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<td>Configure File-Based Import and Export for Enterprise Contracts</td>
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- Set Up Service Contracts
- Create A Service Contracts Implementation Project
- Define Legal Entities
- Define Business Units, Assign Business Function, and Assign Ledger and Legal Entity
- Define Item Organizations For Enterprise Contracts
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- Configure Contract Management Business Functions
- Define Customers with Their Addresses and Contacts
- Define Party Roles, Contact Roles, and Role Sources
- Define Contract Line Types For Service Contracts
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- How You Set Up User Statuses and User Transitions
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- Set Up Common CRM Business Unit Profile Option
- Define Coverage
- Define Items For Service Contracts
- Specify Time Unit Mappings
- Define Order Management Parameters
- Define Pricing
- Define Customer Billing Configuration
- Define Contract Default Values
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- Generate Data Model XML
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- Setup Event Notification Rules for Customer Communications
- Define Contract Terms Library Components
- Configure File-Based Import and Export for Enterprise Contracts
- How You Set Up Approval Groups and Approval Task Configuration Rules
- Enable Contracts for use in Oracle Social Network
- Configure Scheduled Processes
Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Help

Use help icons 🟢 to access help in the application. 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. Not all pages have help icons. You can also access the Oracle Help Center to find guides and videos.

Watch: This video tutorial shows you how to find and use help.

You can also read about it instead.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>
Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.

Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

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

This guide assumes your company's application cloud service is up and running at a basic level.

Note: With release 20A (11.13.20.01.0), "Oracle Engagement Cloud" is now known as Oracle CX Sales and Oracle B2B Service. Existing Oracle Engagement Cloud users will retain access to Oracle CX Sales and B2B Service features under their preexisting licensing agreements. Any new users created within your current Oracle Engagement Cloud license count will also retain the same access to Oracle CX Sales and Oracle B2B Service. To obtain additional features or manage your subscription, refer to your Oracle Cloud Applications Console. This document describes features available to users under Oracle CX Sales, Oracle B2B Service, and Oracle Engagement Cloud licensing agreements.

Related Guides

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

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle CX Sales Getting Started with Your Sales Implementation</td>
<td>Describes your initial service implementation procedures, based on a simple sales-force-automation use case.</td>
</tr>
<tr>
<td>Oracle Applications Cloud Using Functional Setup Manager</td>
<td>Describes how to use the Setup and Maintenance work area when implementing and configuring your sales application.</td>
</tr>
<tr>
<td>Oracle CX Sales Implementing Sales</td>
<td>Provides a reference to conceptual information and procedures required to implement components and features for your cloud service.</td>
</tr>
<tr>
<td>Oracle CX Sales Using Customer Contracts</td>
<td>Contains information about creating and managing customer contracts.</td>
</tr>
<tr>
<td>Oracle CX Sales Using Sales</td>
<td>Contains information to help sales managers, salespeople, and other sales end users when using sales application to perform their day-to-day tasks.</td>
</tr>
<tr>
<td>Oracle Applications Cloud Configuring Applications Using Application Composer</td>
<td>Describes how to create and enhance objects and configure the user interfaces and navigation menus.</td>
</tr>
<tr>
<td>Guide</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Oracle CX Understanding File-Based Data Import and Export for CX Sales and B2B Service</td>
<td>Contains information to help those charged with exporting and importing object data.</td>
</tr>
<tr>
<td>Oracle CX Securing CX Sales and B2B Service</td>
<td>Contains information to help setup users and sales administrators configure access to sales functionality and data.</td>
</tr>
<tr>
<td>Oracle CX Sales Creating and Administering Analytics</td>
<td>Contains information about supplied reports and analytics, as well as how to create your own reports.</td>
</tr>
</tbody>
</table>

You may need to consult other guides other than those shown here. See the Related Topics section for direct access to all guides (if allowed by your organization).

**Related Topics**

- Oracle Help Center
2 Implementation Overview

Overview of Common Implementation

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

Application Extensions

Use the Application Extensions functional area to configure common business objects. For example, this functional area comprises tasks that help you to:

- Set help options, for example to make help icons visible to everyone.
- Review and manage objects, for example currencies and reference data sets that are shared across applications.
- Configure common reference objects such as flexfields, document sequences, and profile options that affect the functionality and look of Oracle Applications Cloud.

Other Functional Areas

Other functional areas contain several tasks to manage common functions that apply to the entire implementation. Examples of such functional areas include Legal Structures, Users and Security, and Enterprise Profile. Use these functional areas to, for example:

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

System Requirements

Before using Oracle cloud applications in browsers and on your mobile devices, check the supported browsers and other system requirements. For information about system requirements, see https://www.oracle.com/system-requirements/. For previous releases, scroll to the end of the page and find the system requirements link for the applicable previous release.

Related Topics

- System Requirements for Oracle Applications Cloud
Contracts Setup Overview

Perform Contracts Setup Tasks

For most setup activities, you access the setup pages associated with the component or feature by first going into the Setup and Maintenance work area and finding the task or task list associated with the feature or component. The Setup and Maintenance work area is also known as the Functional Setup Manager.

Use the following procedure to access the Setup and Maintenance work area:

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

   **Caution:** The administrator doesn't have the same setup permissions as a setup user. He has permissions required to set up and administer features and components, but not the higher-level permissions required to implement enterprise and security features. For more information on setting up users, see the Getting Started with Your Sales Implementation and Securing Sales guide.

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

   The setup page for the task appears.

Downloading Task Lists and Setup Reports

You may also want to download lists of tasks and task lists and other documents related to the Enterprise Contracts offering. Use the following procedure:

1. Sign in as a user with access to the setup areas, such as the initial user, another setup user, or the administrator.
2. On the Setup page, select Go To Offerings from the Task list.
3. On the Offerings page, click the Enterprise Contracts offering icon.

   - Use the Related Documents link to access reports for the offering, including full lists of setup tasks, descriptions of the options and features you can select when you configure the offering, and lists of business objects and enterprise applications associated with the offering.
4. View the reports in various formats, such as .pdf, html, and .xls. Use the reports to guide you in your setup activities.
5. When you're ready to start implementing a feature or functionality, you can optionally create one or more implementation projects for the offerings and options that you want to implement. For more information on creating implementation projects, see the help, using keywords "implementation project".

For more information on using the Setup and Maintenance work area to implement and configure Oracle Enterprise Contracts, see the Oracle Applications Cloud - Using Functional Setup Manager guide.
Overview of Contracts Offering

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

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

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

- Procurement Contracts
- Service Contracts
- Sales Contracts

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

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

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

Define Common Applications Configuration for Contracts

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

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

Define Contracts Common Configuration

Define and manage the setup for common functions within the Oracle Enterprise Contracts set of business processes.
Define Service Contracts Configuration
Define and manage the setup related to service contracts.

Define Procurement Contracts Configuration
Define and manage the setup related to procurement contracts.

Define Sales Contracts Configuration
Define and manage the setup related to sales contracts.

Define Contract Terms and Clause Library Configuration
Define and manage the setup to support creation and verification of contract terms.

Contracts: Define File-Based Data Import
Define mappings between contract attributes and import files, and schedule import jobs.

Manage Bulk Data Export
Review and manage export objects and schedule export processes to export business objects to external data files.

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

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

Setup and Maintenance Basics

Summary of the Basic Setup and Maintenance Steps
Here's a summary of the basic Setup and Maintenance tasks that you must do to set up Enterprise Contracts:

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

- Oracle Applications Cloud Using Functional Setup Manager
- Plan Your Implementation
3 Common Applications Configurations

Users and Security

Overview of Defining Setup Users

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

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

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

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

For information about creating setup users, see the Getting Started with Your Sales Implementation guide.

Related Topics
- Getting Started with Your Sales Implementation guide
- Securing CX Sales Sales and B2B Service guide

Overview of Setting Up Users and Security

Since you followed the Getting Started with Your Sales Implementation guide steps to set up your initial set of users, then you already know that Oracle applications secure access to functionality and data using role-based access control. In a role-based access control model, users are assigned roles, and roles are assigned access privileges to protected system resources.

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

Default Preferences

To set up default preferences for users and roles, access the Security Console as a setup user or other user with the IT Security Manager job role. Only setup users, or other users with the IT Security Manager job role, can access the Security Console.

User Identity Store

The Lightweight Directory Access Protocol (LDAP) identity store is a repository of user identity data. Your LDAP directory stores definitions of LDAP user accounts. In general, changes you make to user accounts are automatically
synchronized between the sales application and your LDAP directory server. However, you must also run processes on a daily basis to manage the information exchange between your application and the LDAP directory server. For information, see the chapter about setting up application security in the Securing CX Sales and B2B Service guide.

## Setup Tasks in the UI and Other Setup Options

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

<table>
<thead>
<tr>
<th>Setup Task or Option and Navigation</th>
<th>Description</th>
</tr>
</thead>
</table>
| Manage Job Roles Task               | Oracle provides many predefined job roles. The relevant sales roles are listed in the Getting Started with Your Sales Implementation guide. You perform the Manage Job Roles task to:  
  - Review the role hierarchy of a job or abstract role.  
  - Create custom job and abstract roles.  
  - View the roles assigned to a user and list the users who have a specific role.  
  This task opens the Roles tab of the Security Console. |
| Manage Duties Task                  | You perform the Manage Duties task to:  
  - Review the duties of a job or abstract role.  
  - Manage the duties of a custom job or abstract role.  
  - Create custom duty roles.  
  This task opens the Roles tab of the Security Console. |
| Manage Data Security Policies Task  | You use the Manage Data Security Policies task to manage the data security policies that determine grants of entitlement to a user or role on an object or attribute group. This task opens the Roles tab of the Security Console. You can also use the Manage Sales and Service Access task to review and configure data security. This task opens the Sales and Service Access Management work area. For information, see the Securing CX Sales and B2B Service guide. |
| Users and Roles Task                | You create application users in the UI using the Users and Roles task. A user with the IT Security Manager job role performs the Manage Users tasks.  
  **Note:** You can also create sales users by importing users. For information on the user import options available, see the Understanding Import and Export Management for CX Sales and B2B Service and Getting Started with Your Sales Implementation guides. |
<p>| Manage HCM Role Provisioning Rules Task | Oracle provides predefined role mapping rules for provisioning many of the standard job roles included with the application. However using the Manage HCM Role Provisioning Rules task, you can create any additional role mappings you need to, to control the provisioning of roles to application users. For example, you can create a role mapping to provision the Channel Sales Manager role automatically to specific sales managers. |</p>
<table>
<thead>
<tr>
<th>Setup Task or Option and Navigation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Navigation: Setup and Maintenance</td>
<td>You can import users in bulk using data files. For information on the user import options available, see the Understanding Import and Export Management for CX Sales and B2B Service and Getting Started with Your Sales Implementation guides.</td>
</tr>
<tr>
<td>Sales Offering &gt; Users and Security functional area</td>
<td>You can also import partner contact data using the Import Partner Users task. For more information, see the Getting Started with Your Partner Relationship Management Implementation guide.</td>
</tr>
<tr>
<td>Import and Export Management</td>
<td>Single sign-on authentication is optionally available for user authentication. If your enterprise has moved from a traditional on-premises environment to an Oracle Cloud implementation, you might want to use your existing identity management solution for authenticating your employees, and you might also want to provide a single sign-on experience. Implementing federated single sign-on lets you provide users with single sign-on access to applications and systems located across organizational boundaries. For additional information, see Oracle Applications Cloud Service Entitlements (Doc ID 2004494.1) on My Oracle Support at <a href="https://support.oracle.com">https://support.oracle.com</a>.</td>
</tr>
<tr>
<td>Import Partner Users Task</td>
<td>Setup users provisioned with the IT Security Manager job role can use the Users tab in the Security Console work area to reset passwords for all application users. Users who can't access the Security Console can reset only their own passwords using the Set Preferences link in the Settings and Actions menu available by clicking their user name in the application or by using the Forgot Password link on the sign-in page. See the Getting Started with Your Sales Implementation guide for more information.</td>
</tr>
<tr>
<td>Single Sign-On Authentication</td>
<td>Use the Users tab in the Security Console work area to change user email addresses. You can use the procedure described in this topic to update addresses of both setup users and sales users. If you're updating the email addresses of sales users, then you can also use the same import process you use to create them. See the Getting Started with Your Sales Implementation guide for more information.</td>
</tr>
<tr>
<td>Updating Email Addresses</td>
<td>Note: Other data security tasks listed in the Users and Security functional area task list don't apply to the sales applications. Follow the guidance in the Getting Started with Your Sales Implementation guide and the Securing CX Sales and B2B Service guide.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Getting Started with Your Sales Implementation guide
- Securing CX Sales and B2B Service guide
- Understanding Import and Export Management for CX Sales and B2B Service guide
- Managing Resources chapter of the Using Sales guide
- Subject Areas for Adoption and Usage Reporting
About Sales Resources

Users who do day-to-day sales transactional activities like managing opportunities and leads are known as "sales resources". During implementation, you create sales resources and build your resource organization at the same time. After implementation, you maintain sales resources, such as by modifying their organization assignments, adding or removing permissions, creating additional users, and so on.

