the one default approver of contract manager.
Estimate_Amount_Rule3	Condition	Task.payload.getContractHeaderRes	Applicable for a total estimated contract amount of null.
Estimate_Amount_Rule3	List Builder	Resource	The name of the approver
Estimate_Amount_Rule3	Response Type	Required	The approval notification requires a response.
Estimate_Amount_Rule3	Participants - Users	customer_contract_manager_vision_operations	The name or ID of the contract manager.



Rule	Field	Predefined Value	Description
Estimate_Amount_Rule3	Participants - Groups	null	The group ID of the contract manager isn't required.
Estimate_Amount_Rule3	Participants - Apps Role	null	The role of the contract manager in the application isn't required.

## Approval by Clause Approval Group Based on Contract Intent

The predefined rule set for approval of contract clauses by the approval group is called ClauseApprovalStage : ContractClauseApproval rule set.

This rule set has two predefined rules:

- Approval by the group if the clause is of intent sell.
- Approval by the group if the clause is of intent buy

You can change the predefined rules, delete the rules, or add additional rules as needed, as seen in this table:

Rule	Field	Predefined Value	Description
SellIntentClauseApproval	Condition	Task.payload.getContractClauseApp	Applicable for approval of a new clause of intent sell.
SellIntentClauseApproval	List Builder	Approval Group	Configurable list of approvers.
SellIntentClauseApproval	Response Type	Required	The approval notification requires a response.
SellIntentClauseApproval	Approval Group	ClauseApprovalGroup	The group of approvers configured to approve the new clause.
SellIntentClauseApproval	Allow empty groups	False	The group must have one or more approvers.
BuyIntentClauseApproval	Condition	Task.payload.getContractClauseApp	Applicable for approval of a new clause of intent buy.
BuyIntentClauseApproval	List Builder	Approval Group	Configurable list of approvers.
BuyIntentClauseApproval	Response Type	Required	The approval notification requires a response.
BuyIntentClauseApproval	Approval Group	ClauseApprovalGroup	The group of approvers configured to approve the new clause.

Rule	Field	Predefined Value	Description
BuyIntentClauseApproval	Allow empty groups	False	The group must have one or more approvers.

## Approval by Template Approval Group Based on Contract Intent

The predefined rule set for approval of a terms template by a group of approvers is called **TermsTemplateApprovalStage : TemplateApproval** rule set

This rule set has two predefined rules:

- Approval by the group if the terms template is of intent sell.
- Approval by the group if the terms template is of intent buy.

You can change the predefined rules, delete the rules, or add additional rules as needed. This table describes these scenarios:

Rule	Field	Predefined Value	Description
Rule_1	Condition	Task.payload.getTermsTemplateRes	Applicable for approval of a new terms template of intent buy.
Rule_1	List Builder	Approval Group	Configurable list of approvers.
Rule_1	Response Type	Required	The approval notification requires a response.
Rule_1	Approval Group	TemplateApprovalGroup	The group of approvers configured to approve the terms template.
Rule_1	Allow Empty Groups	False	The group must have one or more approvers.
Rule_2	Condition	Task.payload.getTermsTemplateRes	Applicable for approval of a new terms template of intent sell..
Rule_2	List Builder	Approval Group	Configurable list of approvers.
Rule_2	Response Type	Required	The approval notification requires a response.
Rule_2	Approval Group	TemplateApprovalGroup	The group of approvers configured to approve the terms template.
Rule_2	Allow Empty Groups	False	The group must have one or more approvers.

### Related Topics

- [Approval Rules Configurations](#)
- [Disable or Enable Workflow Notifications](#)
- [Synchronize Notifications in the Global Header and Home Page with Workflow Tasks](#)

## Approval Rules Configurations

You can create different approval rules for contracts using the BPM Worklist, and to manage approval rules, you must be a BPM Worklist administrator.

Approval rules are rules that you configure in Approval Management Extensions for the approval of contracts, contract clauses, and terms templates. Oracle Fusion Enterprise Contracts provides three predefined human tasks for contract approval, clause approval, and terms template approval.

The contract approval human task has eight rule sets that are connected in a combination of series and parallel stages. The clause approval and terms template approval human tasks each provide one rule set.

If you're authorized to manage approval rules in AMX, you can perform these tasks:

- Create new approval rules
- Modify existing approval rules
- Understand and apply properties of rules and rule sets

If you're authorized to manage approval rules, click the Administration link in the BPM Worklist.

Use this procedure to create new approval rules or modify existing ones:

1. Click the **Task Configuration** tab and select the appropriate approval task for Contracts from the panel beneath Tasks to be configured.
2. Navigate to the **Rules** tab.  
The participant tree displays all the stages of approval and the rule sets for each stage. Each rule set contains one or more approval rules. Each approval rule has an approval condition and a list of approvers. The list of approvers derived for each rule set is called a Participant.
3. To modify rules, first click the **Edit** icon and then click the **Participant**.  
You can now modify or add rules. To generate the list of approvers, each rule requires a list builder to be associated with it.

For approval, each contract, clause, or terms template must satisfy at least one rule within a rule set. If it doesn't satisfy any rule in a rule set, the approval process errors and an incident is reported in Oracle Enterprise Manager Grid Control.

## Create New Approval Rules

To create rules, you must provide values for these rule components:

- Condition: Criteria that a contract, contract clause, or terms template must satisfy
- Response type: Required or FYI. A response from the approver is required or the notification is informational.
- List builder: Creates a list of approvers for a specific notification

To define a condition, select a Payload Type value from the list of values in the IF region. The Condition Browser displays. In the Condition Browser, open a view object (folder) and select the attribute that you want to use as the criteria. You can add multiple conditions to a rule. An example of a condition is:  
`getContractHeaderResponse.result.estimatedAmount` more than 30,000.

This table lists objects (folders) that are visible in the Condition Browser with their associated attributes and descriptions.

**Note:** The values in this table are the only ones that are relevant for you to select as conditions for contract approval rules:

View Object in Condition Browser	View Object Attribute	Description
PayloadType	getContractHeader	Contract identifier
PayloadType	getContractHeaderResponse	All contract header attributes listed under the Result sub-folder such as estimated contract amount, contract type, freight terms, payment type, tax, and risk code
PayloadType	getDeviationResponse	Deviation attributes listed directly under Payload Type such as invalid, nonstandard, and missing clauses, policy deviation, party, and submitter
PayloadType	articleVersionId	Clause version
PayloadType	clauseTitle	Clause title or name
PayloadType	getContractsClauseApprovalRuleAttributes	All contract clause attributes such as intent, clause type, organization, and display name
PayloadType	getTermsTemplate	Terms template identifier
PayloadType	getTermsTemplateResponse	All terms template attributes such as intent, layout name, organization, terms template language, and Contract Expert enabled

Each approval notification generated from an approval rule must have a response type of Required or FYI. You specify the applicable response type in the THEN region on the Data driven configuration page of the BPM Worklist. If the approver should take an action in response to the notification, click Required. If the approval notification is designed as information only, click FYI.

Each rule requires a list builder to build the list of approvers. This table shows the list builder types that are available in the BPM Worklist with their associated descriptions:

List Builder Type	Description
Supervisory	Ascends the primary supervisory hierarchy, starting at the contract submitter or at a given approver, and generates the approval chain.
Job Level	Ascends the supervisory hierarchy, starting at a given approver and continuing until an approver with the appropriate job level is found.

List Builder Type	Description
Position	Ascends the position hierarchy, starting at a given approver's position and continuing until an approver with the appropriate position is found.
Resource	A list of approvers. You can choose a user name or a function that returns a set of approvers.
Approval Group	Group of approvers. You can create approver groups consisting of a list of users for use in the rule sets.

Each list builder type requires values for specific fields to build its approval list. In the THEN region on the Data driven configuration page of the BPM Worklist, select a type of list builder from the List Builder drop-down list and click **Create Action**. The Add Variable dialog box displays where you add specific variables for specific list builders.

This table indicates the fields associated with each list builder type for which you must select specific values:

List Builder Type	Field	Description	Values to Select and Sample Data
Resource	Participants	Participants can be users, groups, or application roles. For users, use a static user name or a function to retrieve a user name.	For example, use customer_contract_manager_vision_operations as the user.
Approval Group	Approval Group	Enter the approval group name. To select an approval group as a list builder, you must create the static approval groups in the BPM Worklist.	For example, use ContractApprovalGroup.

## Modify Existing Approval Rules

You can use the Edit icon in the Tasks to be configured pane and select the approval stage to modify rules in the rule set. You can now add, modify, or delete rules within the specified rule set. Expand the rule to view the existing if then conditions. You can change the condition criteria or values or the result or consequent action of the condition. Click the Commit Task icon in the Tasks to be configured pane for the changes to take effect. Keep in mind that just saving the changes can't activate them. To undo changes, use the Reset icon.

## Create Deviation-Based Rules and Rerouting Approval

You can create new approval rules for specific contract deviations in the Rules tab for the Contract Approval Human Task. To reroute approval for the Contract Approval task, select the participant level in the approval hierarchy or participant tree in the Rules tab at which to add the new deviation-based rule.

Click the Edit icon, and then click the Participant. You can now add a new rule to the ContractsApproval rule set. Select the required IF condition from the Condition Browser and expand the condition object to select the appropriate attribute and in the IF section of the equalsIgnoreCase condition row expand the TermsDeviations object, select the appropriate attribute and enter the contract deviation value for which you're creating additional approval routing. In the THEN section of the row, select the Approval Group List Builder, the Required Response Type, and the appropriate new approval group for the deviation that the contract approval routing must now include.

**Note:** You must have set up the required Approver Groups in the Approval Group tab.

For example, in the case of standard clause jurisdiction being added to the contract, you can choose to additionally route the approval to the Legal team. In this case you would select the Legal Team as the Approver Group for the Jurisdiction condition value for the attribute articleTitle. The test would be for the condition value of OKC\_STD\_ARTICLES\_ADDED for the deviationCategoryCode attribute.

## Understand and Apply Properties of Rules and Rule Sets

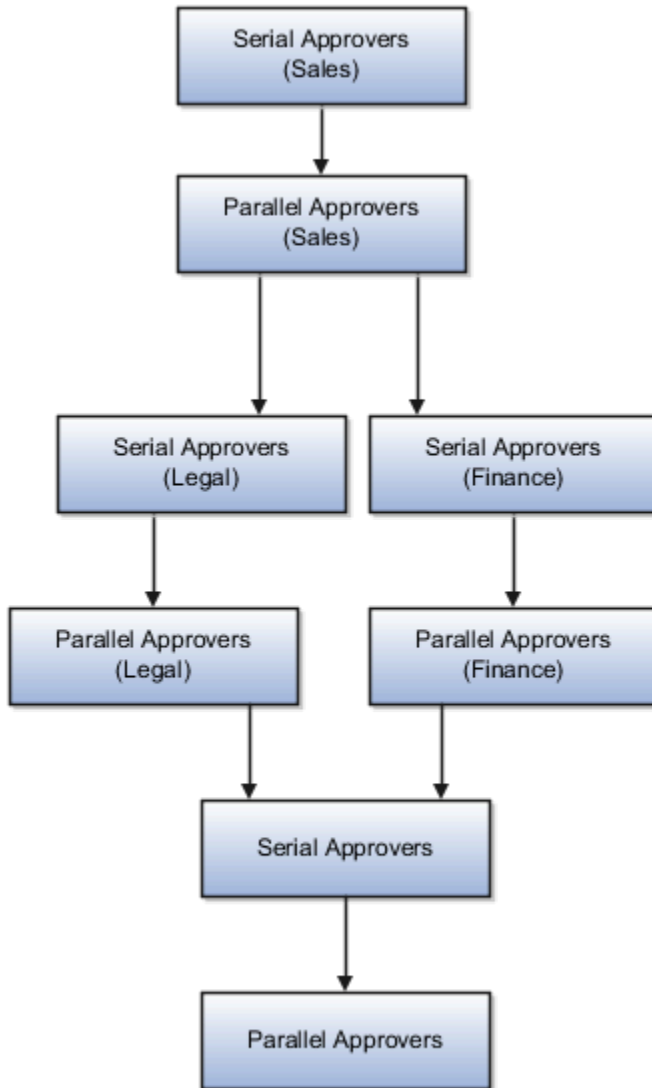
Here are the properties of rules and rule sets that you need to understand and apply:

- New rule sets can only be created using Oracle JDeveloper.
- For each contract, clause, or terms template, one rule must be true within each rule set. If even one rule in the rule set isn't satisfied, the approval process can fail.
- Since there can be only one rule that applies in a rule set for each contract, contract clause or terms template, you must configure the rules at the most granular level applicable and use priority within the rule to differentiate overlapping conditions. AMX doesn't support nested conditions.
- All rule sets are executed in parallel or in serial with respect to the Approval Stage of the contract, clause, or terms template.
- Serial rule sets are designed to execute the approval process in a sequential order. The approvers in the approval list for any rule included in these rule sets are notified in a sequential order.
- To deactivate a rule set, check the **Ignore this participant** check box for that rule set.

**CAUTION:** Don't deactivate rule sets you're using for contract approvals.

- If the participants can't be determined, then AMX sends out a failure notification to the user with an incident identifier. Administrators can access the incident details through the Support Workbench of the Oracle Enterprise Manager Grid Control application and restart the approval process in Oracle Enterprise Manager Grid Control after resolving the issues in the incident report.

This figure shows how rule sets are executed:



#### Related Topics

- [Predefined Approval Flows for Oracle Contracts](#)
- [How Reviewing Contract Deviations Works](#)

## Configure Approval Rule Sets and Rules

Rule sets and rules control how a workflow task is routed, assigned, and completed, based on specific conditions. For example, a rule can say that transactions over a certain amount must have approvals up three levels in the management chain.

A workflow task has one or more rule sets, and a rule set has one or more rules. At run time, if a rule set has multiple rules, all the rules are evaluated at the same time. A rule has two parts, an If section that has the conditions, or tests, and a Then section that has the actions to take when the conditions are met.

## Configure Rule Sets

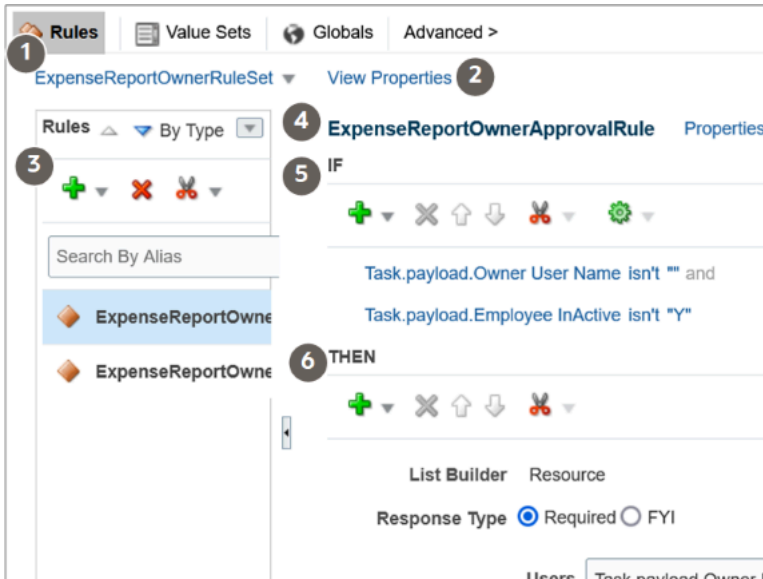
First, create or find the rule set you want to work on:

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.  
  
**Note:** You may see a message saying that flexfields have been modified. This means someone used Application Composer to create new fields, which creates flexfields on the back end. Click the Start Synchronization button to get the latest set of flexfields that you can use for the rules in this task.
4. Click the Assignees subtab.
5. If the diagram mapping out the workflow task is big, click the **Switch to Vertical Layout** link.
6. In the diagram, find the participant you want to work on. Click the **Go to rule** icon and select **Go to rule**. Or, select the participant and, in the pane after the diagram, click the link in the **Business rule** field.
7. Go on to work on the rule set that's displayed on the Rules tab. Or, from the drop-down list with rule set names, select another rule set to edit, or select **Add New Rule Set**.
8. Click the **View Properties** link after the rule set name to see the **Effective Date** setting and **Active** check box. The rule set needs to be effective and active to apply when people create workflow tasks. It's a good idea to leave the effective date set to Always.  
  
**CAUTION:** From here, you can also click the **Delete Rule Set** link. Before you delete any predefined rule sets, make sure you're really not using it and never will. Don't delete the predefined Modification Rules and Substitution Rules rule sets.
9. In the Rules pane, you can add, edit, or delete rules in the rule set. Expand the rule if it's not already. As with the rule set, you can click the **Show Advanced Settings** icon for a rule to make sure that the rule is effective and active.
  - o Create: Click the **Advanced Add or Modify Options** icon and select **General Rule**.
  - o Edit: Select the rule if it's not already.
  - o Delete: Select the rule and click the **Delete** icon in the toolbar in the Rules pane.

For the rule you're creating or editing, you can click the **Properties** link after the rule name to rename the rule and make sure that the rule is effective and active.

Here's a screenshot to help us understand what we see in the Rules subtab on the Assignees tab:





Callout Number	What It Is
1	The rule set drop-down list, where you can select a rule set to work on or create a new rule set.
2	The link to open properties for the rule set.
3	The Rules pane, which lists the rules within the rules set and has a toolbar for working on those rules, for example to add or delete them.
4	The names of the rule that's selected in the Rules pane, followed by a link to open properties for that rule.
5	The If section of the rule, where the conditions are defined and there's a toolbar for working on those conditions.
6	The Then section of the rule, which defines what happens when the conditions are met. There's also a toolbar specific to this section.

## Configure the If Section in Rules

In the If section of the rule, define conditions for the rule. Each line in this section is called a test.

1. For existing conditions, click on the line that you want to edit, making it active and selected. To add a new line, click the **Advanced Add or Modify Options** icon and select a type to add, for example **simple test**.
2. Click the **Left Value** icon to select an attribute in the Condition Browser dialog box.
3. Select an operator.
4. Click the **Right Value** icon to select something from the Condition Browser dialog box, or enter a value in the corresponding field.

5. If you're not working on the last line, you can click the **and** or **or** link at the end of the line to toggle between the two.

**CAUTION:** If the attribute you're evaluating in the condition is optional, users might not have entered a value for that attribute in the UI. For your rule to work properly, it's highly recommended that you first have a line in the condition that checks if the attribute isn't blank. So that means you select the attribute, select **isn't** as the operator, and enter **null**. Then add another line with the condition that you're evaluating the attribute for, and make sure you have an **and** between the two lines.

To delete a line, put your cursor in any field in the line, and click the **Delete** icon.

## Configure the Then Section in Rules

In the Then section of the rule, define what happens when the conditions in the If section are met.

1. Edit any existing actions. Or, click the **Insert Action** icon, and you usually select **Add Approver** and then a list builder, which controls how to route the task.
2. Fill in the rest of the section. The fields you get depends on the list builder, but here are some that you might use.

Field	What This Is
Response Type	Required: The assignee needs to take action, for example to approve or reject.  FYI: The assignee doesn't need to take action.
Number of Levels	Number of levels required for the task to be completely approved, from the starting participant to the top participant.
Starting Participant	The first assignee in the approval chain.
Top Participant	The last assignee in the approval chain if the chain goes up that high. Approvals don't go beyond this participant, for example in the supervisory hierarchy.
Auto Action Enabled	If set to True, there's an automatic action that is taken on the task when the rule conditions are met.
Auto Action	"APPROVE": The task is automatically approved.  "REJECT": The task is automatically rejected.
Rule Name	The name of the rule with the Then section that you want to use.  <ul style="list-style-type: none"> <li>○ Leave the field with the name of the rule you're working on, to indicate that this rule will use the Then section defined here for this rule.</li> <li>○ Or, you can enter the name of an existing rule from any task, enclosed with quotation marks, and leave all the other fields in this Then section blank. The Then section in the</li> </ul>

Field	What This Is
	rule you entered would apply to this rule you're working on. So basically, you're reusing the Then section from another rule.

To select the starting or top participant:

- a. Click the **Starting Participant** or **Top Participant** icon.
- b. In the Add Hierarchy Participant dialog box, select the **Get User** option for a particular user, or **Get Manager** for an attribute, such as the task creator.
- c. For the Get Manager option only, select the list builder that's used for the rule.
- d. For the Get User option, enter in the **Reference User** field the user ID that the user signs in with, enclosed in quotation marks, for example "KLEE".

For the Get Manager option, here's what you do for the **Reference User** field:

- i. Click the **Expression Builder** icon.
- i. In the Variables tab of the Expression Builder, select the attribute you want in the hierarchy. For example, expand Task > payload and find your attribute there.
- ii. Click the **Insert Into Expression** button.
- iii. Click **OK**.
- e. Leave the **Effective Date** field blank to use the latest hierarchy, for example supervisory hierarchy.
- f. Click **OK**.

What shows up in the **Starting Participant** or **Top Participant** field reflects what you have in the Add Hierarchy Participant dialog box. Here are a couple of examples.

- o `HierarchyBuilder.getManager("supervisory",Task.payload.Owner User Name,-1,"","")`

Part of the Participant Value	What This Means
<code>getManager</code>	You selected the Get Manager option.
<code>"supervisory"</code>	You selected the Supervisory list builder.
<code>Task.payload.Owner User Name</code>	For the <b>Reference User</b> field, you went to Task > payload > Owner User Name in the Variables tab to select the Owner User Name attribute.
<code>-1</code>	This is the default value, which corresponds to the primary employment assignment. That supervisory hierarchy will be used to find assignees for the task.
<code>"", ""</code>	You left the <b>Hierarchy Type</b> and <b>Effective Date</b> fields blank, so there's nothing between the quotation marks.








- o `HierarchyBuilder.getPrincipal("KLEE", "", "")`

Part of the Participant Value	What This Means
<code>getPrincipal</code>	You selected the Get User option.
<code>"KLEE"</code>	For the <b>Reference User</b> field, you entered "KLEE".
<code>"", ""</code>	You left the <b>Hierarchy Type</b> and <b>Effective Date</b> fields blank, so there's nothing between the quotation marks.

## Example of a Rule

Let's take a look at an example of a rule. In the If section, we have two tests, the first checking if an attribute is a specific value, the second checking if an attribute is more than a certain amount. The attribute names reflect where the attribute is in the hierarchy you get in the Condition Browser dialog box. The **and** connecting the two tests means that both conditions must be met.


IF

Expense Report.Expense Report Total more than 1000 and

In the Then section, there's the action that applies if the conditions are met, and it's defined based on a Supervisory list builder. Assignees must take action, and only one approval is needed.

**THEN**




**List Builder**
Supervisory


**Response Type**
☒ Required
☐ FYI

**Number of levels**


**Starting Participant**



☐
**Top Participant**



**Auto Action Enabled**



**Auto Action**

**Rule Name**
- 2. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes.

### Related Topics

- [Search for Workflow Tasks to Configure](#)
- [Overview of Flexfields](#)
- [Define Fields](#)
- [Assignments](#)

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# Contract Previewing and Printing

## Contract Printing and Layout Templates

Previewing and printing clauses, reports, contracts, and contract terms uses several Oracle Analytics Publisher layout templates that specify what information is displayed in the contract.

The templates supply the table of contents, headers, footers, text style, and pagination. The templates are RTF files stored in the BI Presentation Catalog. The application comes with samples of all the required layout templates. You can copy the sample layout templates described here and edit the copies to add your own boilerplate text, font styles, and logos.

You can copy and edit layout templates used for:

- Printing enterprise contracts, including partner agreements
- Printing purchasing and sourcing documents
- Printing the report of contract deviations that can be attached to contract approval notifications
- Previewing contract terms templates
- Previewing and importing clauses into the Contract Terms Library

**Note:** When creating or editing a terms template in the Terms Library, you can select a Layout Template. This layout template is only used to preview the terms template itself. If that terms template is then applied to a contract, when the contract prints, it doesn't use the layout template assigned to the terms template. The layout template used when printing a contract is assigned to the contract type using the Manage Contract Types task.

The sample layout templates are available in different subfolders within the **Enterprise Contracts** folder in the catalog. You can navigate to the folders in the catalog either from the Reports and Analytics pane or by selecting the **Reports and Analytics** link in the Navigator. Contact your administrator to grant you the appropriate BI duty roles if these aren't available.

You can download the sample templates, copy them, and edit the copies. When you upload your edited copy to the same directory, it becomes immediately available for use within the application. For specific details of configuring BI templates, see the Creating and Administering Analytics guide for your cloud service.

**Note:** The catalog includes additional layout templates that are used internally by the application. You can edit only the layout templates listed in the following section.

## Printing Enterprise Contracts

The application uses two layout templates for printing enterprise contracts, including partner agreements:

- The contract layout template  
This layout template provides the layout for printing the contract, except for the contract terms. You can assign a contract layout template to a contract in different ways. Here's the priority order in which the application uses the contract layout template for printing a contract:
  - a. Negotiation and Renewal tab on the edit contract page
  - b. Manage Contract Rules in the Setup task side panel

**c. Manage Contract Types task from the Setup and Maintenance work area**

There are two sample layout templates available for you to copy and edit. Both sample layout templates are available in the same directory. This table lists the layout templates that are used for contract header information:

Sample Layout Template Name	Description	Location in Analytics Publisher Catalog Directory
SupplierContract	The layout of contract information for buy-intent contracts.	Enterprise Contracts/Contract Printing/Contract Preview
CustomerContract	The layout of contract information for sell-intent contracts, including partner agreements.	Enterprise Contracts/Contract Printing/Contract Preview
SalesAgreement	The layout of contract information for sell-intent agreements.	Enterprise Contracts/Contract Printing/Contract Preview

- The contract terms layout template

This template provides the layout of the structured terms for printing and for downloading the contract terms for editing offline in Microsoft Word.

When printing an amended contract, the selected terms layout template determines whether only a summary of amendments is printed, or both the amendment summary and the amended contract terms and conditions are printed. Additionally, you can also control the printing of the amendment summary without adjusting the terms layout template for each contract in the Contract Terms tab.

**Note:** u30260932You can't download the amendment summary to Word.

This table describes the layout templates used for structured terms.

File Name	Description	Location in Analytics Publisher Catalog Directory
ContractTermsECM	The layout for printing the contract terms in enterprise contracts when the contract terms are authored in the application.	Enterprise Contracts/Contract Terms Printing/Contract Terms Download and Preview
ContractTermsAmendmentsOnlyECM	The layout for only printing a summary of the amendments made to contract terms in enterprise contracts.	Enterprise Contracts/Contract Terms Printing/Contract Terms Preview
ContractTermsPlusAmendmentsECM	The layout for printing the contract terms in enterprise contracts when	Enterprise Contracts/Contract Terms Printing/Contract Terms Preview

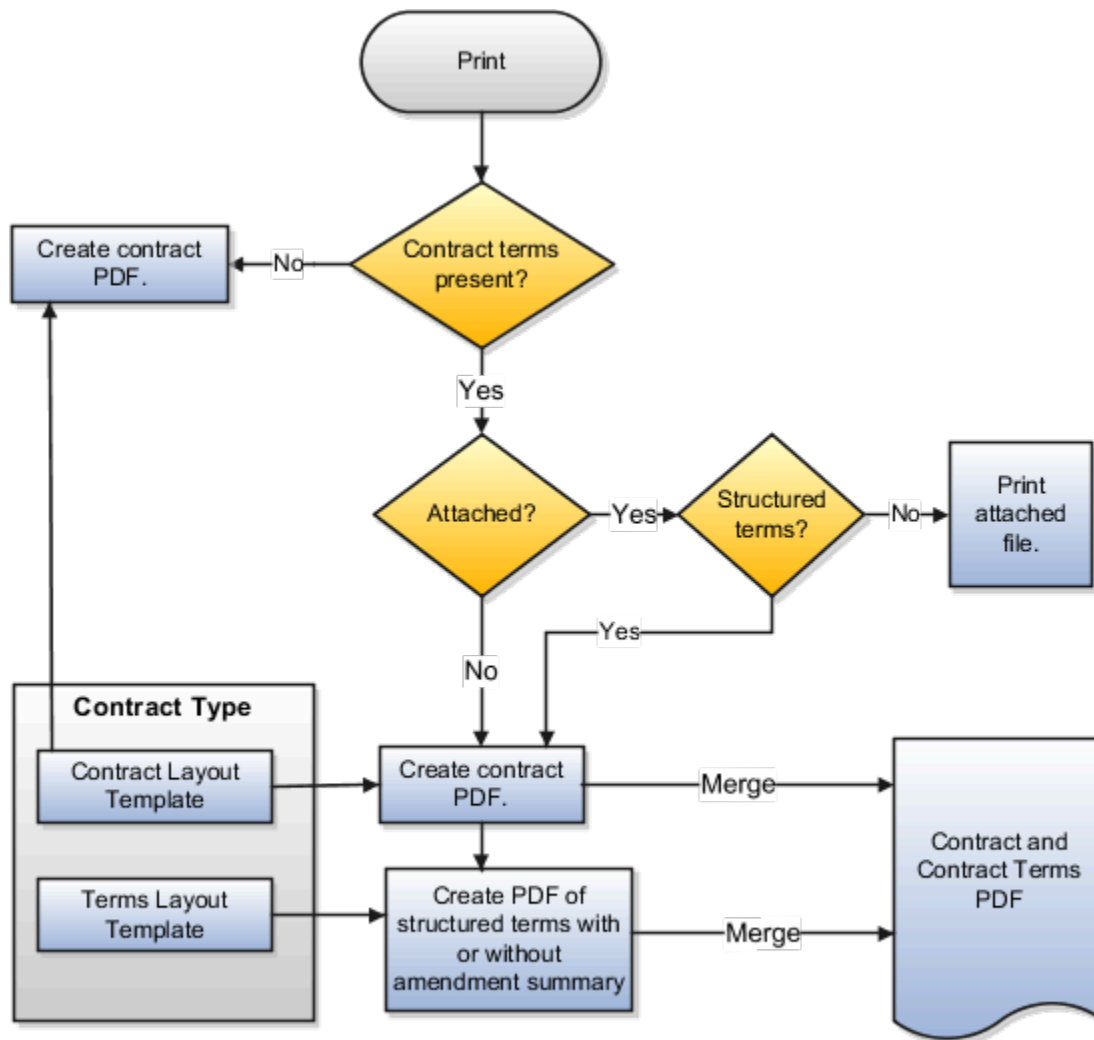
File Name	Description	Location in Analytics Publisher Catalog Directory
	the contract terms are authored in the application. In addition, for a contract that's under amendment, a summary of the amendments made to contract terms is included.	

You specify which templates you want to use during contract type setup. This means that you can create different layout templates for each contract type. To set up contract types, select the **Manage Contract Types** task from the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area or **Contract Types** in the Setup task heading in the Contracts work area.

- The application uses the contract layout template, specified in the **Contract Layout** field of the contract type, to create a PDF of the contract. If the contract doesn't include any contract terms, this is the only layout template used.
- If the contract includes structured terms, then the application uses the contract terms layout template specified in the **Terms Layout Template** field to create the contract terms PDF. To create the contract terms PDF, you must set the terms layout template in contract type.
- If you made amendments to the contract terms and the terms layout template specified includes an amendment summary, then the application creates a PDF document of the amendment summary. If amendments were made and the specified terms layout template includes both the amendment summary and the amended terms of the contract, then the application creates a PDF document of both.
- If the contract terms are attached as a file and the file retains the structured terms format, the application creates the contract terms PDF from the file. Contract terms attached as a file can retain the structured XML format if the file was downloaded from the application using the **Download Contract** action.
- The application then merges the two generated PDFs (one for the basic contract and the other for contract terms) into a single PDF.
- If the contract terms are attached in a file that isn't structured, then the application prints only the contents of the file. It doesn't print the contract information in the application or use either layout template. If you need help in editing the layout templates, download the sample XML file provided in **Enterprise Contracts/Contract Printing/ContractPrintDm**.

This figure outlines how the application uses the layout templates when you print an enterprise contract:





## Printing of Contract Terms on Purchase Orders and Sourcing Documents

For printing purchasing documents with structured terms, Oracle Procurement uses two layout templates.

- The document layout template supplied by Oracle Procurement which is located in the **Procurement** folder.
- The contract terms layout template.

This table lists the sample files provided:

File Name	Description	Location in Analytics Publisher Catalog Directory
ContractTermsProcurement	The layout for printing the contract terms in enterprise contracts when you author contract terms in the application.	Enterprise Contracts/Contract Terms Printing/Contract Terms Download and Preview

File Name	Description	Location in Analytics Publisher Catalog Directory
<code>ContractTermsAmendmentsOnlyProcure</code>	The layout for only printing a summary of the amendments made to contract terms in enterprise contracts.	<b>Enterprise Contracts/Contract Terms Printing/Contract Terms Download and Preview</b>
<code>ContractTermsPlusAmendmentsProcure</code>	The layout for printing the contract terms in enterprise contracts when you author the contract terms in the application. In addition, for a contract that's under amendment, a summary of the amendments made to contract terms is included.	<b>Enterprise Contracts/Contract Terms Printing/Contract Terms Download and Preview</b>

You select both of these templates while setting up business unit properties using the **Configure Procurement Business Function** task. This task in the Setup and Maintenance work area is part of the Procurement offering in the Procurement Foundation functional area.

If you attach the contract terms rather than authoring them in the application and the attached file isn't structured, then Procurement uses a third layout template which includes a brief sentence explaining that the contract terms are contained in a separate document, as described in this table:

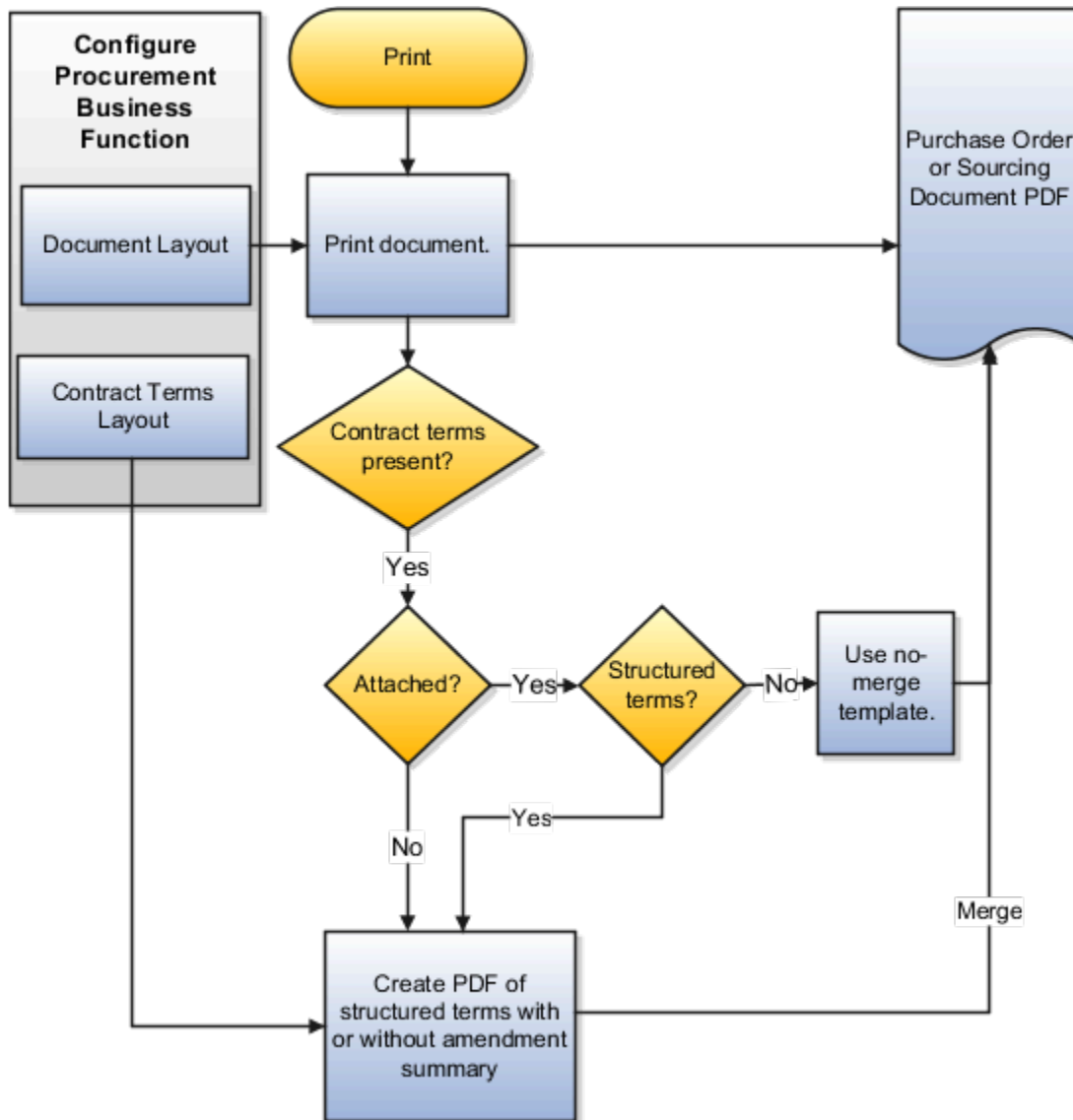
File Name	Description	Location in Analytics Publisher Catalog Directory
<code>ContractTermsNoMerge</code>	<p>This layout template includes the following text: <code>The contract terms for this {doc type} are listed in a separate document which is either attached to the e-mail you received or sent separately. These contract terms should be read in conjunction with this {doc type}.</code></p> <p>The document type name is substituted in the printed contract.</p>	<b>Enterprise Contracts/Contract Terms Printing/Attached Contract Preview</b>

**CAUTION:** If you edit the `contractTermsNoMerge` layout template, then you must save it under the same name in the same directory.

1. The application uses the document layout template specified in the Document Layout field in the PO or purchase agreement to create the PDF.
2. If the contract includes structured terms, then the application uses the contact terms layout template to generate the contract terms PDF.
3. If the contract terms are attached as a file and the file retains the structured terms format, then the application creates the contract terms PDF from the file. Contract terms attached as a file can retain the structured XML format if the file was downloaded from the application using the **Download Contract** action.

4. If the contract terms are attached as a file that isn't structured, then the application creates a small PDF of the message contained in the layout template `contractTermsNoMerge`.
5. The application merges the two PDFs into a single document PDF.

This figure outlines how the procurement application uses these layout templates for printing:



**Note:** To avoid blank content when downloading contracts, check the Contract Type associated with the contract: Go to Manage Contract Types and select your Contract Type.

- Contract Layout Template: If you're using a supplied template, use Supplier Contract or Customer Contract. If you're using a custom template, it should show in the drop-down list and you can select it.
- Terms Layout Template: Use `ContractTermsECM` or `ContractTermsAmendmentsOnlyECM`.

## Printing the Contract Deviations Report

The application uses the contract deviations layout template to generate a PDF report of deviations of a contract from company standards. This report can be automatically attached to the notification sent to the contract approvers during

contract authoring. You can create different layout templates for each business unit. You specify which layout template you want to use in a specific business unit using either the **Specify Customer Contract Management Business Function Properties** or the **Specify Supplier Contract Management Business Function Properties** tasks. These tasks are available in the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

Separate sample layout files are available for buy-intent and sell-intent contracts. Both are in the same directory. This table describes the layout templates used for the contract deviations report:

File Name	Description	Location in Analytics Publisher Catalog Directory
SupplierContractDeviations	The layout for printing the contract deviations for all buy-intent contracts.	Enterprise Contracts/Deviations Report/Deviations Report
CustomerContractDeviations	The layout for printing the contract deviations for all sell-intent contracts.	Enterprise Contracts/Deviations Report/Deviations Report

## How to Customize the Contract Deviation Report

Here are the steps to customize the deviation report:

- Install Oracle Analytics Publisher Desktop

You use the Oracle Analytics Publisher plugin for Microsoft Word to configure the design layout of custom reports. This plugin lets you import sample XML data and create and modify report templates directly inside

Word. Only a user with administrator rights can perform the Analytics Publisher desktop installation on the workstation. Right-click on the executable and select **Run as Administrator**.

Use this procedure to download Oracle Analytics Publisher Desktop:

- a. Sign in to Oracle Analytics Publisher.
- b. Click the **Help** icon on the top right corner and select **Download Oracle Analytics Publisher Tools**.
- c. Click and download **Oracle Analytics Publisher Desktop (64bit Office)**. The page will list all the Oracle Analytics Publisher desktop versions available for download.
- d. Select the folder where you want to install Oracle Analytics Publisher Desktop. Click **Next** to run the Setup.
- e. Click **Finish**.
- f. Open Microsoft Word and you can see the BI Publisher tab on the Microsoft Word menu bar.

**Note:** The versions of Microsoft Office, BI Publisher Desktop, and the Java JRE must all match as either 32-bit or 64-bit.

- Download Data XML

You can download data model attributes in an XML format to access the standard application attributes and extensible attributes. Once you know the attributes, include the required attributes in the contract layout template.

To download data xml, expand **Contract > Contract Terms > Terms Action > Review Contract Deviations > Download**.

- Customize the Deviation Report Layout Template

Follow the steps to customize layout templates:

- a. Sign in to Analytics Publisher with administrator privileges and navigate to the **Catalog**.
- b. In the Shared Folders directory, open the **Enterprise Contracts** folder.
- c. Locate the **Deviation Reports** and click **More**.
- d. Click **Customize**.
- e. Select the Deviation report `SupplierContractDeviations` and click the **Edit** link of the layout to download the RTF file.
- f. The Customize option automatically creates a copy of a predefined report and stores it in the **Shared Folders > Custom folder** within the Catalog.
- g. Open the downloaded RTF template file in Microsoft Word. Or, if you're creating a new template, just open Microsoft Word.
- h. Load the sample data that you generated.
- i. Insert the fields in the file according to your business requirements.
- j. Save the file as Rich Text Format (RTF).

## Preview Contract Terms Templates

Contract Terms Library administrators, as well as contract authors, can preview the content of a template by selecting the preview icon. For example, a contract author may want to preview a template to verify they're selecting the correct one. The preview lists all the clauses and sections the template contains and any boilerplate included in the layout template. It doesn't list any additional clauses inserted by Contract Expert rules.

Using the Opt In page, you can also add a table of contents to the PDF document created when previewing a contract. A table of contents helps you in quickly scan and locate a specific section in a PDF document. To enable this feature, see the Enable Table of Contents in Contract Preview topic.

In addition to setting opt in for this feature, you also need to check the layout templates that you use for previewing your contract. If you have custom the layout template for printing contract terms, you can:

- Take the latest version of the layout template and reapply your customizations.
- Apply the updates required to print the table of contents to your custom layout template.

Here are the layout templates that supports table of contents:

- ContractTermsECM
- ContractTermsPlusAmendmentsECM
- ContractTermsProcurement
- ContractTermsPlusAmendmentsProcurement
- ContractTermsOrAmendmentsECM
- ContractTermsOrAmendmentsProcurement
- ContractTermsTemplate

You can create different layout templates for each contract terms template. You specify the layout template to be used for the preview on the General tab while editing the contract terms template. This table describes the sample layout template:

File Name	Description	Location in Analytics Publisher Catalog Directory
ContractTermsTemplate	This layout template specifies the layout of the contract terms template preview.	Enterprise Contracts/Contract Terms Printing/Contract Terms Download and Preview

## Previewing and Importing Clauses

The application uses the clause layout template for:

- Formatting individual clauses for preview:  
Library administrators can use the preview icon to view preview of individual clauses on the clause search page.
- Formatting clauses imported from outside the application. This applies only to non-Cloud installations.

You can specify which template you want to use in a specific business unit using either the **Specify Customer Contract Management Business Function Properties** or the **Specify Supplier Contract Management Business Function Properties** tasks. These tasks are available in the **Setup and Maintenance** work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

This table describes the sample layout template provided.

