

# Oracle Fusion Cloud Project Management

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**Project Financial Control Agent  
Assistants**



Oracle Fusion Cloud Project Management  
Project Financial Control Agent Assistants

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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.

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# 1 About the Project Financial Control Agent Assistants Guide

## What's Included in the Project Financial Control Agent Assistants Guide

This guide explains how to use the following project financial control agent assistants:

- *Project Cost Adjustment Assistant*
- *Project Cost Exceptions Assistant*
- *Project Contract Bill Transactions Assistant*
- *Project Capitalization Analyst*
- *Project Contract Invoicing Assistant*
- *Project Contract Validation Assistant*
- *Project Contract and Sales Order Reconciliation Assistant*
- *Project Billing and Revenue Event Creation Assistant*
- *Project Contract and Customer Purchase Order Reconciliation Assistant*



# 2 Project Cost Adjustment Assistant

## About the Project Cost Adjustment Assistant

This topic provides an overview of the Project Cost Adjustment Assistant and explains when you can use it to transfer a single project cost transaction to the correct project, task, contract, funding source, expenditure type, or project role, when the transaction supports that adjustment.

### What This Assistant Supports

This assistant supports single-transaction transfer adjustments. It helps you:

- Identify the transaction you want to adjust.
- Refine the search when you do not know the transaction number.
- Review the transfer details before submission.
- Ask for more information about the transaction or its attributes.
- Confirm the adjustment before it is submitted.
- Understand approval or validation outcomes after submission.

### What This Assistant Does Not Support

This assistant does not:

- Adjust multiple transactions at once.
- Guess missing values.
- Perform external corrective actions, such as opening a period or reactivating a task.
- Submit a transfer without your explicit confirmation.

### Before You Start

Have one of these ready:

- A transaction number.
- A project, task, and transaction date.

If you do not have the transaction number, start with the details you know. The assistant asks for one more detail if needed.

## Accessing the Project Cost Adjustment Assistant

Use this topic to understand what access is required to use the Project Cost Adjustment Assistant.

## What you need

To access the assistant, your role must include the assistant-specific duty:

### **ORA\_PJC\_ASSIST\_COST\_ADJUSTMENT\_DUTY**

This duty is not available out of the box. It must be added to the required role hierarchy during setup. For more details, see [Creating Custom Roles to Enable Access to Project Financial Control Agents](#).

The assistant also uses the generative AI runtime duty, which is assigned to all users by default:

### **ORA\_DR\_FAI\_GENERATIVE\_AI\_AGENT\_RUNTIME\_DUTY**

## How to access the agent

1. Log into your Oracle Cloud Applications environment.
2. Click **Me > Explore AI Agents** to navigate to the AI Agents page.
3. Click the **Explore** tab to view a list of all available agents.
4. Search for **Project Cost Adjustment Assistant**.
5. Click the agent to launch it.

If you don't see the agent in the search results, your role or environment configuration may limit access. Contact your administrator.

**Note:** Even when you have the duty required to use the assistant, you must also have the Project Accountant role and the necessary data access for the relevant business units. Without that role and access, you can open the assistant, but you will not be able to view, work with, or adjust the project cost transaction.

## Transfer a Project Cost

This topic provides guidance on how to transfer one project cost transaction to another project, task, contract, or funding source using the Project Cost Adjustment Assistant.

## How to start

Tell the assistant what you want to transfer, or say **Show Templates** when you want to see example request formats for supported tasks.

Examples:

- “Transfer transaction 52525 to Project P3, Task T4.”
- “Transfer a cost on Project P1, Task T3, dated 01/20.”
- “Transfer the project role for transaction 52525 to Project Role: Project Manager.”

## What happens next

The assistant will:

1. Identify the transaction.
2. Show a preview of the transfer.

3. Wait for your confirmation.
4. Submit the adjustment after you confirm.

**Note:** This exact-matching behavior applies when the assistant is helping you identify or find a transaction. If the details do not match, the assistant asks you to correct the values instead of guessing.

## Worked Example

Story: The user knows the transaction number and the target project and task.

A project accountant notices that one transaction was charged to the wrong task and needs to move it to the correct task before period close.

Here's their conversation with the assistant:

**User:** Transfer transaction 8022838 to Project P3, Task T4.

**Assistant:** I found transaction 8022838 and prepared the adjustment for review. Enter "Review" to check the adjustment summary before it can be submitted.

**User:** Review

**Assistant:** Please review the adjustment summary below and confirm your approval:

The proposed adjustment will result in the following changes to the original transaction once approved. All amounts are in provider ledger currency.

Here are the transaction details

- **Transaction Number:** 8022838
- **Business Unit:** Vision Operations
- **Adjustment Date:** 2026-04-17
- **Total Burdened Cost of Adjusted Transactions:** 20.7 USD

Here's a table listing the adjustment details:

**Adjustment Details:** Transfer

Transaction Attribute	Transferred From	Transferred To
Project Number/Name	P3	P3
Task Number/Name	T1	T4

Please review and confirm. On confirmation, I will submit this adjustment. If anything is incorrect, indicate the field to change.

### What this example shows

The assistant collects the minimum required details, presents a confirmation view, and waits for explicit approval before submission.

## Find and Refine a Transaction

This topic provides guidance on how to identify the correct project cost transaction when you do not have the transaction number.

### How the assistant helps

If the transaction number is not available, you can start with:

- Project
- Task
- Business Unit
- Date
- Amount
- Cost Type
- Project Role
- Invoice number
- Purchase order number

**Note:** The assistant uses exact matching. If a value is wrong or incomplete, it will ask you to correct it or provide another detail.

If the number of records matched is N, the assistant can:

- Show a list of records.
- Display up to 50 records at a time and provide a deep-link to the Manage Project Costs page, so you can search among these transactions in more detail and identify the appropriate transaction number.
- Let you move through additional pages.
- Let you add or remove columns.
- Ask for one more detail to narrow the list.

### Worked Example

A project manager knows the project and task, but not the transaction number, and wants help narrowing down the correct record.

Here's their conversation with the assistant:

**User:** Transfer a transaction from project BAT-PJCBAT-Proj-02, Task 1.1.

**Assistant:** I found **7** matching transactions for Project: **BAT-PJCBAT-Proj-02**, Task: **1.1**. Showing 1–7 of 7 below.

No.	Transaction Number	Business Unit	Project Number	Task Number	Expenditure Item Date	Total Burdened Cost
1	8016844	Vision Operations	BAT-PJCBAT- Proj-02	1.3	08/10/2022	6023.9875 USD
2	7689118	Vision Operations	BAT-PJCBAT- Proj-02	1.3	01/01/2014	1.3225 USD
3	7689104	Vision Operations	BAT-PJCBAT- Proj-02	1.3	02/02/2014	132.25 USD
4	7689108	Vision Operations	BAT-PJCBAT- Proj-02	1.3	02/02/2014	-13.225 USD
5	7689105	Vision Operations	BAT-PJCBAT- Proj-02	1.3	02/02/2014	13.225 USD
6	7689107	Vision Operations	BAT-PJCBAT- Proj-02	1.3	02/02/2014	13.225 USD
7	7689106	Vision Operations	BAT-PJCBAT- Proj-02	1.3	02/02/2014	13.225 USD

**User:** The expenditure item date is 08/10/2022.

**Assistant:** I found transaction 8016844.

Tell me the target project and task so I can prepare the adjustment.

### What this example shows

The assistant can start with partial information, ask for one more discriminating detail, and continue until the correct transaction is identified.

## Review, Confirm, and Submit an Adjustment

This topic provides guidance on how to review the transfer details and confirm the adjustment before it is submitted.

### What you will see

Before submission, the assistant shows:

- An adjustment summary
- The transfer details
- The original and target values for the relevant fields

### What you need to do

Review the summary carefully, then confirm the transfer.

You can also:

- Correct a field.

- Add/change the justification.
- Cancel the adjustment.

**Note:** The assistant does not submit until you explicitly confirm.

## After submission

If the transfer is successful, the assistant tells you that the transaction was transferred and gives you the adjusted transaction number when available.

If approval is required, the assistant tells you that the transfer was submitted for approval and that Oracle Cloud notifications will show the progress.

## FAQs for the Project Cost Adjustment Assistant

### Why did the assistant ask me to reenter the transaction details?

The assistant uses exact matching. If the values do not match a record, it will ask you to correct them rather than guessing.

### Why did the assistant ask for justification?

Some transfers require justification to support approval routing. If justification is mandatory, you must provide it before the assistant can continue.

If justification isn't required for your transfer, the assistant may let you skip it. If approval routing requires justification, the assistant won't continue until you provide one.

### Why can't the assistant complete my transfer?

The transaction may be ineligible. Common reasons include:

- The target task is inactive.
- The accounting period is closed.
- The funding source is not valid for the transaction.
- The transfer is restricted by policy.

## What can I do when the assistant can't finish the transfer?

When the assistant can't finish the transfer, you can:

- Choose a different valid target.
- Correct the date or other input.
- Cancel the adjustment.
- Resolve the issue outside the assistant and try again.

## Can I switch to a different transaction while I am working?

Yes. You can start over, switch context, or continue with the current transaction. The assistant should ask which path you want when the request changes mid-flow.

## Why did the assistant ask for justification?

Some transfers require justification to support approval routing. If justification is mandatory, you must provide it before the assistant can continue.

If justification isn't required for your transfer, the assistant may let you skip it. If approval routing requires justification, the assistant won't continue until you provide one.

## What if I want to stop before submitting?

You can cancel the adjustment. The assistant should confirm the cancellation before applying it.



# 3 Project Cost Exceptions Assistant

## About the Project Cost Exceptions Assistant

Use natural language to find, review, and understand unprocessed project cost exceptions.

The Project Cost Exceptions Assistant helps you identify unprocessed project cost exceptions recorded by the Import Costs process.