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

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

- Getting Started with Your Sales Implementation
- Securing Sales and Service

Additional Options for Resource Setups

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

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

Related Topics

- Designate Proxies
- Impersonation Audit
- Configure Impersonation Auditing
- Sales Restricted Users
- About Transferring Records Between Users
Sales Resources FAQ

How does a contract user get access to a business unit?
A contract user is first created as a resource and mapped to a resource organization. Since each resource organization is mapped to one or more BUs, the user gets access to the BUs that are mapped to the resource organization.

For example, if the user-to-resource organization mapping is as seen in table 1, and the resource organization-to-BU mapping is as seen in table 2, then the users will get BU access as seen in table 3:

Table 1:

<table>
<thead>
<tr>
<th>User/Resource</th>
<th>Resource Organization</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sophie Black</td>
<td>Resource Org 1</td>
</tr>
<tr>
<td>Olivia Turner</td>
<td>Resource Org 2</td>
</tr>
<tr>
<td>Bala Gupta</td>
<td>Resource Org 3</td>
</tr>
<tr>
<td>Mark Quinn</td>
<td>Resource Org 4</td>
</tr>
</tbody>
</table>

Table 2:

<table>
<thead>
<tr>
<th>Resource Organization</th>
<th>Business Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Org 1</td>
<td>Vision Operations</td>
</tr>
<tr>
<td>Resource Org 2</td>
<td>Vision Services</td>
</tr>
<tr>
<td>Resource Org 3</td>
<td>Vision Services</td>
</tr>
<tr>
<td>Resource Org 4</td>
<td>Vision Operations</td>
</tr>
<tr>
<td></td>
<td>Vision Services</td>
</tr>
</tbody>
</table>

Table 3:

<table>
<thead>
<tr>
<th>User/Resource</th>
<th>Business Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sophie Black</td>
<td>Vision Operations</td>
</tr>
</tbody>
</table>
How can existing contract users not created as resources get business unit access?
Existing contract users who weren't created as resources can get business unit (BU) access if you make them resources by using the Identify Resource feature.
You can use the Identify Resource feature to search for a user and identify the user as a resource through the Add as Resource option. While adding the user as a resource, the user can be associated with a resource organization. Once a user is mapped to a resource organization, the user gets access to the BU mapped to the resource organization.

Multiple Currencies

Overview

Overview of Setting Up Multiple Currencies for Sales
The applications support multiple currencies, multiple daily rates, and currency rate conversion. If you're going to use multiple currencies, at a minimum you need to:
- Specify corporate currency
- Import or enter daily currency conversion rates
- Enable the currencies you're going to use, if you previously disabled them

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

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

## Set Up Multiple Currencies for Sales

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

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

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

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

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

Set Default Currency Profile Options

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

Here’s how you set the profile options:

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

Check Default Currency Profile Option Setting

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

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

Here’s how to check the default currency setting:

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

   **Note:** If you can’t find this profile option, search for it from the main Sales offering page, using the search available in the Tasks widget available on the right side of the page.
2. On the Manage Applications Core Administrator Profile Values page, search for and select the profile option name, Default Currency, or the code, FND_CURRENCY.

3. Ensure the profile option value is set to your environment's default currency at site level.

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

**Ensure Currencies are Enabled and Verify Precision**

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

Here's how to check:

1. In the Setup and Maintenance work area, go to:
   - Offering: Sales
   - Functional Area: Company Profile
   - Task: Manage Currencies

2. On the Manage Currencies page, click **Search** to search for all currencies, without entering any search criteria.

3. Check that the **Enabled** option is set for each currency you plan to use.

4. Check that the **Precision** is set consistently for each currency you plan to use.

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

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

**Overview of Defining Daily Currency Conversion Rates**

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

- Load them manually using the Create Daily Rates spreadsheet.
- Load them manually using the Import and Calculate Daily Rates file-based data import.
- Load them automatically using web services.

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

**Related Topics**

- What's the difference between precision, extended precision, and minimum accountable unit for a currency
- Load Daily Rates Automatically Using Web Services
- Set General User Currency

**Considerations for Defining Currencies**

When creating or editing currencies, consider these points relevant to entering the currency code, date range, or symbol for the currency.
Currency Codes
You can't change a currency code after you enable the currency, even if you later disable that currency.

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

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

Related Topics
- What's the difference between precision, extended precision, and minimum accountable unit for a currency
- What's a statistical unit currency type
- Euro Currency Derivation

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

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

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

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

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

Also keep in mind the following impact of the process:

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

Run the Process
Run the Revalue Opportunity Currency process from the job process screen available from the Scheduled Processes option on the Navigator menu. Select the job name Revalue Opportunity Currency.
Here are the steps to run the process in basic mode:

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

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

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM Common Currency</td>
<td>Stored in the profile option, Corporate</td>
<td>• Configured corporate currency.</td>
</tr>
<tr>
<td></td>
<td>Currency Default (ZCA_COMMON_CORPORATE_</td>
<td>• Passed if corporate currency changes.</td>
</tr>
<tr>
<td></td>
<td>CURRENCY)</td>
<td>• Program doesn’t check against profile for a match.</td>
</tr>
<tr>
<td>CRM Common Currency Rate Type</td>
<td>Stored in the profile option, Exchange</td>
<td>• Configured rate type.</td>
</tr>
<tr>
<td></td>
<td>Rate Type Default (ZCA_COMMON_RATE_TYPE)</td>
<td>• Passed if there is a requirement to reevaluate the conversion rate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>against a different rate type.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• If no value is passed, the program uses the profile option value.</td>
</tr>
<tr>
<td>Business Unit Organization ID</td>
<td>No default</td>
<td>Leave blank, and all business units are targeted. Otherwise provide the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>specific business unit ID.</td>
</tr>
<tr>
<td>Number of Opportunities per</td>
<td>500</td>
<td>Oracle recommends that you leave this parameter at the default value or</td>
</tr>
<tr>
<td>Database Update</td>
<td></td>
<td>blank (and program uses default value).</td>
</tr>
<tr>
<td>Last Batch Job Run Time Stamp</td>
<td>See Description column</td>
<td>This parameter can be used for batch program reruns. When a few opportunities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>have failed, the log reflects all the failed opportunities, as well as</td>
</tr>
<tr>
<td></td>
<td></td>
<td>provides a time stamp for “Start Batch Job Time Stamp”. Enter this time</td>
</tr>
<tr>
<td></td>
<td></td>
<td>stamp on the second run of the batch program to limit the scope of the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>batch job to only the failed opportunities.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>System date</td>
<td>Date passed to general ledger (using an API) to calculate the conversion</td>
</tr>
<tr>
<td></td>
<td></td>
<td>rate. The program doesn’t validate that the date must be in the future, so,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>in effect, any date can be passed.</td>
</tr>
</tbody>
</table>
Impact of Process on Revenue Attributes
The Revalue Opportunity Currency process impacts several revenue attributes, as shown in this table.

<table>
<thead>
<tr>
<th>Revenue Model Attribute</th>
<th>Attribute Description/Function</th>
<th>Batch Process Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM_CURRENCY_CODE</td>
<td>These attributes store the exchange rate between revenue line currency and the corporate currency, and are used to construct the materialized views for Closed, Pipeline and Unforecasted revenue metrics along the territory hierarchy. For lines in status category of Open, these attributes are updated whenever a revenue line is created or updated or whenever an opportunity with revenue is updated or saved.</td>
<td>CRM_CURRENCY_CODE and CRM_CONVERSION_RATE_TYPE are updated based on a parameter to the batch program. If these two parameters are passed in, the program uses them to update the revenue tables. If these values aren't passed in, the application retrieves the profile option values and updates the revenue tables with them.</td>
</tr>
<tr>
<td>CRM_CONVERSION_RATE_TYPE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CRM_CONVERSION_RATE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- The default for CRM_CURRENCY_CODE is taken from the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- The default for CRM_CONVERSION_RATE_TYPE is taken from the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- CRM_CONVERSION_RATE is calculated using a GL API.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- CRM_CURRENCY_CODE and CRM_CONVERSION_RATE_TYPE are updated based on a parameter to the batch program. If these two parameters are passed in, the program uses them to update the revenue tables. If these values aren't passed in, the application retrieves the profile option values and updates the revenue tables with them.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CONVERSION_RATE_TYPE</td>
<td>These attributes store the exchange rate between revenue line currency and the summary revenue (opportunity level) currency and are used to convert the revenue line amounts to opportunity level currency. For lines in a status category of Open, these attributes are updated whenever the revenue is created or updated or whenever an opportunity with revenues is updated or saved.</td>
<td>CONVERSION_RATE_TYPE is updated based on a parameter to the batch program. CONVERSION_RATE is updated. Changes if corporate rate types change. Rate is obtained using (conversion_rate_type, line_currency_code, summary_currency_code, and system date).</td>
</tr>
<tr>
<td>CONVERSION_RATE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- CONVERSION_RATE_TYPE is updated based on a parameter to the batch program.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- CONVERSION_RATE is updated. Changes if corporate rate types change. Rate is obtained using (conversion_rate_type, line_currency_code, summary_currency_code, and system date).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>REVN_AMT_CURCY_CODE</td>
<td>Currency of the revenue (summary or line)</td>
<td>Entered currency. Not updated.</td>
</tr>
<tr>
<td>- CONVERSION_RATE_TYPE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- CONVERSION_RATE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>REVN_AMT</td>
<td>For summary revenue amounts, these amounts are calculated as the sum of line revenue amounts. These amounts are converted to the opportunity-level currency before calculating the sum. The exchange rate stored in the CONVERSION_RATE attribute is used to perform the conversion.</td>
<td>Line revenue isn't updated. Summary revenue is recalculated.</td>
</tr>
<tr>
<td>- DOWNSIDE_AMT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- UPSIDE_AMT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>LAST_UPDATE_DATE</td>
<td>WHO column</td>
<td>Updated.</td>
</tr>
<tr>
<td>USER_LAST_UPDATE_DATE</td>
<td>Functional WHO column</td>
<td>Not updated.</td>
</tr>
</tbody>
</table>
### Enter Daily Rates Using the Daily Rates Spreadsheet

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

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

#### Entering Daily Rates

1. From the General Accounting work area, select the **Period Close** link.
2. From the Tasks panel, click the **Manage Currency Rates** link.
   
   Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.
3. Click the Daily Rates tab.
   
   Use the Daily Rates tab to review and enter currency rates.
4. Click the **Create in Spreadsheet** button.
   
   Use the Create Daily Rates spreadsheet to enter daily rates in a template that you can save and reuse.
5. Click in the **From Currency** field. Select the GBP - Pound Sterling list item.
6. Click in the **To Currency** field. Select the USD - US Dollar list item.
7. Click in the **Conversion Rate** field. Select the Spot list item.
8. Click in the **From Conversion Date** field. Enter a valid value: 10/2/2017.
9. Click in the **To Conversion Date** field. Enter a valid value: 10/6/2017.
10. Click in the **Conversion Rate** field. Enter a valid value: 1.6.
11. Click **Submit** and click **OK** twice.
12. Review the **Record Status** column to verify that all rows were inserted successfully.
13. Save the template to use to enter daily rates frequently. You can save the spreadsheet to a local drive or a shared network drive.
14. Optionally, edit the rates from the Daily Rates user interface or resubmit the spreadsheet.

#### Related Topics
- Considerations for Setting Up Opportunity Revenue

### Update Currency Rates

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

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

1. Navigate to the Period Close work area.
   
   Use the Period Close work area to link to close processes and currency process.

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

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

4. Click the From Currency list. Select the GBP - Pound Sterling list item.

5. Click the To Currency list. Select the USD - US Dollar list item.

6. Enter the dates for the daily rates that you are changing. Enter today's date.

7. Click the Rate Type list. Select the Spot list item.

8. Click the Search button.

9. Click in the Rate field. Enter the new rate of 1.7 in the Rate field.

10. Click in the Inverse Rate field. Enter the new inverse rate of 0.58822 in the Inverse Rate field.

11. Click the Save button.

Related Topics

- Guidelines for Using Desktop Integrated Excel Workbooks

Enterprise Structures

Overview

A legal entity is a recognized party with rights and responsibilities given by legislation.

Legal entities have the following rights and responsibilities to:

- Own property
- Trade
- Repay debt
- Account for themselves to regulators, taxation authorities, and owners according to rules specified in the relevant legislation

Their rights and responsibilities may be enforced through the judicial system. Define a legal entity for each registered company or other entity recognized in law for which you want to record assets, liabilities, expenses and income, pay transaction taxes, or perform intercompany trading.

A legal entity has responsibility for elements of your enterprise for the following reasons:

- Facilitating local compliance
- Minimizing the enterprise's tax liability
- Preparing for acquisitions or disposals of parts of the enterprise
• Isolating one area of the business from risks in another area. For example, your enterprise develops property and also leases properties. You could operate the property development business as a separate legal entity to limit risk to your leasing business.