File Name	Description	Location in Analytics Publisher Catalog Directory
ContractTermsLibraryClause	Specifies the layout of clause text in the Contract Terms Library.	Enterprise Contracts/Contract Terms Printing/Clause Export and Preview

#### Related Topics

- [Create and Edit Report Layouts](#)
- [Contract Terms Library Business Unit Setup](#)
- [How Contract Terms Templates Work](#)
- [How You Import Clauses into the Contract Terms Library](#)

## What's a layout template?

A layout template is an RTF document that contains a contract's layout, giving you the ability to print it and preview it. Layout templates can include formatting, graphics, text, and other layout elements. The templates are stored in the Oracle Analytics Publisher library.

You must specify a layout template when you create a contract type, to enable printing and previewing of contracts, the contract terms and conditions, and summary of amendments made to contract terms.

## Can I print a contract if there are no layout templates specified for a contract type?

No, you can't print or create a PDF of a contract if contract layout template isn't there in the contract type that was used to create the contract.

If you don't specify the terms layout template, you can't preview the contract terms as a PDF either.

#### Related Topics

- [What's a layout template?](#)

## How do I remove the standard page footer on the printed PDF?

You have an option to hide the standard page footer on the printed PDF.

Simply ask your administrator to change the value of the profile option, Page Number on Contract Print Hidden (ORA\_OKC\_HIDE\_DEFAULT\_PAGE\_NUM\_IN\_PREVIEW\_PDF), from no to yes. After the change, the page footer will be hidden.

## How can I center align a layout for my contract clause?

The layout determines what and how data is displayed on report output.

Alignment determines the appearance and orientation. To center align a clause or text:

1. Select your layout in the [Creating and Administering Analytics and Reports](#) and click **Edit**.
2. Open the downloaded RTF template file in Microsoft Word.
3. Load the sample data that you generated.
4. Select the clause that you want to center align.
5. On the Home tab, in the Paragraph group, click **Center**.
6. Save the file as Rich Text Format (RTF).

#### Related Topics

- [Create and Edit Report Layout Templates Using the Layout Editor](#)
- [Upload the Layout Template File to the Report Definition](#)
- [Configure Layout Settings for Reports](#)

## How can I change the logo in the layout template?

To change a logo in the layout, you can edit the layout template using Microsoft Word or layout editor.

1. Select the layout in the Oracle Analytics catalog and click **Edit**.
2. In the layout editor, click the **Edit** link of the layout to download the RTF file.
3. Open the downloaded RTF template file in Microsoft Word.
4. From the top menu, click the **Insert** tab and then **Header** to choose the style you want or to edit the existing header.
5. Click **Insert > Picture** and choose from **File** to locate the logo if you have any saved on your computer.
6. Select the logo you want to use and click **OK**.
7. Save the file as rich text format (RTF).

#### Related Topics

- [Create and Edit Report Layout Templates Using the Layout Editor](#)
- [Upload the Layout Template File to the Report Definition](#)
- [Configure Layout Settings for Reports](#)

## How can I remove the signature table from the contract?

Editing report layout, for example, using Microsoft Word or the layout editor, involves making the actual changes to the template file.

But that task is just one part of the entire process of modifying layouts. For example, use Microsoft Word with the Oracle Analytics Publisher for Word add-in to modify RTF templates.

To remove a signature table:

1. Select your layout in the the Oracle Analytics catalog and click **Edit**.
2. Open the downloaded RTF template file in Microsoft Word.
3. Load the sample data that you generated.
4. To remove the signature table, hover your mouse over the upper-right hand corner of the table and click **Delete**.
5. Save the file as Rich Text Format (RTF).

#### Related Topics

- [Create and Edit Report Layout Templates Using the Layout Editor](#)
- [Upload the Layout Template File to the Report Definition](#)
- [Configure Layout Settings for Reports](#)



# User Statuses and Transitions

## User Statuses and Transitions

A contract has predefined statuses that characterize its lifecycle. In addition, you can define user statuses and their transitions.

For example, as contract manager you might want to pass the contract for a more thorough review of its sections by the appropriate team such as Legal, Financial, and Accounts. You can do this using the user statuses and transitions that you defined.

### Defining User Statuses and Transitions

Define these user statuses and their transitions using the contract setup task of Manage User Statuses and Transitions and save your changes.

**Note:** While defining user statuses, ensure that you select the Allow Assignment checkbox for each of the user transitions. This enables you to assign the contract to named assignees during a user transition.

### Setting Up The State-Based Event Model

Use the Event Models setup task to create events and actions for the business object, `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVO`.

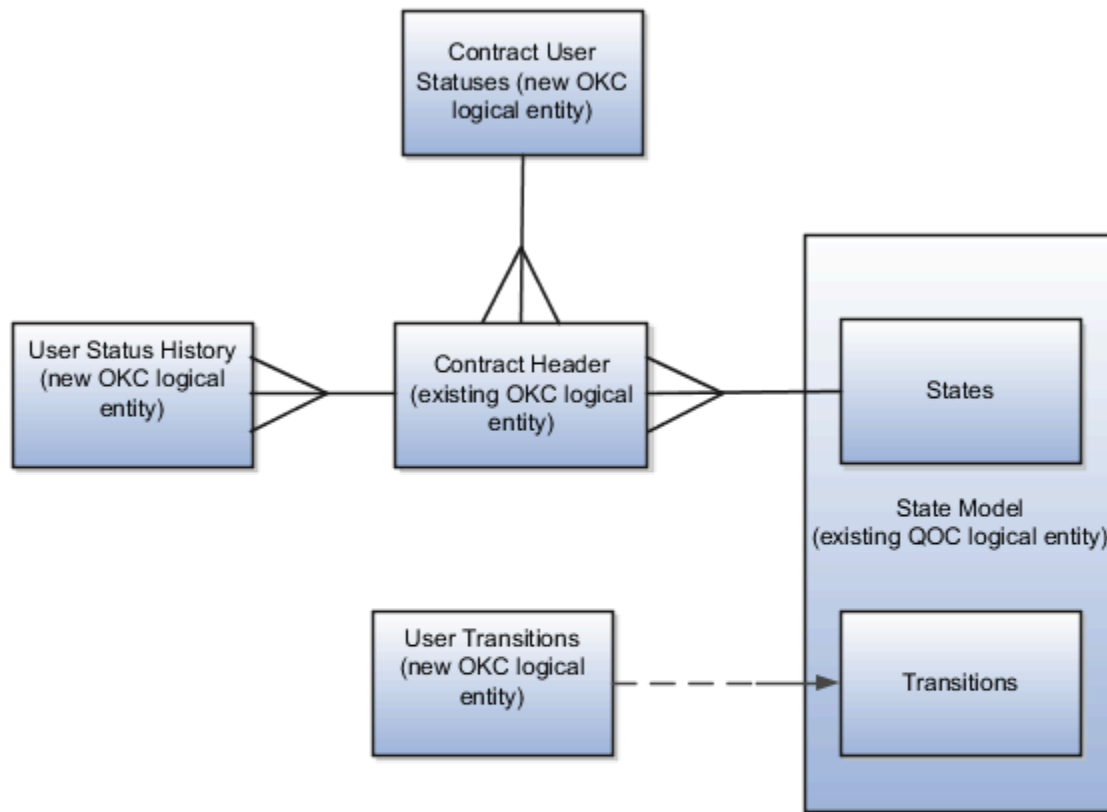
Set these events up for each To and From state of the user transition. For predefined states you can select from available events and actions. An example of an action could be a Groovy script.

Save this new State based event model and specify the condition or contract type that can use this. For contracts of the specified condition, the user statuses and transitions that you created are available as Action menu items. You can use these action menu items to pass a contract between teams for review before submitting the contract for approval.

**Note:**

- User statuses and transitions apply only to contracts that satisfy the condition defined in the Event Model. They can't be used for contract templates.
- To create events and actions, Oracle recommends you use the existing event model instead of creating a new one.

This figure shows the user statuses and their transitions:



#### Related Topics

- [Contract Assignment and Workload Management](#)
- [How You Set Up User Statuses and User Transitions](#)

### How can I set up and display my own statuses on the contract overview?

Yes, you can setup and display user status on the contract overview tab. To have user statuses on a contract, you must add the custom statuses and the transition into the event model.

See the related topic for more information.

### Related Topics

- [How You Set Up User Statuses and User Transitions](#)

## How You Set Up User Statuses and User Transitions

Enterprise Contracts cover the standard statuses that track the progress of a contract from Draft to Approved. You can also create your business-specific user statuses and user transitions, like Legal Review or Finance Review, to closely monitor your contract stage.

Once defined, you can incorporate these statuses into the contract life cycle.

Start by creating user statuses and transitions:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Contract User Statuses and Transitions** task.
3. Click the **Add** icon to add one or more user statuses and transitions.
4. Click **Save and Close**.

For the user statuses to be available on a contract, you must add the custom statuses and the transitions into the event model. Event models are applied to various contracts based on the conditions specified in each event model. The event model enables you to configure the contract states, the transitions between them, and the actions performed while in each state. Event models are made up of states, events, and actions. Each state of an event model can have one or more events defined for it. Each event can have one or more actions associated with it.

Here's how you can configure an event model:

1. Sign in to the application as a setup user.
2. Ensure you're working in an active sandbox.
3. Navigate to Contracts in Contract Management.
4. Open the Tasks side panel and click **Event Models** in the Setup tasks.
5. In the Events Models page, for the `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVO` business object, click the Add icon to create a new event model or select an existing event model and click the **Edit** icon.
6. Create the status, events, and actions as defined in the `DefaultContractHeader` event model. The `DefaultContractHeader` event model contains the standard configurations. You can skip the statuses that you don't want to use.

**Note:** You can associate an event model with a condition. You can create event models specifically for some business units or contract types. You must define these event models with appropriate conditions so that they aren't universally applicable.

7. Click the **Initial** State and configure it as defined in the `DefaultContractHeader` event model.  
The **Initial** state is a special state that enables you to initiate contract creation. The `DefaultContractHeader` event model has `CREATE` and `CREATE_FROM_COPY` events associated with it.
8. Click the **General** State and configure it as defined in the `DefaultContractHeader` event model.  
The **General** state is a common state and any event or action defined in this state becomes available for contracts in all the states. The `DefaultContractHeader` event model has the `Validate` event that's available for a contract in all the states.
9. Add new states based on your business requirements.  
You can create a standalone or a child of a parent state. Examples of standalone states are Draft and Canceled. A parent state is a collection of one or more child states. You can use the parent state when events or actions apply to more than one state. In the `DefaultContractHeader` event model, the Approved Composite state is

a parent state for the Approved and Hold states. The events defined for the Approved Composite state are applicable for all the child states defined under it.

10. Create events for every state based on your business requirements.

Events are the transitions for a specific state. Events control the actions you can take on a contract in the application. For example, while the contract is in the Draft state, some allowable actions are Cancel, Submit for Approval, and Create Version.

11. Create actions associated with every event. You can use the `DefaultContractHeader` event model to find groovy script examples associated with various events and actions.
12. Click **Save and Close**.
13. After testing these changes, publish the sandbox according to your company's business practices.

## Example of Adding Legal Review as Custom Status in Event Model

Here's an example for including Legal\_Review as the custom status in the event model:

1. Create user statuses and transitions.
  - a. Navigate to the **Setup and Maintenance** work area.
  - b. Search and select the **Manage Contract User Statuses and Transitions** task.
  - c. From the User Statuses section, click the **Add** icon and enter `Legal_Review` in the Code column and **Legal review** in the Name column.
  - d. From the User Transitions section, Enter `SEND_FOR_LEGAL_REVIEW` as user transition value and **Send for legal review** as name.
  - e. Click **Save and Close**.
2. Sign in to the application as a setup user.
3. Ensure you're working in an active sandbox.
4. Navigate to Contracts in Contract Management.
5. Open the Tasks side panel and click **Event Models** in the Setup tasks.
6. In the Events Models page, for the `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVO` business object, select an existing event model and click the **Edit** icon.
7. In the States section, click the **New** icon.
  - a. In the Create State window, enter `Legal_Review` in the **Name** field and click **OK**.
  - b. Select State in the Type column.
  - c. Select General in the Parent State column.
8. In the LEGAL\_REVIEW: Details section, click the **New** icon.
  - a. In the Create Event window, select **Entry** in the **Type** field and click **OK**.
  - b. In the Create Event window, select **Named event** in the **Type** field and enter `CANCEL` in the name field. Click **OK**.
  - c. For the CANCEL event, enter `stsCode=='DRAFT'` in the Guard Condition column.
  - d. Similarly create the `SUBMIT`, `ACTIVATE`, and `VERSION` events.
9. After adding all events, click the Entry event.
10. In the Entry section, click the **New** icon to add the condition that changes user status to **Legal\_Review**.
11. In the Create Event window:
  - a. Select **Groovy Script** in the **Type** field.
  - b. In the Script field enter:

```
UserStatusCode='LEGAL_REVIEW';
```

```
eventModel.execute('createHistory');
```

c. Click **OK**.

12. From the States section, select the **DRAFT** state.

13. In the DRAFT: Details section, click the **New** icon.

a. In the Create Event window, select **Named event** in the **Type** field and enter `SEND_FOR_LEGAL_REVIEW` in the name field. Click **OK**.

**Note:** The event name must exactly match with the transition code added in the Manage Contract User Statuses and Transitions task.

b. For this new event, select `Legal_Review` in the To State column.

14. Click **Save and Close**.

15. To test this new status, create a new contract.

16. From the Edit Contract page, click **Actions** > **Send for legal review**.

17. The user status for contract changes to Legal review.

Similarly, you can configure more custom user statuses as per your business requirements.

## How to Raise a Business Event

To configure a status change event, you must raise a business event. To raise a business event, you must first store the changes in an active sandbox. You can either create a sandbox or select an existing one and make it active.

You must activate the configuration tools you want to use in your sandbox.

Follow these steps to create and activate sandboxes for the configuration tool.

1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. On the Sandboxes page, click **Create Sandbox**.
3. Enter a name and description for your sandbox.
4. In the **Publishable** field, select **Yes** or **No**. If you set this option as **No**, you can use your sandbox for testing purposes but can never publish it.
5. Select **Configure Business Objects** and click **Create** to create the sandbox, or **Create and Enter** to enter or activate the sandbox after creating it.

Here are the steps to raise business events for contracts:

1. Navigate to **Contracts** in Contract Management.
2. Open the Tasks side panel and go to **Event Models** in the Setup tasks.
3. In the Events Models page, select `DefaultContractHeader` event model and click the **Edit** icon
4. In the States section, click the **DRAFT**.
5. In the DRAFT: Details section, select **Entry** in the Type field.
6. In the Entry section, click the **New** icon to add the condition that changes user status to **DRAFT**
7. In the Create Event window, use Groovy scripts to raise a business event. Here's sample code, you can modify the scripts to fit your requirements.
  - a. Select **Groovy Script** in the **Type** field.
  - b. In the Script field enter:

```
oracle.jbo.NameValuePairs plist = new oracle.jbo.NameValuePairs();
plist.setAttribute("contractId", ContractId);
eventModel.execute('stsMgtAM').raiseBusinessEvent(plist);
```

- c. Click **OK**.
- 8. Click **Save and Close**.
- 9. To test this new status, create a new contract.

## Contract Assignment and Workload Management

Before a contract is approved, during contract authoring and negotiation, multiple organizations and resources may work on the contract and update it. For example, resource organizations could be Sales, Legal, Financial and Accounts. Defining user statuses and their transitions, and contract assignment enable transfers between various resources and resource organizations. Assignment and user transition actions are Actions menu items at the contract level.

The key aspects of contract workload management are as follows:

- Contract assignment can be performed separately or at the time of performing a user transition from a seeded status or user status. You can view assignment history and status and user status change history on the contract history page.
- In addition, a contract manager has a consolidated view of all contracts assigned to resources and resource organizations within his organization through the Manage Workload task.
- On the Manage Workload page, the Summary bin and the Assignments bin enable the contract manager to review and take the following actions.

### Summary Bin

The Summary bin of the Manage Workload page displays in a tree like structure

- The total number and value of contracts assigned directly to the organization and to each individual resource of that organization.
- The total number and value of contracts assigned directly to nested resource organizations and to each individual resource within a nested resource organization.

**Note:** Though a contract may be assigned to an organization or nested resource organization, until the contract is assigned to a resource, the contract is considered to be unassigned.

To know the details of contracts assigned to an individual resource, click on the total contract count column for the resource in the Summary bin. To know the details of contracts as yet unassigned, click on the total contract count column for contracts assigned to the organization in the Summary bin.

### Assignments Bin

The Assignment bin of the Manage Workload page displays

- By default all contracts assigned to nested resource organizations within the organization of the manager.
- In addition, contracts assigned to individual resources, if you disable the Resource Organizations only option.
- Contracts by user status for example, or by assignee if you use the search criteria to create additional searches and save these.

Based on the information available, the contract manager can decide to take any of the following actions:

- Assign unassigned contracts to individual resources. When selecting a new assignee, add the assignee to the contract team to ensure that they have full access to the contract.

- Remove assigned contracts from a particular resource and reassign to other resources to balance resource workload. You can assign or remove from assignment multiple contracts together by selecting them in the Assignments area.

To track the progress of contracts in review, drill down to the individual contract history page to view the user statuses used, the assignee, days in review and comments.

#### Related Topics

- [User Statuses and Transitions](#)

## Deep Links

### Deep Links

You can use deep links to open pages without using menus or navigating through pages. You can add deep links to a business intelligence report, an email notification, or a company website hosted on Oracle Cloud. Users can simply click those links to go directly to the application pages they need to use without any extra clicks or navigation.

For more information, see [Deep Links](#)

### Deep Links for Contracts

You can use deep links to open the Search page or the Edit Contract page.

Some deep links, such as those assigned the NONE action, are ready to use as-is. Other deep links, such as those assigned the EDIT action, require you to edit the link details before using them.

#### URL Pattern of Deep Links

Here's a typical URL pattern of a deep link.

`https://<pod-name>/fndSetup/faces/deepLink?objType=<objID>&objKey=<name1=value1;name2=value2>&action=<action>`

This table describes the parameters and gives you some examples of parameter values.

Parameter	Description	Example of Parameter Values
<code>pod-name</code>	The host name	<code>pod.oraclecloud.com</code>
<code>objType</code>	The object type.	<code>CONTRACT</code>
<code>objKey</code>	The object identifier	<code>contractId</code> <code>contractPuid</code> <code>chrId &amp; majorVersion</code>
<code>action</code>	The action that users can do on the page that the URL opens up, for example to edit something.  Here are a few things to know:	<code>NONE</code>  <code>EDIT</code>

Parameter	Description	Example of Parameter Values
	<ul style="list-style-type: none"> <li>If you don't add any value for the action parameter, this value is considered as <b>NONE</b> by default and will take users to the landing page.</li> <li>If the value you added for the action parameter doesn't match with any action on the UI, the URL won't work.</li> </ul>	

This table lists Contracts deep links that are available in the Deep Links work area.

Product	Deep Link	Short Description of Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
Oracle Enterprise Contracts	Contracts (CONTRACT, NONE)	Opens the Contracts search page.	N	NA	NA
Oracle Enterprise Contracts	Contract Details (CONTRACT, EDIT)	Opens a specific contract for editing on the Edit Contract page.	Y	contractId: A unique identifier of a contract.	CONTRACT_ID column in the OKC_K_HEADERS_ALL_B table.
Oracle Enterprise Contracts	Contract Details (CONTRACT, EDIT)	Opens a specific contract for editing on the Edit Contract page.	Y	contractPuid: The public unique identifier of a contract.	CONTRACT_PUID column in the OKC_K_HEADERS_ALL_B table.
Oracle Enterprise Contracts	Contract Details (CONTRACT, EDIT)	Opens a specific contract for editing on the Edit Contract page.	Y	chrld: A unique identifier for the latest version of a contract.  <b>Note:</b> You can optionally add majorVersion to edit a specific version of a contract.	ID column in the OKC_K_HEADERS_ALL_B table. MAJOR_VERSION column in the OKC_K_HEADERS_ALL_B table.

In Oracle Enterprise Contracts, deep links that have NONE show the classic or simplified landing page according to the value set for the profile OKC\_ENABLE\_CLASSIC\_LANDING\_PAGE. The EDIT action opens a specific page and needs an ObjKey.

Here's an example for the Contracts deep link:

<https://pod.oraclecloud.com/fndSetup/faces/deepLink?objType=CONTRACT&action=NONE>

Here's an example for the Contract Details deep link:

<https://pod.oraclecloud.com/fndSetup/faces/deepLink?objType=CONTRACT&objKey=contractId=1234567&action=EDIT>



You can open the contract directly on the Edit Contract page from a deep link if you've the appropriate functional or data security to access that contract.

## Contracts Descriptive Flexfields

### Overview of Descriptive Flexfields

Use descriptive flexfields to add attributes to business object entities, and define validation for them. All the business object entities that you can use in the application are enabled for descriptive flexfields. However, configuring descriptive flexfields is an optional task. See the Overview of Descriptive Flexfields topic in *Configuring and Extending Applications* for more information.

### Descriptive Flexfields for Contracts

You can use descriptive flexfields to add user-specific attributes for contract headers, contract lines, and contract parties. You can also define validation and display properties using descriptive flexfields for those attributes.

### Defining Descriptive Flexfield Segments

Use the Manage Descriptive Flexfields task in the Setup and Maintenance work area to define a segment for a descriptive flexfield for contracts. You can add more information related to contacts, headers, lines, and parties.

Oracle Contracts supplies these four descriptive flexfields:

Name	Code	Description
Contract Contacts	ContractPartyContactFlexfield	Fields for contact information that appear on the Parties page.
Contract Headers	ContractHeaderFlexfield	Fields for contract information that appear on the Contracts page.
Contract Line	OKC_LINES_DESC_FLEX	Fields for line information that appear on the Lines page.
Contract Parties	ContractPartyFlexfield	Fields for party information that appear on the Parties page.

**Note:** Contracts doesn't support supplier descriptive flexfields in Contracts .XML files.

The parameters supported for the contract header and line let you tailor the descriptive flexfields. For example, you can filter and display only the bill-to accounts of the contract's customer in a descriptive flexfield segment.

Here are the parameters that are supported in contract descriptive flexfields:

- Contract Headers
  - ChrType: This is the contract type code. It represents the link between the contract type and the context segment. You can look for the desired contract type in the Manage Contract Types task and ensure that it has a code.

- Intent: When defining the Context, set the context code as B for Buy intent and S for Sell intent.
- ContractId: This is the ID that represents the contract.
- Contract Line
  - LineTypeCode: This is the line type code. It represents the link between the line type and the context segment. You can look for the desired contract line type in the Manage Contract Line Types task and ensure that it has a code.
  - LinelId: This is the Id that represents the line.
  - LineClassCode: This is a unique code for a line class. It controls the line types you can assign to a contract type.

This table lists the possible line class codes:

Line Class Code	Line Source Code	Meaning
BUY	AGREEMENT_FREE_FORM	Free-form, buy agreement
	AGREEMENT_ITEM	Item, buy agreement
	USER_FREE_FORM_BUY	Free-form, buy
	USER_ITEM_BUY	Item, buy
SALES_AGREEMENT_SA	PRODUCT_SELL	Product, sell agreement, standalone
	GROUP_SELL	Group, sell agreement
SALES_AGREEMENT	PRODUCT_SELL_INTEG	Product, sell agreement, integrated
PROJECT	USER_FREE_FORM_PROJECT_BASED	Free-form, project-based, sell
	USER_ITEM_PROJECT_BASED	Item, project-based, sell
SERVICE	BUNDLE_SELL	Bundle, sell
	SUBSCRIPTION_ITEM_SELL	Subscription, sell
	COVERAGE_SERVICE_SELL	Coverage, sell
	WARRANTY	Warranty

You can also use Oracle REST APIs to update contract header flexfields and contract lines. See [How do I update contract header flexfields and contract lines using Oracle REST APIs?](#) for more information.

## Activating Descriptive Flexfields

To activate a descriptive flexfield, you must also define lookup codes and value sets along with the descriptive flexfield segment. For more information on using flexfields for user-specific attributes, see the Oracle Applications Cloud Configuring and Extending Applications guide.

**Note:** When a contract is in active status, the contract descriptive flexfields aren't editable anymore.

### Related Topics

- [Overview of Descriptive Flexfields](#)
- [Considerations for Planning Descriptive Flexfields](#)
- [Overview of Flexfields](#)

## Example of Setting Up an Automated Contract Header Descriptive Flexfield

Learn how to create user-defined criteria based on contextual data from the contract type and associate the user-defined criteria with contract headers.

Scenario: Your company wants to be able to perform analysis on contracts created for various portions of your commercial and government customers.

### Summary of Tasks

To create contextual user-defined criteria for contract headers, do these tasks in the Setup and Maintenance work area:

1. Create the contract header value set.
2. Create the context segments on the descriptive flexfield.
3. Deploy the modified descriptive flexfield.

Next, complete these tasks in the Contracts work area:

1. Create contract types associated with the descriptive flexfields.
2. Create a contract and associate the new user-defined criteria.

### Create Contract Header Value Set

Use the Setup and Maintenance work area to complete this task with the default values for fields unless the steps specify other values.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Enterprise Contracts
  - Functional Area: Terms and Clauses Library
  - Task: Manage Contracts Value Sets
2. On the Manage Contract Terms Value Sets page, click the **Create** icon in the Search Results section.
3. Complete the initial fields, as shown in this table:

Field	Value
Value Set Code	OKC_CH_TYPE_DFF
Description	Contract Type Code DFF
Module	Enterprise Contracts
Validation Type	Table

Field	Value
Value Data Type	Character

- Complete the Definition fields, which appear after you select the validation type, as shown in this table. While creating a value set, you can select **Value Data Type** as **Character** and **Value Subtype** as **Numeric digits only** to exclude comma for separating groups of thousands.

Field	Value
FROM Clause	OKC_CONTRACT_TYPES_VL
Value Column Name	NAME
ID Column Name	CHR_TYPE

- Click **Save and Close** to return to the Manage Value Sets page.
- Click **Cancel** to return to the Overview page.

## Create Context Segments

The Setup and Maintenance work area is used to complete this task. We will accept the default values for fields unless the following steps specify other values.

- In the Setup and Maintenance work area, go to the following:
  - Offering: Enterprise Contracts
  - Functional Area: Enterprise Contracts Base
  - Task: Manage Contract Descriptive Flexfields
- On the Manage Contract Descriptive Flexfields page, in the Search section Name field, enter "Contract Headers" to search and find the Contract Headers descriptive flexfield.
- In the Search Results section, select the Contract Headers row and click the **Edit** icon.
- On the Edit Descriptive Flexfields page, enter these values in the Context Segment:

Field	Value
Prompt	Gov_or_Commercial
Value Set	OKC_CH_TYPE_DFF
Default Type	Parameter

Field	Value
Default Value	ChrType
Display Type	Hidden
BI Enabled	enabled (checked)

5. Click **Save**. On the Edit Descriptive Flexfields page, click Manage Contexts.
6. On the Manage Contexts page Search Results tool bar, click the **Create** icon.
7. On the Create Context page create the context header by entering a Display Name of "Government" and clicking **Save**.
8. Optionally enter a description to help with identification in the future.
9. Create a Context Sensitive Segment by clicking **Create** and enter the values as shown in this table.

Field	Value
Name	Level
Data Type	Character
Value Set	OKC_CH_TYPE_DFF
Default Type	Parameter
Default Value	ChrType
Prompt	Level
Display Type	Hidden
BI Enabled	enabled (checked)

10. Click **Save and Close** to return to the Edit Context: Government page.
11. On the Context Sensitive Segments tool bar, click the **Create** icon.
12. Create another segment for the Government context by clicking **Create** and enter the values shown in this table:

Field	Value
Name	Budget

Field	Value
Data Type	Character
Value Set	OKC_CH_TYPE_DFF
Default Type	Parameter
Default Value	ChrType
Prompt	Budget
Display Type	Hidden
BI Enabled	enabled (checked)

13. Click **Save and Close** to return to the Edit Context: Government page.
14. Click **Save and Close** to return to the Manage Contexts page.
15. On the Manage Contexts page Search Results tool bar, click the **Create** icon.
16. On the Create Context page create the context header by entering a Display Name of "Commercial" and clicking **Save**. Optionally enter a description to help with identification in the future.
17. Create a Context Sensitive Segment by clicking **Create** and enter the values as shown in this table:

Field	Value
Name	Industry
Data Type	Character
Value Set	OKC_CH_TYPE_DFF
Default Type	Parameter
Default Value	ChrType
Prompt	Industry
Display Type	Hidden

Field	Value
BI Enabled	enabled (checked)

18. Click **Save and Close** to return to the Edit Context: Commercial page.
19. On the Context Sensitive Segments tool bar, click the **Create** icon.
20. Create another segment for the Commercial context by clicking **Create** and enter the values as shown in this table:

Field	Value
Name	Customer Budget
Data Type	Character
Value Set	OKC_CH_TYPE_DFF
Default Type	Parameter
Default Value	ChrType
Prompt	Customer Budget
Display Type	Hidden
BI Enabled	enabled (checked)

21. Click **Save and Close** to return to the Edit Context: Government page.
22. Click **Save and Close** to return to the Manage Contexts page.
23. Click **Done** to return to the Edit Descriptive Flexfield page.
24. Click **Save and Close** to return to the Manage Descriptive Flexfields page.

## Deploy the Modified Contracts Header Descriptive Flexfield

You deploy the edited descriptive flexfield to expose the field in the application and make it available for use when creating user-defined criteria.

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Enterprise Contracts
  - o Functional Area: Enterprise Contracts Base
  - o Task: Manage Contract Descriptive Flexfields

2. On the Search Results tool bar on the Manage Contract Descriptive Flexfields page, click **Deploy Flexfield**.
3. Monitor the progress of the deployment and click **OK** when it completes.
4. Click **Done** to return to the Search page.
5. Click **Done** to return to the Setup and Maintenance Overview page.

## Create the Contract Type with Context for User-Defined Criteria

Use the Contracts work area to complete this task with the default values for fields unless the steps specify other values.

1. Click the **Contracts Type** task.
2. On the Search Results tool bar, click **Create**.
3. Complete the Create Contract Type fields, as shown in this table:

Field	Value
Class	Enterprise contract
Set	Common Set
Name	Commercial
Intent	Sell
Allow lines	disabled (unchecked)
Buyer Role	Customer
Seller Role	Supplier
Contract Owner Role	Contract administrator
Code	Commercial
	<b>Note:</b> This ties the contract type to the descriptive flexfield segment previously defined.

4. Click **Save and Close** to return to the Manage Contract Types page.
5. Repeat steps 2 through 4 to create a contract type named Government with a Code of Government.

## Create a Contract and Associate User-Defined Criteria

Use the Contracts work area to complete this task with the default values for fields unless the steps specify other values.

1. Click the Create Contracts task.



2. Create a new contract using the entries as shown in this table:

Field	Value
Business Unit	Vision Operations
Legal Entity	Vision Operations
Type	Commercial
Number	HA151101-1
Primary Party	General Associates
Intent	Sell
Description	Contract to demonstrate automated context sensitive descriptive flexfield.

3. Click **Save and Close** on the Create Contract window to continue to the Edit Contracts page and accept any defaulted fields or enter as indicated in the table.
4. On the Edit Contracts page open the Additional Information section and verify that the correct context sensitive segments are displayed.
5. Click **Submit** to return to the Contracts work area page.

#### Related Topics

- [Overview of Descriptive Flexfields](#)
- [Descriptive Flexfields for Contracts](#)
- [Considerations for Managing Descriptive Flexfields](#)

## How can I fetch only supplier sites that belong to the supplier on a contract?

Add the Contract Party Contact DFF to the contract header. The header DFF has the contract\_id parameter and it can be passed into the where clause condition and by using a where clause condition.

Here are the values to pass to the table value set of the supplier site DFF field:

- FROM: okc\_k\_headers\_all\_b a, okc\_k\_party\_roles\_b b, POZ\_SUPPLIER\_SITES\_ALL\_M c, POZ\_SUPPLIERS d
- VALUE COLUMN NAME: VENDOR\_SITE\_CODE
- WHERE CLAUSE:
  - a.id = b.chr\_id
  - and a.major\_version = b.major\_Version
  - and b.RLE\_CODE = 'SUPPLIER'
  - and c.VENDOR\_ID = d.vendor\_id

- `and c.PRC_BU_ID = a.org_id`
- `and d.party_id = b.OBJECT1_ID1`
- `and a.contract_id = :{PARAMETER.ContractId}`

# 6 Procurement Contracts Configurations

## Supplier Contract Fulfillment

### Types of Contract Fulfillment

This topic explains what types of contract fulfillment lines you can create in a supplier contract, and how you can use them to create and monitor purchasing documents in your purchasing applications.

### Types of Contract Fulfillment You Can Create

You can create two types of contract fulfillment:

- Contractual

Fulfillment lines that are covered by the terms of the contract. You can initiate standard purchase orders or purchase agreements from contractual fulfillment lines, depending on the purpose of the contract.

- Noncontractual

Fulfillment lines that aren't negotiated as part of the contract, which are used to monitor the progress or quality of contractual fulfillment lines. You can also create purchase orders and purchase agreements from noncontractual fulfillment lines.

A contract fulfillment of either type can have one or two directions:

- Inbound

The fulfillment is the responsibility of the external party, such as the supplier for buy-intent contracts.

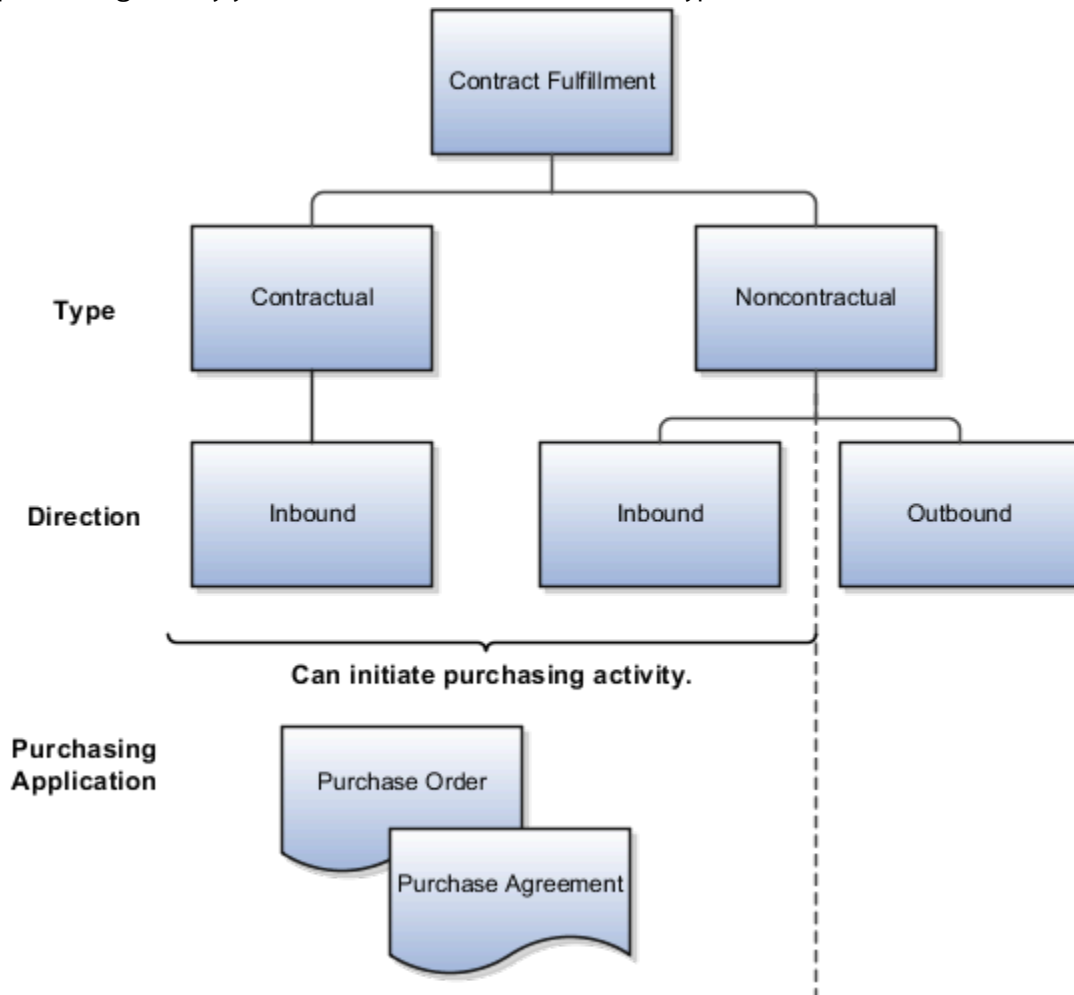
- Outbound

The fulfillment is the responsibility of the internal party, such as the buyer for buy-intent contracts.

You can initiate purchasing activity for buy intent contracts only from inbound fulfillment lines. Contractual fulfillment lines are always inbound for buy contracts.

Contract fulfillment are of the two following types; contractual and noncontractual. The contractual contract fulfillment is inbound only whereas the noncontractual contract fulfillment is inbound as well as outbound. Here's the figure that illustrates the different contract fulfillment types, the

purchasing activity you can initiate, and track from each type is discussed in the next section.



## Types of Purchasing Activities That a Contract Fulfillment Can Initiate

You can initiate purchase orders or purchase agreements from fulfillment lines, depending on the purpose of the contract.

- The contract is used for immediate purchases and has at least one contract line item defined.

You can create purchase orders from the fulfillment lines of such contracts. The contract type class for such contracts must be **Enterprise Contract**.

- The contract is used for future purchases and has at least one contract line item defined.

You can create blanket purchase agreements from the fulfillment lines of such contracts.

- The contract is used for future purchases and doesn't have contract line items defined.

You can create contract purchase agreements from the fulfillment lines of such contracts.

This table lists the purchasing documents that you can create from different contract fulfillment lines in Oracle Purchasing, the purchasing application that's integrated with Enterprise Contracts.

Fulfillment Properties	Purchasing Document Created in Oracle Purchasing
<ul style="list-style-type: none"> <li>The fulfillment is inbound.</li> <li>Contract is for immediate purchase.</li> <li>The contract includes contract lines.</li> </ul>	<p>Purchase order</p> <p>You can create only one purchase order from each fulfillment line, but you can create multiple fulfillment lines for each contract line if you have to stagger the purchases or ship to different destinations, for example. You can also combine multiple fulfillment lines to create one purchase order.</p>
<ul style="list-style-type: none"> <li>The fulfillment is inbound.</li> <li>Contract is for immediate purchase.</li> <li>The contract has no contract lines.</li> </ul>	<p>Purchase order</p> <p>You can duplicate a fulfillment line to create multiple fulfillment lines if you have to create multiple purchase orders.</p>
<ul style="list-style-type: none"> <li>The fulfillment is inbound.</li> <li>Contract is for future purchase.</li> <li>The contract includes contract lines.</li> </ul>	<p>Blanket purchase agreement</p> <p>You can create only one blanket purchase agreement from each fulfillment line, but you can create multiple fulfillment lines for each contract line if you have to stagger the purchases or ship to different destinations, for example. You can also combine multiple fulfillment lines to create one blanket purchase agreement.</p>
<ul style="list-style-type: none"> <li>The fulfillment is inbound.</li> <li>Contract is for future purchase.</li> <li>The contract has no contract lines.</li> </ul>	<p>Contract purchase agreement</p> <p>You can duplicate a fulfillment line to create multiple fulfillment lines if you have to create multiple contract purchase agreements.</p>

#### Related Topics

- [How Contract Fulfillment Works](#)

## How Contract Fulfillment Works

Contract fulfillment makes it possible for you to track goods, services, reports and other fulfillment items you're purchasing in buy-intent contracts.

Depending on the type of contract you're creating, you can use contract fulfillment to initiate the creation purchase orders or purchase agreements within Oracle Fusion Purchasing or in other integrated purchasing applications and monitor their fulfillment from within the contract. This topic explains how you create and work with contract fulfillment.

1. You can create a fulfillment either on the contract header or on individual contract lines by selecting either the **Autocreate Fulfillment Lines** or the **Create fulfillment** actions. The Autocreate Fulfillment Lines action creates the fulfillment line and copies the contract basic header or contract line information to the fulfillment line so you don't have to enter it manually.

Select the **Autocreate Fulfillment Lines** action from the header to automatically create one fulfillment line per contract line. If there are no contract lines, then the application creates one fulfillment based on the header details provided the contract type is of class Agreement. You can't autocreate fulfillment lines for contracts without contract lines if the contract type class is Enterprise Contract.

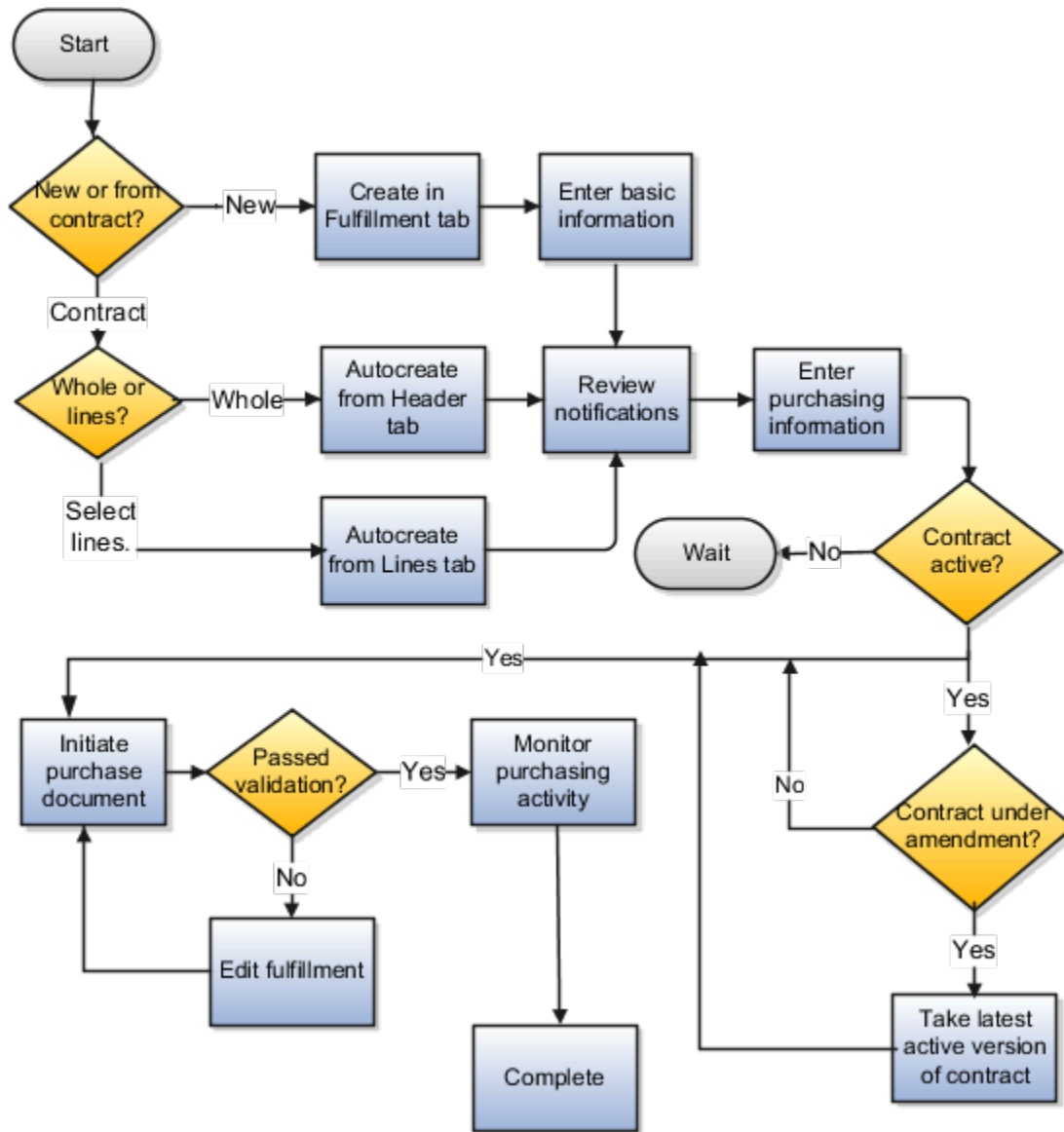
2. Review the notifications that are sent automatically to interested parties regarding fulfillment progress and deadlines. The contract type can be set up to automatically specify who's notified and when. You can change and add more notifications for the contract.