You can use natural language to:

- find exceptions,
- review exception categories,
- drill into exception types,
- review summarized exception details, and
- see possible resolution options.

**Note:** The assistant doesn't perform corrective actions. It helps you investigate exceptions, understand their causes, and review possible resolution options. You must complete any corrective actions in the appropriate application pages.

### Key Abilities Supported

This assistant supports investigation of unprocessed project cost exceptions generated by the Import Costs process. It helps you locate exceptions, understand their causes, and review possible resolution options.

The assistant can:

- Retrieve unprocessed project cost exceptions,
- Search using natural language,
- Summarize exceptions by category,
- Summarize exception types within a category,
- Group exception details by relevant attributes, and
- List possible resolution options.

### Key Abilities Not Supported

This assistant doesn't support corrective actions, transaction reprocessing, warning messages, or project cost exception types outside the Import Costs process.

The assistant can't:

- Resolve exceptions on your behalf,
- Update project setup, rates, or controls,
- Query / analyze burdening, adjustments, labor distribution, or borrowed and lent exceptions,
- Include warning messages in results, or

- Show every transaction individually in chat.

## Access the Project Cost Exceptions Assistant

This topic explains how to access the Project Cost Exceptions Assistant using the required roles, privileges, and project costing security to view authorized exception information through AI Agent Studio.

Users access the assistant from AI Agent Studio.

Access to exception records depends on existing project costing security. Users see only the data they are authorized to view.

### Key Abilities Supported

Users with the right access can:

- launch the assistant,
- retrieve exception information, and
- view permitted exception details.

### Key Abilities Not Supported

Users can't:

- access unauthorized exception data, or
- bypass project costing security.

### Required Access

You need the following roles and privileges to access the Project Cost Exceptions Assistant:

- Project Cost Exceptions Assistant duty role.
- Project Cost Transaction Processing duty role.
- Project Cost Setup Inquiry duty role.
- Required function security privileges.
- Required data security policies.

## Search for Project Cost Exceptions

Use clear natural language and filters to find the exceptions you need.

You can search for exceptions by using natural language and supported filter criteria.

Use both the business object and the value to keep requests clear.

**Preferred:**

Show me exceptions for project ABC

**Less clear:**

Show me exceptions for ABC

The assistant supports attributes such as business unit, transaction source, project, task, cost type, cost organization, and date fields such as creation date, project cost date, and accounting date.

## Key Search Behavior

If a value could match more than one object, the assistant asks for clarification.

**Example:**

**Request**

Show me exceptions for Smith

**Response**

Is Smith a worker, project, supplier, customer, or another entity?

Date requests can use phrases such as:

- last 90 days
- last month
- in January
- between January 1 and February 15

Unless you specify otherwise, the assistant only queries exceptions created in the last 90 days.

Non-date attributes use case-sensitive partial matching.

## Key Abilities Supported

The assistant can:

- search exceptions using natural language,
- apply filter criteria,
- translate date phrases into actual dates, and
- ask for clarification when needed.

## Key Abilities Not Supported

The assistant can't:

- infer an ambiguous value without context,
- search unsupported attributes, or
- ignore security rules.

## Review Exception Details and Resolution Options

Drill down from exception categories to exception details and review possible resolution options.

After you find exceptions, you can drill down through three levels:

### **Exception Category > Exception Type > Exception Details**

For large result sets, the assistant shows categories first. For smaller result sets, it may go directly to exception types.

Select a category or type by entering its number or name from the displayed table.

## Exception Categories and Types

Examples of exception categories include:

- Project Definition
- Rate Definition
- Currency Conversion
- Accounting Period

Examples of exception types include:

- Project cost date isn't within project start and finish dates.
- Cost rate for the worker is missing as of the project cost date.
- Receiver ledger currency conversion rate is missing.

## Exception Details

Exception details are grouped by the attributes most relevant to the selected exception type.

For example, missing worker cost rate exceptions may be grouped by worker, rate schedule, and project cost date range.

When the grouping contains only one transaction, the assistant adds the unprocessed transaction reference.

## Resolution Options

After the assistant displays exception details, it lists possible resolution options for the selected exception type.

Example:

Project cost date isn't within project start and finish dates

Possible resolution options:

- Change the project start and finish dates.
- Change the project cost date.

The assistant lists options but does not choose or execute them.

## Navigation

You can use these commands to move between levels:

- **Exception Types:** return to the type summary.
- **Exception Categories:** return to the category summary.
- **Start Over:** begin a new query.

## Key Abilities Supported

The assistant can:

- drill down one category at a time,
- drill down one exception type at a time,
- summarize exception details,
- show possible resolution options, and
- return to earlier summary levels.

## Key Abilities Not Supported

The assistant can't:

- drill into multiple categories at once,
- drill into multiple types at once,
- display all details when the result set is too large, or
- show transaction-level detail for every exception.

# FAQs for the Project Cost Exceptions Assistant

## Why didn't the assistant find any exceptions?

The assistant first applies the default filter of exceptions created in the last 90 days unless you specify a different date range. It also respects your existing security access.

If you get no results, check these first:

- the date range,
- the business object name in your request,
- whether the value is spelled correctly, and
- whether you have access to the data.

If the request is still valid and no records exist, the assistant returns no matching exceptions.

## Why did the assistant ask me to clarify my request?

The assistant asks for clarification when a value could match more than one object.

For example, a request such as:

Show me exceptions for Smith

can refer to a worker, project, supplier, customer, or another entity.

A clearer request is:

Show me exceptions for worker Smith

or

Show me exceptions for project Smith

## Why can't I drill down into more than one category or type at a time?

The assistant supports drilldown one level at a time.

You can select only one:

- exception category, or
- exception type

at a time.

If you try to select more than one, the assistant asks you to choose a single value from the table.

## Why can't I see every exception transaction?

The assistant is designed to summarize exception data, not list every transaction individually.

At the exception details level, it groups records by the key attributes relevant to the exception type. This helps you review patterns faster and focus on resolution.

If the result set is too large, the assistant limits what it shows and recommends refining the search or using the Manage Unprocessed Costs page.

## Why can't the assistant fix the exception for me?

The assistant lists possible resolution options, but it does not perform corrective actions.

For example, it may suggest that you:

- change project dates,
- add a cost rate, or
- review setup or control rules.

You still need to make the change in the relevant application page or hand off the issue to the right person.

## Why are burdening, adjustment, or warning messages missing from my results?

They are not in scope for this assistant.

The assistant supports unprocessed project cost exceptions from Import Costs errors only. It does not include burdening, adjustments, labor distribution, borrowed and lent, or warning messages.



# 4 Project Contract Bill Transactions Assistant

## About the Project Contract Bill Transactions Assistant

This topic provides an overview of the Project Contract Bill Transactions Assistant and explains how project billing users can use it to find, review, and summarize project contract bill transactions through a conversational experience.

### What this Assistant Supports

The assistant supports these tasks:

- Find bill transactions for a project or contract.
- Review transactions by status, such as Ready, Error, or On Hold.
- Summarize bill transactions by status.
- Review total transaction counts and amounts for billing analysis.
- Narrow results by project, contract, status, or date range.

### What this Assistant Doesn't Support

The assistant is read-only. You can't use it to update bill transactions, change transaction statuses, update rates, fix errors, release transactions, place transactions on hold, or change billing setup.

### When to Use the Assistant

Use the assistant when you need a quick answer to billing review questions, such as:

- Which bill transactions are ready for this project?
- Which transactions are in error for this contract?
- How many transactions are on hold?
- What's the total amount ready to bill?
- Which transactions need review before month-end billing?

### Before You Start

You must have access to the assistant and access to the project, contract, and business unit data that you want to review.

The assistant returns only the transactions that you're authorized to view. It doesn't reveal whether restricted transactions exist.

### Example Prompts

- Show bill transactions in Ready for Project Project 4.
- Show bill transactions in Error for Contract Blue Computers.

- Show bill transactions in Ready for Project Phoenix for last month.
- Show bill transactions between "05/01/2026" and "05/30/2026".
- What's the total amount ready to bill for Contract Blue Computers?

## Set Up Access and Security for the Project Contract Bill Transactions Assistant

This topic provides setup related guidance for granting access to the Project Contract Bill Transactions Assistant.

### Users Without the Predefined Project Billing Specialist Role

Use these steps when the user doesn't have the predefined Project Billing Specialist role or a custom role that's an exact copy of the Project Billing Specialist role.

1. In the Security Console, create a custom role.
2. In the Basic Information section of the custom role, select **Enable Permission Groups**.
3. In **Function Security Policies > Privileges**, add this functional privilege:
  - View Project Contract Bill Transactions Service  
PJB\_VIEW\_PROJECT\_CONTRACT\_BILL\_TRANSACTIONS\_PRIV
  - Manage Project Contract Bill Transaction  
PJB\_MANAGE\_PROJECT\_CONTRACT\_BILL\_TRANSACTION\_PRIV
  - View Contract  
OKC\_VIEW\_CONTRACT\_PRIV
  - Get Project Setups  
PJF\_GET\_PROJECT\_SETUPS\_PRIV
4. In the Permission Groups section, add these permission groups:
  - read:Project Contract Bill Transaction  
oraErpCoreProjectBillingTransactions\_ProjectContractBillTransaction\_read
  - read:Project Contract Billing Event Bill Transaction  
oraErpCoreProjectBillingTransactions\_ProjectContractBillingEventBillTransaction\_read
  - read:Project Contract Cost Bill Transaction  
oraErpCoreProjectBillingTransactions\_ProjectContractCostBillTransaction\_read
5. For each permission group, set the security view to **Business Unit Access Rows and All Fields**
6. In **Data Security Policies**, add this data security policy:
  - Grant on: Business Unit
    - **Data Resource:** Bill Transaction for table PJB\_BILL\_TRXS
    - **Data Set:** Select by Instance Set
    - **Condition Name:** Access to project contract bill transactions for table PJB\_BILL\_TRXS for the contract business units

- **Actions:** View Project Contract Bill Transaction Data
- 7. In **Role Hierarchy > Roles and Privileges**, add this duty role:
  - o Project Contract Invoice Management  
(ORA\_PJB\_PROJECT\_CONTRACT\_INVOICE\_MANAGEMENT\_DUTY)
- 8. In **Role Hierarchy > Roles and Permission Groups**, add this duty role:
  - o Project Contract Bill Transaction Assistant  
(ORA\_PJB\_PROJECT\_CONTRACT\_BILL\_TRANSACTIONS\_ASSISTANT\_DUTY)
  - o Project Inquiry (ORA\_PJF\_PROJECT\_INQUIRY\_DUTY)
- 9. Assign the custom role to the user.
- 10. Ensure that the user and the new custom role have the appropriate business unit data access.

