Oracle Fusion Cloud Sales Automation

How do I extract and classify key terms from contract documents using Generative AI?

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1 How do I extract and classify key terms from contract documents using Generative AI?

About Extracting Key Terms from Contract Documents Using Generative AI

Key terms are the important information, such as payment term, renewal date, jurisdiction, penalty for early termination and so on that you want to retrieve from contract documents. Using generative AI (GenAI), you can now extract key terms from contract documents much easier, faster, and more accurately. The insights that you draw from the contracts will help in making informed decisions during contract negotiation and analysis process.

With the advent of GenAI, analyzing contract documents and extracting important business information can be done in a few minutes. Using GenAI helps reduce the contract processing time and improves the accuracy of the contract review. It provides a strategic insight to stakeholders to risks and critical terms that might require negotiation. GenAI also helps track important dates, milestones, obligations, and enhances the overall contract governance and compliance.

Enable the Extract Key Terms from Contract Documents Using Generative AI Feature

You enable this feature using the opt-in task. If you've permission to configure offerings, then you can use the New Features page to opt into the feature as follows:

1. Navigate to **My Enterprise** > **Offerings**.
2. Click the **Enterprise Contracts** offering.
3. Click **Opt In**.
4. Click **Features** (the pencil icon) and search for the `Extract Key Terms from Contract Documents Using Generative AI` feature.
5. On the Edit Features page, select the checkbox in the **Enable** column.
6. Click **Done** to save the changes and return to the Offerings page.

   For more information, see the New Feature Opt-In Section of the Oracle Applications Cloud - Using Functional Setup Manager guide on the Oracle Help Center (docs.oracle.com).

Enable the Use Generative AI Features in Sales Option

Here are the steps to enable the Use Generative AI Features in Sales feature using the opt-in task:

1. Navigate to **My Enterprise** > **Offerings**.
2. From the Offerings page, select **Sales** and click **Opt in Features**.
3. Search for `Intelligence in Sales` feature and select the **Enable** checkbox.
4. Click **Done**.

5. Click **Opt in Features** again to go to the Offerings page.
6. Click **Edit Feature** for Intelligence in Sales.
7. Select the **Enable** checkbox for the `Use Generative AI Features in Sales` feature.
8. Click **Done**.

Security and Privileges to Sep Up and Extract Key Terms from Contract Documents

Key terms and prompts can be created and added to contract types and extracted from contract documents by any user in the organization with the appropriate privileges and duty roles.

This topic contains the following sections:

- Set Up the Enable Security Console External Application Integration Profile Option
- Enable Permission Groups
- Access Requirements to Set Up Key Terms and Prompts

Set Up the Enable Security Console External Application Integration Profile Option

Set a profile value that prepares the Security Console to work with permission groups and related objects as follows:

1. In the **Setup and Maintenance** work area, click the **Tasks** panel and click **Search**.
2. Search for `Manage Administrator Profile Values`.
3. Click the **Manage Administrator Profile Values** task in the search results.
4. In the Search: Profile Option section, enter `ORA_ASE_SAS_INTEGRATION_ENABLED` (Enable Security Console External Application Integration) in the **Profile Option Code** field and click **Search**.
   A record of the ORA_ASE_SAS_INTEGRATION_ENABLED profile option code appears.
5. In the row for the Site profile level, select **Yes** in the **Profile Value** field.
6. Click **Save and Close**.

Enable Permission Groups

You must enable permission groups for the following contract roles:

- ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB
- ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB
- ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB
- ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB
- ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB

If you've created custom roles, permission groups should be enabled for the custom roles also.

Follow these steps to enable permissions groups:

1. From the Navigator, go to **Tools** > **Security Console** > **Roles**.

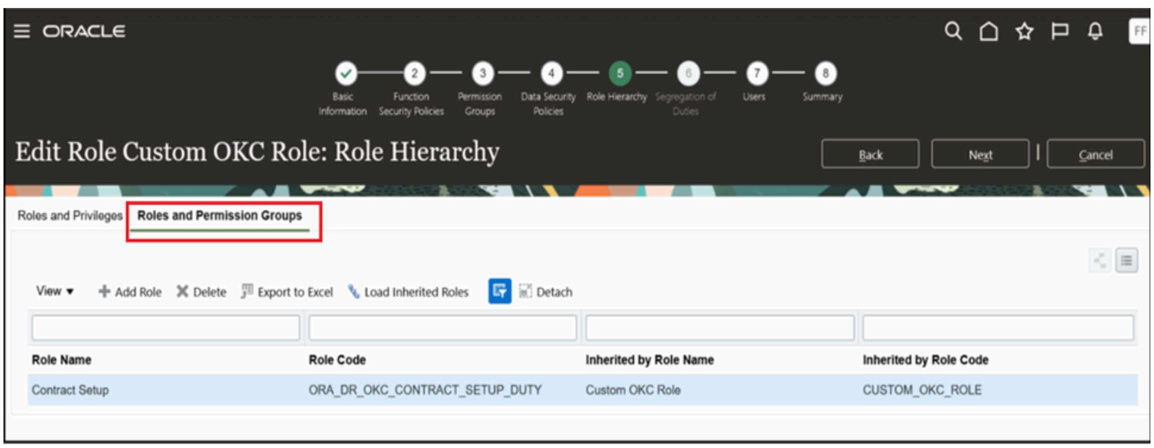
2. Search for each of the contract role names.
3. Click **Edit Role**.
4. Click **Enable Permission Groups**.
5. In the Enable Permission Groups dialog, click **Enable Permission Groups**.
6. Click the Summary step and click **Save and Close**.

   You can also navigate to the Summary step by clicking **Next** until you reach the final step.

Access Requirements to Set Up Key Terms and Prompts

The following section lists the access requirements to set up key terms and prompts and associate them to contract types:

- The Manage AI Setups (OKC_MANAGE_AI_SETUPS_PRIV) privilege - You must have this privilege to access the **AI Insights** tab available in the Manage Contract Types UI. It enables you to set up related AI related features.
- The Manage Key Terms and Prompts (OKC_MANAGE_GEN_AI_KEY_TERM_SETUP_PRIV) privilege - This is already predefined in the Contract Setup duty role. Note that if you're not using this predefined Contract Setup duty role, then add this OKC_MANAGE_GEN_AI_KEY_TERM_SETUP_PRIV privilege to any of your setup related custom duty or job roles.
- The Use Generative AI Features in Sales (ZCA_USE_GENAI_IN_SALES_PRIV) privilege - This must be manually added to any of your setup related custom duty or job roles.
- The ORA_DR_OKC_CONTRACT_SETUP_DUTY privilege must be manually added to any of your setup related custom duty or job roles from step 5 of the Role Hierarchy guided process as per the following screenshot:



Users with these role can:

- Create key terms and prompts from the **Manage Key Terms and Prompts** menu in the contracts landing page.
- Add key terms and prompts to the contract types in the **Key Terms** tab in the **Manage Contract Types** UI.

The following lists the access requirements to run the Extract Key Terms from Contract Documents process from a contract and to view or edit the extracted key term values:

- Edit Key Term Values (OKC_EDIT_KEY_TERM_VALUES_PRIV) - If this privilege isn't available in the Security Console, run the Import User and Role Application Security Data scheduled process.
- Use Generative AI Features in Sales (ZCA_USE_GENAI_IN_SALES_PRIV)
- Edit Contract (OKC_EDIT_CONTRACT_PRIV)

These privileges are needed to:

- Access the **Extract Key Term Values** menu item in the **Edit Contract** UI
- Submit the Extract Key Terms from Contract Documents scheduled process through REST (`extractKeyTermValues`)

- View Contract (OKC_VIEW_CONTRACT_PRIV) privilege is needed to access the key term values tab in read-only mode.