3. If you're using the fulfillment to initiate the purchase of goods and services using the integrated purchasing applications, then you must enter the required purchasing details. For autocreated fulfillment, these details are copied automatically from the corresponding contract lines.
4. When the contract is approved and becomes active, you can initiate the creation of the purchasing documents in one of the purchasing applications. When you do, the application validates the information you entered to make sure it meets all the requirements of the purchasing application and creates the purchasing document. If it doesn't, you must edit the fulfillment to enter additional information.

**Note:** If the contract goes into amendment after being approved, you can't create any more fulfillment lines or edit existing ones. If you initiated the creation of purchasing documents when the contract became active, you can still continue to execute the fulfillment on the purchasing document. In the event that you didn't initiate a purchasing document for the approved contract before it went into amendment, you can create one based on the latest active version of the contract and treat this as an active contract on which you can execute existing fulfillment lines.

5. After the purchasing document is created in the purchasing application, you can monitor the progress of its execution.
6. You can mark a fulfillment as complete after execution of the purchasing document is completed.

This figure that illustrates how you can create and work with both contractual and noncontractual fulfillment lines and how you can initiate purchasing activity from those fulfillment lines.



## Create a Contract Fulfillment

If the fulfillment you're creating is related to the information entered in the contract, then you can select the **Autocreate Fulfillment Lines** action to create a fulfillment line in either the contract Header tab or the Lines tab. Using Autocreate Fulfillment Lines on the contract header creates a single fulfillment line for each contract line. On the Lines tab, you can select individual contract lines where you want to create a fulfillment.

Select the **Create fulfillment** action in the Fulfillment tab to create a completely new fulfillment. See the Oracle Fusion Purchasing guides for more information about the fields in the Purchasing section.

**Note:** The Create Fulfillment and Autocreate Fulfillment Lines actions aren't available for a contract that's under amendment.

**Tip:** You can create multiple fulfillment lines for a single contract line if you need the fulfillment line items to be shipped to different destinations, for example. This is accomplished by autocreating a fulfillment line, duplicating it, and then editing the fulfillment line information.

## Set Up Fulfillment Notifications

You can specify which internal contacts are automatically notified about contract fulfillment milestones and when.

You can notify internal contacts:

- A specified number of days before or after the fulfillment due date
- When the fulfillment line is placed on hold
- When a purchasing document is created from one or more fulfillment lines
- When purchasing document creation fails for the fulfillment
- When purchasing activity is complete for a fulfillment line

Different notification types are available for different fulfillment types. Some notifications might already be specified for you by the contract type you selected to create your contract.

## Create the Purchasing Document

Before you initiate the purchasing document by selecting either the **Create Purchase Order** or **Create Purchase Agreement** actions, you must enter all purchasing information required by the purchasing document you're creating and wait until the contract is approved.

You can create one purchase document from multiple contract fulfillment lines. For example, selecting all the fulfillment lines created from contract lines when creating a purchase order, creates one PO with lines corresponding to each of the fulfillment lines. When creating purchase document for multiple fulfillment lines at once, all the purchase document attributes like buyer, supplier, supplier site, bill-to location, ship-to location, and so on must be the same for all the fulfillment lines.

The application validates your entries to make sure you've entered all the required information. You must correct any errors you receive and resubmit you request. You know that the purchase document is successfully created when the fulfillment status changes to the **PO Created** or **Agreement Created** status.

**Note:** Purchase orders are created automatically in Oracle Fusion Purchasing, but agreements are created only when you run the Import Blanket Agreements and Import Contract Agreements processes from the Purchasing work area as described in a related topic.

## Monitor Purchasing Activity

You can monitor the status of the purchasing activity for the fulfillment on the Purchasing Activity tab.

**Note:** For all agreements and purchase orders created in Oracle Fusion Purchasing, the tab information is updated each time you run the Track Purchasing Activity process as described in a related topic.

## Specify That Purchasing Activity for a Fulfillment is Complete

You can specify that the purchasing activity on a fulfillment is complete by selecting the **Complete** action on the Fulfillment tab. You also use this action to indicate fulfillment lines with no purchasing documents are complete.



### *Related Topics*

- [Types of Contract Fulfillment](#)
- [Can I create multiple contract fulfillment lines for a single contract line?](#)
- [What Actions You Can Use on Contract Fulfillment Lines and When](#)
- [Example of Initiating a Single PO from a Contract Line to Ship Items to Different Destinations](#)
- [Create and Monitor Agreements in Oracle Fusion Purchasing](#)

## How You Set Expiration Date for Notifications

When you receive various notifications in the bell icon and BPM Worklist, and you don't take action after a stipulated time, you may want to expire these notifications. Here's how you can configure expiration duration for notifications:

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search and select the **Manage Task Configurations for Procurement** task. The BPM Worklist page appears.
4. In the Tasks to be configured region, select **ReqApproval**.
5. Click the **Edit task** icon.
6. Click the **Deadlines** tab.
7. In the Escalation section, click **Expire**.
8. Configure the expiration duration.



# 7 Service Contracts Configurations

## Billing Templates

### Manage Billing Templates

Billing templates of a service contract consist of attributes, which upon selection determine the billing schedules of the contract. Setting up of these billing attributes and the creation of a billing template is a mandatory step in contract setup.

During contract creation, these templates are then selected by the sales administrator. For example, if you select Advance Invoice as the Invoicing Rule in the Billing Template, it guarantees that the billing takes place before the Period (Month, Quarter, Year) begins. You can change your billing attributes during contract creation as long as your status is Draft.

Learn about the different billing attributes in the billing template of a service contract. These attributes are in the Edit Billing Templates page:

- **Name:** This is a mandatory field. After setup, choose your named billing template during contract creation.
- **Description:** This field is optional.
- **Bill Service:** The options in the Drop Down list include 'Bill', 'Do not bill', and 'Bill on renewal'. For instance, these options are provided to accommodate legacy contracts being imported into the application and may already be partially billed through another AR system. Therefore, 'Do not bill' can be chosen until contract renewal, following which it changes to 'Bill'.
- **Invoicing Rule:** Choose between bill payments in the form of 'Advance Invoice' and 'Arrears Invoice'.
- **Billing Frequency:** Choose a suitable billing periods: Month, Year, Quarter, and Year.
- **Billing Date:** Choose a billing date: Period start, Period end, Day and Offset.
- **Accounting Rule:** Choose a suitable accounting rule from the Drop Down list.
- **Transaction Type:** This attribute determines if the billing is going to be an Invoice or a Credit Memo. The values for the Drop Down are predefined by Accounts Receivables and generated in the Billing Template.
- **Payment Terms:** Choose a payment method, such as Immediate, Last Day Month, Due 10th, and so on. this indicates the period within which you must pay.
- **Period Start:** Choose your billing period from the Service Start, or Calendar date.
- **Period Type:** Choose between Actual and Fixed to determine if the billing period is based on the number of days in the month, or a fixed duration, such as 30 days.
- **Termination Credit Method:** Choose from the following: Prorate with credit, Prorate without credit, Full, None to determine whether or not partial or full charges will be waived as a refund upon termination.
- **Subscription Invoice Text:** In order to process the descriptions of the invoice by Accounts Receivables, you must add attributes for the subscription invoice text. This includes Charge name, Item name, Bill to date, Bill from date, and so on.
- **Coverage Invoice Text:** In order to process the descriptions of the invoice by Accounts Receivables, you must add attributes for the coverage invoice text. This includes Asset number, Item name, Bill to date, Bill from date, and so on.

**Note:** The combination of the Invoicing Rule, Billing Frequency, and Billing Date determines the billing schedule of the contract.

#### Related Topics

- [Set Up Billing Templates](#)

## Contract Renewals

### Basic Automated Contract Renewal

Contract Renewal makes a copy of the existing source contract. The source contract can be in an active or expired status. The effectivity and price details on the new renewal contract are changed based on the configured renewal defaults.

Other attributes, such as negotiation settings of the new renewal contract, can also be changed. You can choose to activate contract renewal for service contracts on a header and line level. This means that you can choose to renew the entire contract or specific contract lines, or both.

The three options to edit the renewal process at the time of contract creation are:

- **Automatic:** This implies automatic contract renewal, which is generated by the Automatically Renew Eligible Contracts and Contract Lines scheduled process prior to contract expiration.

**Note:** For the scheduled process to pick the eligible contract, the renewal template must have mark-up, mark-down, or reprice enabled.

- **Manual:** This implies that the contract or line must be renewed manually. This can be done at any point during the contract lifecycle. You are notified prior to contract expiration.
- **Do not renew:** This implies that you don't want to opt for contract renewal. On selecting this, the Renewal Type column is removed from the dashboard columns list for all lines and covered assets of the contract.

When contract renewal is selected on a header level, it doesn't reflect on the existing contract lines. The following renewal options are provided for each contract line as a Drop Down list:

- **Renew:** Renewal of the coverage or subscription line.
- **Keep duration:** Available for subscription only, the duration of the line remains unchanged in a renewed contract. It remains the same as in the source contract.
- **Do not renew:** This means that the subscription line, and coverage line along with the covered assets aren't renewed when the contract is renewed.

**Note:** The scheduled process Automatically Renew Eligible Contracts always considers the header level **Edit Renewal Process** drop-down list value to determine a contract's eligibility for renewal over the **Renewal Process** drop-down list value set in the **Negotiations and Renewal** tab.

Contracts can be renewed either manually or automatically. The user can manually renew a contract using the renew action, or the application can be configured to automatically renew a contract. The application uses renewal rules to determine the renewal defaults. The life cycle of a renewal contract is similar to a newly authored contract. However,

you can configure a different life cycle for a renewal contract using the Event Model configuration. You can configure an event model to route the renewal contract to the customer for acceptance, or to the contract administrator for internal approval. You can also activate the contract without either Customer Acceptance or Internal Approval. The application, therefore, evaluates renewal rules template configured in the contract rules to retrieve the renewal process, customer acceptance criteria and internal approval criteria.

The following table provides an overview of the combinations of the Renewal Process, Customer Acceptance, and Internal Approval criteria:

Renewal Process	Customer Acceptance	Internal Approval	Description
Automatic	Not Required	Not Required	The application renews and activates the contract.
Automatic	Not Required	Required	The application renews and submits the contract for approval.
Automatic	Required	Required/Not Required	The application renews the contract and leaves it in the contract administrator's queue for further action. You can configure event notification rules to automatically send the contract to the customer for acceptance.
Manual	Required/Not Required	Required/Not Required	The application renews the contract and leaves it in the contract administrator's queue for further action.
Do not renew	N/A	N/A	The application doesn't renew the contract.

#### Related Topics

- [Set Up Event Notification Rules for Customer Communications and Email Functionality](#)
- [Set Up Renewal Rules](#)

## How You Consolidate Multiple Renewal Contracts

Renewal Consolidation addresses the problem of multiple contracts expiring during a given period causing multiple renewals to happen simultaneously. With Renewal Consolidation, all the contracts to be renewed over a given period are consolidated into a single renewal contract.

A contract is eligible for consolidation into a target contract if these conditions are true:

- The contract has the same Contract Type, Business Unit, Legal Entity, Primary Party, Pricing Strategy, Renewal Process and Currency.
- The source Contract Line End Date +1 is within the effectivity of the target contract.

If the services are the same on both, the source contract and the target contracts, the covered levels of those services can be merged into one contract line on the target contract. The scheduled process Automatically Renew Eligible Contracts and Contract Lines has a built-in logic to consolidate multiple contract lines into a single contract.

**Note:** For the scheduled process to pick the eligible contract, the renewal template must have mark-up, mark-down, or reprice enabled.

## Manage Event Notification Rules and Template Sets

This topic describes the process of enabling renewal notifications, through an example.

Here, you're required to automatically send the renewal quote 90 days before the contract start date to the customer for acceptance. While the renewal contract is awaiting customer acceptance, you're required to send two reminders at 60 days and 30 days before the contract start date, respectively. The notification events in the Event Notification Rules are sourced from the lookup ORA\_OKC\_CUST\_NOTIF\_EVENTS (Customer Notification Events). The following describes the notification events that are available:

Lookup Code	Lookup Meaning
ORA_SEND_QUOTE	Send Quote
ORA_SEND_FIRST_REMINDER	Send first reminder
ORA_SEND_SECOND_REMINDER	Send second reminder
ORA_SEND_THIRD_REMINDER	Send third reminder
ORA_SEND_CONS_REMINDER	Send consolidated reminder

Use the Event Models setup task to create the new notifications events for the business object, oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVO. In this case, since you need to send the quote, send first reminder, and send second reminder, you must add ORA\_SEND\_QUOTE, ORA\_SEND\_FIRST\_REMINDER and ORA\_SEND\_SECOND\_REMINDER in your Event Model.

**Note:** Make these changes in a sandbox and test the changes in the test area before you commit them to the mainline application. For your reference, the ServiceContractHeaderDemo event model has been configured with the following customer notification events: Send Quote, Send first reminder, Send second reminder and Send third reminder.

### Related Topics

- [Set Up Event Notification Rules for Customer Communications and Email Functionality](#)

## Use State Model APIs to send Renewal Notifications

Use these APIs to send customer and internal notifications from the state model:

### SEND EMAIL:

#### Signature:

```
sendEmail (Long contractId, String toAddress, String ccAddress, String bccAddress, String language, String subject, String messageTemplate, String messageBody, String contractLayoutTemplate, String termsLayoutTemplate, String attachmentName, String logInteraction)
```

- contractId: Id that represents the contract.
- toAddress: it represents the email address to send notification.
- ccAddress: it represents the email address to send notification as Cc.
- bccAddress: it represents the email address to send notification as Bcc.
- language: it represents message language in template sets rules.
- subject: it represents email subject
- messageTemplate: it represents message template name defined in notification rules.
- messageBody: it represents email body.
- contractLayoutTemplate: it represents contract layout template name defined in notification rules.
- termsLayoutTemplate: it represents terms layout template name defined in notification rules.
- attachmentName: it represents attachment name defined in notification rules.
- logInteraction: To capture logs 'Y' (enable capturing) or 'N' (disable capturing).

#### Return Values:

Boolean - true if successfully email API is triggered or it returns false.

### GET TEMPLATE:

This API is used to get the templates from Event Notification Rules.

#### Signature:

```
getTemplate (Long contractId, String language, String event).
```

#### Parameters:

- contractId: Id that represents the contract.
- language: Represents the message language in template sets rules.
- event: Represents event condition code.

#### Return Values:

- String Array []:
  - 0- ContractLayoutTemplate
  - 1- TermsLayoutTemplate

- 2- MessageTemplate
- 3- AttachmentName

### Example Code for SendEmail and GetTemplate:

#### Groovy Script:

```
String[] attTemplates = new String[4];
attTemplates=eventModel.applicationModule.getTemplate(ContractId,"US","ORA_SEND_QUOTE");
String toAddress="abc@oracle.com";
String ccAddress="xyz@oracle.com";
String bccAddress="def@oracle.com";
String language="US";
String subject="Test";
String messageTemplate=attTemplates[2];
String messageBody="MessageBody";
String contractLayoutTemplate=attTemplates[0];
String termsLayoutTemplate=attTemplates[1];
String attachmentName=attTemplates[3];
String logInteraction="Y";
boolean sri=eventModel.applicationModule.sendEmail(contractId, toAddress, ccAddress, bccAddress, language,
subject, messageTemplate, messageBody, contract
```

#### NOTIFYREP:

#### Signature:

```
notifyRep(String messageSubject, String messageText, List<String> toSet, String senderEmail).
```

#### Parameters:

- messageSubject: Represents Email Subject.
- messageText: Represents Email Body.
- toSet: Represents set of email lists to send notification.
- senderEmail: Represents the Sender Email.

#### Return Values:

Boolean - true if successfully email API is triggered or it returns false.

#### Example Code for Notifyrep:

```
List<String> s= new ArrayList<String>();
s.add('xyz@oracle.com');
boolean sri=
eventModel.applicationModule.notifyRep('Test','from message body',s,'srinivas.arram@oracle.com')
```

## Renewal Contracts Pricing

You can set up renewal rules that apply to both, manual renewals and automatic renewals. Pricing methods specify how the contract can be priced at renewal. You have three pricing methods:

- **Reprice:** Selection of this method reprices the contract on renewal.
- **Markup Percent:** Selection of this method adjusts the price up by the percentage you enter.



- **Markdown Percent:** Selection of this method automatically adjusts the price down by the percentage you enter.

## Billing and Pricing

### About Price During Billing

In the Manage Contract Types task within the Setup and Maintenance work area, you can create a sell intent contract type with Class set as Enterprise Contract and Line Class set as Service.

You can then select the Allow Pricing During Billing check box to allow pricing of subscription services during contract billing rather than contract authoring. Once the contract type is created, you can't update the value of check box again. This check box is available only when the class is Enterprise Contracts and Line Class is Service.

When you create a service contract from the Manage Contracts page, the **Price During Billing** check box is displayed in Create Line at the time of subscription line creation. This check box isn't displayed if you don't select the **Allow Pricing During Billing** check box at the time of creating contract type with Class set as Enterprise Contract and Line Class set as Service. Once you save the subscription line, you can see the **Price During Billing** check box in Line Overview, but you can't update the value of this check box after the subscription line creation.

### How the Fetch Pricing Information Process Supports Pricing While Billing

The Fetch Pricing Information for Service Contracts process is used to reprice both the usage and price during billing charges.

If the **Price During Billing** check box is selected, the process prices or reprices usage charges and reprices other recurring charges associated with the contract lines. If the process runs successfully, these contracts lines are repriced, but only for future periods. For example, if you have already billed a subscription line at \$100 per month from January to April and now you have changed to the price to \$150 per month then only May onward contract lines are billed at \$150. Keep in mind that if the **Price During Billing** check box isn't selected, the process levies only usage charges.

#### *Related Topics*

- [Contract Types](#)
- [Define Contract Types For Service Contracts](#)

### Partial Period Billing

You can implement rules, wherein, the billing template calculates partial period within the service duration driven by your business.

Let's take an example where we have a service running from 15th January 2019 to 10th April 2019. You can bill your subscription in either of these strategies.

- Two months of service and a partial period at the end. The partial period would be 15th March 2019 to 10th April 2019.
- Service period tied to a calendar period. Here, the first partial period is 15th January 2019 to 31st January 2019, then two full periods of February and March, and second partial period of 1st April 2019 to 10th April 2019.

The period start date can be tied to the service start date of the calendar start date. For service start date, the period starts from the service start date. For calendar start date, the period starts from the calendar start date, which can be the first day of the month.

The period type determines whether the partial period duration is based on fixed number of days or actual days in the period.

## How Period Type Influences Duration

Let's take an example, where a service starts on 1st March 2019 and ends on 10th February 2020, and the period start date is tied to the service start date.

If the period type is actual, the duration is calculated as follows:

Date	Duration
1st March 2019 - 31st January 2020	11 months
1st February 2020 - 10th February 2020	0.357 months (10/28)

Note that since February has 28 days, the partial period is calculated based on 28 days. The total duration is calculated as 11.357 months.

If the period type is fixed, the duration is calculated as follows:

Date	Duration
1st March 2019 - 31st January 2020	11 months
1st February 2020 - 10th February 2020	0.333 months (10/30)

Note that a month is set as 30 days, hence the partial period is calculated based on 30 days. The total duration is calculated as 11.333 months.

## How Period Start Influences Duration

Let's take an example, where a service starts on 15th January 2019 and ends on 10th April 2019 and the period type is actual.

If the period start is service start, the duration is calculated as follows:

Date	Duration
15th January 2019 - 14th March 2019	2 months (2 full periods)
15th March 2019 - 10th April 2019	0.871 months (27/31)

The total duration is calculated as 2.871 months.

If the period start is calendar month, the duration is calculated as follows:

Date	Duration
15th January 2019 - 31st January 2019	0.548 months (17/31) - First partial period
1st February 2019 - 31st March 2019	2 months - 2 full periods tied to calendar months
1st April 2019 - 10th April 2019	0.333 (10/30) - Second partial period

The total duration is calculated as 2.881 months.



# 8 Reports and Analytics

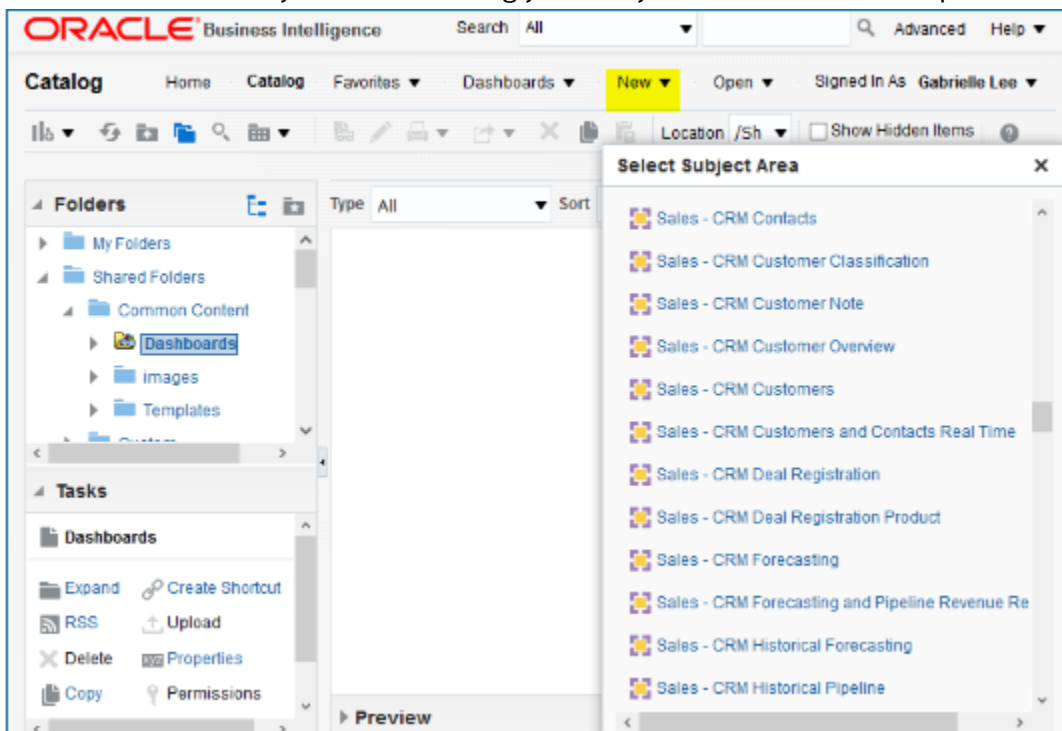
## Overview of Building Your Own Analytics

All your analytics are stored in the Oracle Business Intelligence (BI) catalog. Once you navigate to BI you will see your analytic files as well as tools to build and edit analytics.

To get to BI:

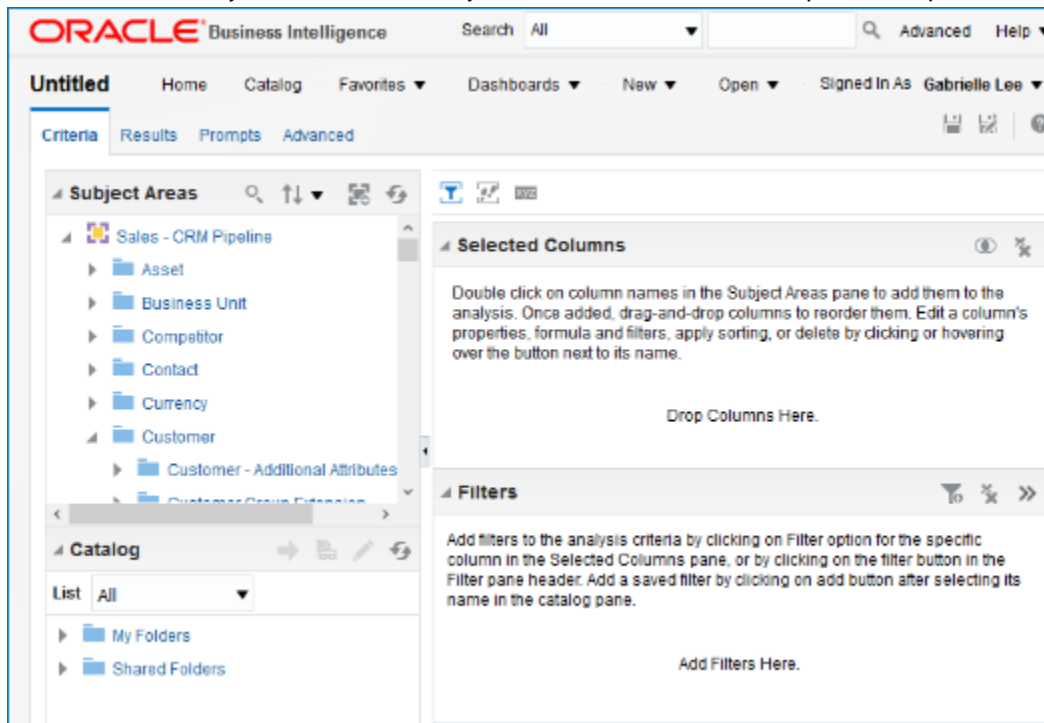
1. Click **Navigator** then **Reports and Analytics**.
2. In the Reports and Analytics pane, select the **Browse Catalog** open book icon.

To create analyses, in BI, you select New and then Analysis, and then select from a variety of subject areas that hold the data that you use for building your analytics. This shows an example of the subject areas in BI.



Once you select the subject area, the subject area opens up and you can add the columns to the editor.

This shows where you create new analytics, and the Sales - CRM Pipeline subject area.



For more information on Oracle CX Sales and Fusion Service analytics, see the [Creating and Administering Analytics](#) guide.

### Related Topics

## Use Enterprise Contracts in Business Intelligence Cloud Connector

You can use Oracle Business Intelligence (BI) Cloud Connector to extract the BI data from Enterprise Contracts.

Here are the contract objects you can use in BI Cloud Connector:

- Contracts
- Contract Translations
- Contract Custom Extensions
- Contract Approval History
- Contract Signature History
- Contract Status History
- Related Contracts
- Contract Parties
- Contract Party Contacts
- Contract Sales Credits

- Contract Fulfillment
- Contract Fulfillment Notifications
- Contract Fulfillment Translations
- Contract Risks
- Contract Lines
- Contract Line Translations

For more information, see the related topic.

- *Creating a Business Intelligence Cloud Extract*

## Custom Analytics and Reports

### How You Create and Edit Reports

Use reports to generate and print documents for internal operations, external business transactions, or legal requirements. To meet specific requirements, you must create or edit reports to capture different data, or present data in another way.

### Report Components

Each report has components that you can modify, as described in this table:

Report Component	Description	Tool for Modifying
Data model	Defines the data source, data structure, and parameters for the report. Multiple reports can use the same data model. Each report has one data model.	Data model editor in the application
Layout	Defines the presentation, formatting, and visualizations of the data. A report can have multiple layouts. Different types of layout templates are available, for example Excel and RTF.	Depending on the template file type: <ul style="list-style-type: none"> <li>• <b>XPT</b>: Layout editor in the application</li> <li>• <b>RTF</b>: Microsoft Word</li> <li>• <b>PDF</b>: Adobe Acrobat Professional</li> <li>• <b>Excel</b>: Microsoft Excel</li> <li>• <b>eText</b>: Microsoft Word</li> </ul>
Properties	Specifies formatting and other settings for the report.	Report editor in the application

## What You Can Create or Edit

This table gives just a few examples of creating or editing reports.

Task	Example
Edit the layout of a report.	Add your company logo to the report output.
Add a new layout to a report.	Design a new layout template that provides less detail than the existing template.
Edit a data model.	Add two fields to the data model used by a report so you can add those new fields to a layout for the report.
Create a new report based on a new data model.	Create a new data model based on data from an external system, and create reports using the data model.

### Related Topics

- [Create Reports](#)
- [Modify Data Models](#)
- [Create and Edit Report Layouts](#)
- [How You Access and Modify Report Components](#)

## How You Access and Modify Report Components

To create or edit reports, you must access the business intelligence (BI) catalog. In the catalog, objects of type Report represent the report definition, which includes report properties and layouts.

Data models are separate objects in the catalog, usually stored in subfolders called Data Models.

### Accessing the BI Catalog

You can access the BI catalog in any of the following ways:

- In the Reports and Analytics work area, click **Browse Catalog** to open the BI catalog, and find your report or data model in the Folders pane.
- In the Reports and Analytics work area, find your report and select **More** to go to the report directly in the catalog. The data model associated with the report should be in the Data Models subfolder within the same folder as the report.
- Sign in to the application directly (for example: `http://host:port/analytics/saw.d11`) to open the catalog.
- Sign in to the Analytics Publisher server directly (for example: `http://hostname.com:7001/xmlpserver`) to open the catalog.
  - Alternatively, once you are in the catalog using another method, for example, through the Reports and Analytics work area, change the final node of the URL. For example, change (`http://host:port/analytics/saw.d11`) to `xmlpserver`. So the URL you use would be: `http://host:port/xmlpserver`.



## Predefined Reports

A special Customize option is available only:

- For predefined reports, not data models.
- Through direct access to the server using the `/xmlpserver` URL. When you find your report in the BI catalog, select **Customize** from the **More** menu.

The Customize option automatically creates a copy of a predefined report and stores it in the **Shared Folders > Custom** folder within the catalog. The new report is linked to the original, so that when users open or schedule the original, they are actually using the copied version.

If you don't have access to the Customize option or don't want the original version linked to the new report, make a copy of the predefined report and save it in the Custom folder.

## Predefined Data Models

Don't edit predefined data models. Instead, copy the data model into the Custom folder and edit the copy. You can't create a new data model based on the transactional tables.

### Related Topics

- [What happens to modified analytics and reports when a release update is applied?](#)
- [Where to Save Analytics and Reports](#)

## How Data Is Structured for Analytics

The business intelligence (BI) repository contains the metadata that defines which columns you can include in analyses, and the source of that data. The repository is organized into subject areas, which contain folders with the columns.

**Note:** You can also use the BI repository as a data source for reports.

## Columns

This table describes the three types of columns available when you create or edit analyses.

Column Type	Description	Example
Fact	Provides a measure of something, meaning that the values are numbers.	Total
Attribute	Represents a piece of information about a business object, with values that are dates, IDs, or text.  <b>Note:</b> Attribute columns can be flexfield segments imported into the BI repository.	Start Date

Column Type	Description	Example
Hierarchy	Holds data values that are organized in a hierarchical manner.	Time, with sublevels: <ul style="list-style-type: none"> <li>• Year</li> <li>• Quarter</li> <li>• Month</li> </ul>

## Subject Areas

When you create an analysis, you first select a subject area, which contains columns related to a specific business object or area. Then, open folders within the subject area to find the columns to include.

For product families that use Application Composer, you can create custom subject areas to accommodate custom objects or to add new facts for analysis.

## Folders

Each subject area has one fact folder and a number of dimension folders. Folders can have subfolders.

- **Fact folders:**
  - Contain fact columns.
  - Are usually the last in a list of folders and are usually named after the subject area.
- **Dimension folders:**
  - Contain attribute and hierarchical columns.
  - Are joined to the fact folder within a subject area.

For example, if your analysis has the Currency attribute from a dimension folder, you see currencies in the results. If you also add the Total fact, then your analysis includes only records with both a currency and a total amount. The more columns you add, the smaller the query set for your analysis.

- Can be common folders, or common dimensions, that appear in more than one subject area.

If your analysis has columns from multiple subject areas, then you:

- Should include columns only from dimension folders that are common to all of those subject areas. At least one such column is required.
- Must include one column from the fact folder in each of those subject areas.

### Related Topics

- [Manage Analytics with Advanced Features](#)
- [Create and Edit Analyses Using a Wizard](#)
- [Create and Modify Analyses and Dashboards](#)
- [About Custom Subject Areas](#)

## Create Reports

Create a report when the predefined reports don't provide the data you need. Or, if you want to use a predefined data model, and also want to change other aspects of the report other than layout. Save your report to Shared Folders Custom

### Create a Report

1. Open the Reports and Analytics work area.
2. Click **New** and select **Report**.
3. Select the data model to use as the data source for your report.

**Note:** Be sure that the data model you select has been validated. If you select a data model that has not been validated or has errors, when the report is run it will error indicating that the data model has not been validated or has an invalid status. To override this warning for a report, select the Ignore Data Model Validation Error option in the report properties.

4. Continue with the wizard to create the report layout, or choose to use the layout editor and close the wizard.
5. Define the layout for the report.
6. Click the **Properties** button in the report editor to set specific formatting, caching, and processing options for your report, including overriding data model validation errors.

### Set Up Access

You or your administrator can:

- Create a job definition so that users can run your report as a scheduled process.
- Secure general access to your report and its job definition, if any.

#### *Related Topics*

- [Set Up Reports for Scheduling](#)
- [Create and Edit Report Layout Templates Using the Layout Editor](#)
- [How You Access and Modify Report Components](#)
- [Modify Data Models](#)

## Create and Edit Analyses Using a Wizard

Use the wizards to quickly create and edit your analyses. You can use a wizard to create and edit most of your analytics, for example to select columns, add filters or views.

You can also use advanced business intelligence features to create or edit dashboards or manage analyses and other objects in the catalog.

1. Start the wizard from the Reports and Analytics work area or the Reports and Analytics panel tab (if available).
  - To create a new analysis click **Create** and select **Analysis**. Select a subject area for your analysis and click the **Continue** button.
  - To edit an existing analysis, in the Reports and Analytics work area, select it in a folder or the favorites list, click its ellipsis icon and select **Edit**. In the Reports and Analytics panel tab, click the analysis, then click **Edit**.
2. In the Select Columns page, optionally, click **Add/Remove Subject Areas** and, in the Add/Remove Subject Areas dialog box, select more subject areas or remove any that you no longer need, and click **OK**. You can't remove the original subject area selected for the analysis. To remove any other subject area, first remove its columns from the analysis.
3. From here on, make selections in a series of analysis-definition pages, selecting Next or Back to navigate among them.
  - In the Select Columns page, expand your subject area and folders within it to choose the columns to include in your analysis. Also set options for those columns.
  - In the Select Views page, determine whether your analysis is to include a table, a graph, or both. For either, select among several types. If you include both, select the order in which they appear.
  - In Edit Table and Edit Graph pages, select options that apply to your table and graph layouts. Each of these pages is active only if you selected the item it applies to in the Select Views page.
  - In the Sort and Filter page, optionally apply filters to columns to refine the selection of records in your analysis, and apply sorts to them to order your results.
  - In the Highlight page, optionally add color highlights based on numeric thresholds you set.
  - In the Save page, enter a name for the analysis, select a catalog folder to save it in, and click **Submit**.

In general, these pages are designed so that procedures for using them are readily apparent. Even so, here are some things you will want to know.

## Select Columns Page

For each column in your analysis, you select an Interaction option.

- Two of the options, Default and Drill, do the same thing: If you click on a column header, the analysis adds a column displaying values at the next hierarchical level. (For example, if you click on Control Name, the analysis adds a Control ID column.) If you click on a column value, the analysis adds the subordinate column, but also filters to display only records containing the value you clicked.
- Navigate to Transaction: If you click on a value from a column for which this option is set, the analysis presents a link to the record of an object the value applies to.

For such links to work, however, further configuration is required: You need to define paths to the records that are to be opened. If you want to use this option, you're probably better off creating the analysis in the BI Catalog. However, you can create it in the wizard, then edit it in the BI Catalog. See the topic titled Link Analyses to Application Pages.

- None: This option in effect turns the Default option off and turns nothing on. Nothing happens if you click on a value in a column for which this option is set.

For each column, you can also select a Hidden option. This prevents the analysis from displaying the column, but leaves its values available for use behind the scenes, for example in filters.

## Select Views Page

You can add a graph to your analysis only if it includes at least one column from a fact folder. (You can include a table in your analysis no matter what columns you select for it.) A fact column contains numeric values, such as counts of incidents returned by advanced controls. Other columns contain attributes of objects, such as names of advanced controls. Without numeric values, there's nothing to base a graph on.

You can create a title for the analysis in this page, but doing so is optional. You also create a name for the analysis in the Save page, and that one is required. If you create both, the analysis displays both; they don't have to be the same.

You can use a Preview option to ensure the analysis returns data you expect. Turn it on or off in this page or in subsequent wizard pages. Once it's on, the preview remains on in other wizard pages you navigate to, unless you turn it off.

## Edit Table Page

Here are the layout options you can select for tables:

- **Columns:** This is the default. Each column you assign this value to appears as a column in the table.
- **Prompt For:** In a prompt field, you select among values from the column you're configuring. For example, you would select a date if the column were Calendar Month Start Date. The table would then display only rows containing the value you selected.
- **Section By:** The table is divided into sections. Each value of the column you're configuring becomes a header, and the section beneath each header includes rows containing that value.
- **Excluded:** The column you select is no longer available to the view you're configuring. The column is hidden, and its values are unavailable for behind-the-scenes tasks such as filtering. However, the column remains available to other views in your analysis.

## Edit Graph Page

You can't apply layout options to fact columns. For other columns, graph layout options include Prompt For, Section By, and Excluded, which have the same effect as they do in tables. You can also apply these options in graphs:

- **Vary Color By:** Each value in the column you're configuring is represented by a distinct color in the graph.
- **Group By:** Values in the columns you assign this option to are combined in the graph. For example, if you select this option for the State and Calendar Month Start Date columns in a bar graph, each bar represents a particular status on a particular date.

## Highlight Page

You can use this feature only if your analysis includes at least one fact column, and you can apply it only to fact columns.

### Related Topics

- [Manage Analytics with Advanced Features](#)
- [How Data Is Structured for Analytics](#)
- [View Analytics, Reports, and Dashboards](#)
- [Where to Save Analytics and Reports](#)

## Manage Analytics with Advanced Features

Wizards are an easy way to create or edit analyses. But you might have to use advanced features for complicated analyses or specific requirements. For example, you can create view selectors so that users can toggle between views within an analysis, or define

You can also perform other actions on analyses, for example delete them or copy and paste them within the business intelligence catalog.

### How to Create and Edit Analytics

1. In the Reports and Analytics work area or the Reports and Analytics panel tab (if available), click the **Browse Catalog** button.
2. Click the **New** button, select **Analysis** in **Analysis and Interactive Reporting**, and select a subject area.  
Or, select your analysis in the catalog and click **Edit**.
3. This table lists the ways you can use the tabs.

Tab	Task
Criteria	Select and define the columns to include.  Add filters.
Results	Add views and set options for results.
Prompts	Define prompts to filter all views in the analysis.
Advanced	View or update the XML code and logical SQL statement that the analysis generates.  Set options related to query performance.

4. Save your analysis.

### More Actions on Analytics

1. In the Reports and Analytics work area or the Reports and Analytics panel tab (if available), select your analysis and click **Action** and select **More..**
2. Click **More** for your analysis and select the action you want, for example **Delete** or **Copy**.

#### Related Topics

- [Create and Edit Analyses Using a Wizard](#)
- [How Data Is Structured for Analytics](#)
- [Where to Save Analytics and Reports](#)

## How You Modify Copies of Predefined Reports

The Customize option automatically creates a copy of a predefined report and stores it in the Shared Folders Custom within the business intelligence (BI) catalog. The copy includes the report definition, folder structure, and original report permissions, and is linked internally to the original, so that when users open or schedule the original, they're actually using the copied version.

### Benefits of the Customize Option

In addition to conveniently copying a predefined report to the Custom folder, the Customize option:

- Makes it unnecessary to update processes or applications that call the report. For example, if the original report is set up to run as a scheduled process, you don't need to change the setup. When users submit the same scheduled process, the newer report runs instead of the original.
- Automatically copies the security settings of the original report.
- Removes the risk of patches overwriting your edits. If a patch updates the original report, the newer report is not updated in any way.

**Note:** The report still references the original data model. The data model is not copied. A patch that updates the data structure of the data model might affect your report.

### Accessing the Customize Option

To access the Customize option:

1. Sign in to the BI server (for example, `http://hostname.com:7001/xmlpserver`).
2. In the Folders pane, select the predefined report.
3. Select **Customize** from the **More** menu for the report.
4. The copied report in the Custom folder opens, so proceed to edit this report.

To edit the copied report again later, you don't need to be in the BI server. Just go to the BI catalog and either:

- Select the **Customize** option for the original report.
- Find your report in the Custom folder and select **Edit**.

#### Related Topics

- [How Links Between Original and Modified Reports Are Managed](#)
- [What happens to modified analytics and reports when a release update is applied?](#)
- [How You Access and Modify Report Components](#)
- [Where to Save Analytics and Reports](#)

## How Links Between Original and Modified Reports Are Managed

The Customize option for predefined reports creates a copy of the report that is linked to the original. Consider the following points when you work with both the original and modified versions.

### Maintaining the Link Between Reports

The link between the predefined and modified report is based on the name of the modified report and its location within the Custom folder in the business intelligence (BI) catalog.

- If you manually create a report with the same name as a predefined report, and give it the same folder path in the Custom folder, then the new report becomes a version of the original. It would be as if you had used the Customize option to create a copy of the predefined report.
- You can edit the report so that it uses a different data model. But if the original data model is updated later, then your newer report doesn't benefit from the change.

**CAUTION:** The link to the original report breaks if you rename the modified or original report.

### Tasks Performed on Original Reports

This table describes what happens when you use the original report and a corresponding copied report exists.

Task Performed on the Original Report	Result When There Is a Copied Report
Open	Opens the copied report.
Schedule	Creates a report submission for the copied report.
Copy	Copies the original report.
Download	Downloads the copied report.
Customize	Edits the copied report.
History	Opens the job history of the copied report.

#### Related Topics

- [How You Modify Copies of Predefined Reports](#)
- [What happens to modified analytics and reports when a release update is applied?](#)
- [How You Access and Modify Report Components](#)
- [Where to Save Analytics and Reports](#)



## Cross-Subject Area Analyses

You can create analyses that combine data from more than one subject area. This type of query is referred to as a cross-subject area analysis. Cross-subject area analyses can be classified into three broad categories:

- Using common dimensions
- Using common and local dimensions
- Combining more than one result set from different subject areas using set operators such as union, union all, intersection, and difference.

### Common Dimensions

A common dimension is a dimension that exists in all subject areas that are being joined in the report. For example, Workforce Management - Worker Assignment Real Time and the Workforce Management - Worker Assignment Event Real Time subject areas have Worker, Job, and Department available. These dimensions are considered common dimensions between these two subject areas and they can be used to build a cross-subject area report.

### Common and Local Dimensions

The Worker Assignment Details dimension in the Workforce Management - Worker Assignment Real Time subject area isn't available in the Workforce Management - Worker Assignment Event Real Time subject area. Therefore it's a local dimension for the purposes of a cross-subject area query between these two subject areas.

#### Related Topics

- [How To Create a Cross-Subject Area Analysis for HCM](#)

## How You Create an Absence by Department Report

Here's how you can create an Oracle Business Intelligence Publisher report. In this example, you use a data model that you created using an Oracle Transactional Business Intelligence analysis for reporting on absence data by department.

These are the key decisions for this scenario.

Decision to Consider	In This Example
Which data model to use?	Use the Absence by Department data model that you previously created.
Which layout options to use?	Select Landscape and select Chart and Pivot table.
Add any additional charts to the report?	Yes. Add a chart with the same configuration as the graph. Add this chart above the graph. When you click the different bars in the chart, it filters the graph by that criteria.
Are filters needed for the report?	Yes. Add filters to the chart, graph, and table to exclude records where the Reason for Absence is blank.

Decision to Consider	In This Example
Is conditional highlighting needed?	Yes. Add conditional highlighting to the pivot table so that departments with 20 or more absences are highlighted in red.