## Users With the Predefined Project Billing Specialist Role

Use these steps when the user already has the predefined Project Billing Specialist role or a custom role that's an exact copy of the Project Billing Specialist role.

1. In the Security Console, create a custom role.
2. In the Basic Information section of the custom role, select **Enable Permission Groups**.
3. In **Function Security Policies > Privileges**, add this functional privilege:
  - o View Contract  
OKC\_VIEW\_CONTRACT\_PRIV
4. In the Permission Groups section, add these permission groups:
  - o read:Project Contract Bill Transaction  
oraErpCoreProjectBillingTransactions\_ProjectContractBillTransaction\_read
  - o read:Project Contract Billing Event Bill Transaction  
oraErpCoreProjectBillingTransactions\_ProjectContractBillingEventBillTransaction\_read
  - o read:Project Contract Cost Bill Transaction  
oraErpCoreProjectBillingTransactions\_ProjectContractCostBillTransaction\_read
5. For each permission group, set the security view to **Business Unit Access Rows and All Fields**
6. In **Role Hierarchy > Roles and Privileges**, add this duty role:
  - o Project Contract Invoice Management  
(ORA\_PJB\_PROJECT\_CONTRACT\_INVOICE\_MANAGEMENT\_DUTY)
7. In **Role Hierarchy > Roles and Permission Groups**, add this duty role:
  - o Project Contract Bill Transaction Assistant  
(ORA\_PJB\_PROJECT\_CONTRACT\_BILL\_TRANSACTIONS\_ASSISTANT\_DUTY)
  - o Project Inquiry (ORA\_PJF\_PROJECT\_INQUIRY\_DUTY)
8. Assign the custom role to the user.
9. Ensure that the user and the new custom role have the appropriate business unit data access.

## Find and Review Bill Transactions with the Project Contract Bill Transactions Assistant

This topic provides instructions for finding and reviewing project contract bill transactions using the Project Contract Bill Transactions Assistant.

## Before You Start

Make sure you have access to the assistant and to the project, contract, and business unit data that you want to review.

You should know at least one of these details:

- Project name or project number
- Contract name or contract number
- Bill transaction status
- Date range

## Steps

1. Open the AI Agents page.
2. Start the Project Contract Bill Transactions Assistant.
3. Enter a request that includes a project or contract.
4. Review the assistant response.
5. If matching transactions are found, the assistant displays a summary and transaction details.
6. If the assistant asks for clarification, provide the requested value.
7. If multiple matching projects or contracts are found, select the correct one by project number, contract number, or the option shown by the assistant.
8. If the result set is large, review the summary by status and amount.
9. Use the link to the **Manage Bill Transactions** page when you need to review the full transaction list or perform an action.

## Result

The assistant displays key transaction information, such as:

- Transaction number
- Date
- Status
- Quantity
- Unit price
- Amount to bill

**Note:** When more than 25 transactions match your request, the assistant displays the first 25 transactions and provides a deep link to view all the transactions on the **Manage Bill Transactions** page.

# 5 Project Capitalization Analyst

## About the Project Capitalization Analyst

This topic provides an overview of the Project Capitalization Analyst and explains how it helps project accountants investigate project capitalization issues through a guided, conversational experience.

### What the Assistant Supports

Use the assistant to:

- Review pending capitalization costs for a project
- Narrow large result sets by business dimensions such as transaction source, task, or expenditure type
- Drill into a selected transaction group
- Diagnose why selected project cost transactions did not generate asset lines
- Enter transaction numbers directly when the affected costs are already known
- Identify the current blocking reason preventing capitalization
- Review supporting transaction details and recommended next steps
- Recognize when transactions were already capitalized

### What the Assistant Does Not Support

The assistant does not:

- Perform corrective actions
- Submit capitalization or accounting processes on your behalf
- Review more than one selected project at a time in project-based review
- Diagnose more than 50 transactions at a time
- Guarantee that the first blocker is the only issue on a transaction

The assistant reports the current blocking reason. After that issue is resolved, another prerequisite may still need attention.

### Business Benefits

The assistant helps users:

- Speed up capitalization investigations
- Reduce manual effort across reports, exports, and process outputs
- Focus on the most relevant transactions by grouping and narrowing large result sets
- Understand capitalization blockers in business-friendly language

- Diagnose known transactions directly from transaction numbers
- Reduce dependency on technical support for initial root-cause analysis
- Identify the next step required to continue capitalization processing
- Avoid unnecessary rework by identifying transactions that were already capitalized

## Access the Project Capitalization Analyst

This topic provides the steps to find and open the Project Capitalization Analyst in Oracle Cloud Applications.

### Before You Start

Make sure you can sign in to Oracle Cloud Applications and that your environment allows access to AI agents.

### Steps to Access the Assistant

1. Sign in to your Oracle Cloud Applications environment.
2. Select **Me > Explore AI Agents**.
3. On the Explore tab, review the list of available agents.
4. Search for **Project Capitalization Analyst**.
5. Select the assistant to launch it.

**Note:** If you do not see the assistant in the search results, your role or environment configuration may limit access. Contact your administrator.

## Set Up Access and Security for the Project Capitalization Analyst

This topic provides the access requirements administrators must complete before users can use the assistant.

### Steps to Enable and Configure

The **Project Capitalization Analyst** role is needed to use the assistant within AI Agent Studio. To make the assistant available, the administrator must complete the required AI agent setup and security configuration.

### Access Requirements

#### Users Without the Project Accountant Role

To enable users without the seeded Project Accountant role, or a custom role derived from it, create and assign a custom role with the following configurations. For details on doing so, see [Creating Custom Roles to Enable Access to Project Financial Control Agents](#).

## Function Security Policies > Privileges

Assign these privileges to provide access to the related project cost and capital asset work areas:

- Project Cost Transaction Processing (ORA\_PJC\_PROJECT\_COST\_TRANSACTION\_PROCESSING\_DUTY)
- Project Asset Maintenance (ORA\_PJC\_PROJECT\_ASSET\_MAINTENANCE\_DUTY)

For sponsored projects, assign these privileges:

- Get Project Setups (PJF\_GET\_PROJECT\_SETUPS\_PRIV)
- Manage Award Service (GMS\_MANAGE\_AWARD\_SERVICE\_PRIV)

## Data Security Policies

Configure the following access:

### 1. Access for business units

- Data resource: Business Unit
- Data set: Select by instance set
- Condition name: Access the business units for which the user is explicitly authorized
- Actions: View Project Expenditure Item, View Project Capital Asset

### 2. Access for managing project cost transactions

- Data resource: Project Expenditure Items for Table PJC\_EXP\_ITEMS\_ALL
- Data set: Select by instance set
- Condition name: Access the project expenditure items for table PJC\_EXP\_ITEMS\_ALL for business unit
- Actions: Manage Project Expenditure Item

### 3. Access for cost distributions

- Data resource: Project Cost Distribution Lines for Table PJC\_COST\_DIST\_LINES\_ALL
- Data set: Select by instance set
- Condition name: Access the project cost distribution lines for table PJC\_COST\_DIST\_LINES\_ALL for business unit
- Actions: Manage Project Expenditure Item

### 4. Access for awards

- Data resource: Award for Table GMS\_AWARD\_HEADERS\_B
- Data set: Select by instance set
- Condition name: Access awards for table GMS\_AWARD\_HEADERS\_B for business units based on Grants Management Award security as defined in the Manage Data Access for Users page
- Actions: View Award Data

## Role Hierarchy > Roles and Permission Groups

Include these roles and duties:

- Project Capitalization Analyst (ORA\_PJC\_PROJECT\_CAPITALIZATION\_ANALYST\_DUTY)
- Project Cost Setup Inquiry (ORA\_PJC\_PROJECT\_COST\_SETUP\_INQUIRY\_DUTY)
- Accounted Project Cost Distribution Inquiry (ORA\_PJC\_ACCOUNTED\_PROJECT\_COST\_DISTRIBUTION\_INQUIRY\_DUTY)
- Project Cost Transaction Processing (ORA\_PJC\_PROJECT\_COST\_TRANSACTION\_PROCESSING\_DUTY)
- Project Asset Maintenance (ORA\_PJC\_PROJECT\_ASSET\_MAINTENANCE\_DUTY)

## Users With the Project Accountant Role

To enable users with the seeded Project Accountant role, or a custom role derived from it, create and assign a custom role with the following configurations.