Note: Users with the View Contract privilege can only view the key term values. They can't extract or edit key terms. Also the Edit Key Term Values privilege isn't added to any predefined duty.

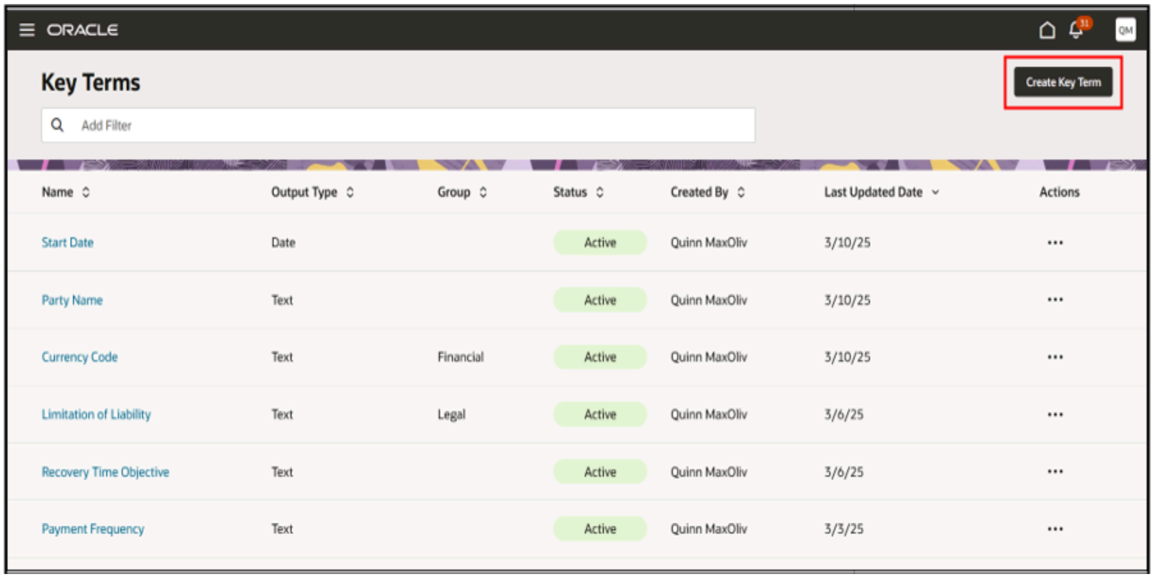
Set Up and Define Key Terms and Prompts

You must perform the following steps to set up key terms and the corresponding prompts. Prompts are the questions that are sent to Generative AI to extract the key terms. Prompts can be different for each contract type. You can test the prompt against different contract documents before making it active. Only key terms and prompts with a status of **Active** can be used in the contracts.

Define Key Terms

You can define key terms and categorize them based on user-defined groups. A key term can have one or more prompts associated with it. For example, you can have one prompt for Item and Services contract type and a different prompt for Sales Agreement contract type. Whether you can use the same prompt for all contract types depends on whether the prompt works for all types of contract documents.

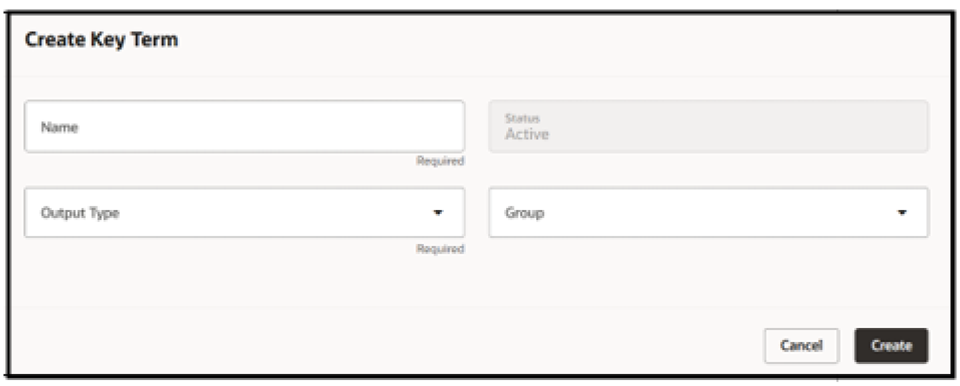
You can access the Key Terms setup pages from the contracts landing page as follows: **Navigator** > **Tasks** > **Setup** > **Manage Key Terms and Prompts**. Here's an example of the Key Terms list page.



This page lists all the key terms that are created. By default, all the active key terms are displayed. Wait for a few seconds for the key terms to load. You can search for existing key terms, create new key terms, and edit existing ones from the Key Terms UI. Any search text you enter in the **Add Filter** area will be searched against the **Name**, **Output Type**, **Group**, and **Status** fields.

To create a key term, follow these steps:

1. From the **Key Terms** UI, click **Create Key Term** to open the Create Key Term page as shown:



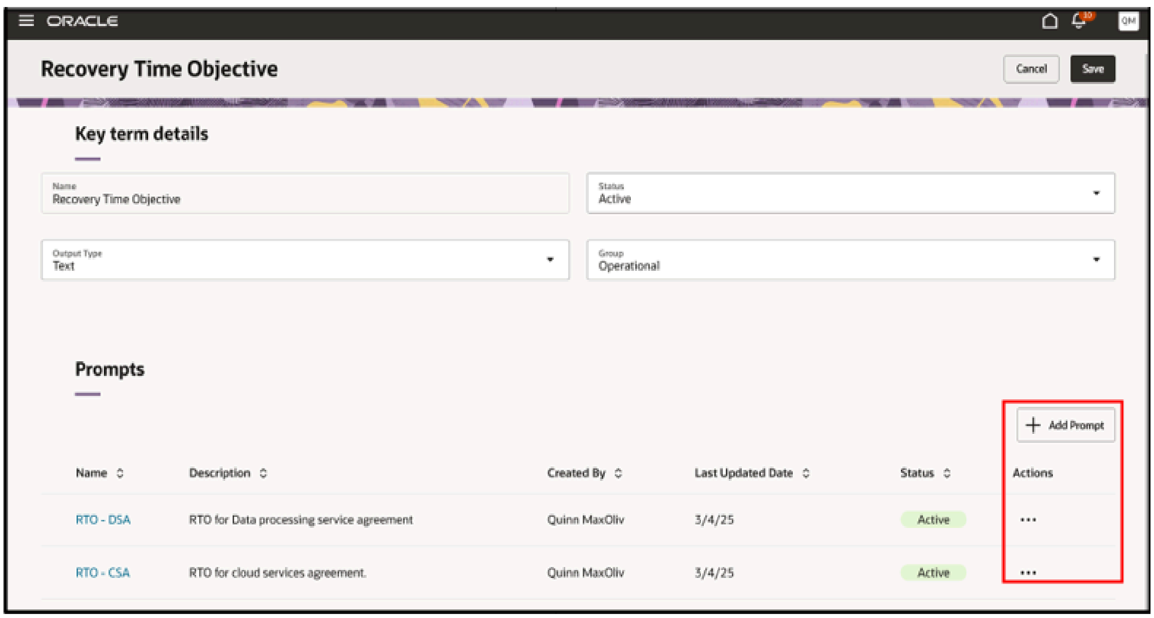
2. Enter the following details:

Field	Description
Name	Unique name of the key term.
Status	Status of the key term. Default status is **Active**. If a key term is made inactive, it won't be extracted from contract documents. An **Inactive** key term will be read-only and can't be made active again. Set it to Inactive only if you don't want to use this key term anymore.