## Create a Report

1. Click **Browse Catalog** to open the BI Catalog.
2. On the OBI EE home page, under Published Reporting, click **Report** in the Create region.
3. In the Create Report window, verify that Use **Data Model** is selected.
4. Click **Search** in the **Data Model** field.
5. In the Select Data Model window, select the absence by department data model that you created.
6. Click **OK**.
7. On the Create Report page, verify that the **Guide Me** option is selected, and click **Next**.
8. On the Create Report, Select Layout page, select **Landscape** for the layout.
9. Select the **Page Header** and **Page Footer** options.
10. Select the **Chart and Pivot Table** option.
11. Click **Next**.
12. On the Create Report, Create Chart page, drag Number of Absences and drop it onto the **Drop Value Here** box.
13. Drag Reason for Absence and drop it onto the **Drop Series Here** box.
14. Drag Department and drop it onto the **Drop Label Here** box.
15. Click **Next**.
16. On the Create Report, Create Table page, review the location of each element in the table to make sure it's formatted correctly.
17. Click **Next**.
18. Select **View Report**, and then click **Finish**.
19. In the Save As window, save your report in My Folders, and name it Absence by Department Report.
20. Click **OK**.
21. The report appears.

## Add Additional Details to the Report

1. In the upper right corner of the Absence by Department Report tab, click **Actions** to view the options for exporting, editing, and so on.
2. Click **Edit Report**.
3. Click **Edit**.
4. On the Insert tab, select **Chart**.
5. Drag the Chart component down to the report area, and drop it directly below the report title.  
When you drag the chart component down to the report area, use the blue bar as a guide to decide where to drop the chart. Drop the chart when the blue bar is directly below the report title.
6. In the Data Source region, select Number of Absences, and drag and drop it onto the **Drop Value Here** box.
7. Click Reason for Absence and drag and drop it onto the **Drop Label Here** box.
8. Click the new graph. A yellow border appears.
9. Click the bottom right corner of the yellow border, and drag the corner to the right so that the graph occupies the entire page.
10. In the Filter options on the Chart tab, click **Filter**.
11. In the Filter window, select Reason for Absence from the **Data Field** menu.
12. In the **Operator** field, select is greater than or equal to from the drop-down list.

13. In the **Value** field, enter 0.
14. Click **OK**.
15. Toggle 3D Effect on and off and choose one of the settings, based on your preference.
16. Repeat steps 9 through 14 for the second graph.
17. Click the pivot table to refocus the page on the pivot table. The yellow border appears.
18. In the Filter options on the Table tab, click **Filter**.
19. In the Filter window, select Reason for Absence from the **Data Field** drop-down list.
20. In the **Operator** field, select is greater than or equal to from the drop-down list.
21. In the **Value** field, enter 0.
22. Click **OK**.
23. Click the cells in the Number of Absences column.
24. In the Conditional Formatting region of the Pivot Table Data tab, click **Highlight**.
25. In the **Operator** field, select is greater than or equal to from the drop-down list.
26. In the **Value** field, enter 20.
27. Click in the **Background Color** field.
28. In the **Color Picker** window, select Red (ff0000)
29. Click **OK**.
30. In the Highlight window, click **OK**.
31. Click **Save** to save the changes to your report.
32. Click **Return**.
33. Click **View Report**.
34. In the upper graph, click the different bars to see how the lower graph filters the results.

#### Related Topics

- [Create a New Data Model for a HCM Report](#)
- [How You Create an Absences by Department Analysis](#)

## Layouts

### Create and Edit Report Layouts

The layout determines what and how data is displayed on report output. Each report has at least one layout template. This topic describes the following aspects of report templates:

- Layout templates
- Layout template types
- Overall process of managing layouts
- Deleting layout templates

### Layout Templates

To modify a layout, you edit the layout template, which:

- Defines the presentation components, such as tables and labeled fields.
- Maps columns from the data model to these components so that the data is displayed in the correct place.

- Defines font sizes, styles, borders, shading, and other formatting, including images such as a company logo.

## Layout Template Types

There are a few types of template files to support different report layout requirements.

- **RTF:** Rich text format (RTF) templates created using Microsoft Word.
- **XPT:** Created using the application's layout editor, these templates are for interactive and more visually appealing layouts.
- **eText:** These templates are specifically for Electronic Data Interchange (EDI) and electronic funds transfer (EFT) information.

You can also create and edit other types of templates using Adobe PDF, Microsoft Excel, Adobe Flash, and XSL-FO.

## Overall Process to Create or Edit Layouts

Editing or creating report layout, for example using Microsoft Word or the layout editor, involves making the actual changes to the template file. But that task is just one part of the entire process for modifying layouts.

1. Copy the original report and save the new version in **Shared Folders > Custom** in the business intelligence (BI) catalog. You create or edit templates for the new copy of the report.

**Tip:** You can use the Customize option if the original is a predefined report.

2. Review report settings for online viewing.
3. Generate sample data for the report.
4. Edit or create the layout template file.
5. Upload the template file to the report definition. Skip this step if you're using the layout editor.
6. Configure the layout settings.

You can also add a table of contents to the PDF document created when previewing a contract using the Opt-In page. A table of contents helps you quickly scan and locate a specific section in a PDF document. See the Enable Table of Contents in the Contract Preview topic to enable this feature.

Click where you want to insert the table of contents, usually at the beginning of a document.

Click **References > Table of Contents** and then choose an Automatic Table of Contents style from the list.

## Deleting Layout Templates

To remove a layout template for a report:

1. Select your report in the BI catalog and click **Edit**.
2. In the report editor, click **View a list**.
3. Select the layout template and click **Delete**.

### Related Topics

- [Make Reports Available for Online Viewing](#)
- [Generate Sample Report Data](#)
- [Create and Edit Report Layout Templates Using the Layout Editor](#)
- [Upload the Layout Template File to the Report Definition](#)
- [Configure Layout Settings for Reports](#)

## Make Reports Available for Online Viewing

Some reports are set up so that you can only view them through another application or submit them as scheduled processes. To view your report online while you're editing it, you must define a few settings. When you're done editing your report, make

### Updating Report Properties

1. Select your report in the business intelligence catalog and click **Edit**.
2. In the report editor, click **Properties**.
3. In the Report Properties dialog box, select **Run Report Online** and deselect **Report is Controlled by External Application**.

### Updating Layout Settings

1. Back in the report editor, click **View a list**.
2. Make sure that the **View Online** check box is selected.

#### *Related Topics*

- [How You Access and Modify Report Components](#)
- [Create and Edit Report Layouts](#)

## Generate Sample Report Data

Depending on the type of report layout changes you're making, sample data can be required or optional. You generate sample data, and then load it for use with your layout so that you can map data fields to layout components.

For example, you can generate sample data from the:

- Report data model
- Report viewer
- Scheduler

### Generate Sample Data from the Data Model

Follow these steps:

1. Select your data model in the business intelligence (BI) catalog and click **Edit**. Alternatively:
  - a. In the catalog, find the report to generate sample data for and click **Edit**.
  - b. Click the data model name in the report editor.
2. In the data model editor, click **View Data**.
3. Enter values for any required parameters, select the number of rows to return, and click **View**.
4. To save the sample data to the data model, click **Save As Sample Data**.  
If you're designing a .rtf template, click **Export** to save the file locally.

5. Save the data model.

## Save Sample Data from the Report Viewer

For reports that are enabled for online viewing, you can save sample data from the report viewer:

1. Select the report in the BI catalog.
2. Click **Open** to run the report in the report viewer with the default parameters.
3. On the Actions menu, click **Export**, then click **Data**.
4. Save the data file.

## Save Sample Data from the Scheduler

For reports that are enabled for scheduling (not necessarily as a scheduled process), you can save sample data from the scheduler:

1. Select the report in the BI catalog.
2. Click **Schedule**.
3. On the General tab, enter values for any report parameters.
4. On the Output tab, ensure that **Save Data for Republishing** is selected.
5. Click **Submit**.
6. Open the Report Job History page.
7. On the global header, click **Open**, then click **Report Job History**.
8. Select your report job name in the Job Histories table.
9. On the details page, in Output and Delivery, click the **XML Data Download** icon button.

### Related Topics

- [How You Access and Modify Report Components](#)
- [Make Reports Available for Online Viewing](#)
- [Create and Edit Report Layouts](#)

## Configure Layout Settings for Reports

As part of creating or editing layout, you can set report properties related to layout. These settings determine, for example, which layouts users can choose from when viewing or scheduling the report. The settings apply only to your report.

### Setting Layout Properties

1. Select your report in the business intelligence catalog and click **Edit**.
2. In the report editor, click **View a list**.
3. Set layout properties, some of which are described in this table.

Setting	Usage
Output Formats	Depending on the requirements for a report, you may want to limit the output file formats (for example, PDF or HTML) that users can choose. The available output formats vary depending on the template file type.

Setting	Usage
Default Format	When multiple output formats are available for the report, the default output format is generated when users open the report in the report viewer.
Default Layout	When multiple layouts are available for the report, you must select a default layout to present it first in the report viewer.
Active	Active layouts are available for users to choose from when they view or schedule the report.
View Online	Select this check box so that layouts are available to users when they view the report. Otherwise, the layout is available only for scheduling the report.

4. Click **Save Report**.

*Related Topics*

- [How You Access and Modify Report Components](#)
- [Create and Edit Report Layouts](#)

## Layout Templates

### Create and Edit Report Layout Templates Using the Layout Editor

The layout editor in the application provides an intuitive, drag-and-drop interface for creating pixel-perfect reports with PDF, RTF, Excel, PowerPoint, and HTML output. The layout template files you create with this tool have an .xpt extension. The layout editor tool is the only

#### Prerequisite

Make sure that sample data is generated from the data model that your report is using.

#### Using the Layout Editor

To create or edit XPT templates:

1. Select the report in the business intelligence (BI) catalog and click **Edit**.
2. In the report editor, click **Edit** to update a template.  
Or, click **Add New Layout** and select a template type in the Create Layout section.
3. Create or edit the layout.
4. Click **Save** to save the layout to the report definition.

*Related Topics*

- [Generate Sample Report Data](#)
- [How You Access and Modify Report Components](#)
- [Set Up for RTF and Excel Report Layout Templates](#)
- [Create and Edit Report Layouts](#)

## Set Up for RTF and Excel Report Layout Templates

You can use Microsoft Word or Microsoft Excel to create or edit RTF and Excel layout templates, in addition to the layout editor in the application. If you use Word or Excel directly, you must download and install the appropriate add-in so that

**Note:** If you're designing a new layout for your report, consider using the layout editor instead unless you are an experienced layout designer.

### Installing the Add-In

1. Open the Reports and Analytics work area.
2. Click the **Browse Catalog** button.
3. Click **Home**.
4. In the Get Started pane, click **Download BI Desktop Tools**.
5. Select the add-in for the type of template you're working with.
  - **Template Builder for Word:** RTF templates
  - **Analyzer for Excel:** Excel templates
6. Save and then run the installer.

### Protecting Reports by Using Passwords

You can assign a password to your report and protect it from unwanted access. You can do this by setting the runtime properties at the server level using the Runtime Configuration page. The same properties can also be set at the report level, from the report editor's Properties dialog. If different values are set for a property at each level, then report level takes precedence.

The following table describes the properties you can use to set passwords for reports in different formats.

Report Format	Property Name	Description	Default	Configuration Name
DOCX output	Open password	Use this property to specify the password that report users must provide to open any DOCX report.	NA	<code>docx-open-password</code>
PPTX output	Open password	Use this property to specify the password that report users must provide to open any PPTX report.	NA	<code>pptx-open-password</code>



Report Format	Property Name	Description	Default	Configuration Name
XLSX output	Open password	Use this property to specify the password that report users must provide to open any XLSX output file.	NA	<code>xlsx-open-password</code>

#### Related Topics

- [Create and Edit Report Layout Templates Using the Layout Editor](#)
- [Create and Edit RTF Report Layout Templates](#)
- [Create and Edit Report Layouts](#)
- [eText Report Layout Templates: Explained](#)

## Create and Edit RTF Report Layout Templates

An RTF template is a rich text format file that contains the layout instructions to use when generating the report output. Use Microsoft Word with the Template Builder for Word add-in to design RTF templates.

### Prerequisites

Install the Template Builder for Word add-in, and generate sample data.

### Using Template Builder for Word

To modify an RTF template:

1. If you are editing an existing layout:
  - a. Select your report in the business intelligence catalog and click **Edit**.
  - b. In the report editor, click the **Edit** link of the layout to download the RTF file.

If you are creating a new layout, skip this step.

2. Open the downloaded RTF template file in Microsoft Word. Or, if you're creating a new template, just open Microsoft Word.
3. Load the sample data that you generated.
4. Edit or create the layout template.
5. Save the file as Rich Text Format (RTF).

#### Related Topics

- [How You Access and Modify Report Components](#)
- [Generate Sample Report Data](#)
- [Set Up for RTF and Excel Report Layout Templates](#)
- [Upload the Layout Template File to the Report Definition](#)
- [Create and Edit Report Layouts](#)

## Upload the Layout Template File to the Report Definition

If you're creating or editing a report layout using the layout editor, the layout is automatically saved to the report definition, so you can skip this step. For all other layout types, for example RTF, upload the template file to the report definition after

### Uploading the Template File

1. Select your report in the business intelligence catalog and click **Edit**.
2. In the report editor, click **View a list**.
3. In the table that lists the layouts, click **Create**.
4. Click **Upload** in **Upload or Generate Layout**.
5. In the Upload Template File dialog box:
  - a. Enter a layout name.
  - b. Browse for and select the layout template file that you created or edited.
  - c. Select the template file type.
  - d. Select the locale, which you can't change once the template file is saved to the report definition.
  - e. Click **Upload**.
6. Save the report definition.

#### Related Topics

- [How You Access and Modify Report Components](#)
- [Create and Edit RTF Report Layout Templates](#)
- [Create and Edit Report Layouts](#)
- [eText Report Layout Templates: Explained](#)
- [Creating and Administering Analytics and Reports](#)

## Custom Dashboards

### Create and Edit Dashboards

You can create and edit dashboards and define their content and layout to organize your analytics and other objects to create meaningful and navigable palettes of information. In addition to objects in the business intelligence (BI) catalog, such as analyses, reports, and prompts, you

### Create a Dashboard

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab (if available).
2. Click **Browse Catalog**.

3. Click **New** and select **Dashboard**.
4. Enter the dashboard's name and description, and select a folder to save in.
5. With the **Add content now** option selected, click **OK**.
6. Optionally, add more pages, or tabs, within the dashboard.
7. Bring items from the Dashboard Objects or Catalog pane to add content to a page.
8. Click **Save**.

**Note:** The first dashboard page is saved with the **page 1** name by default. To rename this page:

1. Click the **Catalog** link.
2. In the Folders pane, select your dashboard.
3. For **page 1**, click **More** and select **Rename**.
4. Enter the new name and click **OK**.

## Edit a Dashboard

1. In the Reports and Analytics work area or the Reports and Analytics panel tab (if available) select your dashboard in the pane and click **More**.
2. Select your dashboard in the pane and click **More**.
3. Click **Edit**.
4. Perform steps 6 and 7 from the preceding Creating Dashboards task, and make other changes as needed, for example:
  - Remove content from the dashboard.
  - Move content around.
  - Change the layout of a page.

### Related Topics

- [Where to Save Analytics and Reports](#)

## Data Structure

## Data Models

### Modify Data Models

A data model defines where data for a report comes from and how that data is retrieved. To create a modified data model if you need additional data not included in the existing model, you can copy and edit an existing data model

You can connect to external data sources using web service or HTTP data sources. Any end point that requires IP's being allowed or proxy configuration may be out of service during maintenance activity. If you select a data source that isn't supported, you will get a warning message. Here are some considerations about external data sources.

- New modified JDBC connections aren't allowed. Existing modified JDBC connections continue to work.
- JNDI connections are restricted to audit data only.
- Web service connections are supported.
- HTTP connections are supported.
- File connections are supported in the Data Model Editor.
- Content Server connections are supported.

## Create a Data Model

1. In the business intelligence (BI) catalog, click **New** and select **Data Model** in **Published Reporting**.
2. Optionally click the **Properties** node in the Data Model pane to set properties for the data model. For example, to prevent null values from removing columns from a report, select **Include Empty Tags for Null Elements** in the XML Output Options section of the properties. This preserves the order of columns when there are null values in an exported report.
3. Click the **Data Sets** node in the Data Model pane to create or edit data sets, which determine where and how to retrieve data. Click **New Data Set** and select a data set type. It's best practice to use the BI repository as a data source, so you should select either:

- **SQL Query:** To use a Query Builder tool to define what to use from the repository. Select **Oracle BI EE** as the data source.
- **Oracle BI Analysis:** To use columns from a selected analysis.

**Note:** OBIEE data sets are retrieved using logical tables in the BI metadata and joined internally, so there is no need for explicit joins within a subject area. It's recommended to create a single data set with tables from the same subject area.

4. Optionally, to limit the data included in the report output, click the **Parameters** node in the Data Model pane to define variables that users can set when they use the report. You can set parameters as mandatory if they're required, for example to filter data by a prompted value to improve query performance. These are indicated by an asterisk when you run the report. Required report parameters are required before you can run a report using the View Data option or online, or schedule it.

**Note:** The order of parameters is important if there are job definitions defined for reports that use your data model. If you change the order in the data model, also update the job definitions.

5. Click **Validate** to view query and performance warnings.
6. Save your data model in **Shared Folders > Custom**.

## Data Model Supported SQL Statements

Data models support standard SQL `SELECT` statements and non-standard SQL, including:

- Database procedures
- Cursor statements that return nested result sets
- Reference cursor functions that support explicit static SQL `SELECT` statements
- SQL query parameters used in a `WHERE` clause

- Conditional queries that execute multiple SQL queries in a single data set using an if-else expression

Data models don't support SQL statements with these keywords: **DELETE, INSERT, UPDATE, DROP, EXECUTE, ALTER, MERGE, DBMS\_SQL, CREATE, AUTONOMOUS\_TRANSACTION, PRAGMA, WRITETEXT, UPDATETEXT, LOAD, UNLOAD, DATABASE, GRANT, REVOKE, TRUNCATE.**

## Edit a Data Model

1. Copy the predefined data model.
  - a. Find the data model in the BI catalog and click **Copy**.
  - b. Paste within **Shared Folders > Custom** in a subfolder that has a folder path similar to the folder that stores the original data model.
  - c. For the data model you pasted, click **More**, and select **Edit**.
2. Optionally click the **Data Model** node in the Data Model pane to set properties for the data model.
3. Click the **Data Set** node in the Data Model pane to create or edit data sets.

Most predefined data models are of type SQL Query, and are set up to get application data from the following tables:

- **ApplicationDB\_FSCM:** Financials, Supply Chain Management, Project Management, Procurement, and Incentive Compensation
  - **ApplicationDB\_CRM:** Sales
  - **ApplicationDB\_HCM:** Human Capital Management
4. Perform steps 4 through 6 from the preceding Create a Data Model task, as needed.

### Related Topics

- [How You Access and Modify Report Components](#)
- [How Data Is Structured for Analytics](#)
- [Generate Sample Report Data](#)
- [Set Data Model Properties](#)

## Create a New Data Model for a HCM Report

Here's how to create a data model for an Oracle Business Intelligence Publisher report.

In this example, you create a data model using an absence by department analysis that you created previously.

### Create a Data Model

1. Navigate to the Reports and Analytics work area and click **Browse Catalog** to open the Oracle Business Intelligence Catalog.
2. On the OBI EE home page under Create, Published Reporting, click **More** and select **Data Model**.
3. On the Diagram tab, click **New Data Set** and select **Oracle BI Analysis**.
4. In the New Data Set - Oracle BI Analysis window enter a name for your data model.
5. In the Oracle BI Analysis field, click **Search**.
6. In the Oracle BI Catalog window, click **Users**.
7. Click the name of the person who created the analysis.
8. Locate and select the absence by department analysis that you have previously created.

9. In the **Time Out** field, enter 120.
10. Click **OK**.
11. Click the **Structure** tab.
12. In the **XML Tag Name** field for the Department Name, replace the default value with DEPT\_NAME, and replace the default value in the Display Name with Department.
13. In the **XML Tag Name** field for the Absence Reason, replace the default value with ABSENCE\_REASON, and replace the default value in the Display Name with Reason for Absence.
14. In the **XML Tag Name** field for the Assignment Absences, replace the default value with NUMBER\_ABSENCES, and replace the default value in the Display Name with Number of Absences.
15. Click the **Data** tab.
16. On the Data tab, click **View**.
17. View the report structure and click **Save As Sample Data**.
18. Click **OK**.
19. In the upper-right corner, click **Save**.
20. In the Save As window, select **My Folders**, and enter Absence by Department Data Model.

## Advanced Procedures

### Create Job Definitions to Run Reports as Scheduled Processes

Every job definition has a job type that reflects the executable for the job, such as Java or Oracle Analytics Publisher reports. You can only create job definitions that are based on Analytics Publisher reports.

When there's a job definition for an Analytics Publisher report, users can run the report as a scheduled process in the Scheduled Processes work area. Otherwise, they can open reports (which are set up to be run online) elsewhere, for example in the Reports and Analytics work area.

**CAUTION:** Make sure your user name doesn't contain any spaces. If you create a custom job definition using a user name that contains spaces, other users might get errors when they submit this custom job definition.

### Create Job Definitions

Here's how you create a job definition for an Analytics Publisher report:

1. In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.  
**Note:** If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.
2. On the Manage Enterprise Scheduler Job Definitions and Job Sets page, click the Manage Job Definitions tab.
3. Click the **Create** icon.
4. Fill in the Job Definition section.

Field or Check Box	What You Do
Display Name	Enter the name that users see and select to submit the scheduled process.

Field or Check Box	What You Do
Name	Enter a name with only alphanumeric characters, for example, <b>AtkEssPrograms1</b> . It can't have spaces or any special characters.
Job Application Name	<p>Select the application to associate the job definition with. What you select depends on the task you're using.</p> <ul style="list-style-type: none"> <li>Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications: Select <b>CrmEss</b>.</li> <li>Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications: Select <b>FscmEss</b>.</li> <li>Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications task: Select <b>EarHcmEss</b>.</li> </ul>
Enable submission from Enterprise Manager	Make sure you don't select this check box.
Job Type	Select <b>BIPJobType</b> . Don't select any other type.
Default Output Format	Select the output format users get by default when they submit the scheduled process.
Report ID	<p>Enter the path to the report in the BI catalog, starting with the folder within Shared Folders, for example: <b>Custom/&lt;Family Name&gt;/&lt;Product Name&gt;/&lt;Report File Name&gt;.xdo</b>.</p> <p>Make sure to include the <b>.xdo</b> file extension for the report definition.</p>
Enable submission from Scheduled Processes	Leave the check box selected.

- In the Parameters subtab, you can define parameters that are available to users when they submit the scheduled process based on your job definition.
- In the User Properties subtab, don't create or edit a user property unless you have the accurate information that's required to create or edit one. The **EXT\_PortletContainerWebModule** user property is automatically created.
- Click **Save and Close**.

When you create a job definition, a privilege with the same name as the job definition is automatically created with a Run prefix. For example, for a job definition named **MyProcess1**, with display name **My Process**, the privilege code is **RUN\_MYPROCESS1**, with **Run My Process** as the name. Make sure to use the Security Console to assign this privilege to roles so that users who need to run the process can do so.

### Related Topics

- [Define Parameters for Job Definitions](#)
- [How do I update existing setup data?](#)
- [Configure Offerings](#)
- [Manage List of Values Sources](#)
- [Edit Job Definitions](#)

## Define Parameters for Job Definitions

A parameter controls which records are included or how they are affected when a job runs. Job definitions can have one or more parameters or none at all.

You define parameters while creating or editing job definitions using the Manage Enterprise Scheduler Job Definitions and Job Sets page. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions or a product-specific functional area
- Task: Manage Enterprise Scheduler Job Definitions and Job Sets

When users run the scheduled process for job definitions of type BIPJobType, the values they enter for the parameters determine the data to be included in the report. Also, the values are passed to the data model that the report is using.

The parameters that you define must be in the same order as parameters in the data model for the report. For example, the data model has parameters in this order:

- P\_START\_DATE
- P\_END\_DATE
- P\_CURRENCY

You create parameters as follows:

- Start Date
- End Date
- Currency

### Defining Parameters: Job Definitions

To define parameters while creating or editing job definitions:

1. On the Manage Job Definitions page, open the Parameters sub tab.
2. Click **Create**.
3. Enter the parameter prompt that users see when they submit the scheduled process.
4. Select a data type and configure how the parameter and the data entered are displayed, as described in this table.

Data Type	Fields
Boolean	Select this if you want the parameter to be a check box.  Select <b>True</b> or <b>False</b> to determine if the check box is selected or not.



Data Type	Fields
Date or time	<p>Select <b>Date and time</b> or <b>Date only</b> option.</p> <p>Select a value from the <b>Default Date Format</b>.</p> <p><b>Note:</b> Make sure the format you select here is the same as the format used for the job. If the job definition type is BIPJobType, select <b>yyyy-MM-dd</b>, and make sure the data model for the corresponding Oracle Analytics Publisher report is using the same date format.</p>
Number	<p>Select a <b>Number Format</b>.</p> <p>Select <b>Left</b> or <b>Right</b> for data alignment.</p>
String	<p>Select a <b>Page Element</b>.</p> <p>Select <b>Text box</b> if you want the user to provide a text.</p> <p>Select <b>Choice list</b> if you want a list with limited options (maximum 10). If there are more than 500 values, users will get an error when they try to set the parameter as part of submitting the scheduled process.</p> <p>Select <b>List of values</b> if you want a list with unlimited options with a search facility.</p>

5. Select the **Read Only** check box if you don't want to enable users to set this parameter. When a parameter is set as read only, the user is required to provide a default value to be passed to the job definition.
6. If you select list of values or choice list page element, select a **List of Values Source** and an **Attribute**. Use the list of values sources from the Manage List of Values Sources tab. Don't define lists of values in the data model that the report is using.
7. From the list of available attributes, select the attributes you want to appear in the list and move them to the selected attributes section. These attributes determine the values that the user can see.
8. Define a **Default Value** for the parameter.
9. In the **Tooltip Text** field, provide additional information for the user to follow.
10. Select the **Required** check box if users must set this parameter to submit the scheduled process.
11. Select the **Do not Display** check box if users should not see this parameter while submitting the process.
12. Click **Save and Create Another** or **Save and Close**.

## Dependent Parameters

The attributes of some parameters depend on the attributes or values of certain other parameters. The attributes of a parameter would change if the value of its dependent parameter changes.

For example, you have three parameters, namely Country, State and, City. In this case, the value of the Country parameter would determine the values available in the State parameter. The values in the State parameter would determine the values available in the City parameter.

*Related Topics*

- [Create Job Definitions to Run Reports as Scheduled Processes](#)
- [Define Dependent Parameters in Job Definitions](#)

## Set Up Reports for Scheduling

You can set up reports as scheduled processes so users can submit them from the Scheduled Processes and other work areas.

If you want users to also submit these scheduled processes from the Reports and Analytics work area and panel tab, then you need to configure properties for the corresponding reports.

### Enable a Report for Scheduling

1. In the Reports and Analytics work area or panel tab, edit the report in the business intelligence catalog.
2. Click **Properties**.
3. In the General tab in the Properties dialog box, enter the field values as shown in this table and then click **OK**.

Field	Value
Enterprise Scheduler Job Package Name	Enter the path for the job definition, for example: <code>/oracle/apps/ess/&lt;product family&gt;/&lt;product&gt;/&lt;business area&gt;/Jobs</code>
Enterprise Scheduler Job Definition Name	Enter the job definition name (not display name), for example: <code>ABCDEFGF</code>

*Related Topics*

- [How You Access and Modify Report Components](#)
- [Create Job Definitions to Run Reports as Scheduled Processes](#)
- [Set Up the Reports and Analytics Panel Tab](#)

## Enable Descriptive Flexfields for Oracle Business Intelligence

You can use descriptive flexfields in Oracle Transactional Business Intelligence. If you haven't already created flexfield segments, you first create them, then deploy them, and then import them into Oracle Transactional Business Intelligence.

To use descriptive flexfields with Transactional Business Intelligence:

- Define flexfield segments.
- Run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process.
- Create an analysis in Transactional Business Intelligence.

## Define Flexfield Segments

To define flexfield segments:

1. Navigate to the Setup and Maintenance work area.
2. Open the Manage Descriptive Flexfields task.
3. Search for and select the flexfield code that you want to use, and edit it.
4. Select the **BI Enabled** option.
5. Save the flexfield and deploy it.

## Run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence Process

To run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process:

1. Navigate to the Scheduled Processes page.
2. In the Search Results region of the Overview page, click **Schedule New Process**.
3. In the Schedule New Process window, click the **Search: Name** arrow in the Name field, and click **Search**.
4. In the Search and Select: Name window, enter Import Oracle Fusion Data Extensions for Transactional Business Intelligence in the **Name** field.
5. Select the row for Import Oracle Fusion Data Extensions for Transactional Business Intelligence, and click **OK**.
6. In the Schedule New Process window, click **OK**.
7. In the Process Details window, click **Submit**.
8. In the Confirmation window, click **OK**.
9. In the Process Details window, click **Close**.
10. On the Scheduled Processes, Overview page, enter Import Oracle Fusion Data Extensions for Transactional Business Intelligence in the **Name** field.
11. Click **Search** to see the status of the job.

**Note:** The job might take several minutes, depending on your application.

## Create an Analysis in Transactional Business Intelligence

After you've successfully run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process:

1. In the Navigator menu under Tools, select **Reports and Analytics**.
2. In the Reports and Analytics work area, click **Create** and select **Analysis**.
3. In the Select Subject Area window, find and select the subject area that contains the flexfield that you deployed and imported.

### Related Topics

- [Human Capital Management Descriptive Flexfields for Oracle Transactional Business Intelligence](#)

## What happens to modified analytics and reports when a release update is applied?

Updates don't affect the Custom folder or My Folder in the catalog, anything saved there is preserved in updates.

This includes analytics and reports you edited or created. But anything saved outside those folders, in the predefined catalog, is preserved only if the update doesn't include a new version of those objects.

If an update includes a new version of a predefined object that you edited outside the Custom folder, the changes you made are saved as a new object. The new version from the update overwrites the existing predefined object. And a copy of the existing object (with your edits) is automatically created in the same folder, with a new name that indicates it's a new version.

If the update includes a new version of both the predefined object and a folder in its file path, the new folder name, along with the new version of the object, overwrites the existing predefined folder and object. And a copy of the existing folder (along with your edited object) is automatically created. The folder is renamed to indicate that it's a new version, but your edited object isn't renamed.

If folders named backup\_nnn are automatically created in the catalog due to conflicts, after reviewing and resolving any conflicts, Oracle recommends that you manually delete the backup folders from the catalog. You can contact your help desk to request an automated removal if you have many folders to delete.

**Note:** Future updates won't affect renamed objects or anything within a renamed folder.

# 9 Data Import and Export

## Importing Contracts

### Overview of Importing Contracts

You can use Oracle's Import Management to bring existing legacy contracts into your Contracts environment. You use Import Management from the Tools work area, to import data from text files. You can create, update, or delete records through import.

### Import Flow

Here's the import flow:

- Upload the source file to the file repository.
- Identify the target import objects.
- Map import object attributes to fields in the source file you uploaded.
- Schedule the import activity to populate the interface tables with the data.
- Import contract attachments (optional).

### Resources

To help you get started, you can use the document and example templates provided in Document ID 2151576.1 on My Oracle Support.

Also see the Understanding Import and Export Management for CX Sales and Fusion Service guide. This guide has instructions on how to import contacts and the different import options available to you.

#### *Related Topics*

- [What are my data import options?](#)
- [How do I import data?](#)
- [Overview of Import Process](#)

### Import Contracts

You can import contracts from a source file into the application. To set up Import Management for importing contract data, use Import Management.

Import Management supports the import of data from an external text or XML file to interface tables, and from interface tables to target application tables.

This topic describes:

- What you can import
- The interface table
- The import process

## What You Can Import

All contracts can be imported except for those in Expired status. The import file can use names as well as IDs to identify data, for example, Party ID or Party Name. You can import only one version for each contract, with this data:

- Contract header
- Primary party (supplier, customer, or partner)
- One contract owner: depending on the owner role, this is either an employee or salesperson of the contract's business
- One primary contract party: a supplier or partner or customer
- Primary contract document as an attachment
- Additional attachments: the import file lists the attachments which are imported using the file import user interface (UI), either individually or as a ZIP file.

You can import new contracts as well as update or delete a contract using import. The same restrictions apply to update and delete as are applied when you perform those same actions in the application UI.

## Interface Table

The table describes that the application uses these database tables for importing contracts:

Table	Description
OKC_IMP_CONTRACT_HEADERS	The interface table used to load contract data from external systems. This table maps to logical contract data: contract header, contract party, contract party contact, contract terms, and contract attachments.
OKC_IMP_CONTRACT_ADDRS	Interface table for importing contract addresses.
OKC_IMP_CONTRACT_CNTRACTS	Interface table for importing contract contacts.
OKC_IMP_CONTRACT_LINES	Interface table for importing contract lines.
OKC_IMP_CONTRACT_PARTIES	Interface table for importing contract parties.
OKC_IMP_CONTRACT_RELNS	Interface table for importing contract relationships.
OKC_K_SALES_CREDITS_INT	Interface table for sales credits.
PJB_BILL_PLANS_INT	Interface table for importing project billing plans.
PJB_BILLING_CONTROLS_INT	Interface table for importing project billing controls.

Table	Description
PJB_CNTRCT_PROJ_LINKS_INT	Interface table for importing project procurement links.

Details about the fields and valid values for import are available from Contracts section of the *Oracle CX Tables and Views for CX Sales and Fusion Service* guide. See [Related Topics](#).

## Importing Contracts from a Source File

To import contracts, use the Import Management and upload contract data into the interface table. To access this feature, select the **Manage File Import Activities** task. This task in the Setup and Maintenance work area is part of the Enterprise Contracts offering in the Enterprise Profile functional area.

**Note:** The Edit Import Activity: Map Fields page contains an import mapping that details the mapping between source file columns and contract attributes, but you may define additional import mappings.

For more information, see the *Understanding Import and Export Management for CX Sales and Fusion Service* guide.

### Related Topics

- [Understanding Import and Export Management for CX Sales and Fusion Service](#)

## Import Activity Source File Options

This topic describes the source file options defined in the Import Activity that are used by the import process to locate and parse the source object.

### Source File Data

Enter attribute details pertaining to the source file as described in this table.

Option	Description
File Type	Source file must be either Text, ZIP, or XML.
Data Type, Delimiter, and Header Row Included	A Text file type can further be defined based on how the data is delimited and if the source file is expected to include a row of headings for each column.
Import Mapping	Displays a list of predefined mappings for the object selected for this import activity. The selected mapping will be used as the basis for mapping your source file in the next Import Activity step.

### Source File Location

This table provides the available options when locating your source file for import.

Option	Description
Upload From	<p>You can upload the source file from the following locations:</p> <ul style="list-style-type: none"> <li>Desktop</li> </ul> <p>If you select <b>Desktop</b>, then a <b>File Name</b> field with an associated Update button is displayed. Click <b>Update</b> and browse to search and select the file you want to upload.</p> <ul style="list-style-type: none"> <li>WebCenter Content Server</li> </ul> <p>If you select <b>WebCenter Content Server</b>, then a <b>File Name</b> field with an associated <b>Browse</b> button is displayed. Click and browse to search and select the file you want to upload.</p>

## How You Import Contracts

You can use the information in this topic to import contracts.

You will also learn how to:

- Identify and associate records
- Access and use reference files to evaluate attributes

Use the Import Management objects and target objects in this table to import contracts.

Import Object	Target Object
Contract	<b>ImportContractHeader1</b>
Contract Party	<b>ImportContractParty1</b>
Contract Party Contact	<b>ImportContractPartyContact1</b>
Contract Lines	<b>ImportContractLines1</b>
Associated Projects	<b>ContractProjectLinkageImport1</b>
Bill Plans	<b>BillPlanImport1</b>
Billing Controls	<b>BillingControlImport1</b>
Contract Sales Credit	<b>ImportContractSalesCredit1</b>
Contract with no lines (Non-Hierarchical)	<b>ImportContractHeader1</b>

Use the Import Management objects and target objects in this table to import service contracts.



Import Object	Target Object
Contract	ImportContractHeader1
Contract Bill Line	ImportContractBillLine1
Contract Charge	ImportContractCharge1
Contract Charge Component	ImportContractChargeComponent1
Contract Covered Asset	ImportContractCoveredAsset1
Contract Line	ImportContractLine1
Contract Manual Adjustment	ImportContractManualAdjustment1
Contract Party	ImportContractParty1
Contract Party Contact	ImportContractPartyContact1
Contract Relationship	ImportContractRelObject1

**Note:** In the Contracts.csv file, the **Auto Generate Billing** option is set to **N**. If you need to generate the invoice bills, then change the **Interfaced** option to **Y**.

## Contract Target Import Objects

You use the Contract import objects to import basic contract information and party information about the customer or supplier, the organization or business unit, and party contacts. The Contract target import object organizes the individual attributes of the contract such as the contract number and contract type. The Contract Party target import object includes the individual attributes of the party information such as the business unit, contract owner, and the primary party. The Contract Party Contact target import object includes the primary party contact information. You use the contract header attributes to import contract headers.

The employee of the associated business unit is the contract owner. The external party can be the customer, the supplier, or the partner. The contract type determines the properties of the contract. For example, the type of permitted contract lines, contract validation checks, and contract acceptance signature requirements.

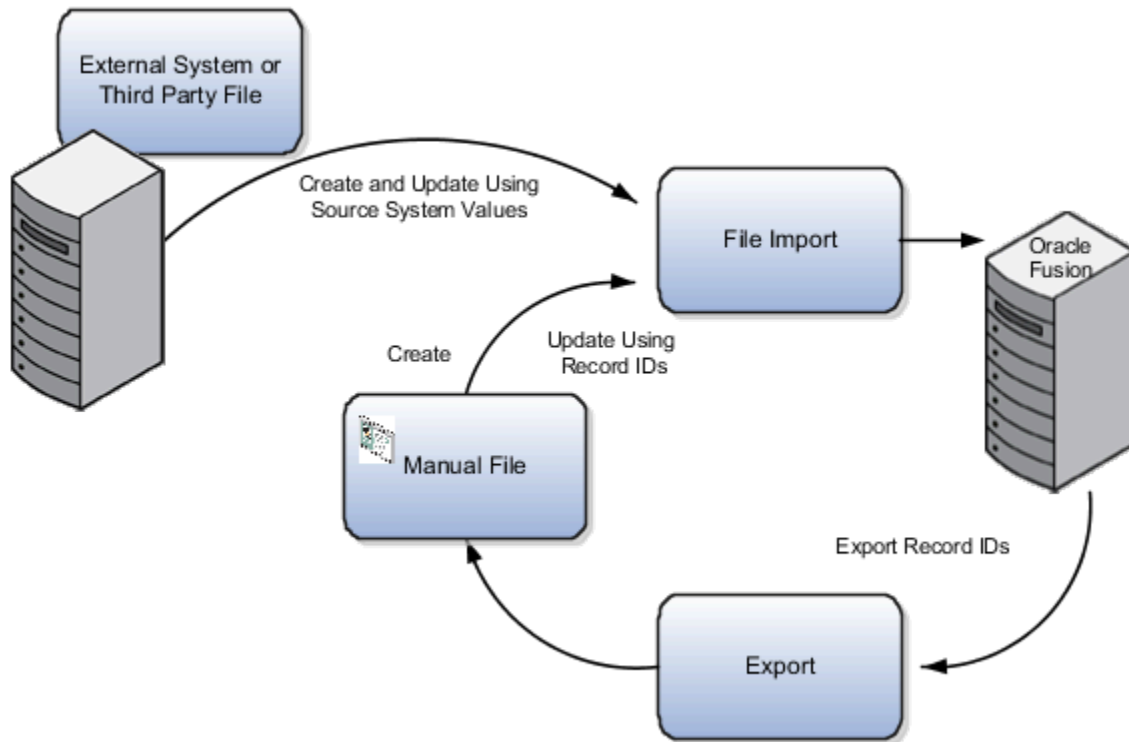
**Note:** Line auto-numbering wasn't enabled for contracts imported in older versions of Oracle Applications Cloud. You need to enable Line auto-numbering only for new contracts. Contracts that already exist will continue to require manual line numbering.

## Identify and Associate Records with Each Other

To create or update existing contracts using Import Management, your source file must contain information about the contract and the associated business unit and contract owner, and external party and external party contact. When you

import the data, a record is created for each contract. Each contract record in the application has a unique ID. This ID is often referred to as the internal ID or object key. You can use these IDs to uniquely identify the records when importing updates.

When the source of your data isn't an external application and you don't plan to regularly update the data, you don't need the source record information such as the contract number and the contract type. To import updates to your existing data, you can export the Oracle record ID and add it to your source file. The import process uses the record ID to identify the existing record. This image shows how you can import contracts.



## Before You Start

The minimum data required to import contract information depends on:

- The purpose of the import. The data is different when you create both the party and the contract in the same import batch, add new contracts to an existing party, or update a contract record.
- Identifying records. You can select the attributes you need for the import process when identifying and associating records. The values provided in your source file may require a setup task or manual step to ensure that they're validated at the time of import. Before preparing the source file, complete the prerequisite steps to determine the data values and then include those values in your source file.

## Evaluate Attributes with Reference Files

For more information about import attributes, see the Oracle CX Understanding Import and Export Management for CX Sales and Fusion Service guide available on the Oracle Help Center. See the topic for your import object, which includes links to reference files for target import objects.

Review a reference file to see attributes that are available to import and information for each attribute, including requirement for inclusion in an import, validation requirements, default value, data type, data length, and description.

## Additional Tips

You can explore related topics by entering the following keywords in the Oracle Help Application search. The Help Application is available from any Oracle Application page by clicking **Applications Help** from the Settings and Actions menu.

- Importing customers
- Importing suppliers
- Importing partners
- Importing contacts

## How You Enable High-Volume Import

The bulk import mode is designed to import millions of contracts at once.

You use Import Management from the Tools work area, to import data. In the **Advanced Options** section, the option **Enable High-Volume Import** is selected by default. For a list of supported objects, see the topic [Data Import Options](#).

### Note:

If ZCA\_FILE\_IMPORT\_ENABLE\_CUSTOM\_BUSINESS\_LOGIC is set to “Yes”, then you won’t be able to use High Volume import.

#### Related Topics

- [Understanding Import and Export Management for CX Sales and B2B Services](#)
- [Best Practices for High Volume Data Import](#)

## Import Activity Options

You can use the import options available in CX Sales and Fusion Service to create import activities.

## Source File Data Transformation

You use the options in this table to identify the formatting of source file data so that the data can be correctly interpreted and transformed by the import process.

Option	Description
Decimal Separator	The format of the fractional portion of numeric values in columns mapped to attributes with a decimal attribute type.
Date Format	The format for values in columns mapped to attributes with a date attribute type.

Option	Description
Time Stamp Format	The format for values in columns mapped to attributes with a time stamp attribute type.
File Encoding	The overall encoding of the characters within the file.

## Interface to Target Import Options

Depending on the object you're importing and the application modules you implemented, you need to select some options. All the options are provided in this table.