## Function Security Policies > Privileges

For sponsored projects, assign these privileges:

- Get Project Setups (PJF\_GET\_PROJECT\_SETUPS\_PRIV)
- Manage Award Service (GMS\_MANAGE\_AWARD\_SERVICE\_PRIV)

## Data Security Policies

Configure award data access for sponsored projects:

- Data resource: Award for Table GMS\_AWARD\_HEADERS\_B
- Data set: Select by instance set
- Condition name: Access awards for table GMS\_AWARD\_HEADERS\_B for business units based on Grants Management Award security as defined in the Manage Data Access for Users page
- Actions: View Award Data

## Role Hierarchy > Roles and Permission Groups

Include these roles and duties:

- Project Capitalization Analyst (ORA\_PJC\_PROJECT\_CAPITALIZATION\_ANALYST\_DUTY)
- Project Cost Setup Inquiry (ORA\_PJC\_PROJECT\_COST\_SETUP\_INQUIRY\_DUTY)
- Accounted Project Cost Distribution Inquiry (ORA\_PJC\_ACCOUNTED\_PROJECT\_COST\_DISTRIBUTION\_INQUIRY\_DUTY)
- Project Cost Transaction Processing (ORA\_PJC\_PROJECT\_COST\_TRANSACTION\_PROCESSING\_DUTY)
- Project Asset Maintenance (ORA\_PJC\_PROJECT\_ASSET\_MAINTENANCE\_DUTY)

## Business Unit Access

For both scenarios, ensure that users have access to the relevant business units. In Setup and Maintenance, use the **Manage Data Access for Users** task, select **Business Unit** as the security context, and assign the applicable business units.

## Review Pending Capitalization Costs for a Project

This topic provides the steps to review pending capitalization costs for a single project and narrow a large result set before diagnosis.

### Before You Start

Have the project name or project number ready. The assistant works with one selected project at a time.

### Steps to Review Capitalization Costs for a Project

1. Open the assistant.
2. Ask to review pending capitalization costs for a project.
3. Enter a full or partial project name or project number.
4. If more than one project matches, select the correct project.
5. Review the returned summary of pending capitalization transactions.

The assistant initially groups the results so you can quickly see where the pending cost is concentrated.

### Narrow the Results

When the result set is large, narrow it before diagnosis. You can:

- Group by transaction source
- Group by task
- Group by expenditure type
- Drill into one returned group
- Refine the result set before requesting diagnosis

This is especially useful when more than 50 transactions are pending, because diagnosis is limited to transaction sets of 50 or fewer.

### Drill Into a Result Group

After the assistant shows a grouped summary, select a row to open one group and review the underlying transactions.

At the transaction level, the assistant can help you:

- Review the affected task or source grouping
- Inspect the selected transaction set
- Diagnose the displayed transactions when they are within the supported limit

## Example

A project accountant is reviewing a data center expansion project and wants to understand why the Construction in Progress balance is lower than expected.

Here's a sample conversation that the project accountant can have with the assistant:

- **User:** View pending capitalization costs for a project
- **Assistant:** Which project would you like to review? Please provide the project name or project number.
- **User:** PJC\_DCI
- **Assistant:** I found multiple matching projects. Select the correct project.
- **User:** row 3

This example shows that the assistant can start from a partial project name, resolve multiple matches, and then return a grouped summary for the selected project.

## Diagnose Why Costs Did Not Capitalize

This topic provides the steps to diagnose why transactions did not capitalize and explains how the assistant describes the current blocker and next step.

### Diagnose by Project Review

After you drill into a project-level result group, ask the assistant to diagnose the displayed transactions.

The assistant checks capitalization prerequisites and identifies the current blocker preventing asset lines from being generated.

Example blockers include:

- No eligible project asset exists
- Accounting is not complete
- Project assets are not assigned
- Project or task setup prevents capitalization
- Capital event setup is incomplete
- A transaction was already capitalized

### Diagnose by Transaction Number

Use this workflow when you already know which transactions need investigation.

### Steps to Diagnose by Transaction Number

1. Open the assistant.
2. Enter up to 50 transaction numbers.
3. Ask why those costs did not capitalize.
4. Review the blocking reason and recommended action.

This approach is useful when transaction numbers already came from a report, reconciliation, or earlier review.

## Follow-Up Questions

After diagnosis, you can ask follow-up questions about the latest result without restating all prior details.

For example, you can ask about:

- The task associated with the diagnosed transactions
- The current result set already under discussion
- A different issue group or summary already shown in the conversation

## Example

A project accountant drills into one task group and wants to know why the displayed transactions did not capitalize.

Here's a sample conversation that the project accountant can have with the assistant:

- **User:** Group by task
- **Assistant:** Here is the pending capitalization summary grouped by task.
- **User:** row 3
- **Assistant:** Here are the transactions for task PJC\_DCI\_SEP-5.0.
- **User:** Diagnose everything

This example shows that the assistant can move from a grouped summary to transaction-level diagnosis without requiring the user to restate the full context.

# Understand Blockers and Recommended Next Steps

This topic provides guidance on how the assistant explains capitalization blockers and what users should do after they identify the reported issue.

## How the Assistant Explains Blockers

The assistant explains the current blocking reason in business-friendly language and gives supporting transaction detail with guidance on what to review next.

## Common Blockers and Next Steps

Here's a table listing some of the common blockers you may encounter while working with the assistant, with guidance on how to resolve them.

Common Blocker	Description	Next Steps
No Eligible Project Asset Exists	This means the cost cannot be assigned to an eligible project asset yet.	Typical next steps include reviewing the project asset, confirming setup and assignment, setting the asset to <b>As-Built</b> when appropriate,

Common Blocker	Description	Next Steps
		entering the actual in-service date, and rerunning <b>Generate Asset Lines</b> .
Accounting Not Completed	This means the transaction is otherwise eligible, but accounting is not complete.	Typical next steps include reviewing accounting status, completing accounting as required, and rerunning Generate Asset Lines.
Assets Not Assigned	This means the project or task does not have the needed asset assignment.	Typical next steps include assigning project assets at the project or task level and then rerunning <b>Generate Asset Lines</b> .
Event Setup Incomplete	For event-based processing, this means the required capital event is not defined or the transaction is not linked to an eligible event.	Typical next steps include reviewing capital event setup, confirming eligible assets are associated to the event, linking the affected costs, and rerunning Generate Asset Lines with the correct event.
Already Capitalized	This means the transaction was already capitalized and no new asset lines will be created.	In this case, no corrective action is usually needed.

**Note:** The assistant flags the current blocker it found. After you resolve that blocker, another prerequisite might still need review.

## Project Capitalization Analyst: Supported Questions

Here are some examples of the kinds of questions users can ask the assistant.

- Show pending capitalization costs for project PJC\_DCI\_SEP
- View pending capitalization costs for a project
- Group by task
- Group by expenditure type
- Show transaction summary
- Diagnose everything
- Validate transactions 8052832, 8052833
- What task are these transactions on?
- Why did these costs not capitalize?

## FAQs for the Project Capitalization Analyst

### Why don't I see the assistant in the Explore AI Agents page?

Your role or environment configuration may limit access.

Check for the following:

- Confirm that the required AI agent setup is complete.
- Confirm that the assistant duty role is assigned.
- Confirm that the user has the required inquiry and maintenance access for project capitalization investigation.
- Contact your administrator if the assistant still isn't available.

## Why does the project search return multiple matches?

The assistant works with one selected project at a time.

Do one of the following:

- Select the correct project from the returned list.
- If needed, search again using a more specific project name or number.

## Why can't I diagnose the current result set?

Diagnosis is limited to 50 transactions at a time.

Do one of the following:

- Group the results by task, transaction source, or expenditure type.
- Drill into a smaller group.
- Apply filters before requesting diagnosis.

## Why does capitalization still fail after I fix the reported issue?

The assistant identifies the current blocking reason.

What to do

1. Resolve the reported blocker.
2. Run the required follow-up process, such as **Generate Asset Lines**.
3. Review the transactions again, because another prerequisite might now be the active blocker.

## Why didn't the assistant make the correction for me?

The assistant is designed for investigation and explanation.

Complete corrections and rerun the relevant processes in Oracle Project Financial Management.



# 6 Project Contract Invoicing Assistant

## About the Project Contract Invoicing Assistant

This topic provides an overview of the Project Contract Invoicing Assistant, and explains how it helps project billing specialists review and process project contract invoices through a guided conversational experience.

### What this Assistant Supports

The assistant supports these tasks:

- Display invoices by business unit, customer, contract number, and status.
- Refine invoice search results by providing additional filter values.
- Submit draft standard invoices for approval.
- Support invoice processing through approval and release when the invoice and setup allow it.
- Prompt for required information, such as contract number, invoice number, or Receivables number, when it isn't provided.
- Create cancel credit invoices for original standard invoices.

### What this Assistant Doesn't Support

This assistant doesn't support these tasks:

- Generating invoices for contracts.
- Creating concession invoices.
- Creating write-off invoices.
- Displaying invoice lines and invoice distributions for a specific invoice.
- Releasing credit memos or credit invoices.
- Supporting partial values when searching by business unit, customer, contract number, or status.

### How the Assistant Identifies Invoices

For invoice processing actions, users must provide the exact contract number and invoice number. For invoice review, users can ask for invoices by business unit, customer, contract number, and status, and then refine the results further.

**Note:** The assistant follows the same invoice approval, release, and cancellation rules that apply in the application. If an invoice can't be processed because of setup, missing information, status restrictions, or sequencing rules, the assistant explains why the action wasn't successful.

### Worked Examples

#### Scenario 1: Review invoices and narrow the results

A project billing specialist wants to review invoices for a customer, but first needs to narrow the results to a specific contract.

Here's a sample conversation that the project billing specialist can have with the assistant:

- **User:**Show invoices for Business Unit Vision Operations.
- **Assistant:** I found invoices for Business Unit Vision Operations. You can narrow the results by customer, contract number, or invoice status.
- **User:** Display invoices for Customer ABC Consulting.
- **Assistant:** I found invoices for customer ABC Consulting. You can narrow the results further by contract number or status.
- **User:** Show invoices for Contract 100245 and Status Draft.
- **Assistant:** Here are the draft invoices for contract 100245.

This example shows how the assistant supports invoice review through a progressive refinement flow.

### Scenario 2: Submit and release a draft standard invoice

A project billing specialist has reviewed a draft standard invoice and wants to move it forward through approval and release.