Field	Description
Output Type	Output type is the data type of the key term returned by the GenAI Large Language Model (LLM). The values are: ◦ Number – For example, renewal percentage, recovery point objective ◦ Date – For example, start date, renewal date ◦ Text – For example, currency, country of jurisdiction
Group	This is based on the lookup **Key Term Groups** (ORA_OKC_KEY_TERM_GROUP). Groups are used to categorize the key terms. You can set up your own groups.

3. Click **Create**.

From the Key Terms list page, click the **Name** of the key term you want to edit. Or, from the **Actions** menu click **Edit** to display the **Key term details** page. From this UI, you can edit an existing key term and create prompts for the key term.



You can edit the **Output Type**, **Status**, and **Group** fields of the key term. If a key term is made inactive, you can't make it active again and the key term won't be extracted from the contract documents.

All the prompts for the key term are listed in the **Prompts** section. You can click **Add Prompt** to create a prompt or go to the **Actions** menu to edit an existing prompt.

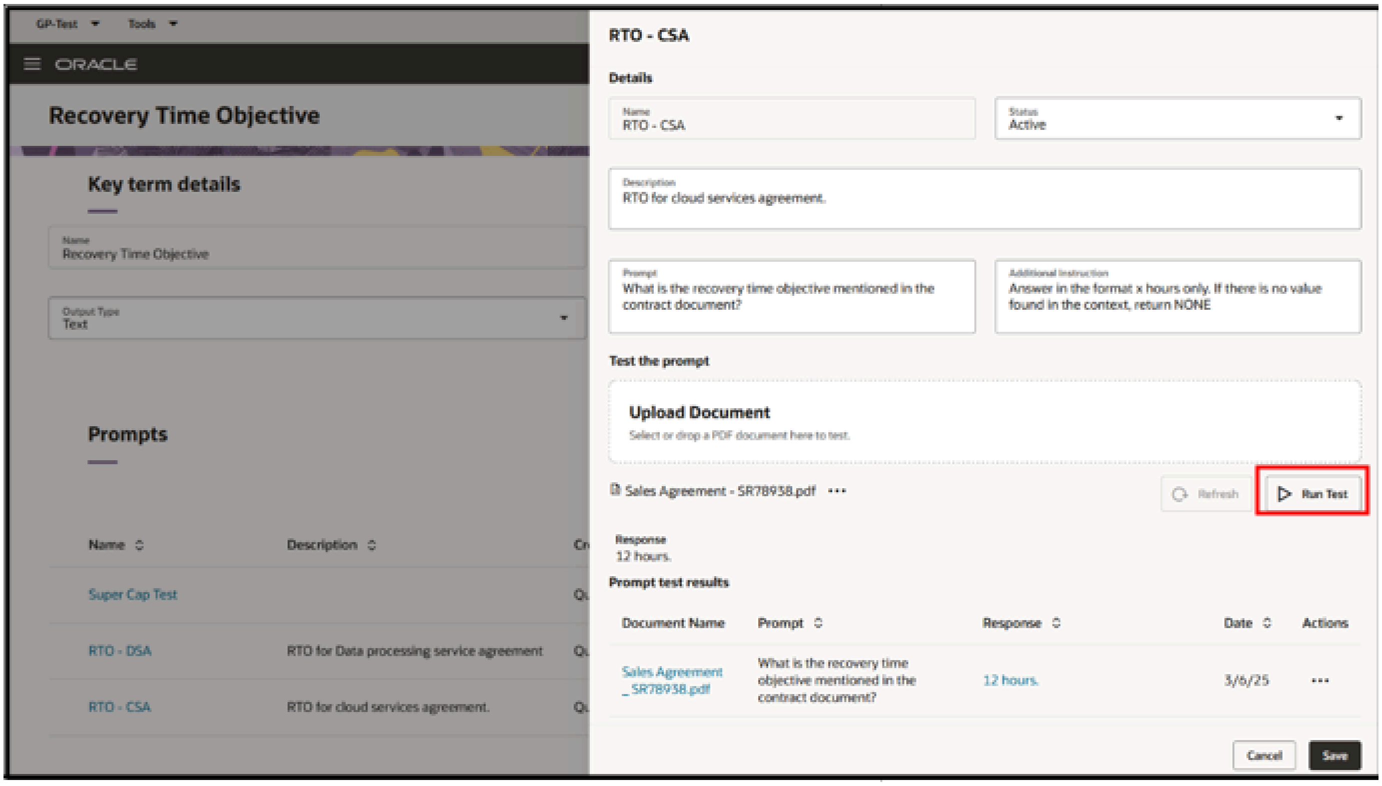
Define Prompts

A prompt is the question that you ask the LLM to get a specific response. For example, you want to set up prompts to extract the key terms from contract documents. You can create a prompt, test it against various contract documents, and fine tune the prompt to fetch the correct response. You can also add additional instructions to specify the format of your answer.

To define a prompt, follow these steps:

1. From the **Prompts** section of the Key term details UI, click **Add Prompt** to open the Create Prompt panel.

2. Enter the Name, Description, Prompt and Additional Instructions and click **Create** to open the Edit Prompt panel as shown.



3. Enter the following details:

Field	Description
Name	Unique name of the prompt.
Status	Prompt statuses are **Draft**, **Active**, and **Inactive**. Only Active prompts will be used for extracting key words from contract documents.
Description	Describes the prompt.
Prompt	The question that's used for extracting the key term.
Additional Instruction	Default additional instruction is `If there is no value found in the context, return NONE`. This text increases the possibility of the LLM providing response based on the details from the document. You can also expect the answer in a specific formation by appending other instructions such as: ◦ Respond only Yes or No ◦ Provide the response only in number ◦ Answer in one phrase only ◦ Answer in the format X hours ◦ Answer in the format {X %} only