The Role of Your Legal Entities

In configuring your enterprise structure in Oracle Fusion Applications, the contracting party on any transaction is always the legal entity. Individual legal entities:

• Own the assets of the enterprise
• Record sales and pay taxes on those sales
• Make purchases and incur expenses
• Perform other transactions

Legal entities must comply with the regulations of jurisdictions, in which they register. Europe now allows for companies to register in one member country and do business in all member countries, and the US allows for companies to register in one state and do business in all states. To support local reporting requirements, legal reporting units are created and registered.

You are required to publish specific and periodic disclosures of your legal entities' operations based on different jurisdictions' requirements. Certain annual or more frequent accounting reports are referred to as statutory or external reporting. These reports must be filed with specified national and regulatory authorities. For example, in the United States (US), your publicly owned entities (corporations) are required to file quarterly and annual reports, as well as other periodic reports, with the Securities and Exchange Commission (SEC), which enforces statutory reporting requirements for public corporations.

Individual entities privately held or held by public companies don't have to file separately. In other countries, your individual entities do have to file in their own name, as well as at the public group level. Disclosure requirements are diverse. For example, your local entities may have to file locally to comply with local regulations in a local currency, as well as being included in your enterprise’s reporting requirements in different currency.

A legal entity can represent all or part of your enterprise's management framework. For example, if you operate in a large country such as the United Kingdom or Germany, you might incorporate each division in the country as a separate legal entity. In a smaller country, for example Austria, you might use a single legal entity to host all of your business operations across divisions.

Business Units

A business unit is a unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy. A business unit can process transactions on behalf of many legal entities. Normally, it has a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss. Roll business units up into divisions if you structure your chart of accounts with this type of hierarchy.

In Oracle Fusion Applications you do the following:

• Assign your business units to one primary ledger. For example, if a business unit is processing payables invoices, then it must post to a particular ledger. This assignment is required for your business units with business functions that produce financial transactions.

• Use a business unit as a securing mechanism for transactions. For example, if you run your export business separately from your domestic sales business, then secure the export business data to prevent access by the domestic sales employees. To accomplish this security, set up the export business and domestic sales business as two separate business units.
The Oracle Fusion Applications business unit model provides the following advantages:

- Enables flexible implementation
- Provides consistent entity that controls and reports on transactions
- Shares sets of reference data across applications

Business units process transactions using reference data sets that reflect your business rules and policies and can differ from country to country. With Oracle Fusion Application functionality, you can share reference data, such as payment terms and transaction types, across business units, or you can have each business unit manage its own set depending on the level at which you want to enforce common policies.

In summary, use business units for:

- Management reporting
- Transaction processing
- Transactional data security
- Reference data sharing and definition

Brief Overview of Business Unit Security

A number of Oracle Fusion Applications use business units to implement data security. You assign roles like Accounts Payable Manager to users to permit them to perform specific functions, and you assign business units for each role to users to give them access to data in those business units. For example, users who have been assigned a Payables role for a particular business unit, can perform the function of payables invoicing on the data in that business unit. Roles can be assigned to users manually using the Security Console, or automatically using provisioning rules. Business Units can be assigned to users using the Manage Data Access for Users task found in Setup and Maintenance.

Related Topics

- Reference Data Sets and Sharing Methods
4 Contracts Common Configurations

Customer Contract Management Business Function Properties

Contract Security Setup

The contract security model provides different levels of access to administrator and non-administrator users. Contract security works this way:

- You must be designated as a resource to be able to create or edit a contract.
- Only a resource or resource organization can be team members of a contract.

The list of business units (BU) that a user can access is based on the resource organization the user is mapped to as a resource.

Users can be of two types: administrator and non-administrator users. Here’s how their access is:

- Administrator users can create or edit contracts in all the BUs they’re authorized in.
- Non-administrator user access to the contracts is controlled by team membership as follows:
  - They can create contracts in all the BUs they’re authorized in.
  - They can also view and edit contracts of other BUs provided they’re team members in those contracts.
  - All the managers of the organization in the upward resource hierarchy of a team member can also access the contract.
  - All the users below the hierarchy are also authorized on the contract.

This table illustrates the user access scenario:

<table>
<thead>
<tr>
<th>Contract Privilege</th>
<th>Administrator User</th>
<th>Non-Administrator User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create contracts</td>
<td>Can create contracts in all the BUs that the user is authorized in, based on their resource/resource organization mapping.</td>
<td>Can create contracts in all the BUs that the user is authorized in, based on their resource/resource organization mapping.</td>
</tr>
<tr>
<td>Edit contracts</td>
<td>Can edit all the contracts of the BUs that the user is authorized to.</td>
<td>Can edit all the contracts in which the user is a team member.</td>
</tr>
</tbody>
</table>

Note:
- Even if a user is authorized in a BU, the user may not be authorized for all contracts in that BU.
### Customer Contracts Business Unit Setup

Using the **Specify Customer Contract Management Business Function Properties** task, available by navigating to Setup and Maintenance work area and searching on the task name, you can specify a wide variety of business function settings for customer contracts in a specific business unit. The selections you make for these business functions impact how Oracle Enterprise Contracts behaves during contract authoring.

Using the **Specify Customer Contract Management Business Function Properties** task, manage these business function properties:

- Enable related accounts
- Set currency conversion details
  
  **Note:** You must select a default currency in the customer or supplier business function properties page, if not populated automatically from the ledger assigned to the business unit in the assign business function setup task.

- Manage project billing options
- Set up clause numbering
- Set up the Contract Terms Library
  
  The setup options available for the Contract Terms Library are applicable to both customer and supplier contracts, and are described in the business unit setup topic for the Contract Terms Library. That topic is available as a related link to this topic.

### Enabling Related Customer Accounts

Contract authors can specify bill-to, ship-to, and other accounts for the parties in a contract. Enable the related customer accounts option if you want accounts previously specified as related to the contract party to be available for selection.

### Managing Currency Conversion Options

If your organization plans to transact project-related business in multiple currencies, then select the multi-currency option. This allows a contract author to override a contract's currency, which is derived from the ledger currency of the business unit. It also enables the contract author to specify currency conversion attributes to use when converting from the bill transaction currency to the contract currency and from the invoice currency to the ledger currency.

In the Bill Transaction Currency to Contract Currency region, enter currency conversion details that will normally be used, by all contracts owned by this business unit, to convert transaction amounts in the bill transaction currency to the contract currency. Newly created contracts contain the default currency conversion values, but you can override the values on any contract, if needed.
In the Invoice Currency to Ledger Currency region:

- Enter invoice transaction conversion details if the invoice and ledger currencies can be different.
- Enter revenue transaction conversion details if the revenue and ledger currencies can be different for as-incurred and rate-based revenue.

Managing Project Billing Options

The options available for selection in the Project Billing region control the behavior of project invoicing and revenue recognition for contracts with project-based work. Project billing can act differently for external contracts (customer billing) or intercompany and inter-project contracts (internal billing).

Set these options, which apply to all contracts:

- Select the **Transfer Revenue to General Ledger** option if you want to create revenue accounting events and entries, and transfer revenue journals to the general ledger. If this option isn't selected, then revenue can still be generated, but won't be transferred to the general ledger.
- Indicate if a reason is required for credit memos that are applied to invoices.

These options exist in two sets - one for customer billing and a second for internal billing:

- Select an invoice numbering method, either **Manual** or **Automatic**. The invoice numbering method is the method that Oracle Fusion Receivables uses to number its invoices, upon release of draft invoices from Project Billing.
  - If the invoice numbering method is **Manual**, then select an invoice number type, which sets the type of Receivables invoice numbers that are allowed. Valid values are **Alphanumeric** and **Numeric**.
  - If the invoice numbering method is **Automatic**, then enter the next invoice number to use when generating Receivables invoice numbers.
- Select the Receivables batch source to use when transferring invoices to Receivables.

Set this option only for customer billing:

- Indicate if you want contract authors to manually enter the Receivables transaction type on the customer contracts they create.

Managing Clause Numbering

You can choose to number clauses manually or automatically.

If you choose the automatic numbering method, you must select a determinant level for the numbering. You must then select the appropriate clause sequence category from document sequences that you set up for this numbering level.

Contract Terms Library Business Unit Setup

You can specify a wide variety of **Contract Terms Library** settings for either customer or supplier contracts within each business unit, by using either the **Specify Customer Contract Management Business Function Properties** or the **Specify Supplier Contract Management Business Function Properties** tasks. These tasks are available in the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

For the Contract Terms Library in each business unit, you can:

- Enable clause and template adoption.
- Set the clause numbering method.
- Set the clause numbering level for automatic clause numbering of contracts.
- For a contract with no assigned ledger or legal entity, set the document sequence to Global or Business Unit level.
- Enable the Contract Expert enabling feature.
- Specify the layout for printed clauses and contract deviation reports.

### Enabling Clause Adoption
Do this to use clause adoption in your implementation:

1. **Specify a global business unit**
   Designate one of the business units in your organization as the global business unit by selecting the Global Business Unit option. This makes it possible for the other local business units to adopt and use approved content from that global business unit. If the Global Business Unit option isn’t available for the business unit you’re setting up, it means you have already designated a business unit as global.

2. **Enable automatic adoption**
   If you’re implementing the adoption feature, you can have all the global clauses in the global business unit automatically approved and available for use in the local business by selecting the Autoadopt Global Clauses option. If you don’t select this option, the employee designated as the Contract Terms Library Administrator has to approve all the global clauses, before they can be adopted and used in the local business unit. This option is available only for local business units.

3. **Specify the administrator who approves clauses available for adoption**
   You must designate an employee as the Contract Terms Library administrator if you’re using adoption. If you don’t enable automatic adoption, then the administrator must adopt individual clauses or localize them for use in the local business unit. The administrator can also copy over any contract terms templates created in the global business unit. The clauses and contract terms templates available for adoption are listed in the administrator’s Terms Library work area.

4. **Adopt global clauses for new business unit**
   If you’re creating a new local business unit and have to adopt existing global clauses, run the Adopt Global Clauses for a New Business Unit process. Refer to the Enterprise Scheduler processes topic for more information.

### Setting Clause Numbering Options
You can set up automatic clause numbering for the clauses in the business unit by selecting Automatic in the Clause Numbering field and setting the clause numbering level. Then select the appropriate clause sequence category for the specified numbering level. You must have previously set up document sequences for the document sequence categories of global, ledger, and business unit. If clause numbering is manual, contract terms library administrators must enter unique clause numbers each time they create a clause.

You can choose to display the clause number in front of the clause title in contracts by selecting the Display Clause Number in Clause Title option.

### Set Up Consistent Clause Numbering
When you skip numbering and suppress the title for a clause or section, the numbering format may look different when you download the contract. You get the difference in numbering format because your downloaded contract has the numbering format of Microsoft Word. To enable Microsoft Word numbering format for your contract in the Enterprise Contracts UI, you must set the Consistent Microsoft Word Numbering for Contract Terms Enabled profile option as Yes.
If this profile option is set as **No**, you may see inconsistent numbering when you download the contract as the Microsoft Word document.

Here are the steps to enable the profile option:

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task.
2. On the Manage Administrator Profile Values page, search for and select the **Consistent Microsoft Numbering for Contract Terms Enabled** profile option.
3. Set the profile option to **Yes**.
4. **Save and Close**.

**Enable Contract Expert**

Select the **Enable Contract Expert** option to use the Contract Expert feature in a business unit. This setting takes precedence over enabling Contract Expert for individual contract terms templates.

**Specify Printed Clause and Deviations Report Layouts**

For each business unit, you can specify the Oracle BI Publisher RTF file that serves as the layout for:

- **The printed contract terms**
  
  Enter the RTF file you want used for formatting the printed clauses in the **Clause Layout Template** field.

- **The contract deviations report**
  
  The RTF file you select as the **Deviations Layout Template** determines the appearance of the contract deviations report PDF. This PDF is attached to the approval notification sent to contract approvers.

**Related Topics**

- How Business Unit Affects Clauses and Other Objects in the Library
- How Contract Expert Works

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**Supplier Contract Management Business Function Properties**

**Set Up Business Unit for Supplier Contracts**

Use the **Specify Supplier Contract Management Business Function Properties** task to specify a variety of business function settings for supplier contracts in a specific business unit. You can access this task by selecting Setup and Maintenance from the Navigator and searching on the task name.

The selections you make for these business functions impact how the Contract Terms Library behaves during supplier contract authoring.

**Note:** The customer must select a default currency in the customer or supplier business function properties page, if not automatically populated from the ledger assigned to the business unit in the assign business function setup task.
Manage Contract Terms Library Setup Options

The setup options available for the Contract Terms Library are applicable to both customer and supplier contracts, and are described in the business unit setup topic for the Contract Terms Library. That topic is available as a related link to this topic.

Set Up Supplier Ship-to Organization, Ship-to Location and Bill-to Location

To set up ship-to organization, create an Inventory Organization by using these steps:

1. Navigate to **Setup and Maintenance**.
2. Click **Search** in the Tasks side panel and search for the **Manage Inventory Organizations** task.
3. Click **Create** in the results table.
4. Enter **Name** and **Organization**, and select **Management Business Unit** and **Legal Entity** information from the drop-down list.
5. Click **Next**.
6. In the **General** tab, select **Schedule** and **Item Master Organization** information.
7. Click **Save and Close**.