Here's a sample conversation that the project billing specialist can have with the assistant:

- **User:**Submit invoice 1045 for contract 100245 for approval.
- **Assistant:** I submitted invoice 1045 for contract 100245 for approval.
- **User:** Approve invoice 1045 for contract 100245.
- **Assistant:** Invoice 1045 is approved. Would you like to release it?
- **User:** Yes.
- **Assistant:** Please provide the Receivables number to use for release.
- **User:** Use Receivables number 6156.
- **Assistant:** Invoice 1045 was released successfully. The Receivables number is 6156.

This example shows the guided processing flow from submission through release, including the prompt for additional required information.

### Scenario 3: Cancel an original standard invoice

A project billing specialist finds that an accepted standard invoice must be canceled.

Here's a sample conversation that the project billing specialist can have with the assistant:

- **User:**Cancel invoice 2078 for contract 100245.
- **Assistant:**Cancel credit invoice 3120 was created for original standard invoice 2078.

This example shows how the assistant performs the Cancel Invoice crediting action for a supported original standard invoice.

# Access and Security for the Project Contract Invoicing Assistant

This topic provides the access requirements for users who work with the Project Contract Invoicing Assistant.

## Users Without the Predefined Project Billing Specialist Role

To enable users who don't have the predefined Project Billing Specialist role, or a custom role that's an exact copy of that role, create and assign a custom role with these configurations:

1. In the Security Console, create a custom role.
2. In the Basic Information section of the custom role, select **Enable Permission Groups**.
3. In **Function Security Policies > Privileges**, add this functional privilege:
  - o Manage Project Contract Invoice Service (PJB\_MANAGE\_PROJECT\_CONTRACT\_INVOICE\_SERVICE\_PRIV)
4. In **Data Security Policies**, add this data security policy:
  - o Grant on Business Unit
    - **Data Resource:** Business Unit
    - **Data Set:** Select by Instance Set
    - **Condition Name:** Access the business units for which the user is explicitly authorized
    - **Actions:** Manage Project Contract Invoice
5. In **Role Hierarchy > Roles and Privileges**, add this duty role:
  - o Project Contract Invoice Management (ORA\_PJB\_PROJECT\_CONTRACT\_INVOICE\_MANAGEMENT\_DUTY)
6. In **Role Hierarchy > Roles and Permission Groups**, add this duty role:
  - o Project Contract Invoicing Assistant (ORA\_PJB\_PROJECT\_CONTRACT\_INVOICING\_ASSISTANT\_DUTY)
7. Assign the custom role to the user.
8. Ensure that the user and the new custom role have the appropriate business unit data access.

## Users With the Predefined Project Billing Specialist Role

To enable users who already have the predefined Project Billing Specialist role, or a custom role that's an exact copy of that role, create and assign a custom role with these configurations:

1. In the Basic Information section of the custom role, select **Enable Permission Groups**.
2. In **Role Hierarchy > Roles and Permission Groups**, add this duty role:
  - o Project Contract Invoicing Assistant (ORA\_PJB\_PROJECT\_CONTRACT\_INVOICING\_ASSISTANT\_DUTY)
3. Assign this custom role to the user who already has the predefined Project Billing Specialist role, or a custom role that's an exact copy of that role.
4. Ensure that the user, the predefined Project Billing Specialist role, or the copied custom role has the appropriate business unit data access.

**Note:** The assistant can return or process only the invoices that the signed-in user is authorized to access.

# Review Invoices with the Project Contract Invoicing Assistant

This topic provides steps for reviewing project contract invoices by using the Project Contract Invoicing Assistant.

## Before You Start

Make sure you know one or more of these exact values:

- Business unit
- Customer
- Contract number
- Invoice status

Partial values aren't recognized by the assistant.

## Steps

1. Open the Project Contract Invoicing Assistant.
2. Ask the assistant to show invoices by using one or more supported filter values.
3. Review the invoice list returned by the assistant.
4. Refine the results further by providing additional exact values, such as contract number or status.
5. Continue with a supported invoice action if needed.

## Sample Prompts

- Show invoices for Business Unit Vision Corporation.
- Display invoices for Customer Vision College.
- Show invoices for Contract 100245 and Status Draft.

**Note:** If you provide a partial business unit, customer, contract number, or status value, the assistant won't match it. Use the exact value instead.

# Submit, Approve, Reject, Release, or Revert Invoices with the Assistant

This topic provides steps for using the Project Contract Invoicing Assistant to process supported invoice actions.

## Before You Start

Make sure you know the exact contract number and invoice number for the invoice you want to process.

## Supported Actions

The assistant supports these invoice actions when the invoice is in the required status:

- Submit a draft standard invoice for approval.
- Approve an invoice in Submitted status.
- Reject an invoice in Submitted status.
- Release an invoice in Approved status.
- Revert an invoice in Rejected status to Draft status.

## Steps

1. Open the Project Contract Invoicing Assistant.
2. Ask the assistant to perform the action on a specific invoice.
3. Provide the exact invoice number and contract number if the assistant prompts for missing details.
4. Provide additional information, such as the Receivables number, if the release action requires it.
5. Review the confirmation returned by the assistant.

## Sample Prompts

- Submit invoice 1045 for contract 100245 for approval.
- Approve invoice 1045 for contract 100245.
- Reject invoice 1045 for contract 100245.
- Release invoice 1045 for contract 100245.
- Revert invoice 1045 for contract 100245 to Draft status.

**Note:** When releasing an invoice, if the invoice numbering method is set to **Manual** in the Contract Business Unit setup, the assistant prompts the user to provide the Receivables number to use for release.

## Cancel an Original Standard Invoice with the Assistant

This topic provides steps for using the Project Contract Invoicing Assistant to create a cancel credit invoice for an original standard invoice.

## Before You Start

Make sure you know the exact contract number and invoice number for the original standard invoice.

## Steps

1. Open the Project Contract Invoicing Assistant.
2. Ask the assistant to cancel the invoice.
3. Provide the contract number and invoice number if the assistant prompts for missing information.
4. Review the result returned by the assistant.

## Sample Prompt

Cancel invoice 2078 for contract 100245.

## When Cancellation isn't Allowed

The assistant doesn't complete the action in these cases:

- The invoice isn't a standard invoice.
- The original standard invoice isn't in Accepted status.
- The invoice is already fully credited.
- The invoice can't be identified from the information provided.

**Note:** Users can use the assistant to perform the Cancel Invoice crediting action only on standard invoices in Accepted status.

## FAQs for the Project Contract Invoicing Assistant

### Why didn't the assistant find the invoices I asked for?

The assistant requires exact values for business unit, customer, contract number, and status. Partial values aren't recognized.

### Why did the assistant ask for the invoice number or contract number?

For invoice processing actions, the assistant requires both values if they weren't included in the original request.

### Why couldn't the assistant release the invoice?

The invoice may require additional information, such as a Receivables number, or it may not be in a supported status for release.

## Why couldn't the assistant cancel the invoice?

The invoice may not be an original standard invoice in Accepted status, or it may already be fully credited.



# 7 Project Contract Validation Assistant

## About the Project Contract Validation Assistant

This topic provides an overview of the Project Contract Validation Assistant and explains how it helps contract administrators validate project contracts before approval.

### What this Assistant Does

Use this assistant to:

- Validate predefined contract rules.
- Validate enabled custom contract rules.
- Review validation errors and warnings.
- Get resolution guidance for validation issues.
- Submit the contract for approval when validation completes with no errors or warnings.

The assistant doesn't replace the Contracts work area. When validation issues are found, you use the resolution guidance from the assistant and make the required changes in the Contracts work area.

### What this Assistant Supports

The assistant supports validation for one project contract at a time.

The contract must be:

- An external contract.
- In Draft status or Under Amendment status.

You can start validation by providing a contract name or contract number.

### What this Assistant Doesn't Support

This assistant doesn't support:

- Validation for multiple contracts in a single request.
- Internal contracts.
- Validation of contracts that are outside Draft or Under Amendment status.
- Create, cancel, terminate, or close contracts.
- Update contract data. If the assistant finds issues, you must update the contract in the Contracts work area and then validate it again.

## How Approval Submission Works

If validation completes with no errors or warnings, the assistant asks whether you want to submit the contract for approval.

If you confirm, the assistant submits the contract for approval. If approval routing assigns the contract to approvers, the assistant confirms that the contract was submitted for approval.

If auto-approval is configured, the assistant tells you that the contract was submitted for approval.

If validation errors or warnings exist, the assistant doesn't submit the contract for approval. You must resolve the issues and validate the contract again.

## Set Up Access and Security for the Project Contract Validation Assistant

This topic provides setup guidance for administrators who need to make the Project Contract Validation Assistant available to contract users.

### Before You Start

- You must have access to AI Agent Studio.
- You must have the Application Implementation Consultant predefined role to configure the assistant.
- Users who interact with the assistant must have access to contracts and also to the published agent team.

The assistant is delivered as a preconfigured template. Create your own agent team from the template, configure security, test the assistant with representative contracts, and publish the agent team.

### Required User Roles

Users must be assigned one of these predefined roles, or a custom role copied from one of these roles:

- Customer Contract Administrator
- Customer Contract Manager

### Required Custom Role Configuration

If you use a custom role, configure the role with the required privileges and duty roles.

### Function Security Policies

Add these functional privileges:

- Edit Contract (OKC\_EDIT\_CONTRACT\_PRIV)
- Edit Contract by Web Service (OKC\_EDIT\_CONTRACT\_VIA\_WEB\_SERVICE\_PRIV)
- Enable Sell Intent (OKC\_MANAGE\_CONTRACT\_SELL\_PRIV)
- View Contract (OKC\_VIEW\_CONTRACT\_PRIV)

## Data Security Policy

Add this data security policy:

- Grant on Contract
  - **Data Resource:** Contract Header for Table OKC\_K\_HEADERS\_ALL\_B
  - **Data Set:** Select by instance set
  - **Actions:** Update, View Contract, Read, Manage Contract
  - **Condition:** Access the contract for table OKC\_K\_HEADERS\_ALL\_B for the business units for which users are authorized

## Role Hierarchy

Add these duty roles:

- Contract Amendment (ORA\_OKC\_CONTRACT\_AMENDMENT\_DUTY)
- Contract Authoring (ORA\_OKC\_CONTRACT\_AUTHORIZING\_DUTY)
- Contract Search and View Access (ORA\_OKC\_CONTRACT\_SEARCH\_VIEW\_DUTY)

## User Setup

Assign the predefined or custom role to each user who needs to use the assistant.