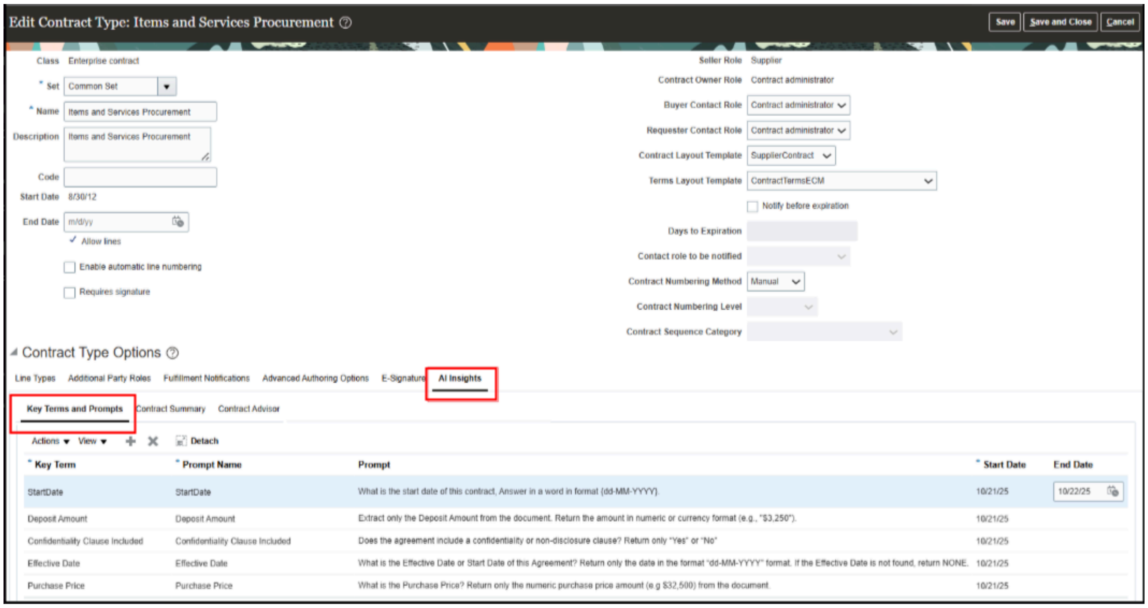
Field	Description
Upload Document	Upload a contract document and test if the prompt extracts the appropriate response. Only text-based PDF files (PDF files in which you can search for text using Ctrl - F) is supported. Other formats aren't currently supported.
Refresh	Click **Refresh** to complete the document upload
Run Test	Once the document is uploaded successfully, the **Run Test** button will be enabled. Click **Run Test** to call the LLM which return the response for the prompt based on the information in the uploaded document.
Prompt test results	◦ Document Name - The document that's used for test. Click to download the document. ◦ Prompt - The prompt that's used for testing. ◦ Response - The response provided by the LLM. Click to find the text snippet in the document from where the response is retrieved. ◦ Date - The testing date. ◦ Actions: - Copy - Copies this prompt to the Prompt field. You can use this to try out one of the previous tested prompts. - Delete - Deletes the test result. You can choose to delete old test results that aren't needed anymore.

4. Click **Save**.

Associate Key Terms and Prompts with Contract Types

The key term and the corresponding prompt must be associated with a contract type for the key terms to be extracted from contracts.

The **Key Terms and Prompts** tab and the **AI Insights** tab is available in the Manage Contracts Type UI as shown:



From the **Key Terms and Prompts** tab, you can select the key term and the corresponding prompt that you want to use for contracts of a specific type. Only those key terms for which the current date is between the start date and end date will be extracted from the documents.

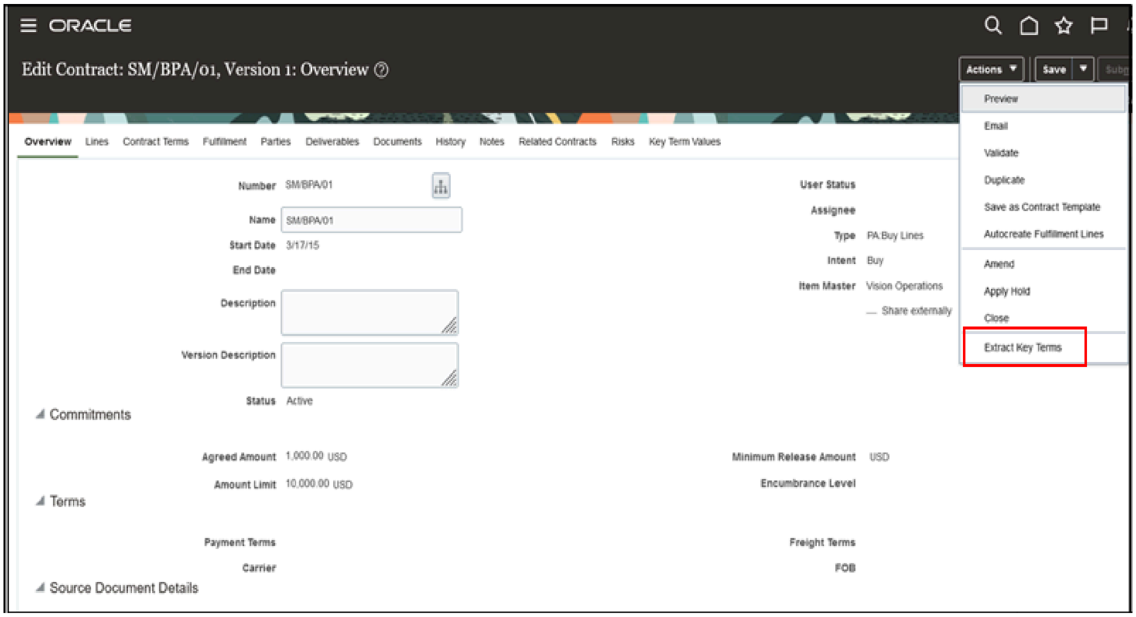
To associate key terms and prompts with contract types, follow these steps:

1. Navigate to **Setup and Maintenance** > **Manage Contract Types** page.
2. Click the **Key Terms** tab and enter the following details:
   - Key Term
   - Prompt Name
   - Prompt
   - Start Date
   - End Date
3. Click **Save and Close**.

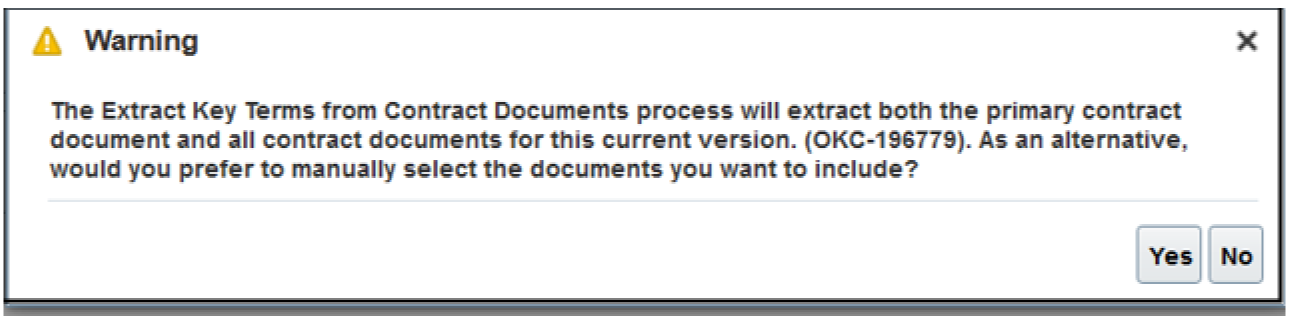
Extract Key Terms from Contract Documents

Key terms are extracted from contracts in the **Edit Contract** UI. Ensure that the contract has structured terms or attached documents in the Contract Terms tab. Key terms can be extracted from one or more documents and from contracts of all statuses.