To set up a ship-to and bill-to location, create an Inventory Organization Location:

1. Search for **Manage Inventory Organization Locations** in the Tasks side panel.
2. On the Search page, click **Manage Inventory Organization Locations**.
3. Click **Create** in the results table.
4. Enter mandatory fields and select **Inventory Organization** in the drop-down list.
5. Click **Submit**.

Contract Terms Library Business Unit Setup

You can specify a wide variety of **Contract Terms Library** settings for either customer or supplier contracts within each business unit, by using either the **Specify Customer Contract Management Business Function Properties** or the **Specify Supplier Contract Management Business Function Properties** tasks. These tasks are available in the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

For the Contract Terms Library in each business unit, you can:

- Enable clause and template adoption.
- Set the clause numbering method.
- Set the **clause numbering level** for automatic clause numbering of contracts.
- For a contract with no assigned ledger or legal entity, set the document sequence to Global or Business Unit level.
- Enable the **Contract Expert** enabling feature.
- Specify the layout for printed clauses and **contract deviation** reports.

Enable Clause Adoption

Here are the steps to use **clause adoption** in your implementation:

1. Specify a global business unit

   Designate one of the business units in your organization as the global business unit by selecting the **Global Business Unit** option. This makes it possible for the other local business units to adopt and use approved
content from that global business unit. If the Global Business Unit option isn't available for the business unit you're setting up, it means you have already designated a business unit as global.

2. Enable automatic adoption
   If you're implementing the adoption feature, you can have all the global clauses in the global business unit automatically approved and available for use in the local business by selecting the Autoadopt Global Clauses option. If you don't select this option, the employee designated as the Contract Terms Library Administrator has to approve all the global clauses, before they can be adopted and used in the local business unit. This option is available only for local business units.

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   You must designate an employee as the Contract Terms Library administrator if you're using adoption. If you don't enable automatic adoption, then the administrator must adopt individual clauses or localize them for use in the local business unit. The administrator can also copy over any contract terms templates created in the global business unit. The clauses and contract terms templates available for adoption are listed in the administrator's Terms Library work area.

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   If you're creating a new local business unit and have to adopt existing global clauses, run the Adopt Global Clauses for a New Business Unit process. Refer to the Enterprise Scheduler processes topic for more information.

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When you skip numbering and suppress the title for a clause or section, the numbering format may look different when you download the contract. The difference in numbering format occurs as your downloaded contract follows the Microsoft Word numbering format. To enable Microsoft Word numbering format for your contract in the Enterprise Contracts UI, you must set the Consistent Microsoft Word Numbering for Contract Terms Enabled profile option as Yes.

If this profile option is set as No, you may see inconsistent numbering when you download the contract as the Microsoft Word document.

Here are the steps to enable the profile option:

1. In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task.
2. On the Manage Administrator Profile Values page, search for and select the Consistent Microsoft Numbering for Contract Terms Enabled profile option.
3. Set the profile option to Yes.
4. Save and Close.

Enable Contract Expert
You must select the Enable Contract Expert option to be able to use the Contract Expert feature in a business unit. This setting takes precedence over enabling Contract Expert for individual contract terms templates.
Specify Printed Clause and Deviations Report Layouts

For each business unit, you can specify the Oracle BI Publisher RTF file that serves as the layout for:

- **The printed contract terms**
  Enter the RTF file you want used for formatting the printed clauses in the **Clause Layout Template** field.
- **The contract deviations report**
  The RTF file you select as the **Deviations Layout Template** determines the appearance of the contract deviations report PDF. This PDF is attached to the approval notification sent to contract approvers.

**Related Topics**
- How Business Unit Affects Clauses and Other Objects in the Library
- How Contract Expert Works

Contract Descriptive Flexfields

Overview of Descriptive Flexfields

Use **descriptive flexfields** to add attributes to business object entities, and define validation for them.

All the business object entities that you can use in the application are enabled for descriptive flexfields. However, configuring descriptive flexfields is an optional task.

**Context**

A descriptive flexfield can have only one context segment to provide context sensitivity. The same underlying database column can be used by different segments in different contexts.

For example, you can define a Dimensions context that uses the following attributes:

- ATTRIBUTE1 column for height
- ATTRIBUTE2 column for width
- ATTRIBUTE3 column for depth

You can also define a Measurements context that uses the same columns for other attributes:

- ATTRIBUTE1 column for weight
- ATTRIBUTE2 column for volume
- ATTRIBUTE3 column for density

**Segments and Contexts**

The following table lists the different types of descriptive flexfield **segments**.

<table>
<thead>
<tr>
<th>Segment Type</th>
<th>Run Time Appearance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global segment</td>
<td>Always available</td>
</tr>
</tbody>
</table>
The following figure displays a descriptive flexfield having one context segment called Category for which there are three values: Resistor, Battery, and Capacitor. Additionally, the descriptive flexfield comprises two global segments that appear in each context, and three context-sensitive segments that only appear in the specific context.

Application development determines the number of segments available for configuring. During implementation, configure the flexfield by determining the following:

- Attributes to add using the available segments
- Context values
- The combination of attributes in each context
Value Sets
For each global and context-sensitive segment, you configure the values permitted for the segment. Based on it, the values that end users enter are validated, including interdependent validation among the segments.

Protected Descriptive Flexfield Data
Application developers may mark some data configurations in a descriptive flexfield as protected, indicating that you can’t edit them.

Related Topics
- Overview of Value Sets
- Considerations for Managing Flexfields
- How can I access predefined flexfields

Considerations for Planning Descriptive Flexfields
Once you have identified a flexfield to configure, plan the configuration in advance. Compile a list of the UI pages and other artifacts in your deployment that are affected by the configuration. Verify that you are provisioned with the roles needed to view and configure the flexfield. View the flexfield using the Highlight Flexfields command in the Administration menu while viewing the run time page where the flexfield appears. Plan how you will deploy the flexfield for test and production users. Review the tools and tasks available for managing flexfields for adding and editing flexfield segments.

Planning a descriptive flexfield can involve the following tasks:

1. Identify existing parameters.
2. Identify existing context values and whether the context value is derived.
3. Identify user-defined attributes and plan the descriptive flexfield segments, segment properties, and structure.
5. Plan initial values.
6. Plan attribute mapping to Oracle Business Intelligence objects.

Identify Existing Descriptive Flexfield Parameters
Some descriptive flexfields provide parameters that can be used to specify the initial value of a descriptive flexfield segment. The parameter is external reference data, such as a column value or a session variable. For example, if a flexfield has a user email parameter, you can configure the initial value for a customer email attribute to be derived from that parameter.

Review the list of available parameters in the Derivation Value field in the Create Segment page for a descriptive flexfield. If you decide to use one of the parameters to set an initial value, select that parameter from the Derivation Value drop-down list when you add the descriptive flexfield segment.

Evaluate Whether the Context Value Is Derived
The context value for a descriptive flexfield might have been preconfigured to be derived from an external reference. For example, if the context is Marriage Status, then the value might be derived from an attribute in the employee business object. When the context value is derived, you might need to take the derived values and their source into consideration in your plan.

To determine whether the context value is derived, access the Edit Descriptive Flexfield task to view the list of configured context values for the flexfield. The Derivation Value field in the Context Segment region displays a list of
available parameters. If context values have been preconfigured, see Oracle Applications Cloud Help for product-specific information about the use of those values.

Plan the Segments, Segment Properties, and Structure
Identify the user-defined attributes you need for a business object to determine the segments of the descriptive flexfield. Determine the segment properties such as the prompt, display type, or initial value.

The structure of the descriptive flexfield is determined by its global, context, and context-sensitive segments. Plan a global segment that captures an attribute for every instance of the business object. Plan a context for segments that depend on a condition of situation applying to a particular instance of the business object. Plan context-sensitive segments to capture attributes that are relevant in the context.

There is only one context segment available for descriptive flexfields. If you have more than one group of user-defined attributes where you could use the context segment, you will have to pick one group over the others, based on your company's needs and priorities, and add the other user-defined attributes as global segments.

Plan Validation Rules
Define each segment's validation rules and check if value sets exist for those rules or you must create new ones. If you must create a value set, you can create it either before configuring the flexfield or while creating or editing a segment.

When determining a segment's validation rules, consider the following questions:

- What is the data type - character, date, date and time, or number?
- Does the segment require any validation beyond data type and maximum length?
- Should a character type value be restricted to digits, or are alphabetic characters allowed?
- Should alphabetic characters automatically be changed to uppercase?
- Should numeric values be zero-filled?
- How many digits can follow the radix separator of a numeric value? In base ten numeric systems, the radix separator is decimal point.
- Does the value need to fall within a range?
- Should the value be selected from a list of valid values? If so, consider the following questions:
  - Can you use an existing application table from which to obtain the list of valid values, or do you need to create a list?
  - If you are using an existing table, do you need to limit the list of values using a WHERE clause?
  - Does the list of valid values depend on the value in another flexfield segment?
  - Is the list of valid values a subset of another flexfield segment's list of values?

Plan Initial Values
For every segment, list the constant value or SQL statement, if any, to use for the initial value of the user-defined attribute.

Plan How Segments Map to Oracle Business Intelligence Objects
You can extend descriptive flexfields into Oracle Transactional Business Intelligence (OTBI) for ad hoc reporting purposes. Determine the descriptive flexfield segments to be made available for reporting, and select the **BI Enabled** check box accordingly on the Manage Descriptive Flexfields page. You must run a process to extend the BI enabled segments into OTBI.
Depending on the reporting needs, you may map similar context-sensitive attributes from different contexts to the same attribute in OTBI. For example, there may be a segment tracking the Product Color attribute in different contexts of a context sensitive descriptive flexfield. You can use segment labels to map these context-sensitive attributes together by defining a segment label and updating the BI Label list accordingly.

**Related Topics**
- Flexfield Segment Properties
- Overview of Value Sets
- Considerations for Enabling Descriptive Flexfield Segments for Business Intelligence
- Default Segment Values
- Overview of Transactional Business Intelligence Configuration of Descriptive Flexfields

### Considerations for Managing Descriptive Flexfields

Configuring *descriptive flexfields* involves managing the available flexfields registered with your Oracle Applications Cloud database and configuring their flexfield-level properties, defining and managing descriptive flexfield contexts, and configuring global and context-sensitive segments.

Every descriptive flexfield is registered to include a *context segment*, which you may choose to use or not.

In general, configuring descriptive flexfields involves:

1. Creating segment labels for business intelligence enabled flexfields.
2. Configuring global segments by providing identity information, the initial default value, and the display properties.
3. Configuring the context segment by specifying the prompt, whether the context segment should be displayed, and whether a value is required.
4. Configuring contexts by specifying a context code, description, and name for each context value, and adding its context-sensitive segments, each of which is configured to include identifying information, the column assignment, the initial default value, and the display properties.

The following aspects are important in understanding descriptive flexfield management:

- Segments
- Adding segments to highlighted descriptive flexfields
- Usages
- Parameters
- Delimiters
- Initial Values
- Business Intelligence

### Segments

You can assign sequence order numbers to global segments and to context-sensitive segments in each context. Segment display is always in a fixed order. You can't enter a number for a segment if that number is already in use for a different segment.

**Value sets** are optional for context segments and follow specific guidelines:

- The value set that you specify for a context segment consists of a set of context codes.
- Each context code corresponds to a context that's appropriate for the descriptive flexfield.
• The value set must be independent or table-validated.
• If table-validated, the WHERE clause must not use the VALUESET.value_set_code or SEGMENT.segment_code bind variables.
• The value set must be of data type Character with the maximum length of values being stored no larger than the context’s column length.
• If you don’t specify a value set for a context segment, the valid values for that context segment are derived from the context codes. The definition of each context segment specifies the set of context-sensitive segments that can be presented when that context code is selected by the end user.
• For reasons of data integrity, you can’t delete an existing context. Instead, you can disable the associated context value in its own value set by setting its end date to a date in the past.
• You can configure the individual global segments and context-sensitive segments in a descriptive flexfield. These segment types are differentiated by their usage, but they’re configured on application pages that use most of the same properties.

**Adding Segments to Highlighted Descriptive Flexfields**

When you highlight flexfields on a run time page and use an Add Segment icon button to create a segment, the segment code, name, description, table column, and sequence number are set automatically. If you use an Add Segment icon button to configure descriptive flexfield segments, you can’t use an existing value set. Value sets are created automatically when you add the segments. You can enter the valid values, their descriptions, and the default value or specify the formatting constraints for the value set, such as minimum and maximum values.

Depending on display type, the value set you create using the Add Segment icon button is either an independent value set or a format-only value set. The following table shows which type of value set is created depending on the segment display component you select.