In Manage Users, make sure each user has the required Resource Role and Organization setup so they can access contracts for the appropriate business units.

## Associate the Role with the Agent Team

1. Go to **Navigator > Tools > AI Agent Studio**.
2. Open **Agent Teams**.
3. Edit the agent team that contains the Project Contract Validation Assistant.
4. Click the Agent Team Settings icon.
5. Open the Security tab.
6. Add the predefined or custom role.
7. Apply your changes.
8. Update and publish the agent team.

**Note:** Users can use the assistant only when they have both contract access and access to the published agent team. If either access path is missing, the assistant may not find the contract or may report that the user doesn't have the required access.

## Validate a Project Contract Using the Assistant

This topic provides instructions for validating a project contract using the Project Contract Validation Assistant.

## Before You Start

Make sure that:

- The contract is an external project contract in Draft or Under Amendment status.
- You know the contract name or contract number.
- You have access to the contract and to the assistant.

## Steps

1. Open the Agent Explore page.
2. Start the Project Contract Validation Assistant.
3. Enter the contract name or contract number.
4. Review the validation results.
5. If no validation errors or warnings are found, choose whether to submit the contract for approval.
6. If validation errors or warnings are found, review the problem details and problem resolution guidance.
7. Open the contract in the Contracts work area. Make the required corrections.
8. Return to the assistant and validate the contract again.

### If the assistant finds one matching contract

The assistant validates the contract and shows the results.

If no validation errors or warnings are found, the assistant asks whether you want to initiate contract approval process.

### If the assistant finds multiple matching contracts

The assistant shows the matching contracts and asks whether you want to select one or further filter the results.

You can refine the results by providing details such as:

- Business unit
- Customer
- Contract type

After the assistant identifies the correct contract, it validates the contract.

### If validation errors or warnings are found

The assistant asks whether you want to submit the contract for approval.

If you respond Yes, the assistant submits the contract for approval.

If you respond No, the assistant doesn't submit the contract and asks whether you want to validate another contract.

**Note:** The assistant can't submit a contract for approval when validation errors or warnings exist.

## FAQs for the Project Contract Validation Assistant

### Why can't the assistant find my contract?

The contract name or number may be incorrect, incomplete, or outside your data access.

Verify the contract details and try again. If you still can't find the contract, confirm that you have access to the contract's business unit.

### Why is the assistant showing more than one contract?

The contract name or number you entered matches multiple contracts. Review the list and select the correct contract, or refine the results by business unit, customer, or contract type.



# 8 Project Contract and Sales Order Reconciliation Assistant

## About the Project Contract and Sales Order Reconciliation Assistant

This topic provides an overview of the Project Contract and Sales Order Reconciliation Assistant, including when to use it, what it validates, and what actions users must complete outside the assistant.

### What this Assistant Does

Use the Project Contract and Sales Order Reconciliation Assistant to reconcile a single external project contract with the signed ordering document uploaded to the contract.

The assistant identifies the ordering document from the contract attachments by using the attachment title and description. After the ordering document is identified, the assistant scans the document and compares it with the contract.

The assistant checks whether:

- The ordering document includes signatures from both the customer and the supplier.
- The currency on the ordering document matches the currency on the contract header.
- The payment terms on the ordering document match the payment terms on the contract bill plans.
- The customer name on the ordering document matches the customer name on the contract.
- The service start and end dates on the ordering document match the contract start and end dates.
- The bill-to and ship-to addresses on the ordering document match the corresponding contract party details.

### What this Assistant Supports

The assistant supports reconciliation only for:

- A single project contract at a time
- External contracts
- Contracts in Draft or Under Amendment status
- Contracts with one identifiable signed ordering document uploaded as an attachment

### What this Assistant Doesn't Do

The assistant doesn't:

- Reconcile internal contracts.
- Reconcile contracts that aren't in Draft or Under Amendment status.
- Reconcile more than one contract in a single request.

- Create, cancel, terminate, close, or update contracts.
- Correct reconciliation issues directly in the conversation.
- Perform reconciliation if the ordering document can't be retrieved.
- Perform reconciliation if multiple ordering documents meet the detection criteria.

## How Issues are Resolved

If reconciliation issues are found, the assistant provides the object, name, problem details, and problem resolution. The user must navigate to the Contracts work area, make the required changes, and then run the reconciliation again.

**Note:** The recommended actions can't be performed using the assistant. Users must make corrections in the application user interface and then revalidate the contract using the assistant.

# Set Up Access and Security for the Project Contract and Sales Order Reconciliation Assistant

This topic provides setup guidance for administrators who need to create, secure, test, and publish the Project Contract and Sales Order Reconciliation Assistant.

## Before You Start

- You must have access to AI Agent Studio.
- You must know which users or roles should be able to use the assistant.

The assistant is delivered as a preconfigured template. Create your own agent team from the template, configure security, test the assistant with representative contracts, and publish the agent team.

## Steps

1. Go to AI Agent Studio.
2. Open the preconfigured agent team templates.
3. Locate the Project Contract and Sales Order Reconciliation Assistant template.
4. Create an agent team from the template.
5. Open the copied agent team.
6. Review the assistant introduction and behavior.
7. On the **Security** tab, add the predefined or custom roles that should have access to the assistant.
8. Test the assistant using external project contracts in Draft or Under Amendment status.
9. Confirm that the test contracts have signed ordering documents attached with titles and descriptions that allow the assistant to identify the correct document.
10. Publish the agent team.

## Required User Roles

Users must be assigned one of these predefined roles, or a custom role copied from one of these roles:

- Customer Contract Administrator
- Customer Contract Manager

## Required Custom Role Configuration

If you use a custom role, configure the role with the required privileges and duty roles.

## Function Security Policies

Add these functional privileges:

- Edit Contract (OKC\_EDIT\_CONTRACT\_PRIV)
- Edit Contract by Web Service (OKC\_EDIT\_CONTRACT\_VIA\_WEB\_SERVICE\_PRIV)
- Enable Sell Intent (OKC\_MANAGE\_CONTRACT\_SELL\_PRIV)
- View Contract (OKC\_VIEW\_CONTRACT\_PRIV)

## Data Security Policy

Add this data security policy:

- Grant on Contract
  - **Data Resource:** Contract Header for Table OKC\_K\_HEADERS\_ALL\_B
  - **Data Set:** Select by instance set
  - **Actions:** Update, View Contract, Read, Manage Contract
  - **Condition:** Access the contract for table OKC\_K\_HEADERS\_ALL\_B for the business units for which users are authorized

## Role Hierarchy

Add these duty roles:

- Contract Amendment (ORA\_OKC\_CONTRACT\_AMENDMENT\_DUTY)
- Contract Authoring (ORA\_OKC\_CONTRACT\_AUTHORIZING\_DUTY)
- Contract Search and View Access (ORA\_OKC\_CONTRACT\_SEARCH\_VIEW\_DUTY)

## User Setup

Assign the predefined or custom role to each user who needs to use the assistant.

In Manage Users, make sure each user has the required Resource Role and Organization setup so they can access contracts for the appropriate business units.

## Associate the Role with the Agent Team

1. Go to **Navigator > Tools > AI Agent Studio**.
2. Open **Agent Teams**.
3. Edit the agent team that contains the Project Contract and Sales Order Reconciliation Assistant.
4. Click the Agent Team Settings icon.
5. Open the Security tab.
6. Add the predefined or custom role.
7. Apply your changes.
8. Update and publish the agent team.

## Prepare Contracts for Sales Order Reconciliation

This topic helps contract administrators prepare a project contract so the Project Contract and Sales Order Reconciliation Assistant can reconcile it with the uploaded ordering document.

### Before You Start

Confirm that the contract is:

- An external project contract.
- In Draft or Under Amendment status.
- A single contract that you want to reconcile.
- Accessible to you based on your role and business unit access.

### Prepare the Ordering Document

Before you run the reconciliation, upload the signed ordering document to the contract as an attachment.

Use an attachment title and description that clearly identify the document as the signed ordering document. The assistant uses the attachment title and description to identify the document to scan.

### Avoid Attachment Issues

The assistant can't perform reconciliation if:

- No ordering document is uploaded to the contract.
- The ordering document can't be retrieved.
- Multiple ordering documents meet the detection criteria.
- Required data can't be extracted from the ordering document.

If the assistant can't retrieve the ordering document details, review the contract attachments, update the attachment title or description if needed, and upload a revised document if necessary. Then run the reconciliation again.

**Note:** Users don't upload the ordering document during the conversation. The ordering document must already be attached to the contract before the assistant is used.

# Reconcile a Project Contract with an Ordering Document

This topic provides the steps for using the Project Contract and Sales Order Reconciliation Assistant to compare a single project contract with its uploaded ordering document.

## Before You Start

Make sure you know the contract name or contract number. The assistant needs a contract name or contract number to identify the contract.

## Steps

1. Open the AI Agents page.
2. Start the Project Contract and Sales Order Reconciliation Assistant.
3. When prompted, enter the contract name or contract number.
4. Review the contract identified by the assistant.
5. Review the reconciliation results.
6. If issues are identified, use the problem resolution details to update the contract or the uploaded ordering document in the Contracts work area.
7. Reconcile the contract again after making corrections.
8. When prompted, choose whether you want to reconcile another contract.

## Sample Prompts

- Contract number {Contract Number}
- Contract name {Contract Name}
- Validate contract {Contract Number}

## Results

If no issues are found, the assistant confirms that no reconciliation issues were identified between the contract and the ordering document.