From the **Edit Contract** page, navigate to the **Extract Key Terms** menu item from the **Actions** menu as shown:

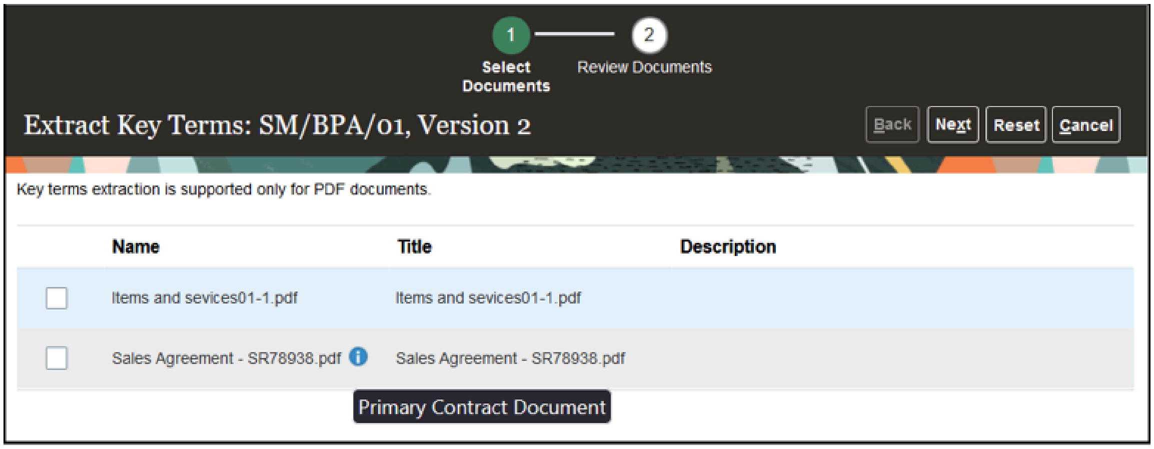


When you select **Extract Key Terms**, you'll get a warning message as shown.



If you click **Yes**, you can choose the documents from which the key terms will be extracted. If you click **No**, the primary contract document and all the documents in the Contract Documents region in the Documents tab will be used for extraction.

When you click **Yes**, the file selection guided process opens as shown:



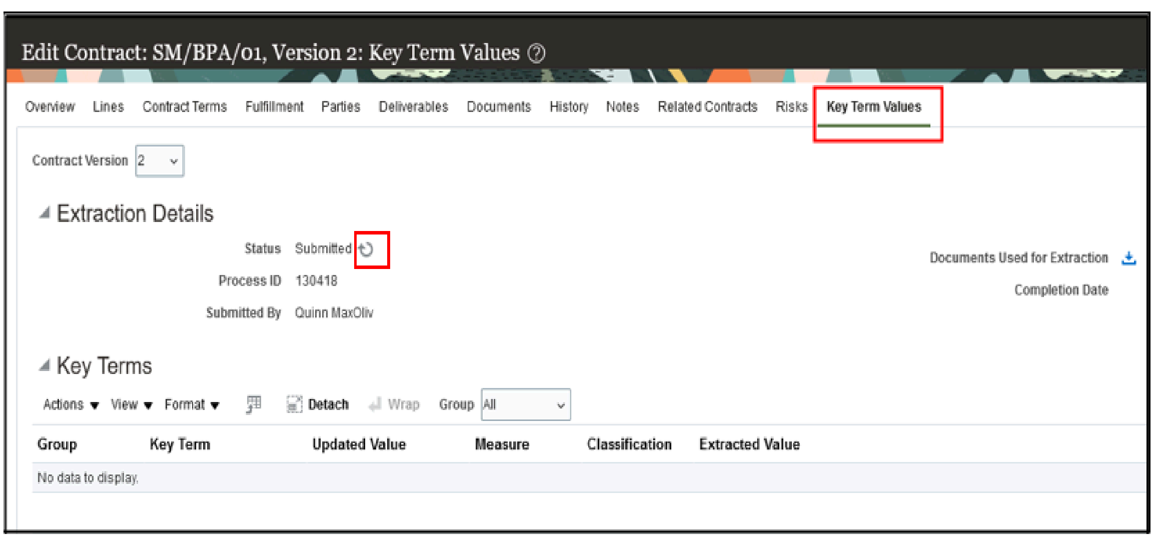
The page lists the Primary Contract Document (marked with blue icon) and all the contract documents. After selecting the documents, click **Next** and click **Submit**. This action launches the **Extract Key Terms from Contract Documents** scheduled process.

> **Note:** If there are no files added to the **Contract Documents** region that are related to the current version, then this message is displayed: `There're no documents for this version of the contract in the Documents tab. Add the documents before running the Extract Key Terms from Contract Documents job.`

If the **Extract Key Terms from Contract Documents** scheduled process is running when you select **Extract Key Terms**, you'll get this warning message: `The Extract Key Terms from Contract Documents process is running for this contract. You must wait for the process to complete before submitting a new request.`

Finally, if there are previous versions of the contract for which the key terms weren't extracted, then this warning is displayed: `Key terms aren't extracted for the previous {VERSIONS_NUM} versions of this contract. Do you want to go to the previous versions and run the Extract Key Terms from Contract Documents process before continuing?`

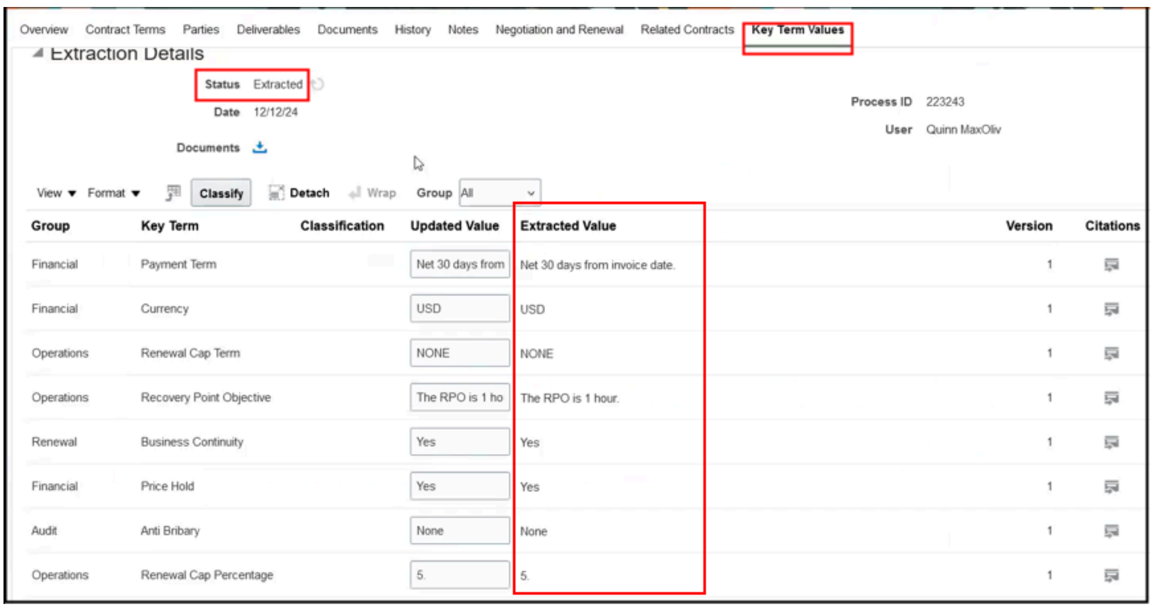
You can view the latest status of the **Extract Key Terms from Contract Documents** scheduled process from the **Key Term Values** tab, by clicking the **Refresh** icon next to the **Status** field as shown:



Here are the extraction details:

Field	Description
Status	Status of the Extract Key Terms from Contract Documents schedule process.
Process ID	Scheduled process unique identifier.
Submitted By	User who submitted the process.
Documents used for extraction	List of documents selected by the user for the extraction.
Completion Date	Date and time when the program completed.