<table>
<thead>
<tr>
<th>Display Component</th>
<th>Value Set Created Using Add Segment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Box</td>
<td>Independent</td>
</tr>
<tr>
<td>Drop-down List</td>
<td>Independent</td>
</tr>
<tr>
<td>List of Values</td>
<td>Independent</td>
</tr>
<tr>
<td>Radio Button Group</td>
<td>Independent</td>
</tr>
<tr>
<td>Text Field With Search</td>
<td>Independent</td>
</tr>
<tr>
<td>Text box</td>
<td>Format Only</td>
</tr>
<tr>
<td>Text area</td>
<td>Format Only</td>
</tr>
<tr>
<td>Date/Time</td>
<td>Format Only</td>
</tr>
</tbody>
</table>

**Tip:** After you add a context value, refresh the page to see the new value.
Usages
Descriptive flexfield usages allow for the same definition to be applied to multiple entities or application tables, such as a USER table and a USER_HISTORY table. Descriptive flexfield tables define the placeholder entity where the flexfield segment values are stored once you have configured the descriptive flexfield. When you configure a flexfield, the configuration applies to all its usages.

Parameters
Some descriptive flexfields provide parameters, which are attributes of the same or related entity objects. Parameters are public arguments to a descriptive flexfield. Parameters provide outside values in descriptive flexfield validation. You use parameters to set the initial value or derivation value of an attribute from external reference data, such as a column value or a session variable, rather than from user input. Parameters can be referenced by the logic that derives the default segment value, and by table-validated value set WHERE clauses.

Delimiters
A segment delimiter or separator visually separates segment values when the flexfield is displayed as a string of concatenated segments.

Initial Values
The SQL statement defining an initial value must be a valid statement that returns only one row and a value of the correct type.

You can use two types of SQL statements:

- SQL statement with no binding. For example, select MIN(SALARY) from EMPLOYEES.
- SQL statement with bind variables. You can use these bind variables in the WHERE clause of the SQL statement.

  - :{SEGMENT.<segment_code>}: Identifies a segment in the same context.
  - :{PARAMETER.<parameter_code>}: Identifies a parameter.
  - :{CONTEXT.<context_code>;SEGMENT.<segment_code>}: Identifies a segment in a different context. The context must be in the same category or in an ancestor category, and it can’t be a multiple-row context.
  - :{VALUESET.<value_set_code>}: Identifies the closest prior segment in the same context that’s assigned to the specified value set.
  - :{FLEXFIELD.<internal_code>}: Identifies a flexfield.

Business Intelligence
Selecting a global, context, or context-sensitive segment's BI Enabled check box specifies that the segment is available for use in Oracle Business Intelligence.

When the flexfield is imported into Oracle Business Intelligence, the label you selected from the BI Label drop-down list equalizes the segment with segments in other contexts, and maps the segment to the logical object represented by the label.

Related Topics
- Validation Type Options for Value Sets
- Default Segment Values
- Considerations for Enabling Descriptive Flexfield Segments for Business Intelligence
- Flexfield Segment Properties
Descriptive Flexfields for Contracts

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

Defining Descriptive Flexfield Segments

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

Oracle Contracts includes these four descriptive flexfields:

<table>
<thead>
<tr>
<th>Name</th>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Contacts</td>
<td>ContractPartyContactFlexfield</td>
<td>Fields for contact information that appear on the Parties page.</td>
</tr>
<tr>
<td>Contract Headers</td>
<td>ContractHeaderFlexfield</td>
<td>Fields for contract information that appear on the Contracts page.</td>
</tr>
<tr>
<td>Contract Line</td>
<td>OKC_LINES_DESC_FLEX</td>
<td>Fields for line information that appear on the Lines page.</td>
</tr>
</tbody>
</table>

**Note:** Contracts doesn’t support supplier descriptive flexfields in contracts xml files.

Activating Descriptive Flexfields

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

**Related Topics**

- Overview of Flexfields

Example of Setting Up an Automated Contract Header Descriptive Flexfield

Learn how to create user-defined criteria based on contextual data from the contract type and associate the user-defined criteria with contract headers.
Scenario: Your company wants to be able to perform analysis on contracts created for various portions of your commercial and government customers.

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

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

Next, complete these tasks in the Contracts work area:

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

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value Set Code</td>
<td>OKC_CH_TYPE_DFF</td>
</tr>
<tr>
<td>Description</td>
<td>Contract Type Code DFF</td>
</tr>
<tr>
<td>Module</td>
<td>Enterprise Contracts</td>
</tr>
<tr>
<td>Validation Type</td>
<td>Table</td>
</tr>
<tr>
<td>Value Data Type</td>
<td>Character</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>FROM Clause</td>
<td>OKC_CONTRACT__TYPES_VL</td>
</tr>
</tbody>
</table>
Create Context Segments

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

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

2. On the Manage Contract Descriptive Flexfields page, in the Search section Name field, enter "Contract Headers" to search and find the Contract Headers descriptive flexfield.

3. In the Search Results section, select the Contract Headers row and click the Edit icon.

4. On the Edit Descriptive Flexfields page, enter these values in the Context Segment:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt</td>
<td>Gov_or_Commercial</td>
</tr>
<tr>
<td>Value Set</td>
<td>OKC_CH_TYPE_DFF</td>
</tr>
<tr>
<td>Default Type</td>
<td>Parameter</td>
</tr>
<tr>
<td>Default Value</td>
<td>ChrType</td>
</tr>
<tr>
<td>Display Type</td>
<td>Hidden</td>
</tr>
<tr>
<td>BI Enabled</td>
<td>enabled (checked)</td>
</tr>
</tbody>
</table>

5. Click Save. On the Edit Descriptive Flexfields page, click Manage Contexts.
6. On the Manage Contexts page Search Results tool bar, click the Create icon.

7. On the Create Context page create the context header by entering a Display Name of "Government" and clicking Save.

8. Optionally enter a description to help with identification in the future.

9. Create a Context Sensitive Segment by clicking Create and enter the values as shown in this table.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Level</td>
</tr>
<tr>
<td>Data Type</td>
<td>Character</td>
</tr>
<tr>
<td>Value Set</td>
<td>OKC_CH_TYPE_DFF</td>
</tr>
<tr>
<td>Default Type</td>
<td>Parameter</td>
</tr>
<tr>
<td>Default Value</td>
<td>ChrType</td>
</tr>
<tr>
<td>Prompt</td>
<td>Level</td>
</tr>
<tr>
<td>Display Type</td>
<td>Hidden</td>
</tr>
<tr>
<td>BI Enabled</td>
<td>enabled (checked)</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Budget</td>
</tr>
<tr>
<td>Data Type</td>
<td>Character</td>
</tr>
<tr>
<td>Value Set</td>
<td>OKC_CH_TYPE_DFF</td>
</tr>
<tr>
<td>Default Type</td>
<td>Parameter</td>
</tr>
<tr>
<td>Default Value</td>
<td>ChrType</td>
</tr>
<tr>
<td>Prompt</td>
<td>Budget</td>
</tr>
<tr>
<td>Display Type</td>
<td>Hidden</td>
</tr>
<tr>
<td>BI Enabled</td>
<td>enabled (checked)</td>
</tr>
</tbody>
</table>
13. Click **Save and Close** to return to the Edit Context: Government page.
14. Click **Save and Close** to return to the Manage Contexts page.
15. On the Manage Contexts page Search Results tool bar, click the **Create** icon.
16. On the Create Context page create the context header by entering a Display Name of "Commercial" and clicking **Save**. Optionally enter a description to help with identification in the future.
17. Create a Context Sensitive Segment by clicking **Create** and enter the values as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Industry</td>
</tr>
<tr>
<td>Data Type</td>
<td>Character</td>
</tr>
<tr>
<td>Value Set</td>
<td>OKC_CH_TYPE_DFF</td>
</tr>
<tr>
<td>Default Type</td>
<td>Parameter</td>
</tr>
<tr>
<td>Default Value</td>
<td>ChrType</td>
</tr>
<tr>
<td>Prompt</td>
<td>Industry</td>
</tr>
<tr>
<td>Display Type</td>
<td>Hidden</td>
</tr>
<tr>
<td>BI Enabled</td>
<td>enabled (checked)</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Customer Budget</td>
</tr>
<tr>
<td>Data Type</td>
<td>Character</td>
</tr>
<tr>
<td>Value Set</td>
<td>OKC_CH_TYPE_DFF</td>
</tr>
<tr>
<td>Default Type</td>
<td>Parameter</td>
</tr>
</tbody>
</table>
## Field | Value
---|---
Default Value | ChrType
Prompt | Customer Budget
Display Type | Hidden
BI Enabled | enabled (checked)

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

### Deploy the Modified Contracts Header Descriptive Flexfield

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

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Enterprise Contracts
   - Functional Area: Enterprise Contracts Base
   - Task: Manage Contract Descriptive Flexfields
2. On the Search Results tool bar on the Manage Contract Descriptive Flexfields page, click **Deploy Flexfield**.
3. Monitor the progress of the deployment and click **OK** when it completes.
4. Click **Done** to return to the Search page.
5. Click **Done** to return to the Setup and Maintenance Overview page.

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

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

1. Click the **Contracts Type** task.
2. On the Search Results tool bar, click **Create**.
3. Complete the Create Contract Type fields, as shown in this table:
### Create a Contract and Associate User-Defined Criteria

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Vision Operations</td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Vision Operations</td>
</tr>
<tr>
<td>Type</td>
<td>Commercial</td>
</tr>
<tr>
<td>Number</td>
<td>HA151101-1</td>
</tr>
<tr>
<td>Primary Party</td>
<td>General Associates</td>
</tr>
<tr>
<td>Intent</td>
<td>Sell</td>
</tr>
<tr>
<td>Description</td>
<td>Contract to demonstrate automated context sensitive descriptive flexfield.</td>
</tr>
</tbody>
</table>

4. Click **Save and Close** to return to the Manage Contract Types page.
5. Repeat steps 2 through 4 to create a contract type named Government with a Code of Government.
3. Click **Save and Close** on the Create Contract window to continue to the Edit Contracts page and accept any defaulted fields or enter as indicated in the table.
4. On the Edit Contracts page open the Additional Information section and verify that the correct context sensitive segments are displayed.
5. Click **Submit** to return to the Contracts work area page.

### Party Contact Roles

#### How You Set Up Party Contact Roles

Contact roles specify the roles that the contacts play in a contract. Your application provides predefined contact roles, but you can set up additional contact roles and use them with different parties in the contract.

This topic:

- Lists the predefined contact roles and explains how you can add your own.
- Explains how you associate the contact roles with party roles and contact role sources.

#### Predefined Contact Roles

The application provides the following predefined contact roles in the extensible lookup type **OKC_PARTY_CONTACT_ROLE**:

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUYER</td>
<td>Buyer</td>
</tr>
<tr>
<td>CONTRACT_ADMIN</td>
<td>Contract administrator</td>
</tr>
<tr>
<td>EMPLOYEE</td>
<td>Employee</td>
</tr>
<tr>
<td>PARTNER_CONTACT</td>
<td>Partner contact</td>
</tr>
<tr>
<td>PARTY_CONTACT</td>
<td>Customer contact</td>
</tr>
<tr>
<td>RESOURCE</td>
<td>Resource</td>
</tr>
<tr>
<td>RESOURCE_ORG</td>
<td>Resource organization</td>
</tr>
<tr>
<td>SALESPERSON</td>
<td>Salesperson</td>
</tr>
<tr>
<td>VENDOR_CONTACT</td>
<td>Supplier contact</td>
</tr>
</tbody>
</table>
You can add additional contact roles by selecting the **Manage Contract Contact Roles** task in the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

**Making Contact Roles Available for Use in Contracts**

For a contact role to be available for use in contracts, you must navigate to the Manage Contract Role Sources page by selecting the **Party Role and Contact Sources** task in the Contracts work area. Make the following entries for each of the party roles where you want the contact role to be available:

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

These contact sources are predefined in the application in the lookup type OKC_PARTY_CONTACT_SOURCE. You can’t edit the contract role sources or add additional ones.

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Meaning</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKX_PARTNER_CONTACT</td>
<td>Partner contact</td>
<td>Used exclusively for Oracle Fusion Partner Management contracts.</td>
</tr>
<tr>
<td>OKX_PCONTACT</td>
<td>Customer contact</td>
<td>Contacts of parties in the Trading Community Architecture where the party usage is External Legal Entity.</td>
</tr>
<tr>
<td>OKXRESOURCE</td>
<td>Resource</td>
<td>The internal resource.</td>
</tr>
<tr>
<td>OKXRESOURCE_ORG</td>
<td>Resource organization</td>
<td>The internal resource organization.</td>
</tr>
<tr>
<td>OKX_VCONTACT</td>
<td>Supplier contact</td>
<td>Contacts of parties in TCA where the party usage is Supplier.</td>
</tr>
</tbody>
</table>

The figure here, illustrates the setup required to make a contact role available in both customer and supplier contracts:

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

Contract Party Roles and Sources
How You Set Up Contract Party Roles

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

This topic:

- Lists the predefined party roles and explains how you can add your own.
- Explains how you make those party roles available for use in buy-intent and sell-intent contracts.