If issues are found, the assistant displays the number of errors and provides a table with these columns:

- Object
- Name
- Problem Details
- Problem Resolution

**Note:**

The assistant doesn't make the corrections for you. Navigate to the Contracts work area, make the required changes, and then reconcile the contract again.

## Understand Reconciliation Results

This topic explains the reconciliation issues that the Project Contract and Sales Order Reconciliation Assistant can report and how to act on the results.

### Signature Issues

The assistant checks whether both the customer and supplier signatures are present in the scanned ordering document.

If a signature is missing, upload a revised ordering document in the Contracts work area that contains the required customer or supplier signature. Then revalidate the contract using the assistant.

### Currency Mismatch

The assistant compares the currency on the contract header with the currency in the ordering document.

If the currencies don't match, update the currency on the draft contract header in the Contracts work area so that it matches the ordering document. Then revalidate the contract.

### Payment Terms Mismatch

The assistant compares the payment terms on the ordering document with the payment terms on the contract bill plans.

If the payment terms don't match, update the bill plan payment terms in the Contracts work area so that they match the ordering document. Then revalidate the contract.

### Customer Name Mismatch

The assistant compares the customer name on the ordering document with the customer name in the contract parties.

If the customer names don't match, update the customer name in the Contract Parties section so that it matches the ordering document. Then revalidate the contract.

### Contract Date Mismatch

The assistant compares the service start and end dates on the ordering document with the contract start and end dates.

If the dates don't match, update the contract start date or end date in the Overview tab of the contract header so that it matches the ordering document. Then revalidate the contract.

### Bill-to Address Mismatch

The assistant compares the bill-to address on the ordering document with the bill-to address in the contract parties.

If the bill-to addresses don't match, update the bill-to address in the Contract Parties section so that it matches the ordering document. Then revalidate the contract.

## Ship-to Address Mismatch

The assistant compares the ship-to address on the ordering document with the ship-to address in the contract parties.

If the ship-to addresses don't match, update the ship-to address in the Contract Parties section so that it matches the ordering document. Then revalidate the contract.

## Attribute Retrieval Issues

If the assistant can't retrieve an attribute from the ordering document, review the uploaded ordering document and upload a revised document if necessary. Then revalidate the contract.

If the assistant can't retrieve an attribute from the contract, update the relevant contract details in the Contracts work area. Then revalidate the contract.

# FAQs for the Project Contract and Sales Order Reconciliation Assistant

## Can I reconcile an Active contract?

No. If the contract is in Active or another unsupported status, the assistant won't proceed with reconciliation.

## What happens if no ordering document is attached?

The assistant informs you that ordering document details couldn't be retrieved and that reconciliation wasn't performed.

## What happens if multiple ordering documents match the detection criteria?

The assistant can't determine which ordering document to use and won't perform reconciliation. Review the contract attachments so only the intended signed ordering document meets the detection criteria.



# 9 Project Billing and Revenue Event Creation Assistant

## About the Project Billing and Revenue Event Creation Assistant

This topic provides an overview of the Project Billing and Revenue Event Creation Assistant and explains how project billing users can use it to create recurring invoice and revenue events.

The Project Billing and Revenue Event Creation Assistant helps project accountants and project billing specialists create recurring invoice and revenue events for eligible external fixed-price project contracts and contract lines after funding. The assistant validates contract and contract line details, calculates proposed event dates and amounts, displays a preview for review, and creates events only after you approve the proposed events.

### What this Assistant Supports

You can use the assistant to create recurring invoice and revenue events for eligible external fixed-price contracts or contract lines.

The assistant supports these billing frequencies:

- Monthly
- Quarterly
- Half-yearly
- Yearly

You can provide either a specific contract line or ask the assistant to evaluate all eligible lines for the contract. The assistant validates the contract, contract lines, billing frequency, and event type before generating a preview.

The assistant supports recurring amount-based invoice and revenue event creation when the contract line has at least one of these methods:

- Amount-based invoice method
- Amount-based revenue method
- Amount-based invoice and revenue methods

### What this Assistant Needs from You

The assistant must have these inputs before it can generate an event preview:

- Contract number or exact contract name
- Contract line number or name, or confirmation that you want to evaluate all eligible lines
- Billing frequency
- Exact active event type name

## What this Assistant Validates

The assistant validates that:

- The contract exists.
- The contract status allows billing event creation.
- The contract is external.
- The contract or contract line is fixed price.
- The contract line is active.
- The contract line has a valid end date.
- The contract line amount isn't blank or zero.
- The billing frequency is supported.
- The event type exists and is active as of the system date.
- The contract line has an amount-based invoice method, amount-based revenue method, or both.
- The contract line doesn't already have events that prevent recurring event creation.
- The contract line has either no association or a single active project or project-and-top-task association.
- The contract line has a revenue plan when the selected event type is applicable to revenue.

## How Event Type Applicability Affects Event Creation

The event type determines whether the assistant creates invoice events, revenue events, or events that are eligible for both invoicing and revenue recognition.

If the event type is applicable only to revenue, the assistant creates revenue billing events.

If the event type is applicable only to invoicing, the assistant creates invoice billing events.

If the event type is applicable to both invoicing and revenue recognition, the assistant creates billing events that are eligible for both invoicing and revenue recognition.

## What You Can Update Before Creation

After the assistant displays the proposed event preview, you can ask it to update the following supported event attributes before events are created.

- Event completion date
- Amount
- Description
- Hold invoice
- Hold revenue
- Billing frequency

If you ask the assistant to update an individual event amount, the assistant updates only the amount you specify. It doesn't automatically rebalance the remaining event amounts. You must provide the exact amounts you want for the affected events.

## What this Assistant Doesn't Support

The assistant doesn't support:

- Internal contracts
- Time and materials contracts
- Contracts or contract lines in Closed or Canceled status
- Contract lines without an end date
- Contract lines with blank or zero amounts
- Contract lines with multiple active project or task associations
- Recurring event creation when events already exist for the contract line
- Deleting existing events
- Automatically rebalancing event amounts after a user-requested amount change
- Updating item information for item-based billing events
- Languages other than English

**Note:** If an inventory-based contract line is used with an event type that has the item flag enabled, the assistant creates amount-based billing events based on the contract line duration, billing frequency, and contract line amount. If you try to update item information in the proposed event preview, the assistant explains that item-based billing event creation isn't permitted.

## Set Up Access and Security for the Project Billing and Revenue Event Creation Assistant

This topic provides setup and security guidance for granting users access to the Project Billing and Revenue Event Creation Assistant.

### Required Roles

Users must be assigned the predefined Customer Contract Administrator and Project Billing Specialist roles, or a custom role copied from these predefined roles.

The Project Billing and Revenue Event Creation Assistant is available as a preconfigured template. You must create your own agent team from the template, configure security, test the assistant, and publish the agent team before users can access it.

### Required Functional Privileges for a Custom Role

If you use a custom role, add these functional privileges:

- View Contract (OKC\_VIEW\_CONTRACT\_PRIV)
- Manage Project Billing Event (PJB\_MANAGE\_PROJECT\_BILLING\_EVENT\_PRIV)

- Maintain Project Contract Revenue (PJB\_MAINTAIN\_PROJECT\_CONTRACT\_REVENUE\_PRIV)

## Required Data Security

Grant access on the Business Unit data resource.

Use this configuration:

- Data Resource: Business Unit
- Action: Manage Project Billing Event
- Condition: Access the business units for which the user is explicitly authorized

## Required Duty Roles

Add these duty roles to the custom role:

- Project Contract Invoice Management (ORA\_PJB\_PROJECT\_CONTRACT\_INVOICE\_MANAGEMENT\_DUTY)
- Project Contract Revenue Management (ORA\_PJB\_PROJECT\_CONTRACT\_REVENUE\_MANAGEMENT\_DUTY)

## Required Permission Group Access

In the Basic Information section of the predefined or custom role, ensure that Enable Permission Groups is selected.

In the Permission Groups section, add this permission group:

- read:Project Contract Billing Event Type  
(oraErpCoreProjectCommonSetup\_ProjectContractBillingEventType\_read)

## Required User Setup

The user must have the appropriate Resource Role and Organization setup in Manage Users to access contracts in the relevant business units.

## Associate the Role with the Agent Team

1. Go to **Navigator > Tools > AI Agent Studio**.
2. Open **Agent Teams**.
3. Edit the agent team that contains the Project Billing and Revenue Event Creation Assistant.
4. Click the Agent Team Settings icon.
5. Open the Security tab.
6. Add the predefined or custom role.
7. Apply your changes.
8. Update and publish the agent team.

# Create Recurring Invoice and Revenue Events with the Assistant

This topic provides instructions for creating recurring invoice and revenue events by using the Project Billing and Revenue Event Creation Assistant.

Use this flow when you want the assistant to calculate recurring event dates and amounts for an eligible external fixed-price contract or contract line.

## Before You Start

Make sure you know:

- The contract number or exact contract name.
- The contract line number or name, or that you want the assistant to evaluate all eligible lines.
- The exact active event type name.
- The billing frequency: Monthly, Quarterly, Half-Yearly, or Yearly.

Also, make sure the contract and contract line meets these requirements:

- The contract is external.
- The contract or contract line is fixed price.
- The contract and contract line aren't Closed or Canceled.
- The contract line has a valid end date.
- The contract line amount isn't blank or zero.
- The contract line has an amount-based invoice method, revenue method, or both.
- The contract line has no association or only one active project or project-and-top-task association.
- The contract line has a revenue plan if the event type is applicable to revenue.