Once the status of the scheduled program becomes **Extracted**, you can view the extracted key terms in the **Extracted Value** column as highlighted:



Field	Description
Group	The group to which the key term belongs to.
Key Term	The key term defined for this contract type.
Classification	The classification code for the key term based on the rules you set up in Application Composer.
Updated Value	For key terms with Text and Date output type, the value is the same as the extracted value. You can change this value to be used for key term classification.
Measure	The Key Terms Classification Measures user defined lookup has measures values such as hours, minutes, days, percentage and so on. This field is available only for key terms with Number output

Field	Description
	type. For example, for a Renewal Period key term, the Updated Value is 3 and Measure is Years and for a Renewal Percentage key term, the Updated Value is 10 and Measure is Percentage.
Extracted Value	The key term value that's extracted from the documents. This is the response to the prompt.
Version	If the key term value isn't found from the current version of the contract, then the already extracted value from the previous version will be displayed.
Citations	The text of the document from which the value is extracted.

Consolidate Key Term Values from Previous Versions of the Contract

Consolidation is the process of merging key term values from previous versions of the contract, if the latest version of a contract doesn't have any value.

For a particular key term, if the extracted value is NONE for the latest version of the contract, then the updated value from the previous version will be automatically populated in the **Extracted Value** field. The **Version** field specifies the contract version from which this value is taken.

For example, let's take an example of where the original version of a contract has the master agreement and subsequent versions have only amendments as shown:

Version	Description
Version 1	Master agreement, 10 key terms
Version 2	Amendment, 2 key terms

Consolidation Logic:

Version	Document	Renewal %	Support Term	Price Hold
1	PCD	8	3 years	
	Exhibit			Yes
Consolidation		**8**	**3 years**	**Yes**

Version	Document	Renewal %	Support Term	Price Hold
2	Amended PCD	9		

Version	Document	Renewal %	Support Term	Price Hold
	Exhibit			No
Consolidation		**9**	**3 years**	**No**

Note: Because there isn't any value for the Support Term in Version 2, the key term value from Version 1 is used.

Classify Contract Key Terms

You can categorize or classify the contractual key terms based on your business specific rules. Classification provides a quick preview of the key terms that need attention. It highlights the risks in the contract, brings attention to the terms that aren't standard and outlines the favorable and non favorable terms in a contract.

The classification rules for each key term can be written in Groovy and validated before using them. You can define your own classification codes such as Standard, Non Standard, Good, Bad, Neutral, and so on and are specific to your organization. For example, the rule for a renewal percentage key term could be as follows:

- If above 5, the classification is Good
- If between 3 and 5, it might be classified as Neutral
- If less than 5, then the classification might be Bad.

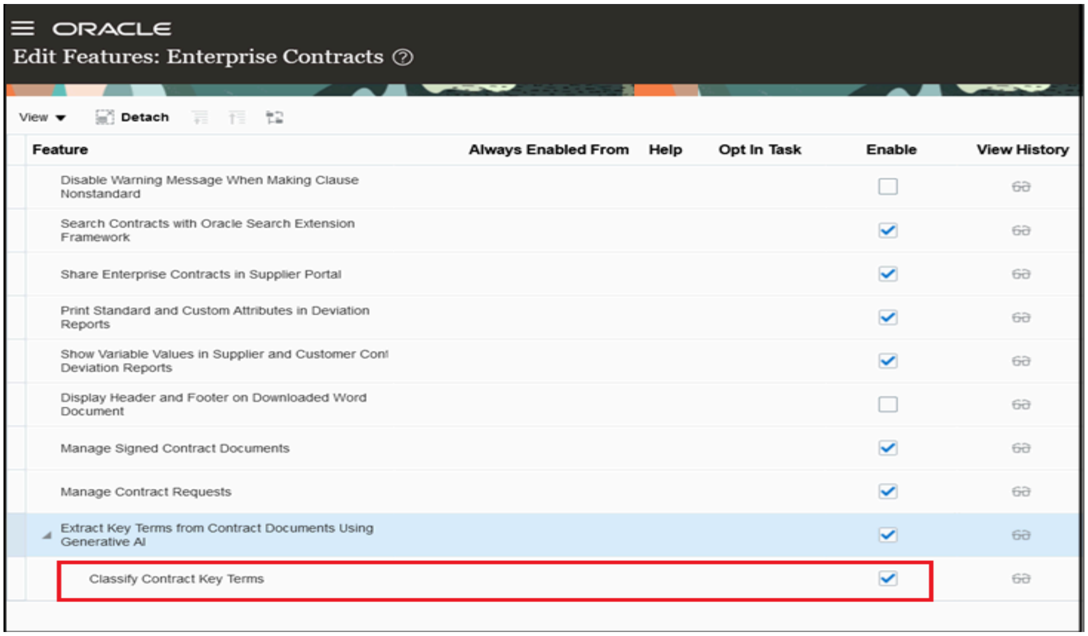
You can classify the key terms after they're extracted from the contract documents. Classifying key terms helps stakeholders get quick insights from the contract so that they can make informed decisions.

Enable the Classify Contract Key Terms Feature

You enable this feature using the opt-in task. If you've permission to configure offerings, then you can use the New Features page to opt into the feature as follows:

1. Navigate to **My Enterprise** > **Offerings**.
2. Click the **Enterprise Contracts** offering.
3. Click **Opt In**.

4. Click **Features** (the pencil icon) and navigate to the `Extract Key Terms from Contract Documents Using Generative AI` parent feature as shown:



5. Expand the parent to display the `Classify Contract Key Terms` child feature and select the checkbox in the **Enable** column.

   Note: The child opt in can't be enabled without the parent opt in being enabled.

6. Click **Done** to save the changes and return to the Offerings page.

   For more information, see the New Feature Opt-In Section of the Oracle Applications Cloud - Using Functional Setup Manager guide on the Oracle Help Center (docs.oracle.com).

Security and Privileges to Classify Key Terms

The following lists the access requirements to classify the key terms. The **Classify** button in the **Key Term Values** tab of the contract will be enabled only if you've the following privileges:

- Edit Key Term Values (OKC_EDIT_KEY_TERM_VALUES_PRIV)
- Use Generative AI Features in Sales (ZCA_USE_GENAI_IN_SALES_PRIV)
- Edit Contract (OKC_EDIT_CONTRACT_PRIV)

Classification Code Lookups

The classification codes are user-defined and you can add them in the **Key Terms Classification Codes** lookup. Use the user defined lookup **Key Terms Classification Measures** to enter measures such as hours, minutes, days, percentage and so on. This field is available only for key terms with Number output type. For example, for a Renewal Period key term, the Updated Value is 3 and Measure is Years and for a Renewal Percentage key term, the Updated Value is 10 and Measure is Percentage.

Key Term Classification Rules

The configuration of Groovy scripts for classification of key terms is done in Application Composer using a sandbox for developing and testing your scripts. Here's how to create a sandbox:

1. Navigate to **Configuration** > **Application Composer** > **Sandboxes**.
2. Click **Create Sandbox**.
3. Specify a name and select **Application Composer** > **All Tools**.
4. In the **Publishable** field, select **Yes**.
5. Click **Create and Enter**.
6. Click the **Application Composer** icon.