Managing Party Roles

As seen in the table, the application comes with the predefined party role names in the lookup type OKC_PARTY_ROLE. You can add additional lookup codes in the Setup and Maintenance work area by selecting the Manage Contract Party Roles task that's part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>CUSTOMER</td>
<td>Customer</td>
</tr>
<tr>
<td>INTERCOMPANY</td>
<td>Internal party</td>
</tr>
<tr>
<td>PARTNER</td>
<td>Partner</td>
</tr>
<tr>
<td>SUPPLIER</td>
<td>Supplier</td>
</tr>
<tr>
<td>THIRD_PARTY</td>
<td>Third party</td>
</tr>
</tbody>
</table>

Making Party Roles Available for Use in Contracts

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

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

As seen in the table, the application includes the following party sources which you can't modify:
Reusing the same party in buy and sell contracts:

You can use the same party role for both buy-intent and sell-intent contracts by associating the party role to different sources. This figure shows how you can reuse the role Customer in both buy and sell contracts. The customer for sales contracts is a TCA party (Customer). The customer for buy contracts is an internal business unit.

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

1. Select the Customer party role in the Manage Contract Role Sources page.
2. Set the Sell Intent Source to Customer and the Buy Intent Source to Business Unit.
3. To use the party role in a contract, you must also enter it in contract types where you want to use it as one of the primary contact parties or as a secondary party.

The setup in this figure has the following effect:

- When you create a sales contract, the Customer list of values lists external parties.
• When you create a purchasing contract, the Customer list of values lists business units.

**Contract Types**

A contract type is a category to which your contract belongs. The contract type you select decides the nature of the contract. For example, contract type determines if a contract is a project contract, a purchasing contract, or simple nondisclosure or employment agreement. A contract type also specifies what kind of information you can enter and what contract lines, parties, and party contacts are permitted.
The contract type also specifies if an electronic signature is required for contract acceptance and activation. If required, then you need to use the standard email format to notify the signers. In turn, the requirement for electronic signature means that you must designate contacts as signers on the contract. It also means that additional statuses and contract header actions are available.

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

Create contract types by selecting the Manage Contract Types task from the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area. You can also create contract types in the Contracts work area by selecting Contract Types in the Setup task heading. In each contract type you can:

- Specify document numbering sequences for the category of global, ledger, legal entity or business unit level to enable automatic contract numbering on contracts.
- Specify if the contract includes lines and what can be entered into them.
- Specify if external item masters can be referenced.
- Make it mandatory to manually capture customer acceptance after internal contract approval.
- If electronic acceptance is required, enable the contract for electronic signature integration.
- Specify what primary and secondary parties can be entered during contract creation.
- Specify if one or more contacts on the contract must be designated as signers for electronic signature acceptance.
- Specify the layout templates that will be used for printing the contract and the contract terms.
- Specify if and when the contract owner is to be notified before the contract expires.
- Specify the billing options for project contracts.
- Enable the capture of contract risks.
- Enable the ability to relate a contract to other contracts.
- Permit the authoring of contract terms using the Contract Terms Library.

### Common Contract Type Entries

This table describes the common contract type entries:

<table>
<thead>
<tr>
<th>Field or Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Class</strong></td>
<td>Indicates the category of the contract you're authoring. The class assigned to a contract type controls whether contract lines are allowed, and what types, on a contract.</td>
</tr>
<tr>
<td></td>
<td>• Enterprise Contract: Used for authoring both buy and sell contracts where you're buying or selling items and services now. Examples of contracts of this class include contract purchase agreements, project contracts, and repository contracts.</td>
</tr>
<tr>
<td></td>
<td>• Agreement: Used for authoring a sell intent contract to create a sales agreement.</td>
</tr>
<tr>
<td></td>
<td>• Purchase Agreement: Used for negotiating a future purchase of goods and services.</td>
</tr>
<tr>
<td></td>
<td>• Partner Agreement: Used exclusively for Oracle Fusion Partner Management.</td>
</tr>
<tr>
<td></td>
<td>You can't change the class after the contract type is created.</td>
</tr>
<tr>
<td><strong>Set</strong></td>
<td>Determines the data security for contracts of this type.</td>
</tr>
<tr>
<td>Field or Option</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Name</td>
<td>The name of the contract type that you select when authoring contracts.</td>
</tr>
<tr>
<td>Description</td>
<td>Description that you can see when managing contract types.</td>
</tr>
<tr>
<td>Allow lines</td>
<td>Selecting this option makes it possible for you to specify what line types can be added to the contract. You can't change the setting after the contract type is created.</td>
</tr>
<tr>
<td>Line Class</td>
<td>This applies only to the Enterprise Contract class and can be set to: Project, Service, Warranty. It controls the line types you can assign to a contract type. Each type of contract determines the line type that's associated with it. For example, you can only associate subscription and coverage line types to a contract type with the Line Class set to “Service”, and warranty line type to a contract type with the Line Class set to “Warranty”.</td>
</tr>
<tr>
<td>Use external item master</td>
<td>Selecting this option lets you reference items from an external item source master.</td>
</tr>
<tr>
<td><strong>Note:</strong> This option is available only for sell intent contracts if you selected the available Allow lines option.</td>
<td></td>
</tr>
<tr>
<td>Pricing Integration</td>
<td>Controls how sales agreements are priced and can be selected for contract types assigned to the class “Agreement”.</td>
</tr>
<tr>
<td><strong>Note:</strong> You can set the pricing integration to either Oracle Fusion Pricing or the pricing functionality available within Oracle CX Sales.</td>
<td></td>
</tr>
<tr>
<td>Allow pricing during billing</td>
<td>Allows pricing of subscription services during contract billing rather than contract authoring. This attribute can be set when the class is Enterprise Contracts and the Line Class is Service.</td>
</tr>
<tr>
<td>Enable Automatic Numbering</td>
<td>Enables automatic numbering of contract lines during contract authoring.</td>
</tr>
<tr>
<td>Requires Signature</td>
<td>Determines if customer signature is required for contract acceptance before this type of contract can become active. After approval, the contract is set to the Pending Signature status and requires you or the signer to enter the date of customer approval to make the contract active.</td>
</tr>
<tr>
<td>Enable Electronic Signature</td>
<td>Determines if designated signers must sign the contract before the contract becomes active. In this case, after approval the contract moves to the Pending Signature status and when the contract is sent for signature, the contract moves to the Sent for Signature status.</td>
</tr>
<tr>
<td>Contract Numbering Method, Contract Numbering Level, and Contract Sequence Category</td>
<td>Specifies if you must enter the contract number manually or if it's generated automatically based on the numbering level and the document sequence category that you specify.</td>
</tr>
<tr>
<td>Intent</td>
<td>Contracts can have either a sell intent (project contracts and partner agreements) or buy intent (purchase contracts).</td>
</tr>
<tr>
<td>Field or Option</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Buyer Role</strong></td>
<td>The party role of the recipient of the goods and services in the contract. For a sales or a project contract, this is the role you set up for the customer. For a purchasing contract, it's the role you set up for the business units in your organization. You can't edit the entry in this field after contract type creation. For sell-side contracts, the source of party role can be Customer, Internal Party or All Eligible Customers.</td>
</tr>
<tr>
<td><strong>Seller Role</strong></td>
<td>The party role of the party delivering the goods and services covered by the contract. For a sales or a project contract, this is the role you set up for one of the internal business units. For a purchasing contract, it's the role you set up for the supplier. You can't edit this field after contract type creation.</td>
</tr>
<tr>
<td><strong>Contract Owner Role</strong></td>
<td>The contact role assigned to the owner of the contract. Contract ownership is automatically assigned to the employee who creates the contract. The owner is automatically assigned the role you specify here.</td>
</tr>
<tr>
<td><strong>Buyer Contact Role</strong></td>
<td>The role you specify in this field specifies the role of the buyer that will be copied from the contract header to the contract fulfillment lines created for contract lines. This option is available for purchase contracts only:</td>
</tr>
<tr>
<td><strong>Re requester Contact Role</strong></td>
<td>In purchase contracts only: The role of employee who will be used as the creator of a requisition in Oracle Fusion Purchasing.</td>
</tr>
<tr>
<td><strong>Contract Layout Template</strong></td>
<td>The Oracle BI Publisher template that's used to print the entire contract. This option isn't available if you enabled Use external item master.</td>
</tr>
<tr>
<td><strong>Terms Layout Template</strong></td>
<td>The Oracle BI Publisher template used to print the contract terms. This option isn't available if you enabled Use external item master.</td>
</tr>
<tr>
<td><strong>Notify Before Expiration, Days to Expiration, and Contact Role to be Notified</strong></td>
<td>Selecting this option sends a notification before contract expiration to the individual with the role specified in the <strong>Contact Role to Be Notified</strong> the number of days specified the <strong>Days to Expiration</strong> field.</td>
</tr>
</tbody>
</table>

**Note:**
- These options aren't available if you enabled Use external item master.
- For the notifications to appear, the process "Send Contract Expiration Notifications" must be running.

**Line Types**

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

This table describes the possible line types:
<table>
<thead>
<tr>
<th>Line Type</th>
<th>Description</th>
<th>Line Type Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Free-form</td>
<td>Enables entry of items not tracked in inventory for purchasing. You can create master agreements in the purchasing application from lines of this type.</td>
<td>Free-form, buy agreement</td>
</tr>
<tr>
<td>Free-form</td>
<td>Enables entry of items not tracked in inventory for purchasing. You can create purchase orders in the purchasing application from lines of this type.</td>
<td>Free-form, buy</td>
</tr>
<tr>
<td>Item</td>
<td>Enables entry of inventory items for purchasing. You can create master agreements in the purchasing application from lines of this type.</td>
<td>Item, buy agreement</td>
</tr>
<tr>
<td>Item</td>
<td>Enables entry of inventory items for purchasing. You can create purchase orders in the purchasing application from lines of this type.</td>
<td>Item, buy</td>
</tr>
<tr>
<td>Free-form, project</td>
<td>Enables entry of items not tracked in inventory and displays project-related tabs and fields in a contract. You can associate and bill the line to a project in Oracle Fusion Projects.</td>
<td>Free-form, project-based, sell</td>
</tr>
<tr>
<td>Item, project</td>
<td>Enables entry of inventory items and displays project-related tabs and fields in a contract. You can associate and bill the line to a project in Oracle Fusion Projects.</td>
<td>Item, project-based, sell</td>
</tr>
<tr>
<td>Subscription</td>
<td>Enables the sale of subscription items that are tracked in inventory. These are the sale of recurrent items or services over a period of time.</td>
<td>Subscription, sell</td>
</tr>
<tr>
<td>Coverage</td>
<td>Enables the coverage of covered assets within a line in a service contract.</td>
<td>Coverage, sell</td>
</tr>
<tr>
<td>Warranty</td>
<td>Enables entry of items tracked in the inventory. It includes the sale of included and extended services in the contract.</td>
<td>Warranty</td>
</tr>
<tr>
<td>Product</td>
<td>Enables entry of a line representing the negotiated terms for future sale of an item.</td>
<td>Product, sell agreement, standalone</td>
</tr>
</tbody>
</table>
If you enable Use external item master when creating a contract type, you can create only the line types, as listed in this table:

<table>
<thead>
<tr>
<th>Line Type</th>
<th>Description</th>
<th>Line Type Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Enables entry of a line representing the negotiated terms for future sale of an item.</td>
<td>Product, sell agreement, integrated</td>
</tr>
<tr>
<td>Group</td>
<td>Enables entry of a line representing the negotiated terms for future sale of a product group.</td>
<td>Group, sell agreement</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intercompany</td>
<td>Enables project billing between internal organizations.</td>
</tr>
<tr>
<td>Interproject</td>
<td>Enables billing to other projects.</td>
</tr>
<tr>
<td>Enable Billing Controls and Billing Limit Type</td>
<td>Enables billing controls for each contract line, making it possible for you to specify a hard limit or a soft limit as the Billing Limit Type. A soft limit warns you if the billing limit is reached. A hard limit prevents you from billing above the limit.</td>
</tr>
</tbody>
</table>

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

| Note: For the notifications to appear, the process "Send Contract Fulfillment Notifications" must be running. |
For contracts with purchase order fulfillment lines, you can notify contacts with a specific role:

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

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

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

### Enabling Contract Terms Authoring and Other Advanced Options

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

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

The advanced authoring options are described in this table:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Terms Authoring</td>
<td>Displays the Contract Terms tab in contracts and enables contract terms authoring using contract terms templates from the Contract Terms Library. You must set up the content of the library from the Terms Library work area before you can take advantage of this feature.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> When this option is disabled, you can attach contract terms along with other supporting documents.</td>
</tr>
<tr>
<td>Enable Risk Management</td>
<td>Enables the entry of contract risks.</td>
</tr>
<tr>
<td></td>
<td>You must set up contract risks selecting the <strong>Manage Contracts Risks</strong> task in Oracle Fusion Functional Setup Manager.</td>
</tr>
<tr>
<td>Enable Related Contracts</td>
<td>Makes it possible for you to relate contracts to each other.</td>
</tr>
</tbody>
</table>

### Enabling Customer E-Signature

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

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

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

**Note:** For an explanation of how to set up e-signature, see the implementation guide topic Set Up Electronic Signature.

**Related Topics**
- Set Up Enterprise Contracts

---

**Contract Line Types**

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

**Line Types**

Line types are names you give to the contract lines.