## Steps

1. Open the Project Billing and Revenue Event Creation Assistant from the AI Agents page.
2. Instruct the assistant that you want to create recurring invoice or revenue events. For example, you can enter: Create monthly Bonus events for contract 587642 line 10.
3. Provide the contract number or exact contract name.
4. Provide a contract line number or name, or instruct the assistant to evaluate all eligible lines.
5. Provide the billing frequency.
6. Provide the exact active event type name.
7. Review the details the assistant has identified.
8. Confirm the details so the assistant can generate the event preview.
9. Review the proposed events. The preview shows proposed event dates, amounts, currency, descriptions, project or task information, invoice hold values, and revenue hold values.

10. Ask the assistant to update supported proposed event attributes, if needed.
11. Review the updated preview.
12. Approve the preview. The assistant creates the events only after you approve the proposed events.

**Note:**

If the assistant finds existing events for the contract line, it doesn't create additional recurring events. The assistant displays the existing events and explains that you can create remaining events manually, or remove existing events manually, if appropriate, and then run the assistant again.

# 10 Project Contract and Customer Purchase Order Reconciliation Assistant

## About the Project Contract and Customer Purchase Order Reconciliation Assistant

### What this Assistant Does

Use the Project Contract and Customer Purchase Order Reconciliation Assistant to reconcile a project contract with the customer purchase order document uploaded to the contract. The assistant identifies the purchase order document from the attachment title and description, scans the document, compares purchase order details with contract data, and reports reconciliation issues.

The assistant helps contract administrators identify discrepancies before the contract continues through funding, approval, invoicing, or revenue processes.

The assistant compares the customer purchase order document with the project contract and validates whether these details match:

- Purchase order number
- Customer name
- Currency
- Bill-to address
- Ship-to address

The assistant supports purchase order number reconciliation at the contract header level or contract line level, depending on how the contract is modeled.

- If the purchase order reference is stored at the contract header level, the assistant compares the purchase order number in the uploaded purchase order document with the purchase order number on the contract header.
- If different contract lines have different purchase order references, the assistant scans the purchase order documents uploaded to the contract and reconciles them against contract line data.

### What this Assistant Supports

The assistant supports reconciliation for a single project contract that meets these requirements:

- External contracts
- Contracts in Draft or Under Amendment status
- A purchase order document is uploaded to the contract as an attachment.
- The uploaded document can be identified as a purchase order document from its attachment title and description.

## What this Assistant Doesn't Do

The assistant doesn't:

- Reconcile internal contracts.
- Reconciling more than one contract in the same request.
- Reconcile contracts that aren't in Draft or Under Amendment status.
- Reconcile more than one contract in a single request.
- Create, cancel, terminate, close, or update contracts.
- Correct reconciliation issues directly in the contract.
- Perform reconciliation if the purchase order document can't be retrieved.

## Set Up Access for the Project Contract and Customer Purchase Order Reconciliation Assistant

This topic provides setup and security guidance for administrators who need to make the Project Contract and Customer Purchase Order Reconciliation Assistant available to users.

### Before You Start

- You must have access to AI Agent Studio.
- Users who interact with the assistant must have contract access for the contracts they reconcile.

The assistant is delivered as a preconfigured template. Create your own agent team from the template, configure security, test the assistant with representative contracts, and publish the agent team.

### Steps

1. Go to AI Agent Studio.
2. Open the preconfigured agent team templates.
3. Locate the Project Contract and Customer Purchase Order Reconciliation Assistant template.
4. Create an agent team from the template.
5. Open the copied agent team.
6. Review the assistant introduction and behavior.
7. On the **Security** tab, add the predefined or custom roles that should have access to the assistant.
8. Test the assistant using external project contracts in Draft or Under Amendment status.
9. Publish the agent team.

### Required User Roles

Users must be assigned one of these predefined roles, or a custom role copied from one of these roles:

- Customer Contract Administrator
- Customer Contract Manager

## Required Custom Role Configuration

If you use a custom role, configure the role with the required privileges and duty roles.

## Function Security Policies

Add these functional privileges:

- Edit Contract (OKC\_EDIT\_CONTRACT\_PRIV)
- Edit Contract by Web Service (OKC\_EDIT\_CONTRACT\_VIA\_WEB\_SERVICE\_PRIV)
- Enable Sell Intent (OKC\_MANAGE\_CONTRACT\_SELL\_PRIV)
- View Contract (OKC\_VIEW\_CONTRACT\_PRIV)

## Data Security Policy

Add this data security policy:

- Grant on Contract
  - **Data Resource:** Contract Header for Table OKC\_K\_HEADERS\_ALL\_B
  - **Data Set:** Select by instance set
  - **Actions:** Update, View Contract, Read, Manage Contract
  - **Condition:** Access the contract for table OKC\_K\_HEADERS\_ALL\_B for the business units for which users are authorized

## Role Hierarchy

Add these duty roles:

- Contract Amendment (ORA\_OKC\_CONTRACT\_AMENDMENT\_DUTY)
- Contract Authoring (ORA\_OKC\_CONTRACT\_AUTHORIZING\_DUTY)
- Contract Search and View Access (ORA\_OKC\_CONTRACT\_SEARCH\_VIEW\_DUTY)

## User Setup

Assign the predefined or custom role to each user who needs to use the assistant.

In Manage Users, make sure each user has the required Resource Role and Organization setup so they can access contracts for the appropriate business units.

## Associate the Role with the Agent Team

1. Go to **Navigator > Tools > AI Agent Studio**.
2. Open **Agent Teams**.
3. Edit the agent team that contains the Project Contract and Customer Purchase Order Reconciliation Assistant.
4. Click the Agent Team Settings icon.
5. Open the Security tab.
6. Add the predefined or custom role.
7. Apply your changes.

8. Update and publish the agent team.

## Reconcile a Project Contract with a Purchase Order Document

This topic provides instructions for using the Project Contract and Customer Purchase Order Reconciliation Assistant to compare a project contract with the purchase order document uploaded to the contract.

### Before You Start

Make sure you know the contract name or contract number. The assistant needs a contract name or contract number to identify the contract.

### Steps

1. Open the AI Agents page.
2. Start the Project Contract and Customer Purchase Order Reconciliation Assistant.
3. When prompted, enter the contract name or contract number.
4. Review the contract identified by the assistant.
5. Review the reconciliation results.
6. If issues are identified, use the problem resolution details to update the contract or the uploaded purchase order document in the Contracts work area.
7. Reconcile the contract again after making corrections.
8. When prompted, choose whether you want to reconcile another contract.

### Sample Prompts

- Contract number {Contract Number}
- Contract name {Contract Name}
- Validate contract {Contract Number}

### Results

If no issues are found, the assistant confirms that no reconciliation issues were identified between the contract and the purchase order document.

If issues are found, the assistant displays the number of errors and provides a table with these columns:

- Object
- Name
- Problem Details
- Problem Resolution

**Note:**

The assistant doesn't make the corrections for you. Navigate to the Contracts work area, make the required changes, and then reconcile the contract again.

## Understand Purchase Order Reconciliation Results

This topic explains the reconciliation issues that the Project Contract and Customer Purchase Order Reconciliation Assistant can identify and how to resolve them.

### Purchase Order Number Mismatch

The assistant compares the purchase order number in the purchase order document with the purchase order number on the contract.

Depending on how the contract is modeled, the purchase order number can be compared with either the contract header or contract lines.

For example, the purchase order number on the contract line is PO7867, whereas the purchase order number in the document uploaded to the contract is PO7868.

In the Contracts work area, update the purchase order number on the contract line to match the uploaded purchase order document. Then revalidate the contract using the assistant.

### Customer Name Mismatch

The assistant compares the customer name in the purchase order document with the customer name on the contract.

For example, The customer name in the contract parties is Vision Operations, whereas the customer name in the purchase order document is Big Computers.

In the Contracts work area, update the customer name in the Contract Parties section so that it matches the purchase order document uploaded to the contract. Then revalidate the contract using the assistant.

### Currency Mismatch

The assistant compares the currency in the purchase order document with the currency on the contract.

The currency on the contract header is USD, whereas the currency on the purchase order document is EUR.

In the Contracts work area, update the currency on the draft contract header so that it matches the purchase order document uploaded to the contract. Then revalidate the contract using the assistant.

### Bill-to Address Mismatch

The assistant compares the bill-to address in the purchase order document with the bill-to address on the contract.

The bill-to address on the contract parties is 1250 Market Street, Suite 400, San Francisco, CA 94103, whereas the bill-to address on the purchase order document uploaded to the contract is 7800 Industrial Parkway, Houston, TX 77032.

In the Contracts work area, update the bill-to address in the Contract Parties section so that it matches the uploaded purchase order document. Then revalidate the contract using the assistant.

## Ship-to Address Mismatch

The assistant compares the bill-to address in the purchase order document with the ship-to address on the contract.

The ship-to address on the contract parties is 1250 Market Street, Suite 400, San Francisco, CA 94103, whereas the ship-to address on the purchase order document uploaded to the contract is 7800 Industrial Parkway, Houston, TX 77032.

In the Contracts work area, update the ship-to address in the Contract Parties section so that it matches the uploaded purchase order document. Then revalidate the contract using the assistant.

## Attribute Can't be Retrieved from the Contract

The assistant may be unable to retrieve an attribute from the contract.

The attribute <attribute\_name> could not be retrieved from the contract; therefore, reconciliation with the purchase order document uploaded to the contract could not be performed.

In the Contracts work area, update the Bill-to Address, Ship-to Address, or Purchase Order Number in the contract to match the purchase order document details uploaded to it. Then revalidate the contract using the assistant.

# FAQs for the Project Contract and Customer Purchase Order Reconciliation Assistant

## Why can't the assistant retrieve the purchase order document?

The assistant identifies the purchase order document from the attachment title and description. If the purchase order document can't be identified or retrieved, the assistant can't perform reconciliation.

Review the contract attachments and make sure the purchase order document is uploaded with a title and description that identify it as a purchase order document.

## Why can't the assistant reconcile my contract?

The assistant reconciles only external project contracts that are in Draft or Under Amendment status. If the contract is in another status, the assistant identifies the contract but explains that reconciliation can't proceed.