Option	Description
Import Mode	To import leads and employee resources, you have the option of specifying if you want to create and update records or only update records. If you select update, then any new records will be ignored by the import process. For all other import objects, both create and update operations are available.
Allowable Error Count	<p>The Allowable Error Count threshold determines if the import operations need to be automatically canceled, if the number of consecutive rows with validation errors exceeds the user defined threshold value. The default value for Allowable Error Count is 2000 but you can change this value when configuring your import. During the "Preparing Data for Import" step, if the number of consecutive rows in your input file with a validation error exceeds the Allowable Error Count value, then the import will be canceled. If the Allowable Error Count isn't reached in this step, then the import will proceed. Errors encountered during the "Importing Data" step aren't counted as part of the Allowable Error Count.</p> <p>Validation errors include:</p> <ul style="list-style-type: none"> <li>• Missing required values</li> <li>• Values that exceed the attribute length</li> <li>• Invalid identifiers and lookup codes</li> </ul> <p>Duplicates found using matching configurations for Customer Data Management objects don't contribute to the error count.</p>
Notification E-Mail	The e-mail of the intended recipient of import processing notifications. Currently this option is supported only for Opportunity, Lead, and user-defined objects.
Customer Data Management Duplicates	<p>You can select the options in the Customer Data Management LOV for handling duplicates when you're importing accounts and legal entities either alone or as part of another object.</p> <p><b>Note:</b> You can use the Customer Data Management Duplicates LOV to retrieve duplicates only if you have licensed the data quality functionality. Once licensed, you must rebuild the keys for your matching configuration using the Manage Enterprise Data Quality Matching Configurations task. For more information, see the Implementing Customer Data Management for CX Sales and Fusion Service guide.</p> <p>The duplicates are determined using the following matching configurations:</p> <ul style="list-style-type: none"> <li>• Address Duplicate Identification</li> <li>• Contact Duplicate Identification</li> </ul>

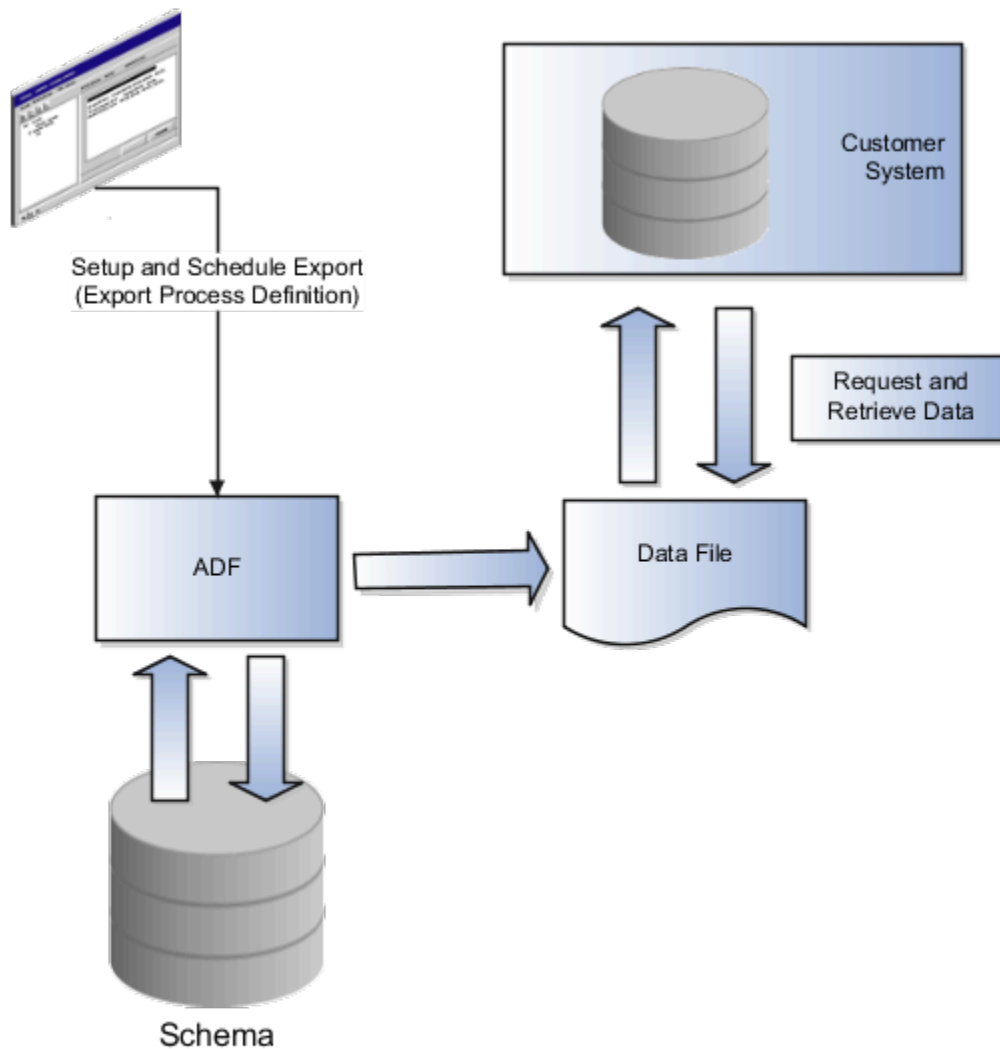
Option	Description
	<ul style="list-style-type: none"> <li>Account Duplicate Identification</li> </ul> <p>Using this option, which is available only if you licensed the data quality functionality, you can select different options for handling duplicates when you're importing accounts and legal entities either alone or as part of another object.</p> <p>The duplicates are determined using these matching configurations:</p> <ul style="list-style-type: none"> <li>Batch Location Basic Duplicate Identification</li> <li>Batch Person Basic Duplicate Identification</li> <li>Batch Organization Basic Duplicate Identification</li> </ul> <p>You can select from one of the following:</p> <ul style="list-style-type: none"> <li>don't Import Duplicate Records</li> </ul> <p>If the main object of the Import Activity is an account or a legal entity object, then the rows that are matched to existing records aren't imported. These duplicates records are reported in the Exception and Error reports.</p> <p>If the Customer Data Management objects are components of another object and one or more matches are found, then the existing duplicate records are evaluated to determine the most recent record. The most recent record will be associated with the main object being imported.</p> <ul style="list-style-type: none"> <li>Import Duplicate Records</li> </ul> <p>The Customer Data Management objects will be imported even if matched records exist.</p> <ul style="list-style-type: none"> <li>Import Duplicate Records and Create Resolution Request</li> </ul> <p>The Customer Data Management objects will be imported even if matched records exist. In addition, a duplicate resolution request is created and displayed in the Customer Data Management, Duplicate Resolution work area.</p>
Duplicate Look Back Days	<p>This option applies only to the Lead import object. Only existing leads created within the period determined by the look back days value are evaluated for duplicates based on the attributes selected for duplicate validation in the predefined import mapping. If a duplicate is found, the lead isn't imported and the duplicate record will be reported on the Exception report. Duplicate leads are included in the calculation of the allowable error count threshold.</p>
Execute Groovy Scripts and Workflows	<p>Selecting this option enables import to trigger the execution of Groovy Scripts and Workflows that have been configured for the object being imported. This option is enabled only if your source file has low-volume data records and the object to be imported supports it.</p>

## Bulk Export

### Overview of Bulk Data Export

You can extract large volumes of data using bulk export. You can either extract a full set of records for an object, or perform incremental extracts.

For example, you can extract complete set of account data or extract updated set of records every week. Bulk export creates comma separated or tab delimited files, which are attached to the export process.

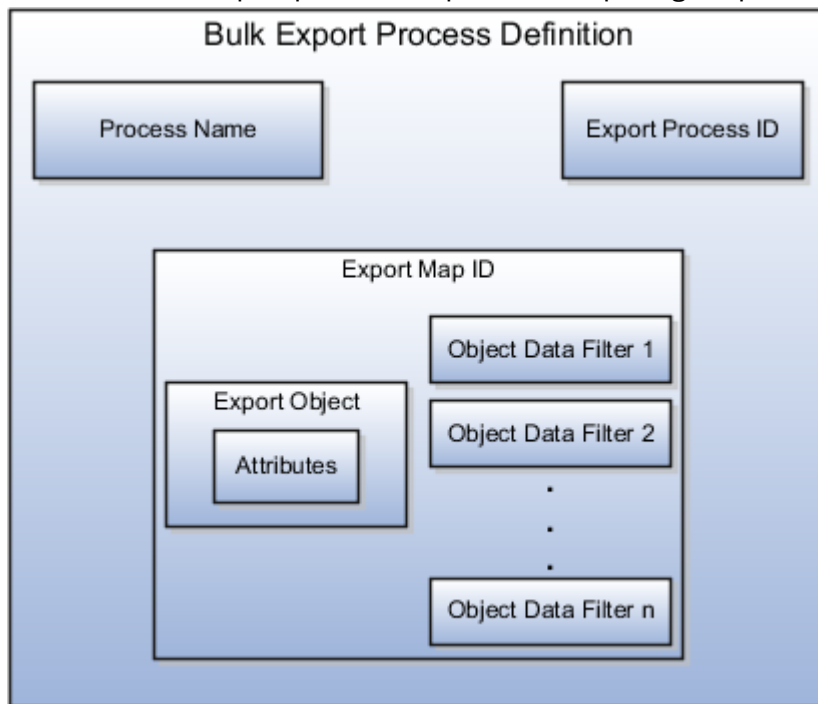


## How Bulk Export Process Components Work Together

You use bulk data export to export data, by leveraging export maps. To export files using bulk export, you create a process definition, map files for full and incremental extract processes, and then schedule the data export process.

### Bulk Data Export Process Components

This image shows the bulk data export process components comprising the process name, export process ID, and the



export map ID.

Bulk data export process includes these three components:

- Process name: A name for the export process that lets you easily refer the export process rather than using the computer generated ID such as 100000019897192.
- Export process ID: A unique, application generated identifier for the export process definition for the export process. The process ID ties the export map with its export objects, filters, and the export schedule.
- Export map ID: A unique identifier for the export map. You can reuse the export map in different process definitions. For example, you create a process definition to export all the data from the Customer export object. You can then reuse that export map and apply a new filter on the data to create an incremental export, such as data accrued since the last export date.

## Perform Bulk Export

You can extract large volumes of data using bulk export. You can either extract full set or records for an object, or perform incremental extracts.

To perform bulk data export:

1. Create the export process definition. The export process definition is made up of the export map and the processing schedule.
2. In the export map of the export process definition:
  - a. Select attributes for the export
  - b. Filter data for the export
3. Schedule the export job.
4. Activate the export job.

## Define Bulk Export

After defining the mapping files, you create an export process to export an object's data using the mapping files created.

To define a bulk export process:

1. Navigate to the following in the Setup and Maintenance work area:
  - o Offerings: Sales
  - o Functional Area: Data Import and Export
  - o Task: Schedule Export Processes
2. Select **Create** from the Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map.
4. Click **Next** to view the Create Export Process Definition: Configure Export Objects page.

In this page, you define the export object you want to export and the mapping you want use for the export process.

5. Optionally, you can enter a name for the mapping if you would like to reuse this mapping for other export processes. An object's mapping file determines what data is exported every time an object is exported. You can have multiple mapping files for an export object for various object details you want to export.

**Note:** The export mapping is optional. You don't need to select an existing mapping to perform an export.

6. Select **Create from the Actions** menu to view the Manage Export Objects dialog box.
7. Select objects from the **Available Objects** list and move them to the **Selected Objects** list and click **Done**.
8. Define the attributes you want to export in the Detail region of the page. You can define:
  - o Attributes you want to export. Select Enabled for the attributes you want to export.
  - o Header text of the attributes. Edit the header text in the Header text column. This value is used as the column header in the files generated by the export process
9. Define the filters to determine the data you want to export by clicking the button in the **Edit Filter Criteria** column.

**Note:** For the incremental extracts, you can create filters using time stamps to determine which rows to export.

10. Click **Next** to view Create Export Process Definition: Create Schedule page.
11. Select if you want to run the export process immediately or at a later time. Two types of scheduled exports are supported:
  - a. Incremental Export
  - b. Normal Export
12. Click Next to view the Create Export Process Definition: Review page.
13. Review the export process details and click Activate.

After each export process executes and completes, a comma or tab delimited data file is created and stored as an attachment to the data export process. If the number of records matching the view criteria exceeds one million records, or if the generated export file size exceeds 100 MB, then the data export process generates multiple files. The generated export files are numbered using the extension "\_NNN" starting at "\_001".



You can also use web services to schedule and start an export process. In this case, you can use the `getAttachment` web service to download the data file.

## Data Export FAQs

### Which data objects do I need to select for successful data export?

Review the requirements for the data to be exported and determine the source view objects that hold the attributes you want.

### How can I create a subset of data for export?

Full sets of data aren't always required for export. To create a subset of data, use filter criteria to determine the time frame or scope of data, based on values of the attributes.

- Offerings: Sales
- Functional Area: Data Import and Export
- Task: Schedule Export Processes

### How can I see my exported data?

You can view the Schedule Export Processes, Overview page to see the History subpage. The column Exported Data File shows a hyperlink to your output file. This file will be a comma separated variable or a tab delimited file.

### What happens if I change the sequence number or header text in an exported data file?

Changing the sequence number changes the order of the attributes in the exported data file. Changing the header text enables you to give a more intuitive meaning to the attribute and the associated data.

### What happens if I need data from multiple export view objects?

Select as many view objects as required for the export process. Select the individual attributes required from every export object.



# 10 Additional Configurations and Integrations

## Overview of Extending the CX Sales Applications

Oracle CX applications offer many different ways to configure, extend, and integrate its services, components, and modules.

Here are just a few of the capabilities:

- Modify objects and user interfaces (UIs).
- Change the appearance and theme of the UIs.
- Configure the Home page by adding announcements and changing navigation.
- Change the structure of the springboard and modify the Navigator.
- Modify the help configuration.
- Create interactive guides to help your users learn about the applications.
- Access a rich set of subject areas around which to build your own reports.
- Configure reporting dashboards by adding new reports or changing the layout.
- Create copy maps to map fields or add information between copied business objects.
- Configure security components.
- Use web services to integrate the services.
- Export data, modify it, and then import it back into the services.
- Integrate with other applications to enhance the functionality, including synchronizing Financials Accounts to the sales applications.

**Note:** For more information about configuring online help, see the *Common Components* chapter.

### Modify Pages and Change Text

Use Oracle's configuration tools, Application Composer and Page Composer, to modify application pages. Use the strings editor to modify text in the application pages.

For example:

- Create a new object and related fields, then create new pages where that object and its fields are exposed to users.
- Add tabs hidden by default to application pages.
- Edit the UI at runtime by showing or hiding fields and tables.
- Change the order of regions, or change a dashboard page layout.
- Change the default text in the UI, for example, by replacing a term with another term throughout the applications.

## Map Fields Between Applications

Copy maps are default mappings of fields between objects. For example, when you convert a lead to an opportunity, the application uses the copy map defined for the Lead and Opportunity objects to determine what to name the leads fields that are carried over to the newly created opportunity. Using Oracle Application Composer, you can create copy maps for several sales business objects, thus allowing you to control the mapping.

Here are some use cases:

- Create maps to change the default mapping between fields when:
  - Leads and opportunities are copied from responses
  - Opportunities are created from leads
  - Opportunities are created from partner deal registrations
  - Opportunities are copied from existing opportunities
- Use Groovy scripting to include information about the lead on a new opportunity converted from a lead.

## Integrate Applications with Web Services and Use Import and Export

You can use web services to integrate with your external applications. You can also use import management to import and export large amounts of data into and out of the applications.

Example web service integrations include:

- Integrate sales applications with back-office applications.
- Create web-based portal applications that access sales applications through a web services interface.

Example import use cases include:

- Import products into the product catalog
- Import users
- Import sales accounts

## Configure Security Components

If the predefined security configuration doesn't meet your business needs, then you can make changes. For example, the predefined Sales Representative job role includes sales forecasting duties. If some business groups in your organization have the sales managers perform forecasting tasks instead of the sales representatives, then you can create a company-defined Sales Representative role without those duties. Alternatively, if a predefined job role is too narrowly defined, then you can create a job role with a greater range of duties than its predefined equivalent. See the [Securing CX Sales and Fusion Service](#) guide for more information.

## Synchronize Financials Accounts to Sales Applications

After users create accounts and contacts in Oracle Financials, use the scheduled process, Synchronize Financials Cloud Accounts and Contacts, to synchronize the data into the sales applications. See [How do I synchronize financial accounts and contacts with CX Cloud?](#) for more information.

## Integrate Sales Applications with Other Products

For additional functionality, you can integrate your sales applications with other products, including, Oracle E-Business Suite, JD Edwards EnterpriseOne, Siebel CRM, Oracle Eloqua, and Oracle Configure, Price, and Quotes (Oracle CPQ).

## Where to Find More Information

To find out where to get more information about the extensions and configurations discussed in this topic, see this list:

- Configure the help system: See *Common Components* chapter in this guide and the *Oracle Applications Cloud Configuring and Extending Applications* guide
- Create interactive guides to help your users learn about the applications: See *Manage Guided Learning for Onboarding and Training*
- Configure the Home page, the Navigator, and the springboard: See *Common Components* chapter in this guide and the *Oracle Applications Cloud Configuring and Extending Applications* guide
- Change the UI:
  - *Common Components* chapter in this guide
  - *Oracle Applications Cloud Configuring and Extending Applications* guide
  - The chapters on extending sales business objects in this guide
- Use Copy Maps: Start with *Set Up Your Mapping File When Copying Opportunities*
- Use Oracle Business Intelligence reports and analytics: Start with *Analytics on the Go* and the *Oracle CX Creating and Administering Analytics* guide
- Synchronize Financials Accounts to the Sales Applications: See *How do I synchronize financial accounts and contacts with CX Cloud?*
- Integrate applications using web services and use Import and Export Management: See *Overview of Import and Export*
- Integrate the Sales applications with other products: See the article on sales integrations (1962226.1) available on *My Oracle Support*.



# 11 Applications Common Components

## Attachments

### Attachments

You can use attachments to provide supplementary information to specific business objects. Attachments can be URLs, desktop files, text, or repository folders.

For a business object you can view, create, delete, or edit attachments, depending on your role and granted privileges.

### Repository

Attachments are stored in a content management repository provided by Oracle WebCenter Content Server. Users managing attachments can't interact with the repository unless the repository mode is enabled. When enabled, users can share attachments among objects, update attachments, and perform other tasks. Access to the attachment files is controlled by a digital signing mechanism.

All attachments are scanned for viruses before they're stored on the content management repository. If a virus is detected at the time of upload, the attachment request fails and the user is notified about it.

### Security

Data security applicable to a specific business object also applies to its attachments. For example, if a user has no access to a specific expense report, then that user can't access its attachments. You can also use attachment categories to control access and actions on attachments, based on roles associated with that category.

#### *Related Topics*

- [Attachment Entities](#)
- [What's an attachment category?](#)

## What's the size limit for attachment files in the sales application?

Users can attach files, such as PDFs and Word docs, to both standard and custom objects. By default, the file size limit for an individual, attached file is 2 GB. You can decrease this limit, but you can't increase it.

There are no limits placed on the number of files. The size of the files is controlled centrally by the File Upload Maximum Size (FND\_FILE\_UPLOAD\_MAX\_SIZE) profile option.

Also note:

- The only limit on the total file size that can be uploaded is the amount of available space that you've purchased for the content server.
- There are no restrictions on the types of files you can attach.

## Attachments Troubleshooting

Attachments UIs are very user-friendly and easy to work with. You may encounter issues in certain cases such as you modify the attachments, for example create additional attachment categories, or implement data security on them.

### Issue: Can't View, Add, Update, or Delete Attachments

You may encounter the following issues when trying to view attachments or perform actions such as adding attachments.

- You can no longer see specific attachments that were earlier visible.
- You can no longer update or delete attachments.
- You get an error stating that you don't have permission to add attachments.

### Resolution

Use the Manage Attachment Entities page to ensure that attachment categories are associated to the relevant attachment entity. You might need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or what categories to assign.

If data security is implemented on the categories for the attachment entity, verify that the Enable Security check box is selected in the Manage Attachment Entities page for that entity. Also, make sure that users have a role that has the necessary privileges. The following table lists the privileges required to view, add, update, or delete attachments with a specific attachment category.

Action	Privilege
View	Read Application Attachment (FND_READ_APPLICATION_ATTACHMENT_DATA)
Add or Update	Update Application Attachment (FND_UPDATE_APPLICATION_ATTACHMENT_DATA)
Delete	Delete Application Attachment (FND_DELETE_APPLICATION_ATTACHMENT_DATA)

For example, if users have the Read Application Attachment privilege for all categories associated with the expense report attachment entity, except the Receipts attachment category, then they can view all expense report attachments except those created with the Receipts category. Likewise, if users don't have the Update Application Attachment privilege for any attachment categories tied to the expense report attachment entity, then they can't create any attachments for the expense reports.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

### Issue: Missing Attachment Category

You can view existing attachments but the attachments no longer have an attachment category associated with them.



## Resolution

When the attachment was added, at least one category existed for the corresponding attachment entity. Since then, the entity was edited so that it no longer has any assigned categories, so the user can't see the category associated with that attachment.

Use the Manage Attachment Entities page to reassign attachment categories to the relevant attachment entity. For example, if users can no longer see the Receipts attachment category for an attachment to an expense report, then search for the expense report attachment entity and assign to it the Receipts category. You may need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or any additional categories to assign.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

### *Related Topics*

- [Attachment Entities](#)
- [How Attachment Entities and Attachment Categories Work Together](#)
- [What's an attachment category?](#)

## Notes

### Define Notes

A note is a record attached to a business object, such as an opportunity or lead. Notes capture nonstandard information received as you do business. Consider the following points when you set up notes for your application:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.

### Note Types

Note types are assigned to notes when they're created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type. When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.

### Note Type Mappings

If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.
- If no other note types appear, then note type mapping doesn't exist for that object and the default note types are used. Select **Default Note Types** to see which default note types exist in the application.

- If you modify a default note type, it affects all the business objects that don't have a note type mapping.

Suppose you decide to add a new note type of Analysis for your product area of Sales-Opportunity Management. You use note type mapping to map Analysis to the Opportunity business object. Now, every time you create or edit a note for an opportunity, you see Analysis as an available note type option.

When deciding which note types to map to business objects, you should keep the same considerations in mind that you did when you decided which note types to include.

## Notes Character Limit

If you're using the source code editing mode, the limit for notes is 100,000 characters. If you're using the Rich Text editing mode, HTML tags can cause the actual maximum character count to vary, as the HTML tags are also counted in the character total.

### *Related Topics*

- [About Application Composer](#)

# 12 Enterprise Contracts Setup

## Overview of Enterprise Contracts Setup

This chapter helps you set up Oracle Enterprise Contracts by configuring only those features that are required to have a functioning application.

Once you've a working application, run the full install offering task list in Setup and Maintenance, to take advantage of all features.

**Note:** Due to differences in the sequence of common setup tasks in the Enterprise Contracts offering and the intent of this chapter, there might be some differences in the order that set up tasks are presented here.

To set up buy and sell intent contracts without lines and partner program enrollment contracts, perform these tasks:

1. Configure Enterprise Contracts and create an implementation project.
2. Define legal entities.
3. Define business units and assign business function and optionally assign ledger and legal entity.
4. Define users.
5. Define document sequences.
6. Configure contract management business functions.
7. Define customers and their addresses and contacts.
8. Define party roles, contact roles, and role sources.
9. Set up electronic signature.
10. Define contract line types.
11. Define contract types.
12. Manage user statuses and user transitions.
13. Set up common CRM business unit profile option.
14. Define contract lines descriptive flexfield.
15. Define contract terms library components.
16. Configure file-based import for Enterprise Contracts.
17. Set up approval groups and approval task configurations.
18. Configure scheduled processes.

## How You Create An Enterprise Contracts Implementation Project

Here's how you can configure Enterprise Contracts and create an implementation project:

1. Navigate to My Enterprise and select **Offerings**.
2. On the Setup and Maintenance work area, select the Enterprise Contracts offering then click **Opt In Features**.
3. On the Opt In page, select the **Enable** check box for Enterprise Contracts.
4. Click the **Features** icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.

5. Navigate to **Setup and Maintenance**.
6. Open the Tasks side panel and click **Manage Implementation Projects**.
7. On the Implementation Project page, click **Create** to create a new project.
8. Enter your project name and move to **Next**.
9. Select **Include** for Enterprise Contracts and click **Save and Open Project**.
10. Expand Enterprise Contracts in the Implementation Project page to be used in the remaining steps in this chapter.

#### Related Topics

- [Configure Offerings](#)

## Define Legal Entities

Here are the steps to define legal entities for use with Contracts:

1. In the Setup and Maintenance work area, create an implementation project that includes the Manage Legal Addresses task.
2. Select a country from the Country drop down list, and a new location.
3. Enter the new location information on the Location Create dialog.
4. **Save and Close**.
5. In your implementation project, search for the Define Legal Entities for Enterprise Contracts task list and open the **Manage Legal Entity** task.
6. Click **Create New**.
7. Click the new icon, and enter the required information by selecting the options Legal Employer and Payroll Statutory Unit. Click **Save**.
8. On the Create Legal Entity page, enter the required information and then **Save and Close**.
9. On the Scope Selection: Legal Entity dialog box, click **Select and Add**.
10. Select the legal entity you created and click **Save and Close**.
11. In your implementation project, select **Define Legal Entities for Enterprise Contracts** from the task list.
12. Click the **+** on the tool bar, then search for and add the tasks **Manage Legislative Data Groups** and **Manage Legal Entity HCM Information** to the Define Legal Entities for Enterprise Contracts folder.
13. Open the task **Manage Legislative Data Groups**.
14. Search and then click **Create**.
15. Enter the required information and click **Submit**.
16. Search again to verify that the legislative data group is created, and click **Done**.
17. Navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Legal Entities for Enterprise Contracts and open the task **Manage Legal Entity HCM Information**.
18. Search for and click the legal entity you added.
19. Select **Update** from the Edit options at the top. Enter a past date in the Update Legal Entity dialog and click **OK**.
20. Enter the required information under the Legal Employer tab and select the Payroll Statutory Unit tab. Enter the required information and click **Submit**.

## Define Contracts Users

Do this to define contracts users:

1. Navigate to **Define Common Applications Configuration for Enterprise Contracts > Define Security for Customer Relationship Management > Define Users for Customer Relationship Management** and open the **Manage HCM Role Provisioning Rules** task.
  - a. Click **Create**.
  - b. Enter the required information to create a new role mapping and **Save and Close**.
2. Navigate to **Define Common Applications Configuration for Enterprise Contracts > Define Security for Customer Relationship Management > Define Users for Customer Relationship Management** and open the **Users, Roles and Delegations** task.
  - a. Click **Create**.
  - b. Enter the required information to create a user with an email ID, who can author and submit contracts for approval. Enter a **Resource Role** and select an **Organization** in the **Resource Information** section.
  - c. Click **Auto-provision Roles**. The provisioned roles from HCM role mapping defined previously are automatically populated. **Save and Close** and then click **Done** to go back to main folder structure.
  - d. Repeat the previous steps to create as many Oracle Contracts users as required for this phase of the implementation.
  - e. Get users and passwords from the email recipients.

## Privilege That Controls Deleting or Editing Mandatory Clauses

The privilege, Override Contract Terms and Conditions Controls (OKC\_AUTHOR\_CONTRACT\_TERMS\_AND\_CONDITIONS\_OVERRIDE\_PRIV), controls whether a user can delete or edit mandatory clauses on contracts.

## Roles for Tracking Purchasing Activity Processes

Here are the roles needed to track the completion of purchasing activity processes:

- ORA\_OKC\_ENTERPRISE\_CONTRACT\_MANAGER\_JOB
- ORA\_OKC\_ENTERPRISE\_CONTRACT\_TEAM\_MEMBER\_ABSTRACT
- ORA\_OKC\_SUPPLIER\_CONTRACT\_ADMINISTRATOR\_JOB
- ORA\_OKC\_SUPPLIER\_CONTRACT\_MANAGER\_JOB
- ORA\_OKC\_SUPPLIER\_CONTRACT\_TEAM\_MEMBER\_ABSTRACT

For more information about how to perform user setups, see the Securing Sales and Fusion Service guide. For more information on the roles required for Contracts users, see the Security Reference for Enterprise Contracts guide.

### Related Topics

- [Role Provisioning Options](#)
- [Ways to Create Sales Users](#)

## Define User as Resource

The list of business units that a user can access is based on the resource organization the user is mapped to as a resource. To associate a resource organization with business units:

1. Sign in to the application as an administrator or a setup user.
2. In the Navigator, select **Resource Directory**.
3. On the Resource Directory page, click the **Tasks** panel tab and select **Identify Resources**.
4. Search for the user you want to include as a resource.
5. Click **Add as Resource**.
6. Click **Done**.

For every business unit you set up, you can define internal resource organizations associated with the business unit. A resource organization represents the internal organization and structure for the business unit.

Once you add a user as a resource, the user becomes available in the **Parties** tab on the Edit Contract page.

### Related Topics

- [How do I enable desktop pages for Resource Directory?](#)
- [Overview of Managing Resources](#)

## Set Up Read-Only Contract User

Here are the steps you can use to set up a read-only contract user after creating a new user and associating him to a resource organization:

1. Sign in as a user with Security Console access.
2. From the Navigator, select **Tools > Security Console**.
3. From the Roles subtab, click **Create Role**.
4. On the Create Role: Basic Information page, perform these steps:
  - a. Enter the role name.
  - b. Enter the role code.
  - c. Select **Common - Job Roles** from the **Role Category** drop-down list.
  - d. Optionally, enter the description.
  - e. Click **Next**.
5. On the Create Role: Function Security Policies page, perform these steps:
  - a. Click **Add Function Security Policy**.
  - b. In the Add Function Security Policy page, search and select the **Enable Sell Intent** privilege.
  - c. Click **Add Privilege to Role**.
  - d. Search and select the **Enable Buy Intent** privilege and click **Add Privilege to Role**.
  - e. Click **Next**.
6. On the Create Role: Data Security Policies page, optionally, you can set your data security policies according to your requirements and click **Next**.
7. On the Create Role: Role Hierarchy page, perform these steps:

- a. Click **Add Role**.
  - b. On the Add Role Membership page, search and select **Contract Search and View Access** with the `ORA_OKC_CONTRACT_SEARCH_VIEW_DUTY` code.
  - c. Click **Add Role Membership**.
  - d. Click **Next**.
8. On the Create Role: Users page, perform these steps:
- a. Click **Add User**.
  - b. In the Add User page, search and select a user.
  - c. Click **Add User to Role**.
  - d. Click **Next**.
9. On the Create Role: Summary page, review your changes.
10. Click **Save and Close**.

## How can I protect supporting documents from deletion?

You can protect your supporting documents from being inadvertently deleted. Adding the new privilege, Delete Supporting Documents by Contract Status, to the required roles lets you restrict the deletion of supporting documents in all contract statuses other than Draft and Under Amendment.

To restrict the deletion of supporting documents in all contract statuses, revoke the existing privilege, Delete Supporting Documents, for specific roles.

This table describes how you can configure the privileges

Delete Supporting Documents Privilege	Delete Supporting Documents by Contract Status Privilege	Result
Yes	Yes	User can delete supporting documents in all contract statuses
Yes	No	User can delete supporting documents in all contract statuses
No	No	User can't delete supporting documents in any contract status
No	Yes	User can delete supporting documents only in Draft and Under Amendment contract status

The supplied privilege, Delete Supporting Documents by Contract Status Privilege, isn't assigned to any role by default. Add the privilege to the necessary roles and revoke the existing privilege, Delete Supporting Documents.

For information about how to add and remove privileges to user roles, see the [Edit Your Custom Job or Abstract Roles](#) topic.

## Generate Data Model XML

Use the BI Publisher to create a new contract layout template by adding the contract data model attributes. Use the Generate Data model XML to find the latest data model attributes.

You can download data model attributes in an XML format to access the standard application attributes and extensible attributes. Once you know the attributes, include the required attributes in the contract layout template. The downloaded data model XML contains:

- Standard contract attributes
- Custom contract attributes
- Standard child entities such as contract parties, lines, and contacts
- Custom child entities created through Application Composer
- Descriptive flexfields for Oracle Contracts

## Download Data Model XML

Here are the steps to download the latest data model XML:

1. Navigate to Contracts in Contract Management.
2. Open the Tasks side panel and click **Generate Data Model XML** in the Setup tasks.
3. On the Generate Data Model XML page, click **Download**.

## Define Document Sequences

Define document sequences for contracts only if you need to autonumber contracts or clauses, or when you're doing the setup for the partner agreement type of contracts.

**Note:** If you're unfamiliar with the setup of document sequences, be sure to read the topics in the *Document Sequences chapter* in the *Oracle Fusion Cloud Applications Implementing Applications* guide.

You can define document sequences for contracts at these levels:

- Global
- Ledger
- Legal Entity
- Business Unit

You can define document sequences for clauses at these levels:

- Global
- Ledger
- Business Unit



**Note:** Each contract type you're using can have a different sequence.

Here are the steps to define the document sequences:

1. In Setup and Maintenance, search for the **Manage Document Sequence Categories** task.
2. In the Application field, search for **Enterprise Contracts**.

You should see document sequence categories for the contract header table, OKC\_K\_HEADERS\_ALL\_B, and the clause table, OKC\_ARTICLES\_ALL.

3. Create a new document sequence category for the table, OKC\_K\_HEADERS\_ALL\_B, to store contract header information.

You don't need to create document sequences for the table, OKC\_ARTICLES\_ALL, that stores clauses, because you'll number the clauses manually.

4. Save your changes.
5. To create partner program enrollment contracts from the Partner Relationship Management application, create a new document sequence category for the table, OKC\_K\_HEADERS\_ALL\_B, to store contract header information.
6. Save your work.
7. Next, search for the **Manage Document Sequences** task.
8. In the Application field, search for **Enterprise Contracts**.
9. Create a document sequence in the primary table and assign it to the document category created for the contract header in the child table.

The assignment start date needs to be before the contract type assignment start date.

Select the primary ledger for the determinant value that's used to determine the document autonumbering scope and save your work.

10. To create partner program enrollment contracts from the Partner Relationship Management application, create a document sequence in the primary table and assign it to document category created for contract header in the child table.

Select the primary ledger for the determinant value that's used to determine the document autonumbering scope and save your work.

**Note:** A contract created when autonumbering is disabled must have the line number provided, even if in the meantime you've changed the line type option back to autonumbering. The change won't propagate to the already created contract.

#### *Related Topics*

- [Document Sequences](#)
- [Document Sequence Categories](#)
- [Guidelines for Managing Document Sequences](#)
- [How can I set up autonumbering in contracts?](#)

## Configure Contract Management Business Functions

Here are the steps to configure contract management business functions:

1. Navigate to **Define Contracts Common Configuration > Define Contract Management Business Function Configuration**.
2. Click **Select** in the Selected Scope column for the Specify Customer Contract Management Business Function task.
3. Click **Select and Add** in the dialog to select a business unit, then **Apply and Go To Task**.
4. Select the BU that you created and click **Save and Close** to save the task list scope to the BU.
5. On the Specify Customer Contract Management Business Function Properties page select the default currency, enter the required information in the Terms Library region and click **Save and Close**. These settings are common for standalone sell and partner program enrollment type of contracts. Ignore the other values in the page for now.
6. Open the Specify Supplier Contract Management Business Function Properties task.
7. Enter the required information and click **Save and Close**.

## Define Customers with Their Addresses and Contacts

Here are the steps to define customers and their addresses and contacts:

1. Navigate to **Define Contracts Common Configuration** and note the following manual tasks. Manual tasks need to be performed outside the Setup and Maintenance work area.

**Note:** As partner management enrollment contracts are created and managed from the Oracle Partner Management application, partner creation and other Partner Management setups are part of the Sales offering implementation.

2. Navigate to **Sales** and then **Accounts**.
  - a. Click **Create Account** to create an account type of Customer. Enter a name, sell-to-address, contact (if you have created one).
  - b. Click **Save and Close**.
3. Navigate to **Manage Customers** through the Global **Search** in the side panel and create Sites associated with the Sales Accounts you have created. Ensure that there is at least one Site with the Purpose "Bill to".

## Define Party Roles, Contact Roles, and Role Sources

You can designate approvers, specify approval routing, and define rule priority. After you assign the role source, you can update the Oracle Business Process Management (BPM) workflow rules to define approval rules as specified by the Contract Role Code.

Use these steps to route the contract approval to the contract owner. Do this to define party roles, contact roles, and role sources:

1. In the Setup and Maintenance work area, create an implementation project that includes the **Define Contracts Common Configuration** task.
2. Create new party roles as needed.
3. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Contact Roles** task.
4. Create new contact roles as needed.
5. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Role Sources** task.
6. For each party role set up in the previous step, enter the required information for the associated contact roles.

#### *Related Topics*

- [How You Set Up Contract Party Roles](#)
- [Approval Rules Configurations](#)
- [How You Set Up Approval Groups and Approval Task Configuration Rules](#)
- [Manage Workflow Rules Using a Spreadsheet](#)

## Set Up Electronic Signature

After you set up the electronic signature functionality, contracts users can submit contracts that can be signed electronically.

### **Before you start**

#### **Contracts Prerequisites**

- When you create contract types, you specify whether an electronic signature is required for contract acceptance and activation.
- An electronic signature contract type is set up with:
  - The **Requires signature** checkbox set to Yes.
  - The **Electronic signature** checkbox set to Yes.
  - The **Solution Provider** is DocuSign or OneSpan.
  - Entry of a meaningful value for the email subject and email message.
- An electronic signature contract terms layout template must be set up with the signature table and with the standard tags in the signature table. This layout template is selected as the default contract terms layout template for the contract type to be used for electronic signatures.
- The contract author who plans to send the contract for signature must have a valid email address and must be set up as a user in the account that's specified in the electronic signature setup.

See [Define Contract Types](#) for more information.

#### **Electronic Signature Prerequisites**

- Your organization must first register and obtain a license directly from a supported third-party electronic signature service provider. The supported providers are DocuSign and OneSpan.
- After the license is obtained, you must set up an account for your organization on the service provider's website. You must create an administrator account on the site. Note that this is a one-time activity.

- Note down the account key, provider URL, user name, and password from the solution provider's site.

### Here's what to do

1. In the Setup and Maintenance work area, search for and select the Manage Contract Electronic Signature task.
2. Select DocuSign or OneSpan as the solution provider.
3. If you're using DocuSign:
  - a. Enter the User ID (a 32-digit GUID from DocuSign) that's associated with the user profile that has administrator privileges.
  - b. Enter the Account ID, which is the API account ID mentioned on the DocuSign website.
  - c. Enter the Endpoint URL, which is the Account Base URL mentioned on the DocuSign website.
  - d. Provide the OAuth URL:
    - Development account: `https://account-d.docusign.com`
    - Production account: `https://account.docusign.com`

**Note:** Developer accounts let you test and develop with DocuSign functionality for free. Developer accounts operate in the DocuSign development (demo) environment, which is similar to production except:

  - Documents sent in this environment aren't legally binding and have test stamps on them.
  - Developer accounts don't expire.
  - Developer accounts have enterprise-level features enabled for development and testing purposes.

  - e. Click **Validate** to provide one-time user consent to use DocuSign integration.
  - f. Click **ALLOW ACCESS** to grant consent.

You'll receive a confirmation message on the linking of Oracle Enterprise Contracts and DocuSign.
  - g. Click **Validate**, and after the validation status changes to Complete, **Save and Close**.
4. If you're using OneSpan:
  - a. Enter the user ID of the OneSpan account user, the API key, and the appropriate OneSpan endpoint URL.
  - b. Save the settings.

### What to do next

After you set up the electronic signature process, you must set up your contract types to enable them for electronic signatures. The enabling at the contract type level works with the Enable electronic signature checkbox on individual contracts. So, if enabled for a particular type, by default, any contract you create of that type will also have the Enabled electronic signature box checked. Still, you can decide to deselect it and turn off the electronic signature specifically for that contract. You can edit this checkbox if the contract hasn't yet been signed. However, once the contract reaches Pending acceptance status, you'll need to continue with the electronic signing process. See the topic, *Define Contract Types*, for more information.

Keep in mind these user requirements to be able to send contracts for signature:

- Users must have a valid electronic signature account.

- Users' electronic signature user names must match their email addresses in Oracle Person Management.
- In the solution provider's account, the users must be defined as members with permission to send contracts for signing.

For more information on Contracts user tasks, see *How Capturing Contract Acceptance with Electronic Signatures Works*.

## Define Contract Line Types

Here's how you can define contract line types:

1. In your implementation project, navigate to **Define Contracts Common Configuration** and expand the task list.
2. Click the + on the toolbar, then search for and add the task **Manage Contract Line Types** to the selected Define Contracts Common Configuration task list.
3. Scroll down to and open the **Manage Contract Line Types** task.
4. Click **Create** and define four line types each with a different source as follows:
  - Buy agreement, free-form
  - Buy agreement, item
  - Buy intent, free-form
  - Buy intent, item
5. Click **Done** to return to the main folder structure.

### Related Topics

- [Contract Line Types](#)

## Define Contract Types

Here's how you can define contract types:

1. In Setup and Maintenance, navigate to **Define Contracts Common Configuration** and open the **Manage Contract Types** task.
2. Click **Create** and enter the required information.
3. Click **Continue** to create the contract type you require.
4. Enter the required information. **Save and Close** to return to the Manage Contract Types page.

### Related Topics

- [Contract Types](#)

## Set Up Contract Text Search

Here's a summary of the tasks that you must perform to set up the Search Contracts by Text feature:

- Enable Search Contracts with Oracle Search Extension Framework Using Opt In
- Set Up Profile Options
- Assign the Search Contracts security privilege to required users.
- Configure Attachment Search
- Run Scheduled Processes

## Enable Search Contracts with Oracle Search Extension Framework Using Opt In

Here's how you can enable the search contract by text feature:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the **Enable** option for **Search Contracts with Oracle Search Extension Framework**.
5. Click **Done**.

## Set Up Profile Options

To set up the track audit feature:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Administrator Profile Values** task.
3. Search and find these profile options:
  - **Enable/Disable Search Ext Framework**: Use this profile to check if Search Extension is enabled.
  - **Enable Search Attachments**: Use this profile to enable attachment support within the Search Infrastructure.
4. Click the **Enable/Disable Search Ext Framework** profile option and set the **Profile Value** as **Yes** to enable this feature to use Oracle Search Extension Framework.
5. Click the **Enable Search Attachments** profile option and set the **Profile Value** as **Yes** to enable search across the attached documents.
6. Click **Save and Close**.

## Configure Attachment Search

Here's how you can configure the attachment search using the Manage Global Search Configurations task:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Global Search Configurations** task.
3. Click **Configure Attachment Search**.
4. Add one or more new rows to enable search across your file types.
5. To enable the same preference for all file types:
  - a. Add one row and enter **\*/\*** in **Content Type**.
  - b. Select the index name **fa-crm-contract**.
  - c. Set **Enable File Search** to **Yes**.

- d. Set **Enable Content Search** to **Yes**. If set to **No**, the content is excluded and only the file metadata, such as the file name, is included in the search.
- e. Set the **Maximum File Size** and **Maximum Content Size**.
  - The file size is the size of the attachment on your system. Files greater than the maximum size aren't loaded and only the file metadata, such as the file name, is included in the search.
  - The content size is the number of bytes of data taken from the file and added to the business object index to be included in the search. **Maximum Content Size** is always less than **Maximum File Size** as it's the content that remains after removing file formatting and metadata.
6. Optionally, you can click the **Create from Sample** button to select how to search for different file content types.

## Run Scheduled Processes

Using the Scheduled Processes task in Tools, run these processes at least once in this order, to include existing contracts data into the search:

- ESS job to create index definition and perform initial ingest to OSCS  
This process ensures that all existing contract data is included before you start using this feature. To ingest all contracts data, enter the index name **fa-crm-contract** for the **Index Name to Reingest** parameter. Leaving the index name parameter blank creates and ingests data for all indices.
- Ingest attachments to OSCS  
This process ensures that the content of the attached contract documents is included in the search.

We also recommend you to run these scheduled processes at least daily, in same sequence, for the contracts to be searched accurately with most updated data:

- ESS job to run Bulk ingest to OSCS
- Ingest attachments to OSCS

### Related Topics

- [Enable Search Extension Framework](#)
- [Configure Attachment Search](#)
- [Contracts Search Options](#)

## Amend Contact Without Versioning

You can enable your contract authors to edit contracts without versioning. To determine which contracts are eligible to avoid visioning, you can select the **Allow amendment without versioning** check box at a contract type level.

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Contract Types** task.
3. In the Contract Type Options section, click the **Advanced Authoring Options** tab.
4. Select the **Allow amendment without versioning** check box.