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

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

**Line Type Sources**

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

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

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

<table>
<thead>
<tr>
<th>Line Type Source</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscription, sell</td>
<td>This line type applies to sell contracts and describes the sale of subscription items that are tracked in inventory.</td>
</tr>
<tr>
<td>Bundle, sell</td>
<td>This line type applies to sell contracts and describes the sale of bundled items tracked in inventory. Bundles can include other bundles or items.</td>
</tr>
</tbody>
</table>

**Guidelines for Setting Up Contract Types for Different Contracts**

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

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

- **Customer Contracts**
  
  Your organization is selling goods and services.

- **Supplier Contracts**
Your organization is purchasing goods and services.

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

- Are you selling or buying?
  
  For **Intent**, you select either **Sell** or **Buy**.

- Are you buying or selling now or negotiating a long-term contract with terms, such as pricing, that will govern a future purchase or sale?
  
  For **Class**, select **Enterprise Contract** if you’re buying or selling now. If you’re negotiating a future purchase or sale, select one of the agreement classes, for instance **Purchase Agreement** for a future purchase.

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

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

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

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

- **Partner Agreements**
  Contracts with partners.
- **Miscellaneous Contracts**
  Contracts such as nondisclosure agreements.
The following figure shows the decision flow when you either buy or sell.

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

Case 3: Customer Contracts with No Lines
These table describes how you can use the contract type settings to create simple sales contracts with no lines.

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple customer contract with no lines.</td>
<td>• Class: Enterprise Contract</td>
</tr>
</tbody>
</table>

ORACLE
### Purpose of Contract

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
</table>
| Sell items and services that are tracked and billed. | Class: Enterprise Contract  
   Intent: Sell  
   Allow Lines: Selected |
| | You can add two types of lines when the Class is set to Enterprise contract and the Line Class is set to Project:  
   - Free-form, project  
     For selling items not tracked in inventory.  
   - Item, project  
     For selling inventory items. |
| | You can add two types of lines when the Class is set to Enterprise Contract and the Line Class is set to Service:  
   - Coverage  
     For selling services provided on covered assets.  
   - Subscription  
     For selling recurrent items or services. |
| | You can add line Warranty when the Line Class is set to Warranty.  
   - For selling included and extended services. |
| | On the Advanced Options tab, leave the Contract Terms Authoring option not enabled for project line types. |

#### Note:
If you use Contract Terms Library, then there is no functional link between the contract terms and the Oracle Fusion Projects application. Therefore you can't monitor the adherence of a project to the terms in the contract.

### Case 4: Customer Contracts with Lines

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

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
</table>
| Sell items and services that are tracked and billed. | Class: Enterprise Contract  
   Intent: Sell  
   Allow Lines: Selected |
| | You can add two types of lines when the Class is set to Enterprise contract and the Line Class is set to Project:  
   - Free-form, project  
     For selling items not tracked in inventory.  
   - Item, project  
     For selling inventory items. |
| | You can add two types of lines when the Class is set to Enterprise Contract and the Line Class is set to Service:  
   - Coverage  
     For selling services provided on covered assets.  
   - Subscription  
     For selling recurrent items or services. |
| | You can add line Warranty when the Line Class is set to Warranty.  
   - For selling included and extended services. |
| | On the Advanced Options tab, leave the Contract Terms Authoring option not enabled for project line types. |

### Case 5: Contracts for Future Sales Without Lines

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

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
</table>
| Contract for future sales, without specifying the goods and services as contract lines. | Class: Agreement  
   Intent: Sell  
   Allow Lines: Leave not enabled |
Case 6: Contracts for Future Sales with Lines

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

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
</table>
| Create this type of contract when you know the detail of the goods or services you plan to sell to a specific customer in a period, but you don’t yet know the detail of your delivery schedules. You can use this type of contract, sometimes called a blanket sales agreement, a standing order, or a blanket order, to specify negotiated prices for your items before actually selling them. Use this type of contract when the customer has negotiated volume discounts and want to create releases against these negotiated volumes, or commits to specific items, quantities, or amounts. | • Class: Agreement  
• Intent: Sell  
• Allow Lines option: Selected  
• You can add the following types of lines:  
  o Group  
  o Product |

Supplier Contracts

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

Case 7: Supplier Contracts Without Lines

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

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
</table>
| Contract where you negotiate specific terms and conditions or a purchase without specifying the goods and services as contract lines. Contract authors can create a corresponding purchase agreement within Oracle Fusion Purchasing or another integrated purchasing application by adding a contract deliverable for the contract. You can use the deliverable to monitor the status of the agreement, but purchase orders are created and tracked in purchasing. | • Class: Enterprise Contract  
• Intent: Buy  
• Allow Lines option: Leave not enabled |
### Case 8: Supplier Contracts with Lines
This table describes the key contract type setups for supplier contracts for immediate purchase of specific items or services.

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
</table>
| Purchase goods and services. This type of contract makes it possible for contract authors to create purchase orders in Oracle Fusion Purchasing or another integrated purchasing application from individual contract lines by adding contract deliverables. You can monitor the status of each purchase order directly from the deliverables. | • **Class**: Enterprise Contract  
• **Intent**: Buy  
• **Allow Lines** option: Selected  
• You can add two types of lines:  
  ○ **Free-form**  
    For items not tracked by inventory.  
  ○ **Item**  
    For items tracked by inventory. |

### Case 9: Contracts for Future Purchases Without Lines
This table describes the key contract type setups for future-purchase contracts without lines.

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
</table>
| Contract for future purchases, without specifying the goods and services as contract lines. This type of contract makes it possible for contract authors to create a contract purchase agreement. Contract authors can create contract purchase agreements with suppliers to agree on specific terms and conditions without indicating the goods and services. | • **Class**: Agreement  
• **Intent**: Buy  
• **Allow Lines** option: Leave not enabled |

### Case 10: Contracts for Future Purchases with Lines
This table describes the key contract type setups for future-purchase contracts with lines.

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
</table>
| Create this type of contract when you know the detail of the goods or services you plan to buy from a specific supplier in a period, but you don't yet know the detail of your delivery schedules. You can use this type of contract, sometimes called a blanket purchase agreement, a standing order, or a blanket order, | • **Class**: Agreement  
• **Intent**: Buy  
• **Allow Lines** option: Selected  
• You can add the following types of lines:  
  ○ **Free-form**  
    To purchase items not tracked by inventory.  
  ○ **Item** |
Purpose of Contract | Contract Type Settings
--- | ---
to specify negotiated prices for your items before actually purchasing them. Use this type of contract when you have negotiated volume discounts and want to create releases against these negotiated volumes, or when you commit to specific items, quantities, or amounts. You can issue a blanket release against a blanket purchase agreement to place the actual order (as long as the release is within the blanket agreement effectivity dates). Contract authors can automatically create corresponding agreements in Oracle Fusion Purchasing or other integrated purchasing applications by adding contract deliverables and monitor the execution of those agreements from the deliverables. | To purchase items tracked by inventory.

**Special Contracts**

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

**Case 1: Partner Agreements**

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

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner enrollment agreement</td>
<td>Oracle Fusion Partner Relationship Management uses contract types only for applying contract terms templates with boilerplate contracts, so most of the contract type entries don't apply or have no effect.</td>
</tr>
<tr>
<td></td>
<td>• Class: Partner Agreement</td>
</tr>
<tr>
<td></td>
<td>• Intent: Sell</td>
</tr>
<tr>
<td></td>
<td>• You must enable contract terms authoring by selecting the Enable Terms Authoring option.</td>
</tr>
</tbody>
</table>

**Case 2: Miscellaneous Contracts**

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

<table>
<thead>
<tr>
<th>Purpose of Contract</th>
<th>Contract Type Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nondisclosure agreement</td>
<td>• Class: Enterprise Contract</td>
</tr>
<tr>
<td></td>
<td>• Intent: Sell</td>
</tr>
<tr>
<td></td>
<td>• Allow Lines option: Leave not enabled</td>
</tr>
</tbody>
</table>
Contract Types FAQ

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

Do I have to create contract types to author contract terms on purchase orders or sourcing documents such as RFQs?
To author contract terms on individual purchase orders or other Oracle Fusion Sourcing documents, such as RFQs, you aren't required to set up contract types. This is because no enterprise contracts are created. The documents themselves are the contracts. All setups to enable contract terms templates and contract terms authoring are done from within Oracle Fusion Purchasing and Sourcing applications.

Contract Risks

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

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

Note: Risk names must be unique.

Related Topics

• How can I specify contract risk

Levels of Editing Privileges for Contract Authoring

The level of editing a contract author can perform on contract terms depends on the privileges granted to them during security setup. This topic describes the different levels of editing privileges that system administrators can assign a contract author from the basic to the most advanced.

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

<table>
<thead>
<tr>
<th>Level</th>
<th>Privilege</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Author Standard Contract Terms and Conditions</td>
<td>Restricts contract authoring to applying contract terms templates, validating the contract, and running Contract Expert when required. It includes the ability to change the template or attach the contract terms as a file.</td>
</tr>
<tr>
<td>2</td>
<td>Author Additional Standard Contract Terms and Conditions</td>
<td>Adds the ability to add, delete, and move the standard clauses and sections after the contract terms template is applied. This includes the ability to select alternate clauses.</td>
</tr>
<tr>
<td>3</td>
<td>Author Nonstandard Contract Terms and Conditions</td>
<td>Allows authoring of nonstandard terms and conditions in the contract. This includes editing standard clauses, creating nonstandard clauses, removing contract terms, and importing edits made offline in Microsoft Word.</td>
</tr>
<tr>
<td>4</td>
<td>Override Contract Terms and Conditions Controls</td>
<td>Adds the ability to edit protected clauses and delete mandatory clauses and sections in contract terms.</td>
</tr>
</tbody>
</table>

**Related Topics**
- How can I make a clause mandatory in a contract

**Set Up Contract Text Search**

If you have implemented the Oracle Enterprise Crawl and Search Framework, you can enable text searches of contracts and their attachments from within the contracts application by running the following indexing schedules:

<table>
<thead>
<tr>
<th>Indexing Schedule Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Contracts</td>
<td>Indexes and enables text search on contracts created in Oracle Contracts.</td>
</tr>
<tr>
<td>Purchasing Contracts</td>
<td>Indexes and enables text search in the POs and agreements within Oracle Purchasing.</td>
</tr>
<tr>
<td>Sourcing Contracts</td>
<td>Indexes and enables text search in the RFIs and other negotiation documents in Oracle Sourcing.</td>
</tr>
<tr>
<td>Contract Documents</td>
<td>Indexes and enables text search in documents attached to Oracle Contracts.</td>
</tr>
</tbody>
</table>
Running Indexing Schedules

The management of indexing schedules is fully described in the Managing Search with Oracle Enterprise Crawl and Search Framework chapter in the Oracle Fusion Applications Administrator's Guide.

- Deploying and starting indexing schedules.
  See: Managing Index Schedules

Contract Relationships

Contract Relationships

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

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

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

These rules apply to contract relationships:

- Contract relationships are one-sided. If contract A is related to contract B, then contract B isn't automatically related to contract A unless it’s explicitly added.
- You can create or update relationships only for valid contracts.

Custom Validation of Contracts

Define User-Specific Validation for Contracts

In addition to the standard validation process that's done for all contracts, you can define your own user-specific validation for your contracts.
**Note:** This custom validation package is for on-premises installations.

To define user-specific validation for your contracts:

1. Create the user-specific packages only in the fusion_dynamic schema.
2. To prevent the object-does-not-exist compilation error, identify all objects to be queried, and grant access to those objects before creating the package. For example, the grants could be this way:
   - GRANT SELECT ON okc_validate_contract_t TO fusion_dynamic;
   - GRANT INSERT ON okc_validate_contract_t TO fusion_dynamic;
   - GRANT SELECT ON okc_k_headers_all_b TO fusion_dynamic;
3. Sign in to the application as an administrator, and using the API `ADM_DDL.DO_DDL(l_stmt)`, create the package this way:
   - Package: OKC_CUSTOM_VALIDATION_DYD
   - Procedure: CUSTOM_VALIDATIONS
   - Parameters: IN
   - p_contract_id: Contract Id of the contract i.e okc_k_headers_all_b.id
   - p_major_version: Version of the contract i.e okc_k_headers_all_b.major_version
   - p_sequence_id: Use this sequence_id to insert errors or warning into okc_validate_contract_t
4. Define user-specific validation messages prefixed with OKC_CUSTOM_ in FND_MESSAGES in the product OKC.
5. Add validation logic to the procedure OKC_CUSTOM_VALIDATION_DYD.CUSTOM_VALIDATIONS.

---

**How can I define user-specific validation for my contracts?**

This code is an example of defining user-specific validation for contracts as explained in the topic Defining User-Specific Validation for Contracts: Procedure.