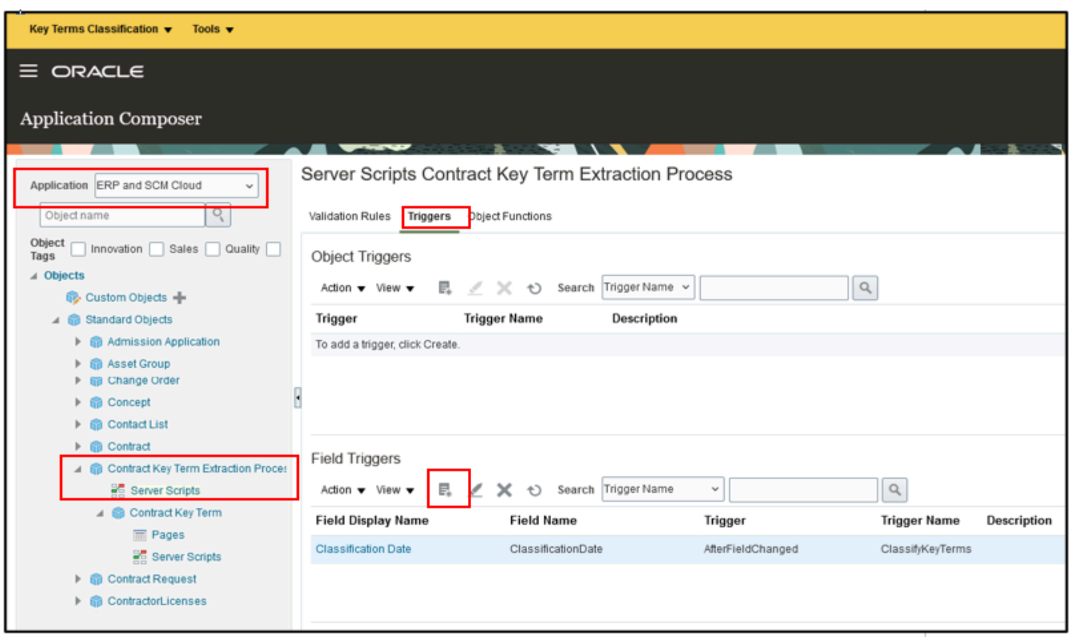
You can find more information about sandboxes here *Overview of Sandboxes*

Sample rules might be as follows:

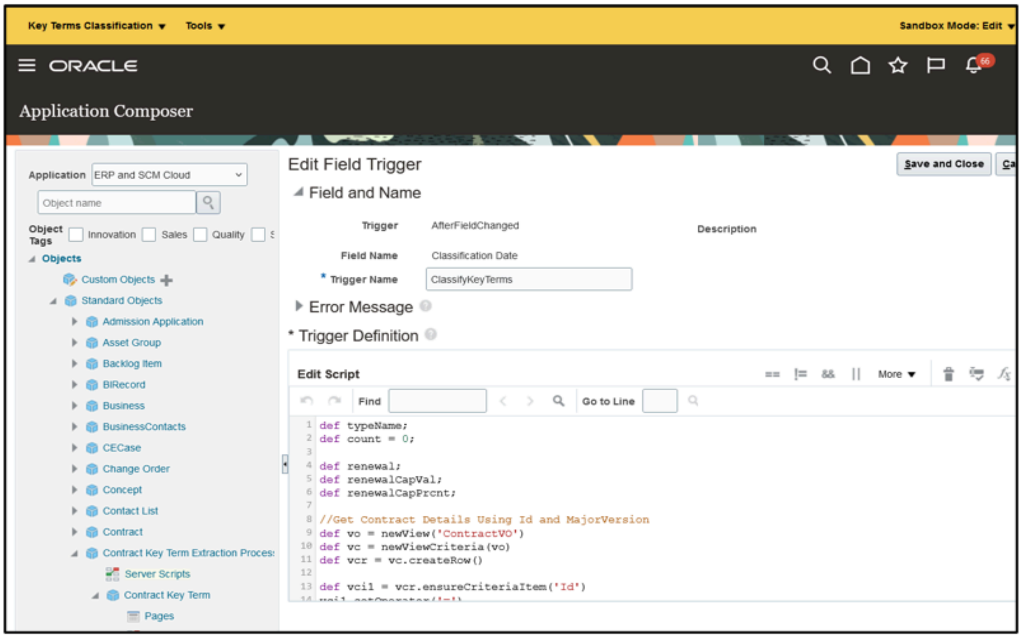
Name	Description
Rule 1	`If the key term Renewal Cap Percentage is more than 2, then the key term is classified as Non-standard , else classified as Standard`
Rule 2	`If the key term Price Hold value is Yes, then the key term is classified as Present, else classified as Absent`
Rule 3	`If the contract type is Sell : No lines and Renewal Period is < 3 years, it's Non-standard, if it's >= 3 years it's Standard`

Here's how to create a field trigger to activate a key term classification rule.

1. Click **Navigator** > **Configuration** > **Application Composer**.
2. In the **Application** field, select **ERP and SCM Cloud**.
3. From the **Objects** area, select **Contract Key Term Extraction Process** > **Server Scripts** as shown:

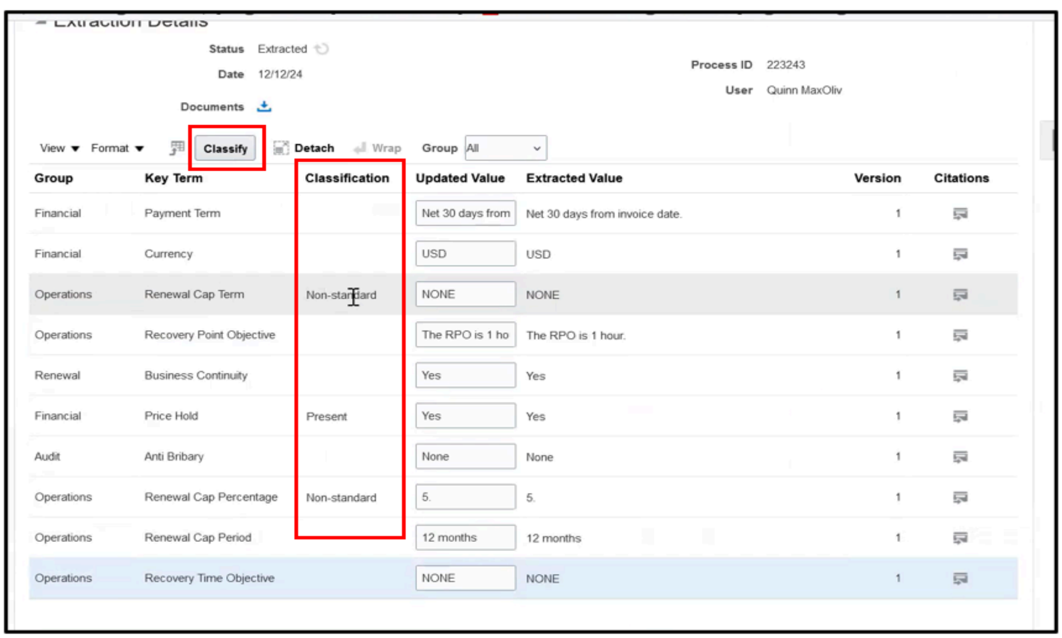


4. From the **Triggers** tab, in the **Field Triggers** region click **Add** to create a new field trigger as shown:



5. Validate the Groovy script and click **Save and Close**.

Once you validate the Groovy script, you can classify the key terms from the **Key Term Values** tab of a contract as shown:



Click **Classify** to call the Groovy script and based on the rules you've written, the classification happens, and you can see the values in the **Classification** field. The values entered in the **Updated Value** field can be used for classification. The response returned by the LLM is populated in the **Extracted Value** and **Updated Value** fields. If the response isn't in the format that you want for classification, then you can change the value in the **Updated Value** field and use that value for classification.