**Note:** If you amend a contract without versioning, you can't revert the contract amendment.

5. Click **Save and Close**.

Once you enable this check box and navigate to the Edit Contract page for the selected type of contract, the application displays the Amend Contract window with these options:

- Version the contract
- Don't version the contract

**Note:** The **Allow amendment without versioning** check box is disabled when the class is Grant or when the line class is Service or Warranty.

## Set Up Common CRM Business Unit Profile Option

In the Manage Common CRM Business Unit Profile Options task, you can select:

- The HZ\_ENABLE\_MULTIPLE\_BU\_CRM profile option when you want to use more than one business unit.
- The HZ\_DEFAULT\_BU\_CRM profile option when you only want to use only one business unit.

Here is how you can define your default business unit (BU) profile options:

1. Navigate to **Define Contracts Common Configuration** and open the **Manage Common CRM Business Unit Profile Options** task.
2. Click the default BU profile. Set the profile value to the business unit that should be the default, and click **Save and Close**.
3. Set the default multiple BU profile value to Yes. This means the contracts users are allowed to access multiple business units.
4. **Save your changes**.
5. Click **Done**.

## Define Contract Lines Descriptive Flexfields

If you're going to use sales agreement lines with descriptive flexfields, you need to set up descriptive flexfields.

See the related topic for more information.

### *Related Topics*

- [Descriptive Flexfields for Contracts](#)

## Define Contract Terms Library Components

Here are the steps to define contract terms library components (clauses and terms templates):

1. In the Setup and Maintenance work area, go to your implementation project, navigate to the **Define Contract Terms and Clause Library Configuration** task list, and go to the **Manage Contract Terms Value Sets** task.



- a. Search for value sets created for the Enterprise Contracts module. Value sets are required to define questions and rules in Terms library work area. Click **Create**.
  - b. Enter the required information to create a value set. Save and click **Done**.
2. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Manage Contract Clause Types** task.
3. Create a new clause type and save.
4. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Specify Contract Clause Import XML File Location** task.
5. Set the profile value to the required value in your Enterprise Scheduling Service (ESS) server. Specify the ESS server directory where the import clauses from XML File process uploads and imports files into the Contract Terms Library.
6. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Manage Contract Standard Clauses, Templates, and Expert Rules** task. This is not a setup and maintenance task, but a manual task that is performed from the Terms Library work area.
7. To create terms clauses navigate in the application to **Contract Management**, then the **Terms Library** work area.
  - a. Click the **Create Clause** task.
  - b. Enter the required information to create a clause and click **Submit**.
    - The Title name should be unique for both buy and sell clauses.
    - The End Date for new clauses can't be a date in the past.
  - c. Once you have submitted a new clause for approval, it will need to be approved by the clause approver.
  - d. Once approved, you should now search for the clauses to verify that they are in Approved status.
8. To create terms templates navigate in the application to **Contract Management**, then the **Terms Library** work area.
  - a. Click the **Create Terms Template** task.
  - b. Enter the required template information and click **Save** to enable the Document Types table.
  - c. Select a contract type in the document type table and click the **Clauses** tab.
  - d. Click the **Add Section** action.
  - e. In the Add Section dialog box, enter a section name in the New Section box and click **OK**.
  - f. Select your new section and click **+** to add a clause.
  - g. In the Add Clauses dialog box, search for your clause, select the row, and click **OK**.
  - h. Open your section, and click the clause title. Click the refresh icon in the toolbar to view the section and clause in the terms template preview pane. Click **Submit**.
  - i. Check for and resolve any warnings or errors, and then click **Submit**.
  - j. **Save and close**.
  - k. Repeat the previous steps to add more term templates as needed.
  - l. Click **Submit** and then click **Submit** again on the next page to submit it for approval.
  - m. Once you have submitted a new template for approval, it will need to be approved by the template approver.
  - n. Once approved, you should now search for the templates to verify that they are in Approved status.

#### Related Topics

- [How Contract Terms Templates Work](#)
- [How You Import Clauses into the Contract Terms Library](#)

## Enable Table of Contents in Contract Preview

Here are the steps to add table of contents in contract preview:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the **Enable** option for **Add Table of Contents to Contract Terms**.
5. Click **Done**.

## Configure Import and Export Management for Enterprise Contracts

Here are the steps to configure Import Management for Enterprise Contracts:

1. In your implementation project, go to the **Define Import Management** task list, and open the **Manage File Import Objects** task.
  - a. Select the row for `CONTRACT` and click **Edit**.
  - b. Enter default values for the attributes of objects `contractImportJob1` and `Import ContractHeader1`.
  - c. Select the Map and Required check boxes as required and click **Save and Close** twice.
2. Navigate to **Define Import Management**, and open the **Manage File Import Mappings** task.
  - a. Select **Contract** in the Object drop down list and click **Search** to view the available mappings. Click **Create** to define a new mapping.
  - b. Enter the required information and click **Save and Close**.
  - c. Click a contract import mapping. Add column mappings as required. Ensure the source column header values match the column names in the data file and click **Save and Close**.
  - d. Again click **Save and Close** to return to main folder structure.
3. Navigate to **Define Import Management**, and open the **Manage File Import Activities** task.
  - a. Click **Create** to schedule an import job.
  - b. Enter the required information and click **Next**.
  - c. Enter constant values for the import object attributes or click **Next**.
  - d. Select a schedule from the Repeat Unit drop down list and click **Next**.
  - e. Click **Activate** to schedule the import job.

Follow these steps to configure Export Management for Enterprise Contracts:

1. In your implementation project, go to the **Manage Bulk Data Export** task list, and open the **Schedule Export Processes** task.
2. Select **Create** from the Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map, in the page.
4. Select **Create** from the Actions menu to view the Manage Export Objects dialog box.
5. Select the objects you want to export and click **Done**.

6. Specify the attributes and filters you want used to export.
7. Click **Next** to view the Create Export Process Definition: Create Schedule page.
8. Select the schedule for your export.
9. Click **Next** to view the Create Export Process Definition: Review page.
10. Review the export process details, and click **Activate**.

#### Related Topics

- [Perform Bulk Export](#)

## How You Set Up Approval Groups and Approval Task Configuration Rules

Here's how you set up or define approval groups and approval task configuration rules for contracts:

1. Sign in as a setup user.
2. In Setup and Maintenance go to:
  - Offerings: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Approval Groups
3. On the Manage Approvals page, click the **Approval Groups** tab.
4. In the Groups region, select the plus sign icon to begin creating a new approval group.
  - a. Enter a name for the new group.
  - b. Click **Save**.
5. Add a member to the group. Click the **Add Member** icon to retrieve the Add to Group dialog window. In the search box, enter the email address of the user created earlier and click OK.
6. Click **Save**.
7. Repeat the previous steps to create an approval group that includes both level-one and level-two approvers.
8. Click the **Task Configuration** tab.
9. In the **Tasks to be configured** region, search for **ContractsApproval**.
10. Click the **ContractsApproval** task to access a set of subtabs where you can set up rules for the approval task. For example, under **Configuration**, you can set the assignment and routing policy attributes to suit your business needs. If you want to let the initiator add ad hoc approvers and configure notifications as the approval progresses, select the **Allow initiator to add participants option**. As another configuration example, you can specify a variety of conditions, such as preventing a PDF from being attached to a notification or allowing an initiator to add participants.
11. You can create rules to suit your business needs. Edit the ContractsApproval task.
12. Click **Rules**
13. Expand each rule.
14. Click **Edit** to create rules for the **contractsApproval** stage rule set.
15. Delete all three rules.
16. Create a new rule.
  - Note:** Create rule names without spaces between them.
17. Enter the rule name. Click the arrow. Under the IF label, click the list icon next to the first field.

18. As an example, in the Condition Browser, expand `ContractsApprovalPayloadType`, `ContractDetails`, **result**, and select the `estimatedAmount` payload attribute.

**Note:** Set up this rule for contracts starting with zero dollars: `ContractDetails.estimatedAmount` is null or `ContractDetails.estimatedAmount.value.doubleValue()` is same or above 0.00.

Here's another example with `contract_type_id`, `organization_id`, amount null, and agreed amount 0 or agreed amount smaller than 2000 dollars:

```
IF ContractDetails.org_id is {org_id} and ContractDetails.contractTypeId in {contract_type_id}
and (contractdetails.agreedAmount is null or (contractdetails.agreedAmount isn't null and
contractdetails.agreedAmount.doubleValue() same or less than 2000))
```

19. Select **'isn't'** from the operator drop-down list, and select null as the comparison value of the IF condition.
20. Click the down arrow in IF condition and select simple test to add a new IF condition.
21. In the IF condition of `ContractApproval`, use the following condition to setup contract approval based on Contract Intent:
  - o For Buy Intent: `ContractDetails.buyOrSell` is "B"
  - o For Sell Intent: `ContractDetails.buyOrSell` is "S"
22. Select the comparison field of the new IF condition from the condition browser.
23. Similarly add another IF condition as follows: select `estimatedAmount` for the comparison field, select **same or less than** as the operator, and select a value such as 30000 as the comparison value.
24. Select Approval Group from the List Builder drop-down list under THEN, and click Create Action to create the List builder action 1 region.
25. Select level 1 approver and enter the required information for the List builder action 1 region.
26. Click **+** next to `Estimate_Amount_Rule1` to create a second rule, give it a name such as `Estimate_Amount_Rule2`, and expand it.
27. Create a second rule to route to higher level approvers for higher contract amounts.
28. Create a third rule such that, if contract estimated amount isn't entered, it's routed to level 1 approver.
29. Click the **Save** button and then the **Commit** task button to commit the rules to the database. Expand all the rules.

Note that you could also add rules based on:

- o Policy deviations (`ContractsApprovalPayloadType.policyDeviation = Y or N`)
- o Terms amended rule (`ContractsApprovalPayloadType.termsAmended = Y or N`)
- o Nonstandard clauses added (`ContractsApprovalPayloadType.nonStdClause = Y or N`)
- o Missing (deleted) standard clauses (`ContractsApprovalPayloadType.missingStdClause = Y or N`)
- o Standard clause (not on the terms template) added (`ContractsApprovalPayloadType.stdClauseAdded = Y or N`)
- o Clause deviation category codes (`TermsDeviations.deviationCategory = "<<Code>>"`)
- o Deviation codes (`TermsDeviations.deviationCode = "<<Code>>"`)

Add steps to define such approval rules, referring to this table:

Clause Deviation Category Code	Clause Deviation Code	Description
OKC_NON_STD_ARTICLES	NA	A nonstandard clause exists on the contract.

Clause Deviation Category Code	Clause Deviation Code	Description
OKC_NON_STD_ARTICLES	ADDED_NON_STD	A new nonstandard clause was added.
OKC_NON_STD_ARTICLES	MODIFIED_STD	A standard clause was modified and made nonstandard.
OKC_MISSING_STD_ARTICLES	NA	A standard clause from the terms template was deleted from the contract.
OKC_MISSING_STD_ARTICLES	MISSING_MANDATORY	A mandatory clause is missing.
OKC_MISSING_STD_ARTICLES	MISSING_EXPERT_ARTICLE	A conditional clause based on an expert rule is missing.
OKC_MISSING_STD_ARTICLES	MISSING_OPTIONAL_ARTICLE	An optional clause is missing.
OKC_INVALID ARTICLES	NA	An invalid clause exists on the contract.
OKC_INVALID ARTICLES	ARTICLE_EXPIRED	The clause is expired.
OKC_INVALID ARTICLES	ARTICLE_ON_HOLD	The clause is on hold.
OKC_INVALID ARTICLES	EXPERT_ARTICLE_NOT_REQUIRED	The rule conditions no longer apply for a clause added by Contract Expert.
OKC_STD_ARTICLES_ADDED	NA	A standard clause was added.
OKC_STD_ARTICLES_ADDED	ADDED_STD_ARTICLE	A standard clause from the library was added.
OKC_STD_ARTICLES_ADDED	REPLACED_ALT	A standard clause was replaced with an alternate clause.

**30.** Alternatively, to bypass the approval hierarchy and have automatic approval, create only the following rule.

```

Edit IF condition to 1 is 1
Under Then block Choose
List builder : Supervisory Response type: Required Number of levels: 1 Starting
Participant: HierarchyBuilder.getPrincipal("<User Id>", -1, null, null) Top Participant:
HierarchyBuilder.getPrincipal("<User Id>", -1, null, null)
Auto action enabled: True Auto Action: "APPROVE"

```

Save and commit.

31. Click the **Approval Group** tab to create an approval group for Clause Approval.
32. Click the **Task Configuration** tab to create rules for clause approval human task. Click the human task **ContractClauseApproval** and then click the **Rules** subtab.
33. Click the **Approval Group** tab to create an approval group for Template Approval.
34. Click the **Task Configuration** tab to create rules for Contracts Template Approval human task, click the **TemplateApprovalHumanTask** human task, and then click the **Rules** subtab.
35. Repeat the rule creation steps described for contract approvals.

**Note:** To create a dynamic list of approvers, you can create a dynamic approval group based on a Java class file. The Java class can refer to approval task payload parameters, for example, contract identifier.

#### Related Topics

- [Approval Rules Configurations](#)
- [Configure Workflow Approvals and Notifications](#)
- [How Workflow Task Routing Is Mapped Out](#)
- [How Authoring Contract Terms Works](#)
- [How Reviewing Contract Deviations Works](#)

## Scenario-Based Contract Approval Rule Setups

Here are steps you can use to set up specific approval scenarios, including:

- Automatic contract approval
- Contract approval based on the immediate manager's authorization
- Contract approval based on term deviation
- Contract approval by an internal contact:

**Note:** For any field that can potentially have a null value, ensure you have specified a null condition in the approval rule.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search and select the **Manage Task Configurations for Customer Relationship Management** task. The BPM Worklist page appears.
4. In the Tasks to be configured region, select **ContractsApproval**.
5. Click the **Edit task** icon.
6. Click the **Assignees** tab and click the **Go to rule** icon to create a new rule.
7. Click the **Add Rule** icon to add one of these rules such that:
  - Contracts are approved automatically:
    - i. In the If section, select the condition as 1 is 1.
    - ii. In the Then section, select:

- List Builder: Supervisory
    - Response Type: Required
    - Number of levels: 1
    - Starting Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
    - Top Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
    - Auto Action Enabled: True
    - Auto Action: "APPROVE"
  - iii. Ensure that other rules are inactive.
  - Contracts are approved after the manager's authorization:
    - i. In the If section, select the condition as 1 is 1.
    - ii. In the Then section, select:
      - List Builder: Supervisory
      - Response Type: Required
      - Number of levels: 1
      - Starting Participant:  
`HierarchyBuilder.getManager_1("supervisory",Task.payload.submitter,-1,"","")`
      - Top Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
      - Auto Action Enabled: False
      - Auto Action: "APPROVE"
    - iii. Ensure that other rules are inactive.
  - Contracts are approved based on term deviation:
    - i. In the If section, select the condition as `TermsDeviations.articleTitle.toUpperCase() is "Key word"`.
    - ii. In the Then section, define rules as per your requirements.
  - Contracts are approved by an internal contact:
    - i. In the If section, select the condition as `InternalContacts.croCode is "CONTRACT_ADMIN"`.
- Note:** Replace the "CONTRACT\_ADMIN" with the internal contact role.
- ii. In the Then section, select:
    - List Builder: Resource
    - Response Type: Required
    - Users: `InternalContacts.username`
    - Participants: Groups: null
    - Application Role = null

8. Click **Save and Close**.

## Configure Scheduled Processes

Configure scheduled processes to change a set of records for a specific business need, or to get a printable output with information about certain records. These processes are predefined but not pre-configured.

This list identifies those scheduled processes that are critical for the smooth operation of your Contracts application:

- Indexing schedules
- Deliverables notifications scheduled processes:
  - Send Contract Terms Deliverable Due Date Notifications
  - Send Contract Terms Deliverable Escalation Notifications
  - Send Contract Terms Deliverable Overdue Notifications
- Expiration notification scheduled process:
  - Send Contract Expiration Notifications
- Fulfillment notification scheduled process:
  - Send Contract Fulfillment Notifications
- Service Contract Billing scheduled process:
  - Send Service Contract Billing Information to Receivables
  - Import Auto-invoice
  - Fetch Service Contract Invoice Information from Receivables
- Process Installed Base Updates

For more information, see the related topics.

### *Related Topics*

- [Set Up Contract Text Search](#)
- [Overview of Contracts Scheduled Processes](#)

## Set Enable Classic Landing Page Profile Option

Depending on your implementation, consider the setting of the Enable Classic Landing Page (OKC\_ENABLE\_CLASSIC\_LANDING\_PAGE) profile option. It's important if you're extending the Contracts landing page.

Set the profile option to No if you want to customize the Contracts landing page. A setting of Yes for this profile option means the "classic" UI is enabled for Contracts landing page, instead of the newer "simplified" UI.

Setting this profile option to Yes doesn't impact any other functionality like import or approvals.



Here's how to set the profile option:

1. Navigate to **Setup and Maintenance** and search for the **Manage Administrator Profile Options** task.
2. Search for the profile option code, OKC\_ENABLE\_CLASSIC\_LANDING\_PAGE, and set the value at Site level to Yes.

## Enable Purge Contracts

Here's how you enable the purge contract feature:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for Enterprise Contracts.
4. On the Edit Features page, select the **Enable** option for Purge Contracts.
5. Click **Done**.



# 13 Procurement Contracts Setup Checklist

## Overview of Procurement Contracts Quick Setup

Learn how to quickly set up Oracle Procurement Contracts by configuring only those features that are required to have a functioning application. Once you have a working application, follow the entire install offering task list in the Setup and Maintenance work area, to get all available features.

**Note:** Due to differences in the sequence of common setup tasks in the Enterprise Contracts offering and the intent of this chapter, there may be some differences in the order that set up tasks are presented here.

## Set Up Procurement Contracts

Here are the high-level steps to set up Oracle Procurement Contracts:

1. Configure Enterprise Contracts and create an implementation project.
2. Define legal entities.
3. Define business units and assign business function and optionally assign ledger and legal entity.
4. Define item organizations.
5. Define users.
6. Define document sequences.
7. Configure contract management business functions.
8. Define suppliers and their addresses and contacts.
9. Define party roles, contact roles, and role sources.
10. Define contract line types.
11. Define contract types.
12. Manage user statuses and user transitions.
13. Set up electronic signature.
14. Set up common CRM business unit profile option.
15. Assign Procurement Contracts business functions.
16. Define items.
17. Define payment terms.
18. Define FOB and freight terms.
19. Define contract lines descriptive flexfield.
20. Define contract terms library components.
21. Configure file-based import for Enterprise Contracts.
22. Set up approval groups and approval task configurations.
23. Enable contracts for use in Oracle Social Network.
24. Configure scheduled processes.

### Related Topics

- [Overview of Enterprise Contracts Setup](#)

## How You Create A Procurement Contracts Implementation Project

Here are the steps to configure Procurement Contracts and create an implementation project, proceed:

1. In the Setup and Maintenance work area, select the Enterprise Contracts offering and click **Change Feature Opt In**.
2. On the Opt In page, enable Enterprise Contracts and Procurement Contracts.
3. Click the **Features** icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
4. Navigate to **Setup and Maintenance** work area.
5. Open the Tasks side panel and click **Manage Implementation Projects**.
6. On the Implementation Project page, click **Create** to create a new project.
7. Enter your project name and move to **Next**.
8. Select **Include** for Enterprise Contracts and Procurement Contracts. **Save and open the project**.
9. Expand the Enterprise Contracts task list on the Implementation Project page to be used in the remaining steps in this chapter.

### Related Topics

- [Configure Offerings](#)

## Define Legal Entities

Here are the steps to define legal entities for use with Contracts:

1. In the Setup and Maintenance work area, create an implementation project that includes the Manage Legal Addresses task.
2. Select a country from the Country drop down list, and a new location.
3. Enter the new location information on the Location Create dialog.
4. **Save and Close**.
5. In your implementation project, search for the Define Legal Entities for Enterprise Contracts task list and open the **Manage Legal Entity** task.
6. Click **Create New**.
7. Click the new icon, and enter the required information by selecting the options Legal Employer and Payroll Statutory Unit. Click **Save**.
8. On the Create Legal Entity page, enter the required information and then **Save and Close**.
9. On the Scope Selection: Legal Entity dialog box, click **Select and Add**.
10. Select the legal entity you created and click **Save and Close**.
11. In your implementation project, select **Define Legal Entities for Enterprise Contracts** from the task list.
12. Click the **+** on the tool bar, then search for and add the tasks **Manage Legislative Data Groups** and **Manage Legal Entity HCM Information** to the Define Legal Entities for Enterprise Contracts folder.
13. Open the task **Manage Legislative Data Groups**.
14. Search and then click **Create**.
15. Enter the required information and click **Submit**.
16. Search again to verify that the legislative data group is created, and click **Done**.

17. Navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Legal Entities for Enterprise Contracts and open the task **Manage Legal Entity HCM Information**.
18. Search for and click the legal entity you added.
19. Select **Update** from the Edit options at the top. Enter a past date in the Update Legal Entity dialog and click **OK**.
20. Enter the required information under the Legal Employer tab and select the Payroll Statutory Unit tab. Enter the required information and click **Submit**.

## Define Business Units, Assign Business Function, and Assign Ledger and Legal Entity

Here are the steps to define a business unit (BU) and assign a business function, ledger, or legal entity:

1. In the Setup and Maintenance work area, create an implementation project that includes the Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Business Units for Enterprise Contracts, and **Manage Business Unit** tasks.
  - a. Click **Create**.
  - b. Enter the required information on the Create Business Unit page. Select **Create** from the Default Set drop-down list.
  - c. Create a reference data set and click **OK**.
  - d. Select the reference data set created from the Default Set drop-down list and **Save and Close**.
2. Navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Business Units for Enterprise Contracts**, and click **Select** for the task Assign Business Unit Business Function to select the business unit you created as the task list scope.
  - a. Click **Select and Add** in the dialog to set the BU you created as the task list scope.
  - b. Select the task **Assign Business Unit Business Function** and click **Go to Task**.
  - c. In the Assign Business Functions page, based on requirements, verify that the checkbox against Customer Contract Management and Procurement Contract Management is selected.
  - d. Enter the required information and **Save and Close**. Click the up arrow, and select Enterprise Contracts to go to the main folder structure.

**Note:** If the implementation doesn't need to create financial transactions from contracts, assigning a primary ledger and default legal entity in the Assign Business Function page is optional. For service contracts, it isn't optional.

3. Navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Business Units for Enterprise Contracts**, and open the **Manage Business Unit Set Assignment** task. You can update or override the reference data set code for a particular reference data object.

**Note:** Anytime you create a new BU, be sure to run the Adopt Global Clauses for a New Business Unit scheduled process. Otherwise, new clauses aren't automatically adopted into the new business unit.

## Define Item Organizations For Enterprise Contracts

Here are the steps to define item organizations:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Workforce Structures for CRM**, and open the task **Manage Locations**.
  - a. Click **Create**.
  - b. Enter the required information and **Submit**. Click **Done** to return to the main folder structure.
2. To start creating item organizations, navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Facilities for Enterprise Contracts**, and open the **Manage Facility Shifts** task.
  - a. Click **Create**.
  - b. Enter the required information and **Save and Close**. Click **Done**.
3. Navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Facilities for Enterprise Contracts**, and open the **Manage Facility Workday Patterns** task.
  - a. Click **Create**.
  - b. Enter the required information and **Submit**. Click **Done**.
4. Navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Facilities for Enterprise Contracts**, and open the **Manage Facility Schedules** task.
  - a. Click **Create**.
  - b. Enter the required information and **Submit**. Click **Done**.
5. Navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Facilities for Enterprise Contracts**, and open the **Manage Item Organizations** task.
  - a. Click **Create**.
  - b. Enter the required information and go to **Next** page.
  - c. Enter the required information and **Save and Close**.
  - d. Search again to view the item organization created, and click **Done**.

### Related Topics

- [Item Organizations](#)

## Define Contracts Users

Do this to define contracts users:

1. Navigate to **Define Common Applications Configuration for Enterprise Contracts > Define Security for Customer Relationship Management > Define Users for Customer Relationship Management** and open the **Manage HCM Role Provisioning Rules** task.
  - a. Click **Create**.
  - b. Enter the required information to create a new role mapping and **Save and Close**.
2. Navigate to **Define Common Applications Configuration for Enterprise Contracts > Define Security for Customer Relationship Management > Define Users for Customer Relationship Management** and open the **Users, Roles and Delegations** task.
  - a. Click **Create**.
  - b. Enter the required information to create a user with an email ID, who can author and submit contracts for approval. Enter a **Resource Role** and select an **Organization** in the **Resource Information** section.
  - c. Click **Auto-provision Roles**. The provisioned roles from HCM role mapping defined previously are automatically populated. **Save and Close** and then click **Done** to go back to main folder structure.
  - d. Repeat the previous steps to create as many Oracle Contracts users as required for this phase of the implementation.
  - e. Get users and passwords from the email recipients.

## Privilege That Controls Deleting or Editing Mandatory Clauses

The privilege, Override Contract Terms and Conditions Controls (OKC\_AUTHOR\_CONTRACT\_TERMS\_AND\_CONDITIONS\_OVERRIDE\_PRIV), controls whether a user can delete or edit mandatory clauses on contracts.

## Roles for Tracking Purchasing Activity Processes

Here are the roles needed to track the completion of purchasing activity processes:

- ORA\_OKC\_ENTERPRISE\_CONTRACT\_MANAGER\_JOB
- ORA\_OKC\_ENTERPRISE\_CONTRACT\_TEAM\_MEMBER\_ABSTRACT
- ORA\_OKC\_SUPPLIER\_CONTRACT\_ADMINISTRATOR\_JOB
- ORA\_OKC\_SUPPLIER\_CONTRACT\_MANAGER\_JOB
- ORA\_OKC\_SUPPLIER\_CONTRACT\_TEAM\_MEMBER\_ABSTRACT

For more information about how to perform user setups, see the Securing Sales and Fusion Service guide. For more information on the roles required for Contracts users, see the Security Reference for Enterprise Contracts guide.

### Related Topics

- [Role Provisioning Options](#)
- [Ways to Create Sales Users](#)

## Define User as Resource

The list of business units that a user can access is based on the resource organization the user is mapped to as a resource. To associate a resource organization with business units:

1. Sign in to the application as an administrator or a setup user.
2. In the Navigator, select **Resource Directory**.
3. On the Resource Directory page, click the **Tasks** panel tab and select **Identify Resources**.
4. Search for the user you want to include as a resource.
5. Click **Add as Resource**.
6. Click **Done**.

For every business unit you set up, you can define internal resource organizations associated with the business unit. A resource organization represents the internal organization and structure for the business unit.

Once you add a user as a resource, the user becomes available in the **Parties** tab on the Edit Contract page.

### *Related Topics*

- [How do I enable desktop pages for Resource Directory?](#)
- [Overview of Managing Resources](#)

## Define User for Buyer LOV

The list of business units that a user can access is based on the resource organization the user is mapped to as a resource. To associate a resource organization with business units:

1. Sign in to the application as an administrator or a setup user.
2. In the Navigator, select **Resource Directory**.
3. On the Resource Directory page, click the **Tasks** panel tab and select **Identify Resources**.
4. Search for the user you want to include as a resource.
5. Click **Add as Resource**.
6. Click **Done**.

For every business unit you set up, you can define internal resource organizations associated with the business unit. A resource organization represents the internal organization and structure for the business unit.

Once you add a user as a resource, the user becomes available in the **Parties** tab on the Edit Contract page.

### *Related Topics*

- [How do I enable desktop pages for Resource Directory?](#)
- [Overview of Managing Resources](#)



## Set Up Read-Only Contract User

Here are the steps you can use to set up a read-only contract user after creating a new user and associating him to a resource organization:

1. Sign in as a user with Security Console access.
2. From the Navigator, select **Tools > Security Console**.
3. From the Roles subtab, click **Create Role**.
4. On the Create Role: Basic Information page, perform these steps:
  - a. Enter the role name.
  - b. Enter the role code.
  - c. Select **Common - Job Roles** from the **Role Category** drop-down list.
  - d. Optionally, enter the description.
  - e. Click **Next**.
5. On the Create Role: Function Security Policies page, perform these steps:
  - a. Click **Add Function Security Policy**.
  - b. In the Add Function Security Policy page, search and select the **Enable Sell Intent** privilege.
  - c. Click **Add Privilege to Role**.
  - d. Search and select the **Enable Buy Intent** privilege and click **Add Privilege to Role**.
  - e. Click **Next**.
6. On the Create Role: Data Security Policies page, optionally, you can set your data security policies according to your requirements and click **Next**.
7. On the Create Role: Role Hierarchy page, perform these steps:
  - a. Click **Add Role**.
  - b. On the Add Role Membership page, search and select **Contract Search and View Access** with the `ORA_OKC_CONTRACT_SEARCH_VIEW_DUTY` code.
  - c. Click **Add Role Membership**.
  - d. Click **Next**.
8. On the Create Role: Users page, perform these steps:
  - a. Click **Add User**.
  - b. In the Add User page, search and select a user.
  - c. Click **Add User to Role**.
  - d. Click **Next**.
9. On the Create Role: Summary page, review your changes.
10. Click **Save and Close**.

## What roles do suppliers need to get access to the Procurement Contracts pages?

Supplier users need specific roles to access the Procurement Contracts pages are:

On the Enterprise Contracts side, the roles are:

- Supplier Contract Administrator
- Supplier Contract Manager

See the *Security Reference for Enterprise Contracts* guide for more information on these roles.

On the Procurement Contracts side, the roles are:

- Supplier Administrator
- Supplier Manager

See the *Security Reference for Procurement* guide for more information on these roles.

## Define Document Sequences

Define document sequences for contracts only if you need to autonumber contracts or clauses, or when you're doing the setup for the partner agreement type of contracts.

**Note:** If you're unfamiliar with the setup of document sequences, be sure to read the topics in the *Document Sequences chapter* in the *Oracle Fusion Cloud Applications Implementing Applications* guide.

You can define document sequences for contracts at these levels:

- Global
- Ledger
- Legal Entity
- Business Unit

You can define document sequences for clauses at these levels:

- Global
- Ledger
- Business Unit

**Note:** Each contract type you're using can have a different sequence.

Here are the steps to define the document sequences:

1. In Setup and Maintenance, search for the **Manage Document Sequence Categories** task.
2. In the Application field, search for **Enterprise Contracts**.

You should see document sequence categories for the contract header table, OKC\_K\_HEADERS\_ALL\_B, and the clause table, OKC\_ARTICLES\_ALL.

3. Create a new document sequence category for the table, OKC\_K\_HEADERS\_ALL\_B, to store contract header information.

You don't need to create document sequences for the table, OKC\_ARTICLES\_ALL, that stores clauses, because you'll number the clauses manually.

4. Save your changes.
5. To create partner program enrollment contracts from the Partner Relationship Management application, create a new document sequence category for the table, OKC\_K\_HEADERS\_ALL\_B, to store contract header information.
6. Save your work.
7. Next, search for the **Manage Document Sequences** task.
8. In the Application field, search for **Enterprise Contracts**.
9. Create a document sequence in the primary table and assign it to the document category created for the contract header in the child table.

The assignment start date needs to be before the contract type assignment start date.

Select the primary ledger for the determinant value that's used to determine the document autonumbering scope and save your work.

10. To create partner program enrollment contracts from the Partner Relationship Management application, create a document sequence in the primary table and assign it to document category created for contract header in the child table.

Select the primary ledger for the determinant value that's used to determine the document autonumbering scope and save your work.

**Note:** A contract created when autonumbering is disabled must have the line number provided, even if in the meantime you've changed the line type option back to autonumbering. The change won't propagate to the already created contract.

#### *Related Topics*

- [Document Sequences](#)
- [Document Sequence Categories](#)
- [Guidelines for Managing Document Sequences](#)
- [How can I set up autonumbering in contracts?](#)

## Generate Data Model XML

Use the BI Publisher to create a new contract layout template by adding the contract data model attributes. Use the Generate Data model XML to find the latest data model attributes.

You can download data model attributes in an XML format to access the standard application attributes and extensible attributes. Once you know the attributes, include the required attributes in the contract layout template. The downloaded data model XML contains:

- Standard contract attributes
- Custom contract attributes
- Standard child entities such as contract parties, lines, and contacts
- Custom child entities created through Application Composer
- Descriptive flexfields for Oracle Contracts

## Download Data Model XML

Here are the steps to download the latest data model XML:

1. Navigate to Contracts in Contract Management.
2. Open the Tasks side panel and click **Generate Data Model XML** in the Setup tasks.
3. On the Generate Data Model XML page, click **Download**.

## Configure Contract Management Business Functions

Here are the steps to configure contract management business functions:

1. Navigate to **Define Contracts Common Configuration > Define Contract Management Business Function Configuration**.
2. Click **Select** in the Selected Scope column for the Specify Customer Contract Management Business Function task.
3. Click **Select and Add** in the dialog to select a business unit, then **Apply and Go To Task**.
4. Select the BU that you created and click **Save and Close** to save the task list scope to the BU.
5. On the Specify Customer Contract Management Business Function Properties page select the default currency, enter the required information in the Terms Library region and click **Save and Close**. These settings are common for standalone sell and partner program enrollment type of contracts. Ignore the other values in the page for now.
6. Open the Specify Supplier Contract Management Business Function Properties task.
7. Enter the required information and click **Save and Close**.

## Define Customers with Their Addresses and Contacts

Here are the steps to define customers and their addresses and contacts:

1. Navigate to **Define Contracts Common Configuration** and note the following manual tasks. Manual tasks need to be performed outside the Setup and Maintenance work area.

**Note:** As partner management enrollment contracts are created and managed from the Oracle Partner Management application, partner creation and other Partner Management setups are part of the Sales offering implementation.

2. Navigate to **Sales** and then **Accounts**.
  - a. Click **Create Account** to create an account type of Customer. Enter a name, sell-to-address, contact (if you have created one).
  - b. Click **Save and Close**.
3. Navigate to **Manage Customers** through the Global **Search** in the side panel and create Sites associated with the Sales Accounts you have created. Ensure that there is at least one Site with the Purpose "Bill to".

## Define Party Roles, Contact Roles, and Role Sources

You can designate approvers, specify approval routing, and define rule priority. After you assign the role source, you can update the Oracle Business Process Management (BPM) workflow rules to define approval rules as specified by the Contract Role Code.

Use these steps to route the contract approval to the contract owner. Do this to define party roles, contact roles, and role sources:

1. In the Setup and Maintenance work area, create an implementation project that includes the **Define Contracts Common Configuration** task.
2. Create new party roles as needed.
3. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Contact Roles** task.
4. Create new contact roles as needed.
5. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Role Sources** task.
6. For each party role set up in the previous step, enter the required information for the associated contact roles.

### Related Topics

- [How You Set Up Contract Party Roles](#)
- [Approval Rules Configurations](#)
- [How You Set Up Approval Groups and Approval Task Configuration Rules](#)
- [Manage Workflow Rules Using a Spreadsheet](#)

## Define Contract Line Types For Procurement Contracts

Do this to define procurement contract line types:

1. Return to the Setup and Maintenance work area. In your project under **Define Procurement Contracts Configurations**, open the **Manage Contract Line Types** task. Select and Add your business unit if requested.
2. Click **Create** and create line types each with the following seeded line type sources:
  - Buy agreement, free-form
  - Buy agreement, item
  - Buy intent, free-form
  - Buy intent, item
3. Click **Done** to return to the main task list.

## Define Contract Types For Procurement Contracts

Here are the steps to define contract types:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to **Define Contracts Common Configuration**, and open the **Manage Contract Types** task.
2. Click **Create** to create a buy intent contract type. Enter the required information and click **Continue**.
3. Enter the required information and save.
4. Click the **Fulfillment Notifications** tab.
5. Create a fulfillment notification and check what notification types are available.
6. Select the Enable Terms Authoring check box and click **Save and Close**.
7. Click **Create** again to create a purchase agreement contract type by repeating the previous steps.
8. Click **Done** and return to the main task list.

## How You Set Up User Statuses and User Transitions

Enterprise Contracts cover the standard statuses that track the progress of a contract from Draft to Approved. You can also create your business-specific user statuses and user transitions, like Legal Review or Finance Review, to closely monitor your contract stage.

Once defined, you can incorporate these statuses into the contract life cycle.

Start by creating user statuses and transitions:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Contract User Statuses and Transitions** task.
3. Click the **Add** icon to add one or more user statuses and transitions.
4. Click **Save and Close**.

For the user statuses to be available on a contract, you must add the custom statuses and the transitions into the event model. Event models are applied to various contracts based on the conditions specified in each event model. The event model enables you to configure the contract states, the transitions between them, and the actions performed while in each state. Event models are made up of states, events, and actions. Each state of an event model can have one or more events defined for it. Each event can have one or more actions associated with it.

Here's how you can configure an event model:

1. Sign in to the application as a setup user.
2. Ensure you're working in an active sandbox.
3. Navigate to Contracts in Contract Management.
4. Open the Tasks side panel and click **Event Models** in the Setup tasks.
5. In the Events Models page, for the `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVo` business object, click the Add icon to create a new event model or select an existing event model and click the **Edit** icon.
6. Create the status, events, and actions as defined in the `DefaultContractHeader` event model. The `DefaultContractHeader` event model contains the standard configurations. You can skip the statuses that you don't want to use.

**Note:** You can associate an event model with a condition. You can create event models specifically for some business units or contract types. You must define these event models with appropriate conditions so that they aren't universally applicable.

7. Click the **Initial** State and configure it as defined in the `DefaultContractHeader` event model.

The **Initial** state is a special state that enables you to initiate contract creation. The `DefaultContractHeader` event model has `CREATE` and `CREATE_FROM_COPY` events associated with it.

8. Click the **General** State and configure it as defined in the `DefaultContractHeader` event model.

The **General** state is a common state and any event or action defined in this state becomes available for contracts in all the states. The `DefaultContractHeader` event model has the `Validate` event that's available for a contract in all the states.

9. Add new states based on your business requirements.

You can create a standalone or a child of a parent state. Examples of standalone states are `Draft` and `Canceled`. A parent state is a collection of one or more child states. You can use the parent state when events or actions apply to more than one state. In the `DefaultContractHeader` event model, the `Approved Composite` state is a parent state for the `Approved` and `Hold` states. The events defined for the `Approved Composite` state are applicable for all the child states defined under it.

10. Create events for every state based on your business requirements.

Events are the transitions for a specific state. Events control the actions you can take on a contract in the application. For example, while the contract is in the `Draft` state, some allowable actions are `Cancel`, `Submit for Approval`, and `Create Version`.

11. Create actions associated with every event. You can use the `DefaultContractHeader` event model to find groovy script examples associated with various events and actions.
12. Click **Save and Close**.
13. After testing these changes, publish the sandbox according to your company's business practices.

## Example of Adding Legal Review as Custom Status in Event Model

Here's an example for including `Legal_Review` as the custom status in the event model:

1. Create user statuses and transitions.
  - a. Navigate to the **Setup and Maintenance** work area.
  - b. Search and select the **Manage Contract User Statuses and Transitions** task.
  - c. From the User Statuses section, click the **Add** icon and enter `Legal_Review` in the Code column and **Legal review** in the Name column.
  - d. From the User Transitions section, Enter `SEND_FOR_LEGAL_REVIEW` as user transition value and **Send for legal review** as name.
  - e. Click **Save and Close**.
2. Sign in to the application as a setup user.
3. Ensure you're working in an active sandbox.
4. Navigate to Contracts in Contract Management.
5. Open the Tasks side panel and click **Event Models** in the Setup tasks.
6. In the Events Models page, for the `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVO` business object, select an existing event model and click the **Edit** icon.
7. In the States section, click the **New** icon.

- a. In the Create State window, enter `Legal_Review` in the **Name** field and click **OK**.
  - b. Select **State** in the **Type** column.
  - c. Select **General** in the **Parent State** column.
8. In the **LEGAL\_REVIEW: Details** section, click the **New** icon.
  - a. In the Create Event window, select **Entry** in the **Type** field and click **OK**.
  - b. In the Create Event window, select **Named event** in the **Type** field and enter `CANCEL` in the name field. Click **OK**.
  - c. For the `CANCEL` event, enter `stsCode=='DRAFT'` in the **Guard Condition** column.
  - d. Similarly create the `SUBMIT`, `ACTIVATE`, and `VERSION` events.
9. After adding all events, click the **Entry** event.
10. In the **Entry** section, click the **New** icon to add the condition that changes user status to **Legal\_Review**.
11. In the Create Event window:
  - a. Select **Groovy Script** in the **Type** field.
  - b. In the **Script** field enter:

```
UserStatusCode='LEGAL_REVIEW';  
  
eventModel.execute('createHistory');
```
  - c. Click **OK**.
12. From the **States** section, select the `DRAFT` state.
13. In the **DRAFT: Details** section, click the **New** icon.
  - a. In the Create Event window, select **Named event** in the **Type** field and enter `SEND_FOR_LEGAL_REVIEW` in the name field. Click **OK**.

**Note:** The event name must exactly match with the transition code added in the **Manage Contract User Statuses and Transitions** task.
  - b. For this new event, select `Legal_Review` in the **To State** column.
14. Click **Save and Close**.
15. To test this new status, create a new contract.
16. From the **Edit Contract** page, click **Actions** > **Send for legal review**.
17. The user status for contract changes to **Legal review**.

Similarly, you can configure more custom user statuses as per your business requirements.

## How to Raise a Business Event

To configure a status change event, you must raise a business event. To raise a business event, you must first store the changes in an active sandbox. You can either create a sandbox or select an existing one and make it active.

You must activate the configuration tools you want to use in your sandbox.

Follow these steps to create and activate sandboxes for the configuration tool.

1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. On the **Sandboxes** page, click **Create Sandbox**.
3. Enter a name and description for your sandbox.
4. In the **Publishable** field, select **Yes** or **No**. If you set this option as **No**, you can use your sandbox for testing purposes but can never publish it.



5. Select **Configure Business Objects** and click **Create** to create the sandbox, or **Create and Enter** to enter or activate the sandbox after creating it.

Here are the steps to raise business events for contracts:

1. Navigate to **Contracts** in Contract Management.
2. Open the Tasks side panel and go to **Event Models** in the Setup tasks.
3. In the Events Models page, select **DefaultContractHeader** event model and click the **Edit** icon
4. In the States section, click the **DRAFT**.
5. In the DRAFT: Details section, select **Entry** in the Type field.
6. In the Entry section, click the **New** icon to add the condition that changes user status to **DRAFT**
7. In the Create Event window, use Groovy scripts to raise a business event. Here's sample code, you can modify the scripts to fit your requirements.
  - a. Select **Groovy Script** in the **Type** field.
  - b. In the Script field enter:

```
oracle.jbo.NameValuePairs plist = new oracle.jbo.NameValuePairs();

plist.setAttribute("contractId", ContractId);

eventModel.execute('stsMgtAM').raiseBusinessEvent(plist);
```
  - c. Click **OK**.
8. Click **Save and Close**.
9. To test this new status, create a new contract.

## Set Up Contract Text Search

Here's a summary of the tasks that you must perform to set up the Search Contracts by Text feature:

- Enable Search Contracts with Oracle Search Extension Framework Using Opt In
- Set Up Profile Options
- Assign the Search Contracts security privilege to required users.
- Configure Attachment Search
- Run Scheduled Processes

## Enable Search Contracts with Oracle Search Extension Framework Using Opt In

Here's how you can enable the search contract by text feature:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the **Enable** option for **Search Contracts with Oracle Search Extension Framework**.
5. Click **Done**.

## Set Up Profile Options

To set up the track audit feature:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Administrator Profile Values** task.
3. Search and find these profile options:
  - **Enable/Disable Search Ext Framework**: Use this profile to check if Search Extension is enabled.
  - **Enable Search Attachments**: Use this profile to enable attachment support within the Search Infrastructure.
4. Click the **Enable/Disable Search Ext Framework** profile option and set the **Profile Value** as **Yes** to enable this feature to use Oracle Search Extension Framework.
5. Click the **Enable Search Attachments** profile option and set the **Profile Value** as **Yes** to enable search across the attached documents.
6. Click **Save and Close**.

## Configure Attachment Search

Here's how you can configure the attachment search using the Manage Global Search Configurations task:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Global Search Configurations** task.
3. Click **Configure Attachment Search**.
4. Add one or more new rows to enable search across your file types.
5. To enable the same preference for all file types:
  - a. Add one row and enter **\*/\*** in **Content Type**.
  - b. Select the index name **fa-crm-contract**.
  - c. Set **Enable File Search** to **Yes**.
  - d. Set **Enable Content Search** to **Yes**. If set to **No**, the content is excluded and only the file metadata, such as the file name, is included in the search.
  - e. Set the **Maximum File Size** and **Maximum Content Size**.
    - The file size is the size of the attachment on your system. Files greater than the maximum size aren't loaded and only the file metadata, such as the file name, is included in the search.
    - The content size is the number of bytes of data taken from the file and added to the business object index to be included in the search. **Maximum Content Size** is always less than **Maximum File Size** as it's the content that remains after removing file formatting and metadata.
6. Optionally, you can click the **Create from Sample** button to select how to search for different file content types.

## Run Scheduled Processes

Using the Scheduled Processes task in Tools, run these processes at least once in this order, to include existing contracts data into the search:

- ESS job to create index definition and perform initial ingest to OSCS  
This process ensures that all existing contract data is included before you start using this feature. To ingest all contracts data, enter the index name **fa-crm-contract** for the **Index Name to Reingest** parameter. Leaving the index name parameter blank creates and ingests data for all indices.
- Ingest attachments to OSCS

This process ensures that the content of the attached contract documents is included in the search.

We also recommend you to run these scheduled processes at least daily, in same sequence, for the contracts to be searched accurately with most updated data:

- ESS job to run Bulk ingest to OSCS
- Ingest attachments to OSCS

#### *Related Topics*

- [Enable Search Extension Framework](#)
- [Configure Attachment Search](#)
- [Contracts Search Options](#)

## Amend Contract Without Versioning

You can enable your contract authors to edit contracts without versioning. To determine which contracts are eligible to avoid visioning, you can select the **Allow amendment without versioning** check box at a contract type level.

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Contract Types** task.
3. In the Contract Type Options section, click the **Advanced Authoring Options** tab.
4. Select the **Allow amendment without versioning** check box.

**Note:** If you amend a contract without versioning, you can't revert the contract amendment.

5. Click **Save and Close**.

Once you enable this check box and navigate to the Edit Contract page for the selected type of contract, the application displays the Amend Contract window with these options:

- Version the contract
- Don't version the contract

**Note:** The **Allow amendment without versioning** check box is disabled when the class is Grant or when the line class is Service or Warranty.

## Set Up Electronic Signature

After you set up the electronic signature functionality, contracts users can submit contracts that can be signed electronically.

### **Before you start**

## Contracts Prerequisites

- When you create contract types, you specify whether an electronic signature is required for contract acceptance and activation.
- An electronic signature contract type is set up with:
  - The **Requires signature** checkbox set to Yes.
  - The **Electronic signature** checkbox set to Yes.
  - The **Solution Provider** is DocuSign or OneSpan.
  - Entry of a meaningful value for the email subject and email message.
- An electronic signature contract terms layout template must be set up with the signature table and with the standard tags in the signature table. This layout template is selected as the default contract terms layout template for the contract type to be used for electronic signatures.
- The contract author who plans to send the contract for signature must have a valid email address and must be set up as a user in the account that's specified in the electronic signature setup.

See *Define Contract Types* for more information.

## Electronic Signature Prerequisites

- Your organization must first register and obtain a license directly from a supported third-party electronic signature service provider. The supported providers are DocuSign and OneSpan.
- After the license is obtained, you must set up an account for your organization on the service provider's website. You must create an administrator account on the site. Note that this is a one-time activity.
- Note down the account key, provider URL, user name, and password from the solution provider's site.

## Here's what to do

1. In the Setup and Maintenance work area, search for and select the Manage Contract Electronic Signature task.
2. Select DocuSign or OneSpan as the solution provider.

3. If you're using DocuSign:

- a. Enter the User ID (a 32-digit GUID from DocuSign) that's associated with the user profile that has administrator privileges.
- b. Enter the Account ID, which is the API account ID mentioned on the DocuSign website.
- c. Enter the Endpoint URL, which is the Account Base URL mentioned on the DocuSign website.
- d. Provide the OAuth URL:

- Development account: `https://account-d.docusign.com`
- Production account: `https://account.docusign.com`

**Note:** Developer accounts let you test and develop with DocuSign functionality for free. Developer accounts operate in the DocuSign development (demo) environment, which is similar to production except:

- Documents sent in this environment aren't legally binding and have test stamps on them.
- Developer accounts don't expire.
- Developer accounts have enterprise-level features enabled for development and testing purposes.

- e. Click **Validate** to provide one-time user consent to use DocuSign integration.
- f. Click **ALLOW ACCESS** to grant consent.  
You'll receive a confirmation message on the linking of Oracle Enterprise Contracts and DocuSign.
- g. Click **Validate**, and after the validation status changes to Complete, **Save and Close**.

4. If you're using OneSpan:

- a. Enter the user ID of the OneSpan account user, the API key, and the appropriate OneSpan endpoint URL.
- b. Save the settings.

**What to do next**

After you set up the electronic signature process, you must set up your contract types to enable them for electronic signatures. The enabling at the contract type level works with the Enable electronic signature checkbox on individual contracts. So, if enabled for a particular type, by default, any contract you create of that type will also have the Enabled electronic signature box checked. Still, you can decide to deselect it and turn off the electronic signature specifically for that contract. You can edit this checkbox if the contract hasn't yet been signed. However, once the contract reaches Pending acceptance status, you'll need to continue with the electronic signing process. See the topic, *Define Contract Types*, for more information.

Keep in mind these user requirements to be able to send contracts for signature:

- Users must have a valid electronic signature account.
- Users' electronic signature user names must match their email addresses in Oracle Person Management.
- In the solution provider's account, the users must be defined as members with permission to send contracts for signing.

For more information on Contracts user tasks, see *How Capturing Contract Acceptance with Electronic Signatures Works*.

## Assign Procurement Contracts Business Functions

You can assign business functions for Procurement Contracts in the Setup and Maintenance work area.

Here are the steps to assign business functions for Procurement Contracts:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts**, and open the **Define Business Units for Enterprise Contracts** task list.
  - a. Click **Select** from the Select Scope column for the **Assign Business Unit Business Function** task.
  - b. In the Select Scope dialog, select **Select and Add** from the Business Unit drop down list and then click **Apply and Go To Task**.
  - c. Search for your business unit, select it, and then save.
  - d. Under Business Unit Function, select **Materials Management**, and save.

## Define Items For Procurement Contracts

Do this to define items:

1. In the Setup and maintenance work area, search for your implementation project, navigate to **Define Procurement Contracts Configurations**, and add two tasks: Manage Units of Measure and Manage Item Classes. Open the **Manage Units of Measure** task.
  - a. Click **Manage UOM Classes** in the table.
  - b. Click **+** to create an UOM class and **save**.
  - c. Enter the base UOM created as part of UOM class creation in previous step to verify whether the UOM got created automatically. Save the changes. Ignore conversions for now as there is only one unit in the UOM class.
2. Navigate to **Define Procurement Contracts Configurations**, and open the **Manage Item Classes** task.
  - a. In the Manage Item Classes task, click **Root Item Class** in the search results table.
  - b. Click the **Security** tab and use the **+** icon to add a row for Item Class People. Under Actions in the child table, add all actions starting with C for create privileges, V for view privileges, and M for maintain privileges, and save.
  - c. Click the **Item Templates** tab. Click the filter icon in the table and search for Purchased.
  - d. Click **Create**. Enter the required information in the dialog and click **OK**.
  - e. Enter the required information. Save and then click **Done**.
3. This next step is a manual task to be performed in the Item work area and requires you leave the setup and maintenance work area..

4. Navigate in the application to **Product Management** and then **Items**.
  - a. Click **Create Item** task.
  - b. Enter the required information to create a purchasable item and click **OK**.
  - c. Enter the required information and click the **Specifications** tab.
  - d. Click **Purchasing** under Item Organization under the Specifications tab. Ensure the values are as follows and save the changes:
    - Purchased = Yes
    - Purchasable = Yes
    - User Approved Supplier = No
    - Allow Purchasing Document = Yes
    - Taxable = Yes

## Define Payment Terms For Procurement Contracts

Do this to define payment terms:

1. You may have already set up payment terms as part of a Procurement implementation. If you haven't set up yet, then, add this task to your implementation project. Navigate to **Define Procurement Contracts Configurations** and with that task list selected add the **Manage Payment Terms** task.
2. Open the **Manage Payment Terms** task and Select and Add your business unit if needed.
3. Click **Create** to create a simple payment term of NET 30.
4. Enter the required information and **save your changes**.

## Define FOB and Freight Terms For Procurement Contracts

Here are the steps to define FOB and freight terms:

1. You may have already set up FOB and freight terms as part of a Procurement implementation. If you haven't setup yet then, add these tasks to your implementation project. Navigate to **Define Procurement Contracts Configurations** and with that task list selected add the **Manage FOB Lookup** and **Manage Freight Terms Lookup** tasks.
2. Open the **Manage FOB Lookup** task. Select and add your business unit if needed.
3. Click **Create** to create a lookup. For example, FOB is commonly used.
4. Open the **Manage Freight Terms Lookup** task.
5. Click **Create** to create a lookup. For example, FREIGHT TERMS.

## Define Contract Lines Descriptive Flexfields

If you're going to use sales agreement lines with descriptive flexfields, you need to set up descriptive flexfields.

See the related topic for more information.

#### Related Topics

- [Descriptive Flexfields for Contracts](#)

## Define Contract Terms Library Components

Here are the steps to define contract terms library components (clauses and terms templates):

1. In the Setup and Maintenance work area, go to your implementation project, navigate to the **Define Contract Terms and Clause Library Configuration** task list, and go to the **Manage Contract Terms Value Sets** task.
  - a. Search for value sets created for the Enterprise Contracts module. Value sets are required to define questions and rules in Terms library work area. Click **Create**.
  - b. Enter the required information to create a value set. Save and click **Done**.
2. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Manage Contract Clause Types** task.
3. Create a new clause type and save.
4. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Specify Contract Clause Import XML File Location** task.
5. Set the profile value to the required value in your Enterprise Scheduling Service (ESS) server. Specify the ESS server directory where the import clauses from XML File process uploads and imports files into the Contract Terms Library.
6. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Manage Contract Standard Clauses, Templates, and Expert Rules** task. This is not a setup and maintenance task, but a manual task that is performed from the Terms Library work area.
7. To create terms clauses navigate in the application to **Contract Management**, then the **Terms Library** work area.
  - a. Click the **Create Clause** task.
  - b. Enter the required information to create a clause and click **Submit**.
    - The Title name should be unique for both buy and sell clauses.
    - The End Date for new clauses can't be a date in the past.
  - c. Once you have submitted a new clause for approval, it will need to be approved by the clause approver.
  - d. Once approved, you should now search for the clauses to verify that they are in Approved status.



8. To create terms templates navigate in the application to **Contract Management**, then the **Terms Library** work area.
  - a. Click the **Create Terms Template** task.
  - b. Enter the required template information and click **Save** to enable the Document Types table.
  - c. Select a contract type in the document type table and click the **Clauses** tab.
  - d. Click the **Add Section** action.
  - e. In the Add Section dialog box, enter a section name in the New Section box and click **OK**.
  - f. Select your new section and click **+** to add a clause.
  - g. In the Add Clauses dialog box, search for your clause, select the row, and click **OK**.
  - h. Open your section, and click the clause title. Click the refresh icon in the toolbar to view the section and clause in the terms template preview pane. Click **Submit**.
  - i. Check for and resolve any warnings or errors, and then click **Submit**.
  - j. **Save and close**.
  - k. Repeat the previous steps to add more term templates as needed.
  - l. Click **Submit** and then click **Submit** again on the next page to submit it for approval.
  - m. Once you have submitted a new template for approval, it will need to be approved by the template approver.
  - n. Once approved, you should now search for the templates to verify that they are in Approved status.

#### Related Topics

- [How Contract Terms Templates Work](#)
- [How You Import Clauses into the Contract Terms Library](#)

## Configure Import and Export Management for Enterprise Contracts

Here are the steps to configure Import Management for Enterprise Contracts:

1. In your implementation project, go to the **Define Import Management** task list, and open the **Manage File Import Objects** task.
  - a. Select the row for **CONTRACT** and click **Edit**.
  - b. Enter default values for the attributes of objects **ContractImportJob1** and **Import ContractHeader1**.
  - c. Select the Map and Required check boxes as required and click **Save and Close** twice.
2. Navigate to **Define Import Management**, and open the **Manage File Import Mappings** task.
  - a. Select **Contract** in the Object drop down list and click **Search** to view the available mappings. Click **Create** to define a new mapping.
  - b. Enter the required information and click **Save and Close**.
  - c. Click a contract import mapping. Add column mappings as required. Ensure the source column header values match the column names in the data file and click **Save and Close**.
  - d. Again click **Save and Close** to return to main folder structure.
3. Navigate to **Define Import Management**, and open the **Manage File Import Activities** task.
  - a. Click **Create** to schedule an import job.

- b. Enter the required information and click **Next**.
- c. Enter constant values for the import object attributes or click **Next**.
- d. Select a schedule from the Repeat Unit drop down list and click **Next**.
- e. Click **Activate** to schedule the import job.

Follow these steps to configure Export Management for Enterprise Contracts:

1. In your implementation project, go to the **Manage Bulk Data Export** task list, and open the **Schedule Export Processes** task.
2. Select **Create** from the Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map, in the page.
4. Select **Create** from the Actions menu to view the Manage Export Objects dialog box.
5. Select the objects you want to export and click **Done**.
6. Specify the attributes and filters you want used to export.
7. Click **Next** to view the Create Export Process Definition: Create Schedule page.
8. Select the schedule for your export.
9. Click **Next** to view the Create Export Process Definition: Review page.
10. Review the export process details, and click **Activate**.

#### Related Topics

- [Perform Bulk Export](#)

## Enable Table of Contents in Contract Preview

Here are the steps to add table of contents in contract preview:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the **Enable** option for **Add Table of Contents to Contract Terms**.
5. Click **Done**.

## How You Set Up Approval Groups and Approval Task Configuration Rules

Here's how you set up or define approval groups and approval task configuration rules for contracts:

1. Sign in as a setup user.
2. In Setup and Maintenance go to:
  - Offerings: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Approval Groups
3. On the Manage Approvals page, click the **Approval Groups** tab.
4. In the Groups region, select the plus sign icon to begin creating a new approval group.

- a. Enter a name for the new group.
  - b. Click **Save**.
5. Add a member to the group. Click the **Add Member** icon to retrieve the Add to Group dialog window. In the search box, enter the email address of the user created earlier and click OK.
6. Click **Save**.
7. Repeat the previous steps to create an approval group that includes both level-one and level-two approvers.
8. Click the **Task Configuration** tab.
9. In the **Tasks to be configured** region, search for `ContractsApproval`.
10. Click the **ContractsApproval** task to access a set of subtabs where you can set up rules for the approval task.  
For example, under **Configuration**, you can set the assignment and routing policy attributes to suit your business needs. If you want to let the initiator add ad hoc approvers and configure notifications as the approval progresses, select the **Allow initiator to add participants option**.  
As another configuration example, you can specify a variety of conditions, such as preventing a PDF from being attached to a notification or allowing an initiator to add participants.
11. You can create rules to suit your business needs. Edit the `ContractsApproval` task.
12. Click **Rules**
13. Expand each rule.
14. Click **Edit** to create rules for the `ContractsApproval` stage rule set.
15. Delete all three rules.
16. Create a new rule.

**Note:** Create rule names without spaces between them.

17. Enter the rule name. Click the arrow. Under the IF label, click the list icon next to the first field.
18. As an example, in the Condition Browser, expand `ContractsApprovalPayloadType`, `ContractDetails`, **result**, and select the `estimatedAmount` payload attribute.

**Note:** Set up this rule for contracts starting with zero dollars: `ContactDetails.estimatedAmount` is null or `ContractDetails.estimatedAmount.value.doubleValue()` is same or above 0.00.

Here's another example with `contract_type_id`, `organization_id`, amount null, and agreed amount 0 or agreed amount smaller than 2000 dollars:

```
IF ContractDetails.org_id is {org_id} and ContractDetails.contractTypeId in {contract_type_id}
and (contractdetails.agreedAmount is null or (contractdetails.agreedAmount isn't null and
contractdetails.agreedAmount.doubleValue() same or less than 2000))
```

19. Select **'isn't'** from the operator drop-down list, and select null as the comparison value of the IF condition.
20. Click the down arrow in IF condition and select simple test to add a new IF condition.
21. In the IF condition of `ContractApproval`, use the following condition to setup contract approval based on Contract Intent:
  - o For Buy Intent: `ContractDetails.buyOrSell` is "B"
  - o For Sell Intent: `ContractDetails.buyOrSell` is "S"
22. Select the comparison field of the new IF condition from the condition browser.
23. Similarly add another IF condition as follows: select `estimatedAmount` for the comparison field, select **same or less than** as the operator, and select a value such as 30000 as the comparison value.
24. Select Approval Group from the List Builder drop-down list under THEN, and click Create Action to create the List builder action 1 region.
25. Select level 1 approver and enter the required information for the List builder action 1 region.

26. Click **+** next to Estimate\_Amount\_Rule1 to create a second rule, give it a name such as Estimate\_Amount\_Rule2, and expand it.
27. Create a second rule to route to higher level approvers for higher contract amounts.
28. Create a third rule such that, if contract estimated amount isn't entered, it's routed to level 1 approver.
29. Click the **Save** button and then the **Commit** task button to commit the rules to the database. Expand all the rules.

Note that you could also add rules based on:

- Policy deviations (`ContractsApprovalPayloadType.policyDeviation = Y or N`)
- Terms amended rule (`ContractsApprovalPayloadType.termsAmended = Y or N`)
- Nonstandard clauses added (`ContractsApprovalPayloadType.nonStdClause = Y or N`)
- Missing (deleted) standard clauses (`ContractsApprovalPayloadType.missingStdClause = Y or N`)
- Standard clause (not on the terms template) added (`ContractsApprovalPayloadType.stdClauseAdded = Y or N`)
- Clause deviation category codes (`TermsDeviations.deviationCategory = "<<Code>>"`)
- Deviation codes (`TermsDeviations.deviationCode = "<<Code>>"`)

Add steps to define such approval rules, referring to this table:

Clause Deviation Category Code	Clause Deviation Code	Description
OKC_NON_STD_ARTICLES	NA	A nonstandard clause exists on the contract.
OKC_NON_STD_ARTICLES	ADDED_NON_STD	A new nonstandard clause was added.
OKC_NON_STD_ARTICLES	MODIFIED_STD	A standard clause was modified and made nonstandard.
OKC_MISSING_STD_ARTICLES	NA	A standard clause from the terms template was deleted from the contract.
OKC_MISSING_STD_ARTICLES	MISSING_MANDATORY	A mandatory clause is missing.
OKC_MISSING_STD_ARTICLES	MISSING_EXPERT_ARTICLE	A conditional clause based on an expert rule is missing.
OKC_MISSING_STD_ARTICLES	MISSING_OPTIONAL_ARTICLE	An optional clause is missing.
OKC_INVALID ARTICLES	NA	An invalid clause exists on the contract.
OKC_INVALID ARTICLES	ARTICLE_EXPIRED	The clause is expired.

Clause Deviation Category Code	Clause Deviation Code	Description
OKC_INVALID_ARTICLES	ARTICLE_ON_HOLD	The clause is on hold.
OKC_INVALID_ARTICLES	EXPERT_ARTICLE_NOT_REQUIRED	The rule conditions no longer apply for a clause added by Contract Expert.
OKC_STD_ARTICLES_ADDED	NA	A standard clause was added.
OKC_STD_ARTICLES_ADDED	ADDED_STD_ARTICLE	A standard clause from the library was added.
OKC_STD_ARTICLES_ADDED	REPLACED_ALT	A standard clause was replaced with an alternate clause.

30. Alternatively, to bypass the approval hierarchy and have automatic approval, create only the following rule.

```

Edit IF condition to 1 is 1
Under Then block Choose
List builder : Supervisory Response type: Required Number of levels: 1 Starting
Participant: HierarchyBuilder.getPrincipal("<User Id>",-1,null,null) Top Participant:
HierarchyBuilder.getPrincipal("<User Id>",-1,null,null)
Auto action enabled: True Auto Action: "APPROVE"
Save and commit.

```

31. Click the **Approval Group** tab to create an approval group for Clause Approval.
32. Click the **Task Configuration** tab to create rules for clause approval human task. Click the human task **ContractClauseApproval** and then click the **Rules** subtab.
33. Click the **Approval Group** tab to create an approval group for Template Approval.
34. Click the **Task Configuration** tab to create rules for Contracts Template Approval human task, click the **TemplateApprovalHumanTask** human task, and then click the **Rules** subtab.
35. Repeat the rule creation steps described for contract approvals.

**Note:** To create a dynamic list of approvers, you can create a dynamic approval group based on a Java class file. The Java class can refer to approval task payload parameters, for example, contract identifier.

#### Related Topics

- [Approval Rules Configurations](#)
- [Configure Workflow Approvals and Notifications](#)
- [How Workflow Task Routing Is Mapped Out](#)
- [How Authoring Contract Terms Works](#)
- [How Reviewing Contract Deviations Works](#)

## Scenario-Based Contract Approval Rule Setups

Here are steps you can use to set up specific approval scenarios, including:

- Automatic contract approval
- Contract approval based on the immediate manager's authorization
- Contract approval based on term deviation
- Contract approval by an internal contact:

**Note:** For any field that can potentially have a null value, ensure you have specified a null condition in the approval rule.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search and select the **Manage Task Configurations for Customer Relationship Management** task. The BPM Worklist page appears.
4. In the Tasks to be configured region, select **ContractsApproval**.
5. Click the **Edit task** icon.
6. Click the **Assignees** tab and click the **Go to rule** icon to create a new rule.
7. Click the **Add Rule** icon to add one of these rules such that:
  - Contracts are approved automatically:
    - i. In the If section, select the condition as 1 is 1.
    - ii. In the Then section, select:
      - List Builder: Supervisory
      - Response Type: Required
      - Number of levels: 1
      - Starting Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
      - Top Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
      - Auto Action Enabled: True
      - Auto Action: "APPROVE"
    - iii. Ensure that other rules are inactive.
  - Contracts are approved after the manager's authorization:
    - i. In the If section, select the condition as 1 is 1.
    - ii. In the Then section, select:
      - List Builder: Supervisory
      - Response Type: Required
      - Number of levels: 1
      - Starting Participant:  
`HierarchyBuilder.getManager_1("supervisory",Task.payload.submitter,-1,"","")`

- Top Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
- Auto Action Enabled: False
- Auto Action: "APPROVE"
- iii. Ensure that other rules are inactive.
- Contracts are approved based on term deviation:
  - i. In the If section, select the condition as `TermsDeviations.articleTitle.toUpperCase() is "Keyword"`.
  - ii. In the Then section, define rules as per your requirements.
- Contracts are approved by an internal contact:
  - i. In the If section, select the condition as `InternalContacts.croCode is "CONTRACT_ADMIN"`.
- Note:** Replace the "CONTRACT\_ADMIN" with the internal contact role.
- ii. In the Then section, select:
  - List Builder: Resource
  - Response Type: Required
  - Users: `InternalContacts.username`
  - Participants: Groups: null
  - Application Role = null

8. Click **Save and Close**.

## Configure Scheduled Processes

Configure scheduled processes to change a set of records for a specific business need, or to get a printable output with information about certain records. These processes are predefined but not pre-configured.

This list identifies those scheduled processes that are critical for the smooth operation of your Contracts application:

- Indexing schedules
- Deliverables notifications scheduled processes:
  - Send Contract Terms Deliverable Due Date Notifications
  - Send Contract Terms Deliverable Escalation Notifications
  - Send Contract Terms Deliverable Overdue Notifications
- Expiration notification scheduled process:
  - Send Contract Expiration Notifications
- Fulfillment notification scheduled process:
  - Send Contract Fulfillment Notifications

- Service Contract Billing scheduled process:
  - Send Service Contract Billing Information to Receivables
  - Import Auto-invoice
  - Fetch Service Contract Invoice Information from Receivables
- Process Installed Base Updates

For more information, see the related topics.

*Related Topics*

- [Set Up Contract Text Search](#)
- [Overview of Contracts Scheduled Processes](#)



# 14 Service Contracts Setup Checklist

## Overview of Service Contracts Setup

This chapter explores how to quickly set up Oracle Service Contracts by configuring only those features that are required to have a functioning application. After you get a working application, it's recommended that you follow the full install offering task list in the Setup and Maintenance work area.

**Note:** Due to differences in the sequence of common setup tasks in the Enterprise Contracts offering and the intent of this chapter, you may find some differences in the order that set up tasks are presented here.

## Set Up Service Contracts

Here are the steps to set up Oracle Service Contracts:

1. Configure Enterprise Contracts and create an implementation project.
2. Define legal entities.
3. Define business units and assign business function, and assign ledger and legal entity.
4. Define item organizations.
5. Define users.
6. Define document sequences.
7. Configure contract management business functions.
8. Define customers and their addresses and contacts.
9. Define party roles, contact roles, and role sources.
10. Define contract line types.
11. Define contract types.
12. Manage user statuses and user transitions.
13. Set up electronic signature.
14. Set up common CRM business unit profile option.
15. Define coverage.
16. Define items.
17. Manage time unit mappings.
18. Define order management parameters.
19. Define pricing.
20. Define customer billing configuration.
21. Define contract default values.
22. Manage contract rules.
23. Define contract terms library components.
24. Configure file-based import and export for Enterprise Contracts.
25. Set up approval groups and approval task configurations.
26. Enable contracts for use in Oracle Social Network.

27. Configure scheduled processes.

## Create A Service Contracts Implementation Project

Here are the steps to configure Service Contracts and create an implementation project:

1. In the Setup and Maintenance work area, select the Enterprise offering and click **Change Feature Opt In**.
2. On the Opt In page, enable Enterprise Contracts and Service Contracts.
3. Click the **Features** icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
4. Navigate to **Setup and Maintenance**.
5. Open the Tasks side panel and click **Manage Implementation Projects**.
6. On the Implementation Project page, click **Create** to create a new project.
7. Enter your project name and click **Next**.
8. Select **Include** for Enterprise Contracts and Service Contracts, then click **Save and Open Project**.
9. Expand Enterprise Contracts in the Implementation Project page to be used in the remaining steps in this chapter.

### Related Topics

- [Configure Offerings](#)

## Define Legal Entities

Here are the steps to define legal entities for use with Contracts:

1. In the Setup and Maintenance work area, create an implementation project that includes the Manage Legal Addresses task.
2. Select a country from the Country drop down list, and a new location.
3. Enter the new location information on the Location Create dialog.
4. **Save and Close**.
5. In your implementation project, search for the Define Legal Entities for Enterprise Contracts task list and open the **Manage Legal Entity** task.
6. Click **Create New**.
7. Click the new icon, and enter the required information by selecting the options Legal Employer and Payroll Statutory Unit. Click **Save**.
8. On the Create Legal Entity page, enter the required information and then **Save and Close**.
9. On the Scope Selection: Legal Entity dialog box, click **Select and Add**.
10. Select the legal entity you created and click **Save and Close**.
11. In your implementation project, select **Define Legal Entities for Enterprise Contracts** from the task list.
12. Click the **+** on the tool bar, then search for and add the tasks **Manage Legislative Data Groups** and **Manage Legal Entity HCM Information** to the Define Legal Entities for Enterprise Contracts folder.
13. Open the task **Manage Legislative Data Groups**.
14. Search and then click **Create**.
15. Enter the required information and click **Submit**.

16. Search again to verify that the legislative data group is created, and click **Done**.
17. Navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Legal Entities for Enterprise Contracts and open the task **Manage Legal Entity HCM Information**.
18. Search for and click the legal entity you added.
19. Select **Update** from the Edit options at the top. Enter a past date in the Update Legal Entity dialog and click **OK**.
20. Enter the required information under the Legal Employer tab and select the Payroll Statutory Unit tab. Enter the required information and click **Submit**.

## Define Item Organizations For Enterprise Contracts

Here are the steps to define item organizations:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Workforce Structures for CRM**, and open the task **Manage Locations**.
  - a. Click **Create**.
  - b. Enter the required information and **Submit**. Click **Done** to return to the main folder structure.
2. To start creating item organizations, navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Facilities for Enterprise Contracts**, and open the **Manage Facility Shifts** task.
  - a. Click **Create**.
  - b. Enter the required information and **Save and Close**. Click **Done**.
3. Navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Facilities for Enterprise Contracts**, and open the **Manage Facility Workday Patterns** task.
  - a. Click **Create**.
  - b. Enter the required information and **Submit**. Click **Done**.
4. Navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Facilities for Enterprise Contracts**, and open the **Manage Facility Schedules** task.
  - a. Click **Create**.
  - b. Enter the required information and **Submit**. Click **Done**.
5. Navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Facilities for Enterprise Contracts**, and open the **Manage Item Organizations** task.
  - a. Click **Create**.
  - b. Enter the required information and go to **Next** page.
  - c. Enter the required information and **Save and Close**.
  - d. Search again to view the item organization created, and click **Done**.

### Related Topics

- [Item Organizations](#)

## Define Contracts Users

Do this to define contracts users:

1. Navigate to **Define Common Applications Configuration for Enterprise Contracts > Define Security for Customer Relationship Management > Define Users for Customer Relationship Management** and open the **Manage HCM Role Provisioning Rules** task.
  - a. Click **Create**.
  - b. Enter the required information to create a new role mapping and **Save and Close**.
2. Navigate to **Define Common Applications Configuration for Enterprise Contracts > Define Security for Customer Relationship Management > Define Users for Customer Relationship Management** and open the **Users, Roles and Delegations** task.
  - a. Click **Create**.
  - b. Enter the required information to create a user with an email ID, who can author and submit contracts for approval. Enter a **Resource Role** and select an **Organization** in the **Resource Information** section.
  - c. Click **Auto-provision Roles**. The provisioned roles from HCM role mapping defined previously are automatically populated. **Save and Close** and then click **Done** to go back to main folder structure.
  - d. Repeat the previous steps to create as many Oracle Contracts users as required for this phase of the implementation.
  - e. Get users and passwords from the email recipients.

## Privilege That Controls Deleting or Editing Mandatory Clauses

The privilege, Override Contract Terms and Conditions Controls (OKC\_AUTHOR\_CONTRACT\_TERMS\_AND\_CONDITIONS\_OVERRIDE\_PRIV), controls whether a user can delete or edit mandatory clauses on contracts.

## Roles for Tracking Purchasing Activity Processes

Here are the roles needed to track the completion of purchasing activity processes:

- ORA\_OKC\_ENTERPRISE\_CONTRACT\_MANAGER\_JOB
- ORA\_OKC\_ENTERPRISE\_CONTRACT\_TEAM\_MEMBER\_ABSTRACT
- ORA\_OKC\_SUPPLIER\_CONTRACT\_ADMINISTRATOR\_JOB
- ORA\_OKC\_SUPPLIER\_CONTRACT\_MANAGER\_JOB
- ORA\_OKC\_SUPPLIER\_CONTRACT\_TEAM\_MEMBER\_ABSTRACT

For more information about how to perform user setups, see the Securing Sales and Fusion Service guide. For more information on the roles required for Contracts users, see the Security Reference for Enterprise Contracts guide.

### Related Topics

- [Role Provisioning Options](#)
- [Ways to Create Sales Users](#)

## Define User as Resource

The list of business units that a user can access is based on the resource organization the user is mapped to as a resource. To associate a resource organization with business units:

1. Sign in to the application as an administrator or a setup user.
2. In the Navigator, select **Resource Directory**.
3. On the Resource Directory page, click the **Tasks** panel tab and select **Identify Resources**.
4. Search for the user you want to include as a resource.
5. Click **Add as Resource**.
6. Click **Done**.

For every business unit you set up, you can define internal resource organizations associated with the business unit. A resource organization represents the internal organization and structure for the business unit.

Once you add a user as a resource, the user becomes available in the **Parties** tab on the Edit Contract page.

### Related Topics

- [How do I enable desktop pages for Resource Directory?](#)
- [Overview of Managing Resources](#)

## Set Up Read-Only Contract User

Here are the steps you can use to set up a read-only contract user after creating a new user and associating him to a resource organization:

1. Sign in as a user with Security Console access.
2. From the Navigator, select **Tools > Security Console**.
3. From the Roles subtab, click **Create Role**.
4. On the Create Role: Basic Information page, perform these steps:
  - a. Enter the role name.
  - b. Enter the role code.
  - c. Select **Common - Job Roles** from the **Role Category** drop-down list.
  - d. Optionally, enter the description.
  - e. Click **Next**.
5. On the Create Role: Function Security Policies page, perform these steps:
  - a. Click **Add Function Security Policy**.
  - b. In the Add Function Security Policy page, search and select the **Enable Sell Intent** privilege.
  - c. Click **Add Privilege to Role**.
  - d. Search and select the **Enable Buy Intent** privilege and click **Add Privilege to Role**.
  - e. Click **Next**.
6. On the Create Role: Data Security Policies page, optionally, you can set your data security policies according to your requirements and click **Next**.

7. On the Create Role: Role Hierarchy page, perform these steps:
  - a. Click **Add Role**.
  - b. On the Add Role Membership page, search and select **Contract Search and View Access** with the `ORA_OKC_CONTRACT_SEARCH_VIEW_DUTY` code.
  - c. Click **Add Role Membership**.
  - d. Click **Next**.
8. On the Create Role: Users page, perform these steps:
  - a. Click **Add User**.
  - b. In the Add User page, search and select a user.
  - c. Click **Add User to Role**.
  - d. Click **Next**.
9. On the Create Role: Summary page, review your changes.
10. Click **Save and Close**.

## Define Document Sequences

Define document sequences for contracts only if you need to autonumber contracts or clauses, or when you're doing the setup for the partner agreement type of contracts.

**Note:** If you're unfamiliar with the setup of document sequences, be sure to read the topics in the *Document Sequences chapter* in the *Oracle Fusion Cloud Applications Implementing Applications* guide.

You can define document sequences for contracts at these levels:

- Global
- Ledger
- Legal Entity
- Business Unit

You can define document sequences for clauses at these levels:

- Global
- Ledger
- Business Unit

**Note:** Each contract type you're using can have a different sequence.

Here are the steps to define the document sequences:

1. In Setup and Maintenance, search for the **Manage Document Sequence Categories** task.
2. In the Application field, search for **Enterprise Contracts**.  
You should see document sequence categories for the contract header table, OKC\_K\_HEADERS\_ALL\_B, and the clause table, OKC\_ARTICLES\_ALL.
3. Create a new document sequence category for the table, OKC\_K\_HEADERS\_ALL\_B, to store contract header information.

You don't need to create document sequences for the table, OKC\_ARTICLES\_ALL, that stores clauses, because you'll number the clauses manually.

4. Save your changes.
5. To create partner program enrollment contracts from the Partner Relationship Management application, create a new document sequence category for the table, OKC\_K\_HEADERS\_ALL\_B, to store contract header information.
6. Save your work.
7. Next, search for the **Manage Document Sequences** task.
8. In the Application field, search for **Enterprise Contracts**.
9. Create a document sequence in the primary table and assign it to the document category created for the contract header in the child table.  
The assignment start date needs to be before the contract type assignment start date.  
Select the primary ledger for the determinant value that's used to determine the document autonumbering scope and save your work.
10. To create partner program enrollment contracts from the Partner Relationship Management application, create a document sequence in the primary table and assign it to document category created for contract header in the child table.  
Select the primary ledger for the determinant value that's used to determine the document autonumbering scope and save your work.

**Note:** A contract created when autonumbering is disabled must have the line number provided, even if in the meantime you've changed the line type option back to autonumbering. The change won't propagate to the already created contract.

#### Related Topics

- [Document Sequences](#)
- [Document Sequence Categories](#)
- [Guidelines for Managing Document Sequences](#)
- [How can I set up autonumbering in contracts?](#)

## Configure Contract Management Business Functions

Here are the steps to configure contract management business functions:

1. Navigate to **Define Contracts Common Configuration > Define Contract Management Business Function Configuration**.
2. Click **Select** in the Selected Scope column for the Specify Customer Contract Management Business Function task.
3. Click **Select and Add** in the dialog to select a business unit, then **Apply and Go To Task**.
4. Select the BU that you created and click **Save and Close** to save the task list scope to the BU.
5. On the Specify Customer Contract Management Business Function Properties page select the default currency, enter the required information in the Terms Library region and click **Save and Close**. These settings are common for standalone sell and partner program enrollment type of contracts. Ignore the other values in the page for now.
6. Open the Specify Supplier Contract Management Business Function Properties task.

7. Enter the required information and click **Save and Close**.

## Define Customers with Their Addresses and Contacts

Here are the steps to define customers and their addresses and contacts:

1. Navigate to **Define Contracts Common Configuration** and note the following manual tasks. Manual tasks need to be performed outside the Setup and Maintenance work area.

**Note:** As partner management enrollment contracts are created and managed from the Oracle Partner Management application, partner creation and other Partner Management setups are part of the Sales offering implementation.

2. Navigate to **Sales** and then **Accounts**.
  - a. Click **Create Account** to create an account type of Customer. Enter a name, sell-to-address, contact (if you have created one).
  - b. Click **Save and Close**.
3. Navigate to **Manage Customers** through the Global **Search** in the side panel and create Sites associated with the Sales Accounts you have created. Ensure that there is at least one Site with the Purpose "Bill to".

## Define Party Roles, Contact Roles, and Role Sources

You can designate approvers, specify approval routing, and define rule priority. After you assign the role source, you can update the Oracle Business Process Management (BPM) workflow rules to define approval rules as specified by the Contract Role Code.

Use these steps to route the contract approval to the contract owner. Do this to define party roles, contact roles, and role sources:

1. In the Setup and Maintenance work area, create an implementation project that includes the **Define Contracts Common Configuration** task.
2. Create new party roles as needed.
3. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Contact Roles** task.
4. Create new contact roles as needed.
5. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Role Sources** task.
6. For each party role set up in the previous step, enter the required information for the associated contact roles.

### Related Topics

- [How You Set Up Contract Party Roles](#)
- [Approval Rules Configurations](#)
- [How You Set Up Approval Groups and Approval Task Configuration Rules](#)
- [Manage Workflow Rules Using a Spreadsheet](#)



## Define Contract Line Types For Service Contracts

Here's how you can define contract line types:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to **Define Contracts Common Configuration** and expand the task list.
2. Click the + on the toolbar, then search for and add the task **Manage Contract Line Types** to the selected Define Contracts Common Configuration task list.
3. Scroll down to and open the **Manage Contract Line Types** task.
4. Click **Create** and define line types with the following seeded line type sources:
  - Subscription, sell  
Recurrent sale of subscription products, for example, Cloud Service.
  - Coverage, sell  
Sale of coverage based products such as extended warranty, maintenance service and so on.
  - Warranty  
Sale of warranty included in the product.
5. Click **Done** to return to the main folder structure.

## Define Contract Types For Service Contracts

Do this to define contract types:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to, **Define Contracts Common Configurations**, and open the **Manage Contract Types** task.
2. Click **Create** to create a sell intent contract type. Enter the required information and click **Continue**.
  - For subscription and coverage line types, the contract type Class must be **Enterprise Contract** and the Line Class must be **Service**. You can select **Allow pricing during billing** if you choose to have your lines get the most current unit price every time an invoice is generated.
  - For warranty type, the Line Class must be **Warranty**.
3. Click **Create** and enter all other required and additional information.
4. Click **Continue** to create the contract type you require.
5. Add the desired line types and click **Save and Close** to return to the Manage Contract Types page.
6. Click **Done** and return to the main task list structure.

### Related Topics

- [Contract Types](#)

## How You Set Up User Statuses and User Transitions

Enterprise Contracts cover the standard statuses that track the progress of a contract from Draft to Approved. You can also create your business-specific user statuses and user transitions, like Legal Review or Finance Review, to closely monitor your contract stage.

Once defined, you can incorporate these statuses into the contract life cycle.

Start by creating user statuses and transitions:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Contract User Statuses and Transitions** task.
3. Click the **Add** icon to add one or more user statuses and transitions.
4. Click **Save and Close**.

For the user statuses to be available on a contract, you must add the custom statuses and the transitions into the event model. Event models are applied to various contracts based on the conditions specified in each event model. The event model enables you to configure the contract states, the transitions between them, and the actions performed while in each state. Event models are made up of states, events, and actions. Each state of an event model can have one or more events defined for it. Each event can have one or more actions associated with it.

Here's how you can configure an event model:

1. Sign in to the application as a setup user.
2. Ensure you're working in an active sandbox.
3. Navigate to Contracts in Contract Management.
4. Open the Tasks side panel and click **Event Models** in the Setup tasks.
5. In the Events Models page, for the `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVo` business object, click the Add icon to create a new event model or select an existing event model and click the **Edit** icon.
6. Create the status, events, and actions as defined in the `DefaultContractHeader` event model. The `DefaultContractHeader` event model contains the standard configurations. You can skip the statuses that you don't want to use.

**Note:** You can associate an event model with a condition. You can create event models specifically for some business units or contract types. You must define these event models with appropriate conditions so that they aren't universally applicable.

7. Click the **Initial** State and configure it as defined in the `DefaultContractHeader` event model.  
The **Initial** state is a special state that enables you to initiate contract creation. The `DefaultContractHeader` event model has `CREATE` and `CREATE_FROM_COPY` events associated with it.
8. Click the **General** State and configure it as defined in the `DefaultContractHeader` event model.  
The **General** state is a common state and any event or action defined in this state becomes available for contracts in all the states. The `DefaultContractHeader` event model has the `Validate` event that's available for a contract in all the states.
9. Add new states based on your business requirements.

You can create a standalone or a child of a parent state. Examples of standalone states are Draft and Canceled. A parent state is a collection of one or more child states. You can use the parent state when events or actions apply to more than one state. In the `DefaultContractHeader` event model, the Approved Composite state is

a parent state for the Approved and Hold states. The events defined for the Approved Composite state are applicable for all the child states defined under it.

10. Create events for every state based on your business requirements.  
Events are the transitions for a specific state. Events control the actions you can take on a contract in the application. For example, while the contract is in the Draft state, some allowable actions are Cancel, Submit for Approval, and Create Version.
11. Create actions associated with every event. You can use the `DefaultContractHeader` event model to find groovy script examples associated with various events and actions.
12. Click **Save and Close**.
13. After testing these changes, publish the sandbox according to your company's business practices.

## Example of Adding Legal Review as Custom Status in Event Model

Here's an example for including Legal\_Review as the custom status in the event model:

1. Create user statuses and transitions.
  - a. Navigate to the **Setup and Maintenance** work area.
  - b. Search and select the **Manage Contract User Statuses and Transitions** task.
  - c. From the User Statuses section, click the **Add** icon and enter `Legal_Review` in the Code column and **Legal review** in the Name column.
  - d. From the User Transitions section, Enter `SEND_FOR_LEGAL_REVIEW` as user transition value and **Send for legal review** as name.
  - e. Click **Save and Close**.
2. Sign in to the application as a setup user.
3. Ensure you're working in an active sandbox.
4. Navigate to Contracts in Contract Management.
5. Open the Tasks side panel and click **Event Models** in the Setup tasks.
6. In the Events Models page, for the `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVo` business object, select an existing event model and click the **Edit** icon.
7. In the States section, click the **New** icon.
  - a. In the Create State window, enter `Legal_Review` in the **Name** field and click **OK**.
  - b. Select State in the Type column.
  - c. Select General in the Parent State column.
8. In the LEGAL\_REVIEW: Details section, click the **New** icon.
  - a. In the Create Event window, select **Entry** in the **Type** field and click **OK**.
  - b. In the Create Event window, select **Named event** in the **Type** field and enter `CANCEL` in the name field. Click **OK**.
  - c. For the CANCEL event, enter `stsCode=='DRAFT'` in the Guard Condition column.
  - d. Similarly create the `SUBMIT`, `ACTIVATE`, and `VERSION` events.
9. After adding all events, click the Entry event.
10. In the Entry section, click the **New** icon to add the condition that changes user status to **Legal\_Review**.
11. In the Create Event window:
  - a. Select **Groovy Script** in the **Type** field.
  - b. In the Script field enter:

```
UserStatusCode='LEGAL_REVIEW';
```

```
eventModel.execute('createHistory');
```

c. Click **OK**.