Sample Groovy Script for Key Term Classification Rules

Here's sample Groovy script for the rules describes in the Key Term Classification Rules section.

```
def typeName;
def count = 0;

def renewal;
def renewalCapVal;
def renewalCapPrcnt;

try{
//Below snippet will get Contract Type Name Using Id and MajorVersion of the
Contract def vo = newView('ContractVO')
def vc = newViewCriteria(vo)
def vcr = vc.createRow()

def vci1 = vcr.ensureCriteriaItem('Id')
vci1.setOperator('=')
vci1.setValue(DnzChrId)

def vci2 = vcr.ensureCriteriaItem('MajorVersion')
vci2.setOperator('=')
vci2.setValue(MajorVersion)

vc.insertRow(vcr)
vo.appendViewCriteria(vc)
vo.executeQuery()

def row = vo.first();
if(row != null)
{
typeName = row.getAttribute('ContractTypeName')
}

//Iterate through KeyTerms to classify key terms such as Renewal Cap Percentage,
//Based on the rules, user must populate ClassificationCode with appropriate Lookup Code
def contKeyTerms = contractKeyTerms
while(contKeyTerms.hasNext()){
 def keyTermrow = contKeyTerms.next();


// Implementing Rule #1
 if(keyTermrow.getAttribute('KeyTermName') == 'Renewal Cap Percentage'){
 renewalCapPrcnt = keyTermrow.getAttribute('UpdatedValue')
 if(renewalCapPrcnt > '2')
 keyTermrow.setAttribute("ClassificationCode","OKC_CLASSIFY_NON_STD")
 else
 keyTermrow.setAttribute("ClassificationCode","OKC_CLASSIFY_STD")
 }

// Implementing Rule #2
 if(keyTermrow.getAttribute('KeyTermName') == 'Price Hold'){
 if(keyTermrow.getAttribute('UpdatedValue') == 'Yes')
 keyTermrow.setAttribute("ClassificationCode","OKC_CLASSIFY_PRESENT")
 else
 keyTermrow.setAttribute("ClassificationCode","OKC_CLASSIFY_ABSENT")
 }


}

// Implementing Rule #3
//Re-Iterate through KeyTerms to Classify the Renewal Period
def contKeyTermsUpd = contractKeyTerms
```

```
    while(contKeyTermsUpd.hasNext()){
     def keyTermUpdrow = contKeyTermsUpd.next();
     if(keyTermUpdrow.getAttribute('KeyTermName') == 'Renewal Period'){
     if(typeName == "Sell : No lines"){

     if(keyTermrow.getAttribute('UpdatedValue') < 3 != 'NONE'){
     keyTermUpdrow.setAttribute("ClassificationCode","OKC_CLASSIFY_NON_STD")
     }
     if(keyTermrow.getAttribute('UpdatedValue') >= 3){
     keyTermUpdrow.setAttribute("ClassificationCode","OKC_CLASSIFY_STD")
     }
     }
     }
    }
    }
    catch(Exception e){
     def message = "There is an error in the implementation. Please contact Administrator";
     adf.error.warn(message)
    }
```

Frequently Asked Questions (FAQs)

Why do I get an authorization denied error when I try to create a key term?

If you get the error `Authorization is denied for action create on business object oraCxSalesCommonKeyterms.Keyterm` when you try to create a key term, then go to the *Security and Privileges to Set Up and Extract Key Terms from Contract Documents* area of this playbook.

Follow the setup instructions listed in the Set Up the Enable Security Console External Application Integration Profile Option and Enable Permission Groups sections.

Why is the Group list of values empty in the Create Key Term UI?

The **Group** list of values is based on a user-defined lookup. You can add your own lookup values in the Key Term Groups lookup (ORA_OKC_KEY_TERM_GROUP). See *How can I edit lookups?* for more information.

Why can't I see the key term in the Manage Contract Type UI?

Go to the Edit Key Term UI and check if the key term is in **Active** status.

Why can't I see the prompt in the Manage Contract Type UI?

If you can see the key term but not the prompt in the **Manage Contract Type** page, then check if the status of the prompt is **Active** in the **Edit Prompt** UI.

Why can't I see the Extract Key Terms menu item from the Action menu in the Contracts UI?

To display and use the Extract Key Terms menu item from the Action menu in the Contracts UI, you must enable the opt-in Extract Key Terms from Contract Documents Using Generative AI as outlined in *Enable the Extract Key Terms from Contract Documents Using Generative AI Feature*.

You must also have the following privileges:

- Edit Key Term Values (OKC_EDIT_KEY_TERM_VALUES_PRIV)
- Use Generative AI Features in Sales (ZCA_USE_GENAI_IN_SALES_PRIV)
- Edit Contract (OKC_EDIT_CONTRACT_PRIV)

Why am I getting an error when I run the Extract Key Terms from Contract Documents process?

You might be getting this error `There're no documents for this version of the contract in the Documents tab` when you run the **Extract Key Terms from Contract Documents** process for the following reasons:

- No primary contract document was added and no documents were added to the **Contract Documents** region of the current version of the contracts in the **Documents** tab.
- The documents aren't in PDF format.

What can I do if the Edit Key Term Values privilege isn't available in the security console?

If you can't see the Edit Key Term Values (OKC_EDIT_KEY_TERM_VALUES_PRIV) privilege in the security console, then run the following schedule processes:

- Import User and Role Application Security Data
- Retrieve Latest LDAP Changes (it might take 10 - 15 minutes to complete)

Why can't I edit the values in the Updated Values field in the Key Term Values tab of the contract?

Check if you've edit access to the contract and you've the following roles:

- Edit Key Term Values (OKC_EDIT_KEY_TERM_VALUES_PRIV)
- Use Generative AI Features in Sales (ZCA_USE_GENAI_IN_SALES_PRIV)
- Edit Contract (OKC_EDIT_CONTRACT_PRIV)

Why isn't my key term extracted from the contract document?

First, check that you've added the key term and prompt in the **Manage Contract Type** UI and the current date is between the start date and end date. Then check if the key term is active. If not, it won't be extracted even if it's added in the **Manage Contract Type** UI.

Why aren't the documents I added not visible in the Document Selection UI?

When you click **Extract Key Terms** from the **Actions** menu in the Contract UI and the documents you added aren't visible in the **Document Selection** UI, then the reasons are as follows:

- Only the Primary Contract Document (in PDF format) and the PDF files in the **Contract Documents** region of the **Documents** tab will be displayed.
- Only those documents added in the current version of the contract will be displayed.

Why is the Classify button disabled?

To display and use the **Classify** button to classify the contractual key terms based on your business specific rules, you must enable the **Classify Contract Key Terms** opt-in feature as outlined in *Classify Contract Key Terms*.

The **Classify** button in the **Key Term Values** tab of the contract will be enabled if you've the following privileges:

- Edit Key Term Values (OKC_EDIT_KEY_TERM_VALUES_PRIV)
- Use Generative AI Features in Sales (ZCA_USE_GENAI_IN_SALES_PRIV)
- Edit Contract (OKC_EDIT_CONTRACT_PRIV)