12. From the States section, select the **DRAFT** state.

13. In the DRAFT: Details section, click the **New** icon.

a. In the Create Event window, select **Named event** in the **Type** field and enter `SEND_FOR_LEGAL_REVIEW` in the name field. Click **OK**.

**Note:** The event name must exactly match with the transition code added in the Manage Contract User Statuses and Transitions task.

b. For this new event, select `Legal_Review` in the To State column.

14. Click **Save and Close**.

15. To test this new status, create a new contract.

16. From the Edit Contract page, click **Actions** > **Send for legal review**.

17. The user status for contract changes to Legal review.

Similarly, you can configure more custom user statuses as per your business requirements.

## How to Raise a Business Event

To configure a status change event, you must raise a business event. To raise a business event, you must first store the changes in an active sandbox. You can either create a sandbox or select an existing one and make it active.

You must activate the configuration tools you want to use in your sandbox.

Follow these steps to create and activate sandboxes for the configuration tool.

1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. On the Sandboxes page, click **Create Sandbox**.
3. Enter a name and description for your sandbox.
4. In the **Publishable** field, select **Yes** or **No**. If you set this option as **No**, you can use your sandbox for testing purposes but can never publish it.
5. Select **Configure Business Objects** and click **Create** to create the sandbox, or **Create and Enter** to enter or activate the sandbox after creating it.

Here are the steps to raise business events for contracts:

1. Navigate to **Contracts** in Contract Management.
2. Open the Tasks side panel and go to **Event Models** in the Setup tasks.
3. In the Events Models page, select `DefaultContractHeader` event model and click the **Edit** icon.
4. In the States section, click the **DRAFT**.
5. In the DRAFT: Details section, select **Entry** in the Type field.
6. In the Entry section, click the **New** icon to add the condition that changes user status to **DRAFT**.
7. In the Create Event window, use Groovy scripts to raise a business event. Here's sample code, you can modify the scripts to fit your requirements.
  - a. Select **Groovy Script** in the **Type** field.
  - b. In the Script field enter:
 

```
oracle.jbo.NameValuePairs plist = new oracle.jbo.NameValuePairs();
plist.setAttribute("contractId", ContractId);
eventModel.execute('stsMgtAM').raiseBusinessEvent(plist);
```

```
oracle.jbo.NameValuePairs plist = new oracle.jbo.NameValuePairs();
plist.setAttribute("contractId", ContractId);
eventModel.execute('stsMgtAM').raiseBusinessEvent(plist);
```

- c. Click **OK**.
8. Click **Save and Close**.
9. To test this new status, create a new contract.

## Set Up Contract Text Search

Here's a summary of the tasks that you must perform to set up the Search Contracts by Text feature:

- Enable Search Contracts with Oracle Search Extension Framework Using Opt In
- Set Up Profile Options
- Assign the Search Contracts security privilege to required users.
- Configure Attachment Search
- Run Scheduled Processes

### Enable Search Contracts with Oracle Search Extension Framework Using Opt In

Here's how you can enable the search contract by text feature:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the **Enable** option for **Search Contracts with Oracle Search Extension Framework**.
5. Click **Done**.

### Set Up Profile Options

To set up the track audit feature:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Administrator Profile Values** task.
3. Search and find these profile options:
  - **Enable/Disable Search Ext Framework**: Use this profile to check if Search Extension is enabled.
  - **Enable Search Attachments**: Use this profile to enable attachment support within the Search Infrastructure.
4. Click the **Enable/Disable Search Ext Framework** profile option and set the **Profile Value** as **Yes** to enable this feature to use Oracle Search Extension Framework.
5. Click the **Enable Search Attachments** profile option and set the **Profile Value** as **Yes** to enable search across the attached documents.
6. Click **Save and Close**.

### Configure Attachment Search

Here's how you can configure the attachment search using the Manage Global Search Configurations task:

1. Navigate to the Setup and Maintenance work area.

2. Search and select the **Manage Global Search Configurations** task.
3. Click **Configure Attachment Search**.
4. Add one or more new rows to enable search across your file types.
5. To enable the same preference for all file types:
  - a. Add one row and enter \*/\* in **Content Type**.
  - b. Select the index name **fa-crm-contract**.
  - c. Set **Enable File Search** to **Yes**.
  - d. Set **Enable Content Search** to **Yes**. If set to **No**, the content is excluded and only the file metadata, such as the file name, is included in the search.
  - e. Set the **Maximum File Size** and **Maximum Content Size**.
    - The file size is the size of the attachment on your system. Files greater than the maximum size aren't loaded and only the file metadata, such as the file name, is included in the search.
    - The content size is the number of bytes of data taken from the file and added to the business object index to be included in the search. **Maximum Content Size** is always less than **Maximum File Size** as it's the content that remains after removing file formatting and metadata.
6. Optionally, you can click the **Create from Sample** button to select how to search for different file content types.

## Run Scheduled Processes

Using the Scheduled Processes task in Tools, run these processes at least once in this order, to include existing contracts data into the search:

- ESS job to create index definition and perform initial ingest to OSCS

This process ensures that all existing contract data is included before you start using this feature. To ingest all contracts data, enter the index name **fa-crm-contract** for the **Index Name to Reingest** parameter. Leaving the index name parameter blank creates and ingests data for all indices.

- Ingest attachments to OSCS

This process ensures that the content of the attached contract documents is included in the search.

We also recommend you to run these scheduled processes at least daily, in same sequence, for the contracts to be searched accurately with most updated data:

- ESS job to run Bulk ingest to OSCS
- Ingest attachments to OSCS

### Related Topics

- [Enable Search Extension Framework](#)
- [Configure Attachment Search](#)
- [Contracts Search Options](#)

## Amend Contract Without Versioning

You can enable your contract authors to edit contracts without versioning. To determine which contracts are eligible to avoid versioning, you can select the **Allow amendment without versioning** check box at a contract type level.

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Contract Types** task.
3. In the Contract Type Options section, click the **Advanced Authoring Options** tab.
4. Select the **Allow amendment without versioning** check box.

**Note:** If you amend a contract without versioning, you can't revert the contract amendment.

5. Click **Save and Close**.

Once you enable this check box and navigate to the Edit Contract page for the selected type of contract, the application displays the Amend Contract window with these options:

- Version the contract
- Don't version the contract

**Note:** The **Allow amendment without versioning** check box is disabled when the class is Grant or when the line class is Service or Warranty.

## Set Up Electronic Signature

After you set up the electronic signature functionality, contracts users can submit contracts that can be signed electronically.

### Before you start

#### Contracts Prerequisites

- When you create contract types, you specify whether an electronic signature is required for contract acceptance and activation.
- An electronic signature contract type is set up with:
  - The **Requires signature** checkbox set to Yes.
  - The **Electronic signature** checkbox set to Yes.
  - The **Solution Provider** is DocuSign or OneSpan.
  - Entry of a meaningful value for the email subject and email message.
- An electronic signature contract terms layout template must be set up with the signature table and with the standard tags in the signature table. This layout template is selected as the default contract terms layout template for the contract type to be used for electronic signatures.
- The contract author who plans to send the contract for signature must have a valid email address and must be set up as a user in the account that's specified in the electronic signature setup.

See *Define Contract Types* for more information.

## Electronic Signature Prerequisites

- Your organization must first register and obtain a license directly from a supported third-party electronic signature service provider. The supported providers are DocuSign and OneSpan.
- After the license is obtained, you must set up an account for your organization on the service provider's website. You must create an administrator account on the site. Note that this is a one-time activity.
- Note down the account key, provider URL, user name, and password from the solution provider's site.

### Here's what to do

1. In the Setup and Maintenance work area, search for and select the Manage Contract Electronic Signature task.
2. Select DocuSign or OneSpan as the solution provider.
3. If you're using DocuSign:

- a. Enter the User ID (a 32-digit GUID from DocuSign) that's associated with the user profile that has administrator privileges.
- b. Enter the Account ID, which is the API account ID mentioned on the DocuSign website.
- c. Enter the Endpoint URL, which is the Account Base URL mentioned on the DocuSign website.
- d. Provide the OAuth URL:
  - Development account: `https://account-d.docusign.com`
  - Production account: `https://account.docusign.com`

**Note:** Developer accounts let you test and develop with DocuSign functionality for free. Developer accounts operate in the DocuSign development (demo) environment, which is similar to production except:

- Documents sent in this environment aren't legally binding and have test stamps on them.
- Developer accounts don't expire.
- Developer accounts have enterprise-level features enabled for development and testing purposes.

- e. Click **Validate** to provide one-time user consent to use DocuSign integration.
- f. Click **ALLOW ACCESS** to grant consent.

You'll receive a confirmation message on the linking of Oracle Enterprise Contracts and DocuSign.

- g. Click **Validate**, and after the validation status changes to Complete, **Save and Close**.

4. If you're using OneSpan:

- a. Enter the user ID of the OneSpan account user, the API key, and the appropriate OneSpan endpoint URL.
- b. Save the settings.

### What to do next

After you set up the electronic signature process, you must set up your contract types to enable them for electronic signatures. The enabling at the contract type level works with the Enable electronic signature checkbox on individual contracts. So, if enabled for a particular type, by default, any contract you create of that type will also have the Enabled electronic signature box checked. Still, you can decide to deselect it and turn off the electronic signature specifically for that contract. You can edit this checkbox if the contract hasn't yet been signed. However, once the contract reaches



Pending acceptance status, you'll need to continue with the electronic signing process. See the topic, *Define Contract Types*, for more information.

Keep in mind these user requirements to be able to send contracts for signature:

- Users must have a valid electronic signature account.
- Users' electronic signature user names must match their email addresses in Oracle Person Management.
- In the solution provider's account, the users must be defined as members with permission to send contracts for signing.

For more information on Contracts user tasks, see *How Capturing Contract Acceptance with Electronic Signatures Works*.

## Manage Contract Visibility in Multiple Business Units Setup

For security reasons, you can restrict the contract visibility based on a selected user and BU.

In addition, you can associate contracts with a BU, allowing them to be restricted by a BU.

Here are the overall steps:

1. Create a contracts organization.
2. Associate the contracts organization with a BU.
3. Associate the contracts organization with a user.

### Create a Contracts Organization

1. Sign in as a setup user and go to Setup and Maintenance.
2. Search for and select the **Manage Internal Resource Organizations** task.
3. On the Manage Internal Resource Organizations page, click the create icon.
4. Select **Option 2: Create New Organization**, and then click **Next**.
5. Enter the name of the contract organization in the **Name** field. This name is shown in the resource directory. Here are a few things to keep in mind when naming contracts organizations:
  - Each contract organization name must be unique.
  - The names don't have to correspond to any formal organization in your enterprise. The names are only used to create a resource directory.
  - Don't use the name of a manager as the organization name, because you might need to reassign the organization to someone else later.
6. In the Organization Usages region, click the add icon and select **Contracts Organization**.
7. Click **Finish**.

### Associate a Contracts Organization with a Business Unit

1. Sign in to the application as an administrator or as a setup user.
2. In the Navigator, select **Resource Directory**.
3. On the Resource Directory page, click the **Tasks** panel tab.
4. In the Resource Organizations region, click **View Organizations**.
5. On the View Organizations page, search for the organization that you created.
6. In the Search Results region, click the link for the organization.

7. Select the **Business Units** tab.
8. Click **Add Row**.
9. Select the BU from the drop-down list.

**Note:** The first BU that you associate the contracts organization with becomes the primary BU. If you associate the organization with more BUs, you can change the primary BU as needed.

10. To add more BUs, click **Save**, and then click **Add Row**.
11. After you add the BUs, click **Save and Close**.
12. Click **Done**.

**Note:** If you enable multiple BUs, be sure that each user is associated with a contracts organization, and the contracts organization is associated with one or more BUs.

## Associate the Organization with a User

Use the Manage Users task in Setup and Maintenance to associate the organization to the user. While creating a new user or editing an existing user, navigate to the Resource Information section, search and select the contracts organization in the **Organization** drop-down list.

## Define Coverage

Here are the steps to define coverage for service contracts:

1. Navigate to **Contracts** in Contract Management.
2. Open the Tasks side panel and go to **Standard Coverage** in the Setup tasks.
3. Click Create and enter **Name**, **Description**, **Entitlement Type**, and **Start Date**. Click **Continue**.
4. In the Actions task, click **Channel Type** and then, **Next**.
5. Choose the required Optional Result columns - **First Response Metric**, **First Response Warning Threshold**, **Resolution Metric**, and **Resolution Warning Threshold**, and click **Finish**.
6. Choose options for **Severity**, **Channel Type** and **Calendar** from the drop down list, add numeric values, in 'Minutes', for the remaining fields and choose a **Start Date**.
7. Click **Save and Close**.
8. Click **Default Coverage** in the Setup tasks to link standard coverage values with **Default Level** and **Default Level Value**. If the Default Level is **Business Unit**, you can select a specific Business Unit in Default Level Value.
9. Choose **Start Date** and **End Date** and then click **Save and Close**.

For details on coverage for service contracts, see the Managing Pricing Algorithms, Service Mappings, and Matrix Classes chapter in the Oracle SCM Cloud, Administering Pricing guide.

## Define Items For Service Contracts

Here's how you can define items:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to **Define Service Contracts Configurations**, and add two tasks: Manage Units of Measure and Manage Item Classes. Open the **Manage Units of Measure** task.

- a. Click **Manage UOM Classes** in the table.
  - b. Click **+** to create a Time UOM class with time units, such as Year, Month, Day. Click **Save and Close**.
  - c. Enter the base UOM created as part of UOM class creation in previous step to verify whether the UOM got created automatically. Click **Save and Close**. Ignore conversions for now as there's only one unit in the UOM class.
2. Search for task **Manage Administrator Profile Values**.
  - a. Click the task and search for the profile code: `RCS_DEFAULT_UOM_CLASS_CODE_FOR_SVC_DURATION` and set the value to the Time UOM Class as defined in step 1.
3. Navigate to **Define Service Contracts Configurations**, and open the **Manage Item Classes** task.
  - a. The Manage Item Classes page will open in a new window, as it's a work area by itself. Click **Root Item Class** in the search results table.
  - b. Click the **Security** tab and use the **+** icon to add a row for Item Class People. Under Actions in the child table, add all actions starting with C for create privileges, V for view privileges, and M for maintain privileges, and **Save**.
  - c. Click the **Item Templates** tab. Click the filter icon in the table and search for Finished Goods.
  - d. Click **Create**. Enter the required information in the dialog and click **OK**.
  - e. Enter the required information and click **Save and Close**, then click **Done**.
4. Navigate in the application to **Product Management and then Items**.
5. Click **Create Item** task.
6. Do this to setup an Included Warranty:
  - a. Go to **Product Management > Product Information Management**.
  - b. Expand the Tasks region and select **Create Items**.
  - c. On the Create Item page, select the organization, enter the number of items, and select the item class. Ensure that the selected list doesn't contain any template.
  - d. Click **Ok**.
  - e. Enter the item name and description.
  - f. Select the item status and lifecycle phase.
  - g. Ensure that the primary unit of measure, in the Mandatory Attributes section, is same as the primary unit of measure in the Unit of Measure section.
  - h. Go to the Specifications tab and select **Item Organization > Service**.
    - i. In the Asset section, select **Not Tracked** from the **Enable Asset Tracking** drop-down list.
    - ii. In the Service Contracts section, select **Fixed** from the **Service Duration Type** drop-down list.
    - iii. In the Service Contracts section, select **Milestone** from the **Service Start Type** drop-down list. This refers to the customer asset shipment date.
    - iv. In the Service Contracts section, enter the **Service Start Delay** days. The Included Warranty Start Date is Asset Shipment Date + Service Start Delay days.
    - v. In the Service Contracts section, select an appropriate standard coverage.
  - i. Go to the Specifications tab and select **Item Organization > Sales and Order Management**.
    - i. In the Order Management section, set **Customer Ordered** to **No**.
    - ii. In the Order Management section, set **Customer Orders Enabled** to **No**.
    - iii. In the Order Management section, select **Included Warranty** from the **Sales Product Type** drop-down list.
  - j. Open an existing goods item or create a new goods item.
    - i. Repeat steps from step 1 to step 7.

- ii. Go to the Specifications tab and select **Item Organization > Service**.
          - iii. In the Asset section, select **Customer Asset** from the Enable Asset Tracking drop-down list.
          - iv. Go to the Specifications tab and select **Item Organization > Sales and Order Management**.
          - v. In the Order Management section, select **Goods** from the **Sales Product Type** drop-down list.
        - k. In the **Relationship** tab of a goods item, create a relationship:
          - i. Search and select the included warranty item in the **To Item** filed.
          - ii. Select **Warranty** from the **Type** drop-down list.
          - iii. Add other details and click **OK**.
- Note:** You must set the effectivity period (start or end date) such that the effective period is valid for the given shipment date.
- l. Click **Save**.
7. Do this to setup a Coverage Item:
  - a. Select **Organization, Number of Items, Item Class** from the Drop Down list. Ensure that the Selected List doesn't contain any templates. Click **OK**.
  - b. Edit the Item name and **Description** along with the **Item Status** and **Life cycle Phase**.
  - c. Ensure that the Primary Unit of Measure is from the same UOM Class set in the profile option, SCM Common: Default Service Duration Class, in the Overview tab.
  - d. Set the Service Duration Type to Open Ended.
  - e. Set **Customer Ordered** and **Customer Orders Enabled** to 'Yes'.
  - f. Set **Sales Product Type** to one of the coverage item types in the drop-down list, Extended Warranty, Service Level Agreement, Software Maintenance, or Preventive Maintenance.
8. Do this to setup a Subscription Item:
  - a. Select **Organization, Number of Items, Item Class** from the Drop Down list. Ensure that the Selected List doesn't contain any templates. Click **OK**.
  - b. Edit the Item name and **Description** along with the **Item Status** and **Life cycle Phase**.
  - c. Ensure that the Primary Unit of Measure is set to 'Each'.
  - d. Set **Customer Ordered** and **Customer Orders Enabled** to 'Yes'.
  - e. Set **Sales Product Type** to **Subscription**.

## Manage Contract Profile Options

The Manage Contract Profile Options task groups the profile options required for Service Contracts.

You can use this task to configure:

- RCS\_DEFAULT\_UOM\_CLASS\_CODE\_FOR\_SVC\_DURATION
- OKC\_USAGE\_CHARGE\_IDENTIFIER

Here are the steps to access the Manage Contract Profile Options task:

1. Sign in as a user with access to the setup areas.
2. Navigate to Setup and Maintenance work area.
3. Open the Tasks side panel and click **Search**.
4. Search and select the **Manage Contract Profile Options** task.

5. Select a profile option you want edit.

## Define Unit of Measure

The way you define the unit of measure conversion for time in Service Contracts is different from other cloud applications. Time-unit mapping ensures that the scheduling is more accurate than a simple conversion, such as 6 months = 180 days.

To define your own time unit conversions for billing schedule, you must define your own time unit conversions.

1. Navigate to Setup and Maintenance work area.
2. Open the **Manage Contract Profile Options** task.
3. Click the **RCS\_DEFAULT\_UOM\_CLASS\_CODE\_FOR\_SVC\_DURATION** profile option.
4. Select profile value to specify a default unit of measure class.
5. Click **Save and Close**.

## Define Contract Time Unit Mappings

You can use time unit mappings to convert the service duration and period between different time units. To define time unit mappings:

1. In Setup and Maintenance, navigate to the **Manage Contract Time Unit Mappings** task.
2. Click the **Create** icon to define base units and conversion rate to be applied to user units you've selected for your time unit UOM.
3. Click **Save and Close**.

**Note:** You must set the **RCS\_DEFAULT\_UOM\_CLASS\_CODE\_FOR\_SVC\_DURATION** profile option to convert the service duration and period between different time units using the **Manage Contract Time Unit Mappings** task.

## Define Order Management Parameters

Do this to define Order Management Parameters:

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Subscriptions
  - o Task: Manage Order Management Parameters
2. Search for **Manage Order Management Parameters** in the Search Tasks.
3. Select Business Unit from the drop down list and click **Apply and Go to Task**.
4. Enter Name, Location or Manager and select it in Manage Business Units and click **Save and Close**.
5. Click **Item Validation Organization** in the General tab and choose **Business Unit** and **Organization** from the Drop Down list. Add and remove rows, if necessary.
6. Click **Save and Close**.

**Note:** Ensure that Service Contracts is enabled in the Change Feature Opt-in work area.

## Define Pricing

To define pricing for subscriptions, you must set up price list lines for the subscription items.

Use this high-level procedure for quick setup of pricing lines, after your full pricing setups are done in Oracle Supply Chain Management (SCM) Cloud. See the related topics for additional details.

1. Navigate to the **Pricing Administration** work area.
2. In the Pricing Rules tab, open the price list to which this item is associated.
3. Create a price list line for a coverage item. Open **Associated Items** to define unit price and percent price based on covered items.
4. Enter the recurring price details of the item.
5. Create a price list line for a subscription item.
6. Create different charges such as one-time setup fee, recurring flat monthly fee, or recurring usage-based fee.

For details, refer to the Oracle SCM Cloud, Administering Pricing guide.

## Define Customer Billing Configuration

Do this to define customer billing configuration for service contracts:

1. Drill down to the Define Customer Billing Configuration for Service Contracts task in Define Service Contracts Configuration.
2. Click each task within Define Customer Billing Configuration for Service Contracts.
  - Define payment terms in the **Manage Receivables Payment Terms** page.
  - Define rules based on your Business Unit in the **Manage AutoAccounting Rules** page.
  - Ensure that the seeded transaction source: ORA\_Enterprise Contracts is present in the **Manage Transaction Sources** page. You must use this transaction source when you run your program.
  - Ensure that the seeded transaction type: ORA\_OKC\_Credit Memo and ORA\_OKC\_Invoice is present in the **Manage Transaction Types**.
3. Click **Save and Close**.

After you complete the steps, you must add information for the task Register Third-Party Contract Usage Data Acquisition Service. This is to retrieve subscription usage data for billing.

Follow these steps to define subscription usage-based billing for service contracts:

1. Drill down to the Define Customer Billing Configuration for Service Contracts task and click **Register Third-Party Contract Usage Data Acquisition Service**.
2. Enter **URL**, **User Name** and **Password**, and click **Save and Close**.

For details about Managing AutoInvoice, see the Managing AutoInvoice section in the Oracle Financials Cloud, Using Receivables Credit to Cash guide.

## Define Contract Default Values

Here are the steps to define default values to be used on service contracts:

1. Go to Contracts work area and navigate to **Home, Contract Management, Contracts**, and open the **Contract Default Values** task.
2. Select the **Included Warranty Creation** group you want to define values for and click **Create** to create a set of default values.
  - Set Contract Default Values at a Global Level, used to create a new included warranty contract when a customer asset is created. Contract Default Values can also be set at Asset Selling Business Unit level, which takes precedence over Global Settings. In order to create an Included Warranty contract upon asset creation in Installed Base, this setup is mandatory.
3. Select the **Installed Base Update** attribute group you want to define values for and click **Create** to create a set of default values.
  - Set Contract Default Values for Installed Base update attribute group which can be set at different levels in the following precedence:
    - Business Unit + Asset Transaction Type
    - Global + Asset Transaction Type
    - Global
  - These default values will default to impacted contracts for return or expiry asset transaction in Reprocess Installed Base Updates UI. The asset transaction will be 'On Hold' in Reprocess Installed Base Updates UI. For the contract to automatically update based on updates to assets in Installed Base, this setup is mandatory.
4. Enter this information and click **Save and Close**.
5. Click **Create Entry** to create default renewal values.

**Note:** You can create default values at three different levels depending on your business requirements.

## Manage Contract Rules

Here are the steps to manage contract rules in service contracts:

1. Navigate to the **Contracts** work area in the Contract Management region.
2. Open **Manage Contract Rules**: Expand the tasks side panel and look in the **Setup** category.
3. Add a row to the table.

Each column in the Condition Columns area of the table acts as a AND condition. If no value is supplied, the column is seen as a full column search. Therefore, at least one value must be provided for these columns:

  - Contract Type
  - Business Unit
  - Renewal Rules Template
  - Billing Template

4. You can select the Contract Type, Business Unit, and Primary Party condition.
5. Enter a Precedence value, if necessary. You can select the results for a given combination of conditions, such as Billing Templates, Event Notification Templates, and Renewal Templates.

**Note:** The Renewal Rule Templates, the Billing Templates and Event Notification Rules and Template Sets are defined in the side panels of the same work area.

## Generate Data Model XML

Use the BI Publisher to create a new contract layout template by adding the contract data model attributes. Use the Generate Data model XML to find the latest data model attributes.

You can download data model attributes in an XML format to access the standard application attributes and extensible attributes. Once you know the attributes, include the required attributes in the contract layout template. The downloaded data model XML contains:

- Standard contract attributes
- Custom contract attributes
- Standard child entities such as contract parties, lines, and contacts
- Custom child entities created through Application Composer
- Descriptive flexfields for Oracle Contracts

## Download Data Model XML

Here are the steps to download the latest data model XML:

1. Navigate to Contracts in Contract Management.
2. Open the Tasks side panel and click **Generate Data Model XML** in the Setup tasks.
3. On the Generate Data Model XML page, click **Download**.

## Enable Table of Contents in Contract Preview

Here are the steps to add table of contents in contract preview:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the **Enable** option for **Add Table of Contents to Contract Terms**.
5. Click **Done**.



## Set Up Billing Templates

Do this to manage billing templates in service contracts:

1. Navigate to **Manage Contract Rules** from the Setup tasks side panel.
2. In the Billing Templates tab, click **Create** and fill in the required fields based on your Business Unit. These include **Name**, **Description**, **Bill Service**, **Invoicing Rule**, **Billing Frequency**, **Billing Date**, **Accounting Rule**, **Transaction Type**, **Payment Terms**, **Period Start**, **Period Type**, and **Termination Credit Method**.
3. Add attributes for **Subscription Invoice Text** and **Coverage Invoice Text**.
4. **Save and Close**.
5. You can also edit your billing template on the same tab, if necessary.
6. Click **Manage Contract Rules** to view the Result Columns based on your Business Unit.

### Related Topics

- [Manage Billing Templates](#)

## Set Up Renewal Rules

Do this to set up renewal rules for service contracts:

1. Navigate to **Manage Contract Rules** from the Setup tasks side panel.
2. In the Renewal Rules Templates tab, click **Create**.
3. Enter **Template Name**, **Renew Before End Date**, **Minimum Renewal Duration**, **Renewal Duration**, **Period**, and **Renewal Process**.
4. Along with that, provide **Coterminate**, **Renewal Level**, **Customer Acceptance**, and **Internal Approval**.
5. Set the **Price Adjustment Type** to enable Price Adjustment Basis and Price Adjustment Value.
6. Choose the Billing Template you created in the Billing Templates tab.
7. **Save and Close** the renewal rules.

## Set Up Event Notification Rules for Customer Communications and Email Functionality

Follow these steps to set up event notification rules for customer communications and email functionality in service contracts:

1. Navigate to **Manage Contract Rules** from the Setup tasks side panel.
2. In the Event Notification Rules and Template Sets tab, click **Create**.
3. Enter **Name**, **Sender Email ID**, and **Start Date**. Add **Description** and **End Date** as well.
4. Set the conditions related to the notifications:

Condition	Description
Event	Set an event in the contract life cycle. The values are sourced from the contract event model.
Days before contract start date	The number of days before the renewal contract start date you would like to send the notification.
Notification Type	Set a suitable notification type: <ul style="list-style-type: none"> <li>○ Quote</li> <li>○ Reminder</li> <li>○ User Defined</li> </ul>
Customer Acceptance	Set whether customer acceptance is Required or Not Required. If you select not required, then the application automatically renews contracts without requiring customer acceptance, or you can route renewal contracts to the customer for approval.
Communication Channel	Set the mode of communication. For example, if you set the mode as email, customer receives contract quote as an email. If you select 'Custom', it includes third party portals. The application raises a business event with the message and attachment details.

5. In the Message, click **(+)**, choose the **Language**, **Message Template** and **Message Subject** along with the Start and End dates. You can use token `<CON_NUM>` and `<EXPIRY_DATE>` in the message subject.
6. To attach contract document to the notification, click **(+)**. You can attach the contract layout template, terms layout template, and the contract document file.
7. **Save and Close** the event notification.

**Note:** The notifications are sent by the ESS Job - **Process Contracts Event Notifications**.

## Email Functionality

You can use email action to send emails to the designated parties with stated and defined information. After event notification rules setup, you can use email functionality.

To send an email, create a new contract.

- From the Edit Contract page, click **Action > Email**.

### Related Topics

- [Manage Event Notification Rules and Template Sets](#)

## Define Contract Terms Library Components

Here are the steps to define contract terms library components (clauses and terms templates):

1. In the Setup and Maintenance work area, go to your implementation project, navigate to the **Define Contract Terms and Clause Library Configuration** task list, and go to the **Manage Contract Terms Value Sets** task.
  - a. Search for value sets created for the Enterprise Contracts module. Value sets are required to define questions and rules in Terms library work area. Click **Create**.
  - b. Enter the required information to create a value set. Save and click **Done**.
2. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Manage Contract Clause Types** task.
3. Create a new clause type and save.
4. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Specify Contract Clause Import XML File Location** task.
5. Set the profile value to the required value in your Enterprise Scheduling Service (ESS) server. Specify the ESS server directory where the import clauses from XML File process uploads and imports files into the Contract Terms Library.
6. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Manage Contract Standard Clauses, Templates, and Expert Rules** task. This is not a setup and maintenance task, but a manual task that is performed from the Terms Library work area.
7. To create terms clauses navigate in the application to **Contract Management**, then the **Terms Library** work area.
  - a. Click the **Create Clause** task.
  - b. Enter the required information to create a clause and click **Submit**.
    - The Title name should be unique for both buy and sell clauses.
    - The End Date for new clauses can't be a date in the past.
  - c. Once you have submitted a new clause for approval, it will need to be approved by the clause approver.
  - d. Once approved, you should now search for the clauses to verify that they are in Approved status.
8. To create terms templates navigate in the application to **Contract Management**, then the **Terms Library** work area.
  - a. Click the **Create Terms Template** task.
  - b. Enter the required template information and click **Save** to enable the Document Types table.
  - c. Select a contract type in the document type table and click the **Clauses** tab.
  - d. Click the **Add Section** action.
  - e. In the Add Section dialog box, enter a section name in the New Section box and click **OK**.
  - f. Select your new section and click **+** to add a clause.
  - g. In the Add Clauses dialog box, search for your clause, select the row, and click **OK**.
  - h. Open your section, and click the clause title. Click the refresh icon in the toolbar to view the section and clause in the terms template preview pane. Click **Submit**.
  - i. Check for and resolve any warnings or errors, and then click **Submit**.
  - j. **Save and close**.
  - k. Repeat the previous steps to add more term templates as needed.
  - l. Click **Submit** and then click **Submit** again on the next page to submit it for approval.

- m. Once you have submitted a new template for approval, it will need to be approved by the template approver.
- n. Once approved, you should now search for the templates to verify that they are in Approved status.

#### Related Topics

- [How Contract Terms Templates Work](#)
- [How You Import Clauses into the Contract Terms Library](#)

## Configure Import and Export Management for Enterprise Contracts

Here are the steps to configure Import Management for Enterprise Contracts:

1. In your implementation project, go to the **Define Import Management** task list, and open the **Manage File Import Objects** task.
  - a. Select the row for `CONTRACT` and click **Edit**.
  - b. Enter default values for the attributes of objects `ContractImportJob1` and `Import ContractHeader1`.
  - c. Select the Map and Required check boxes as required and click **Save and Close** twice.
2. Navigate to **Define Import Management**, and open the **Manage File Import Mappings** task.
  - a. Select **Contract** in the Object drop down list and click **Search** to view the available mappings. Click **Create** to define a new mapping.
  - b. Enter the required information and click **Save and Close**.
  - c. Click a contract import mapping. Add column mappings as required. Ensure the source column header values match the column names in the data file and click **Save and Close**.
  - d. Again click **Save and Close** to return to main folder structure.
3. Navigate to **Define Import Management**, and open the **Manage File Import Activities** task.
  - a. Click **Create** to schedule an import job.
  - b. Enter the required information and click **Next**.
  - c. Enter constant values for the import object attributes or click **Next**.
  - d. Select a schedule from the Repeat Unit drop down list and click **Next**.
  - e. Click **Activate** to schedule the import job.

Follow these steps to configure Export Management for Enterprise Contracts:

1. In your implementation project, go to the **Manage Bulk Data Export** task list, and open the **Schedule Export Processes** task.
2. Select **Create** from the Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map, in the page.
4. Select **Create** from the Actions menu to view the Manage Export Objects dialog box.
5. Select the objects you want to export and click **Done**.
6. Specify the attributes and filters you want used to export.
7. Click **Next** to view the Create Export Process Definition: Create Schedule page.
8. Select the schedule for your export.

9. Click **Next** to view the Create Export Process Definition: Review page.
10. Review the export process details, and click **Activate**.

#### Related Topics

- [Perform Bulk Export](#)

## How You Set Up Approval Groups and Approval Task Configuration Rules

Here's how you set up or define approval groups and approval task configuration rules for contracts:

1. Sign in as a setup user.
2. In Setup and Maintenance go to:
  - Offerings: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Approval Groups
3. On the Manage Approvals page, click the **Approval Groups** tab.
4. In the Groups region, select the plus sign icon to begin creating a new approval group.
  - a. Enter a name for the new group.
  - b. Click **Save**.
5. Add a member to the group. Click the **Add Member** icon to retrieve the Add to Group dialog window. In the search box, enter the email address of the user created earlier and click OK.
6. Click **Save**.
7. Repeat the previous steps to create an approval group that includes both level-one and level-two approvers.
8. Click the **Task Configuration** tab.
9. In the **Tasks to be configured** region, search for `ContractsApproval`.
10. Click the **ContractsApproval** task to access a set of subtabs where you can set up rules for the approval task.

For example, under **Configuration**, you can set the assignment and routing policy attributes to suit your business needs. If you want to let the initiator add ad hoc approvers and configure notifications as the approval progresses, select the **Allow initiator to add participants option**.

As another configuration example, you can specify a variety of conditions, such as preventing a PDF from being attached to a notification or allowing an initiator to add participants.
11. You can create rules to suit your business needs. Edit the `ContractsApproval` task.
12. Click **Rules**
13. Expand each rule.
14. Click **Edit** to create rules for the `ContractsApproval` stage rule set.
15. Delete all three rules.
16. Create a new rule.

**Note:** Create rule names without spaces between them.
17. Enter the rule name. Click the arrow. Under the IF label, click the list icon next to the first field.
18. As an example, in the Condition Browser, expand `ContractsApprovalPayloadType`, `ContractDetails`, **result**, and select the `estimatedAmount` payload attribute.

**Note:** Set up this rule for contracts starting with zero dollars: `ContactDetails.estimatedAmount` is null or `ContactDetails.estimatedAmount.value.doubleValue()` is same or above 0.00.

Here's another example with `contract_type_id`, `organization_id`, amount null, and agreed amount 0 or agreed amount smaller than 2000 dollars:

```
IF ContractDetails.org_id is {org_id} and ContractDetails.contractTypeId in {contract_type_id}
and (contractdetails.agreedAmount is null or (contractdetails.agreedAmount isn't null and
contractdetails.agreedAmount.doubleValue() same or less than 2000))
```

19. Select **'isn't'** from the operator drop-down list, and select null as the comparison value of the IF condition.
20. Click the down arrow in IF condition and select simple test to add a new IF condition.
21. In the IF condition of ContractApproval, use the following condition to setup contract approval based on Contract Intent:
  - o For Buy Intent: `ContractDetails.buyOrSell` is "B"
  - o For Sell Intent: `ContractDetails.buyOrSell` is "S"
22. Select the comparison field of the new IF condition from the condition browser.
23. Similarly add another IF condition as follows: select `estimatedAmount` for the comparison field, select **same or less than** as the operator, and select a value such as 30000 as the comparison value.
24. Select Approval Group from the List Builder drop-down list under THEN, and click Create Action to create the List builder action 1 region.
25. Select level 1 approver and enter the required information for the List builder action 1 region.
26. Click **+** next to Estimate\_Amount\_Rule1 to create a second rule, give it a name such as Estimate\_Amount\_Rule2, and expand it.
27. Create a second rule to route to higher level approvers for higher contract amounts.
28. Create a third rule such that, if contract estimated amount isn't entered, it's routed to level 1 approver.
29. Click the **Save** button and then the **Commit** task button to commit the rules to the database. Expand all the rules.

Note that you could also add rules based on:

- o Policy deviations (`ContractsApprovalPayloadType.policyDeviation` = Y or N)
- o Terms amended rule (`ContractsApprovalPayloadType.termsAmended` = Y or N)
- o Nonstandard clauses added (`ContractsApprovalPayloadType.nonStdClause` = Y or N)
- o Missing (deleted) standard clauses (`ContractsApprovalPayloadType.missingStdClause` = Y or N)
- o Standard clause (not on the terms template) added (`ContractsApprovalPayloadType.stdClauseAdded` = Y or N)
- o Clause deviation category codes (`TermsDeviations.deviationCategory` = "<<Code>>")
- o Deviation codes (`TermsDeviations.deviationCode` = "<<Code>>")

Add steps to define such approval rules, referring to this table:

Clause Deviation Category Code	Clause Deviation Code	Description
OKC_NON_STD_ARTICLES	NA	A nonstandard clause exists on the contract.
OKC_NON_STD_ARTICLES	ADDED_NON_STD	A new nonstandard clause was added.

Clause Deviation Category Code	Clause Deviation Code	Description
OKC_NON_STD_ARTICLES	MODIFIED_STD	A standard clause was modified and made nonstandard.
OKC_MISSING_STD_ARTICLES	NA	A standard clause from the terms template was deleted from the contract.
OKC_MISSING_STD_ARTICLES	MISSING_MANDATORY	A mandatory clause is missing.
OKC_MISSING_STD_ARTICLES	MISSING_EXPERT_ARTICLE	A conditional clause based on an expert rule is missing.
OKC_MISSING_STD_ARTICLES	MISSING_OPTIONAL_ARTICLE	An optional clause is missing.
OKC_INVALID ARTICLES	NA	An invalid clause exists on the contract.
OKC_INVALID ARTICLES	ARTICLE_EXPIRED	The clause is expired.
OKC_INVALID ARTICLES	ARTICLE_ON_HOLD	The clause is on hold.
OKC_INVALID ARTICLES	EXPERT_ARTICLE_NOT_REQUIRED	The rule conditions no longer apply for a clause added by Contract Expert.
OKC_STD_ARTICLES_ADDED	NA	A standard clause was added.
OKC_STD_ARTICLES_ADDED	ADDED_STD_ARTICLE	A standard clause from the library was added.
OKC_STD_ARTICLES_ADDED	REPLACED_ALT	A standard clause was replaced with an alternate clause.

**30.** Alternatively, to bypass the approval hierarchy and have automatic approval, create only the following rule.

```

Edit IF condition to 1 is 1
Under Then block Choose
List builder : Supervisory Response type: Required Number of levels: 1 Starting
Participant: HierarchyBuilder.getPrincipal("<User Id>",-1,null,null) Top Participant:
HierarchyBuilder.getPrincipal("<User Id>",-1,null,null)
Auto action enabled: True Auto Action: "APPROVE"
Save and commit.

```

31. Click the **Approval Group** tab to create an approval group for Clause Approval.
32. Click the **Task Configuration** tab to create rules for clause approval human task. Click the human task **ContractClauseApproval** and then click the **Rules** subtab.
33. Click the **Approval Group** tab to create an approval group for Template Approval.
34. Click the **Task Configuration** tab to create rules for Contracts Template Approval human task, click the **TemplateApprovalHumanTask** human task, and then click the **Rules** subtab.
35. Repeat the rule creation steps described for contract approvals.

**Note:** To create a dynamic list of approvers, you can create a dynamic approval group based on a Java class file. The Java class can refer to approval task payload parameters, for example, contract identifier.

#### Related Topics

- [Approval Rules Configurations](#)
- [Configure Workflow Approvals and Notifications](#)
- [How Workflow Task Routing Is Mapped Out](#)
- [How Authoring Contract Terms Works](#)
- [How Reviewing Contract Deviations Works](#)

## Scenario-Based Contract Approval Rule Setups

Here are steps you can use to set up specific approval scenarios, including:

- Automatic contract approval
- Contract approval based on the immediate manager's authorization
- Contract approval based on term deviation
- Contract approval by an internal contact:

**Note:** For any field that can potentially have a null value, ensure you have specified a null condition in the approval rule.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search and select the **Manage Task Configurations for Customer Relationship Management** task. The BPM Worklist page appears.
4. In the Tasks to be configured region, select **ContractsApproval**.
5. Click the **Edit task** icon.
6. Click the **Assignees** tab and click the **Go to rule** icon to create a new rule.
7. Click the **Add Rule** icon to add one of these rules such that:
  - Contracts are approved automatically:
    - i. In the If section, select the condition as 1 is 1.
    - ii. In the Then section, select:
      - List Builder: Supervisory



- Response Type: Required
  - Number of levels: 1
  - Starting Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
  - Top Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
  - Auto Action Enabled: True
  - Auto Action: "APPROVE"
- iii. Ensure that other rules are inactive.
- Contracts are approved after the manager's authorization:
  - i. In the If section, select the condition as 1 is 1.
  - ii. In the Then section, select:
    - List Builder: Supervisory
    - Response Type: Required
    - Number of levels: 1
    - Starting Participant:  
`HierarchyBuilder.getManager_1("supervisory",Task.payload.submitter,-1,"","")`
    - Top Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
    - Auto Action Enabled: False
    - Auto Action: "APPROVE"
  - iii. Ensure that other rules are inactive.
- Contracts are approved based on term deviation:
  - i. In the If section, select the condition as `TermsDeviations.articleTitle.toUpperCase() is "Key word"`.
  - ii. In the Then section, define rules as per your requirements.
- Contracts are approved by an internal contact:
  - i. In the If section, select the condition as `InternalContacts.croCode is "CONTRACT_ADMIN"`.
  - Note:** Replace the "CONTRACT\_ADMIN" with the internal contact role.
  - ii. In the Then section, select:
    - List Builder: Resource
    - Response Type: Required
    - Users: `InternalContacts.username`
    - Participants: Groups: null
    - Application Role = null

**8. Click Save and Close.**

## Configure Scheduled Processes

Configure scheduled processes to change a set of records for a specific business need, or to get a printable output with information about certain records. These processes are predefined but not pre-configured.

This list identifies those scheduled processes that are critical for the smooth operation of your Contracts application:

- Indexing schedules
- Deliverables notifications scheduled processes:
  - Send Contract Terms Deliverable Due Date Notifications
  - Send Contract Terms Deliverable Escalation Notifications
  - Send Contract Terms Deliverable Overdue Notifications
- Expiration notification scheduled process:
  - Send Contract Expiration Notifications
- Fulfillment notification scheduled process:
  - Send Contract Fulfillment Notifications
- Service Contract Billing scheduled process:
  - Send Service Contract Billing Information to Receivables
  - Import Auto-invoice
  - Fetch Service Contract Invoice Information from Receivables
- Process Installed Base Updates

For more information, see the related topics.

### *Related Topics*

- [Set Up Contract Text Search](#)
- [Overview of Contracts Scheduled Processes](#)