**Package Header**

```
DECLARE
  l_stmt clob;
BEGIN
  l_stmt := 'CREATE OR REPLACE PACKAGE OKC_CUSTOM_VALIDATION_DYD AUTHID CURRENT_USER AS /*PROCEDURE CUSTOM_VALIDATIONS ( p_contract_id IN NUMBER, p_major_version IN NUMBER, p_sequence_id IN NUMBER ) */ OKC_CUSTOM_VALIDATION_DYD ; /* END OKC_CUSTOM_VALIDATION_DYD */
  ADM_DDL.DO_DDL(l_stmt);
END;
```

**Package Body**

```
DECLARE
  l_stmt clob;
BEGIN
  l_stmt := 'CREATE OR REPLACE PACKAGE body OKC_CUSTOM_VALIDATION_DYD AS
  PROCEDURE CUSTOM_VALIDATIONS(p_contract_id IN NUMBER, p_major_version IN NUMBER, p_sequence_id IN NUMBER ) IS
    CURSOR csr_test_val IS
      SELECT h.id , h.major_version, h.contract_number, h.contract_number_modifier FROM fusion.okc_k_headers_all_b h
      WHERE h.id = p_contract_id AND h.major_version = p_major_version AND 1 = 1 ;
  BEGIN
    FOR rec_test_val IN csr_test_val
      LOOP
        INSERT INTO fusion.okc_validate_contract_t
          ( SEQUENCE_ID,
            DOCUMENT_TYPE,
        ```
Oracle CX Sales
Implementing Enterprise Contracts

Contracts Common Configurations

```
DOCUMENT_ID,
DOCUMENT_VERSION,
OBJECT_GROUP,
OBJECT_TYPE,
OBJECT_ID,
OBJECT_NAME,
CONTRACT_NUMBER,
CONTRACT_NUMBER_MODIFIER,
ERROR_SEVERITY,
QA_CODE,
MESSAGE_NAME,
MESSAGE_TOKEN1,
MESSAGE_VALUE1,
MESSAGE_TOKEN2,
MESSAGE_VALUE2,
MESSAGE_TOKEN3,
MESSAGE_VALUE3,
MESSAGE_TOKEN4,
MESSAGE_VALUE4,
MESSAGE_TOKEN5,
MESSAGE_VALUE5,
PROBLEM_SHORT_DESC,
PROBLEM_DETAILS,
PROBLEM_DETAILS_SHORT,
SUGGESTION,
REFERENCE_COLUMN1,
REFERENCE_COLUMN2,
REFERENCE_COLUMN3,
REFERENCE_COLUMN4,
REFERENCE_COLUMN5,
OBJECT_VERSION_NUMBER,
CREATION_DATE,
CREATED_BY,
LAST_UPDATED_BY,
LAST_UPDATE_DATE,
LAST_UPDATE_LOGIN
)
VALUES
(
  p_sequence_id, --SEQUENCE_ID,
  ''ECM'', --DOCUMENT_TYPE,
  rec_test_val.id, --DOCUMENT_ID,
  rec_test_val.major_version, --DOCUMENT_VERSION,
  ''CONTRACT'', --OBJECT_GROUP,
  ''HEADER'', --OBJECT_TYPE,
  rec_test_val.id, --OBJECT_ID,
  rec_test_val.contract_number , --OBJECT_NAME,
  rec_test_val.contract_number , --CONTRACT_NUMBER,
  rec_test_val.contract_number_modifier , --CONTRACT_NUMBER_MODIFIER,
  ''E'', -- ERROR_SEVERITY,
  ''CHECK_CUSTOM_VALIDATION1'', -- QA_CODE,
  ''OKCUSTOMTESTVAL1'', -- MESSAGE_NAME DEFINED BY CUSTOMER,
  NULL, -- MESSAGE_TOKEN1,
  NULL, -- MESSAGE_VALUE1,
  NULL, -- MESSAGE_TOKEN2,
  NULL, -- MESSAGE_VALUE2,
  NULL, -- MESSAGE_TOKEN3,
  NULL, -- MESSAGE_VALUE3,
  NULL, -- MESSAGE_TOKEN4,
  NULL, -- MESSAGE_VALUE4,
  NULL, -- MESSAGE_TOKEN5,
  NULL, -- MESSAGE_VALUE5,
  NULL, -- PROBLEM_SHORT_DESC,
  NULL, -- PROBLEM_DETAILS,
  NULL, -- PROBLEM_DETAILS_SHORT,
  NULL, -- SUGGESTION,
```
Contract Approvals

Predefined Approval Flows for Oracle Contracts

In Oracle Contracts, you can configure approval rules for the approval of contracts, clauses, and terms templates. To do this, you use the Approvals Management Extensions of the Oracle Service-Oriented Architecture (SOA) suite and Oracle Business Process Management Suite (BPM). BPM provides the interface to administer the approval rules. BPM Worklist administrators can access the approval rules in the BPM Worklist. Oracle Contracts provides predefined approval flows or approval tasks and predefined rule sets for them. You can use the BPM Worklist to configure the rules for a predefined approval task rule set and configure the approval group for each task. Using Oracle JDeveloper, you can edit this flow and create additional approval flows for contracts with different approval requirements.

Oracle Contracts has three predefined approval flows or approval tasks each with a predefined rule set for which you can configure the rules and approval groups based on your approval requirements, as seen in the following table:

<table>
<thead>
<tr>
<th>Approval Task</th>
<th>Rule Set</th>
<th>Approval Group</th>
<th>Default Approver in Group</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>ContractsApproval (1.0)</td>
<td>ContractApprovalStage :</td>
<td>ContractApprovalGroup</td>
<td>customer_contract_manager_</td>
<td>To approve contract attributes or contract deviation attributes before using the contract</td>
</tr>
<tr>
<td></td>
<td>ContractsApproval</td>
<td></td>
<td>vision_operations</td>
<td></td>
</tr>
<tr>
<td>ContractClauseApproval (1.0)</td>
<td>ClauseApprovalStage :</td>
<td>ClauseApprovalGroup</td>
<td>Business Practices</td>
<td>To approve clause or term attributes before adding them to the Terms Library</td>
</tr>
<tr>
<td></td>
<td>ContractClauseApproval</td>
<td></td>
<td>Director Operations</td>
<td></td>
</tr>
</tbody>
</table>
As a contract administrator, you can see an Administration link displayed in the BPM Worklist. To create new rules or modify existing rules, click the Administration link, click the Task Configuration tab, select the required task in the side panel, click the Data Driven tab, and select the appropriate rule set. To create or modify approval groups, click the Administration link, click the Approval Groups tab, and select the required approval group.

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

<table>
<thead>
<tr>
<th>Approval Task</th>
<th>Rule Set</th>
<th>Approval Group</th>
<th>Default Approver in Group</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>TemplateApprovalHumanTask (1.0)</td>
<td>TermsTemplateApprovalStage</td>
<td>TemplateApprovalGroup</td>
<td>Business Practices Director Operations</td>
<td>To approve terms template attributes before using the terms template for a contract</td>
</tr>
</tbody>
</table>
The following figure shows how each approval rule is applied in turn to the clause, terms template or contract, and how at least one must be satisfied for the clause, terms template or contract to be approved and activated.

To configure approval rules for Contracts, you can access approval tasks from the list of Tasks to be Configured using the following methods:

- Click the Setup and Maintenance link in the navigator and search for Approval Management tasks. Expand Define Approval Management for Customer Relationship Management and click on the Go to Task button in Manage Task Configurations for Customer Relationship Management.
- Click on the Administration link displayed in the BPM Worklist application and then click the Task Configuration tab.

The approval process is described as follows.

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

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

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

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

- You can reject the contract, clause, or terms template.
  - By default, the approval process stops when the contract, clause, or terms template is rejected and the contract, clause, or terms template returns to draft status for further editing and resubmission.
  - By default, the next approver or approval group of the next applicable approval rule is notified when you approve the contract, clause, or terms template.
  - You can also request more information from the other approver, the person who submits for approval, or both. Such requests don’t affect control of the approval process, but the person from whom information is requested receives a worklist notification.

- You can’t edit a contract in pending approval status. You can enter comments in the Notification Task Details page and reject it, so that, the approval requester can edit it.
- You can perform ad hoc insertion of approvers.
- You can delegate your approval responsibilities to other approvers.
- You can claim the approval and respond. By default, the approval process stops at the first response and the response of the first approver that responds becomes the response for the approval group.

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

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

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

Approval of Contract Based on Estimated Contract Amount

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

The predefined rules include the following:

- Approval for a contract with no estimated amount
- Approval for contracts with an estimated amount that’s more than 30,000
- Approval for contracts with an estimated amount that’s equal to or less than 30,000

You can change the predefined rules, delete the rules, or add additional rules as needed, as seen in the following table:
<table>
<thead>
<tr>
<th>Rule</th>
<th>Field</th>
<th>Predefined Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimate_Amount_Rule1</td>
<td>Condition</td>
<td>Task. payload. getContractHeaderResponse. result. estimatedAmount</td>
<td>Applicable for a total estimated contract amount of 30,000 or less.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule1</td>
<td>List Builder</td>
<td>Resource</td>
<td>The name of the approver</td>
</tr>
<tr>
<td>Estimate_Amount_Rule1</td>
<td>Response Type</td>
<td>Required</td>
<td>The approval notification requires a response.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule1</td>
<td>Participants - Users</td>
<td>customer_contract_manager_vision_operations</td>
<td>The name or ID of the contract manager.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule1</td>
<td>Participants - Groups</td>
<td>null</td>
<td>The group ID of the contract manager isn't required.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule1</td>
<td>Participants - Apps Role</td>
<td>null</td>
<td>The role of the contract manager in the application isn't required.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule2</td>
<td>Condition</td>
<td>Task. payload. getContractHeaderResponse. result. estimatedAmount</td>
<td>Applicable for a total estimated contract amount of more than 30,000.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule2</td>
<td>List Builder</td>
<td>Approval Group</td>
<td>Configurable list of approvers.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule2</td>
<td>Response Type</td>
<td>Required</td>
<td>The approval notification requires a response.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule2</td>
<td>Approval Group</td>
<td>ContractApprovalGroup</td>
<td>The group of approvers configured to approve the contract.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule2</td>
<td>Allow empty groups</td>
<td>True</td>
<td>The group may have only the one default approver of contract manager.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule3</td>
<td>Condition</td>
<td>Task. payload. getContractHeaderResponse. result. estimatedAmount</td>
<td>Applicable for a total estimated contract amount of null.</td>
</tr>
<tr>
<td>Estimate_Amount_Rule3</td>
<td>List Builder</td>
<td>Resource</td>
<td>The name of the approver</td>
</tr>
<tr>
<td>Estimate_Amount_Rule3</td>
<td>Response Type</td>
<td>Required</td>
<td>The approval notification requires a response.</td>
</tr>
</tbody>
</table>
### Approval by Clause Approval Group Based on Contract Intent

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

This rule set has two predefined rules:

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

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

<table>
<thead>
<tr>
<th>Rule</th>
<th>Field</th>
<th>Predefined Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SellIntentClauseApproval</td>
<td>Condition</td>
<td>Task. payload. getContractClauseApprovalRuleAttributesResponse. result. articleIntent</td>
<td>Applicable for approval of a new clause of intent sell.</td>
</tr>
<tr>
<td>SellIntentClauseApproval</td>
<td>List Builder</td>
<td>Approval Group</td>
<td>Configurable list of approvers.</td>
</tr>
<tr>
<td>SellIntentClauseApproval</td>
<td>Response Type</td>
<td>Required</td>
<td>The approval notification requires a response.</td>
</tr>
<tr>
<td>SellIntentClauseApproval</td>
<td>Approval Group</td>
<td>ClauseApprovalGroup</td>
<td>The group of approvers configured to approve the new clause.</td>
</tr>
<tr>
<td>SellIntentClauseApproval</td>
<td>Allow empty groups</td>
<td>False</td>
<td>The group must have one or more approvers.</td>
</tr>
<tr>
<td>BuyIntentClauseApproval</td>
<td>Condition</td>
<td>Task. payload. getContractClauseApprovalRuleAttributesResponse. result. articleIntent</td>
<td>Applicable for approval of a new clause of intent buy.</td>
</tr>
<tr>
<td>BuyIntentClauseApproval</td>
<td>List Builder</td>
<td>Approval Group</td>
<td>Configurable list of approvers.</td>
</tr>
</tbody>
</table>
Approval by Template Approval Group Based on Contract Intent

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

This rule set has two predefined rules:

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

You can change the predefined rules, delete the rules, or add additional rules as needed. The following table describes these situations:

<table>
<thead>
<tr>
<th>Rule</th>
<th>Field</th>
<th>Predefined Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule_1</td>
<td>Condition</td>
<td>Task.payload.</td>
<td>Applicable for approval of a new terms template of intent buy.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>getTermsTemplateResponse.result.intent</td>
<td></td>
</tr>
<tr>
<td>Rule_1</td>
<td>List Builder</td>
<td>Approval Group</td>
<td>Configurable list of approvers.</td>
</tr>
<tr>
<td>Rule_1</td>
<td>Response Type</td>
<td>Required</td>
<td>The approval notification requires a response.</td>
</tr>
<tr>
<td>Rule_1</td>
<td>Approval Group</td>
<td>TemplateApprovalGroup</td>
<td>The group of approvers configured to approve the terms template.</td>
</tr>
<tr>
<td>Rule_1</td>
<td>Allow Empty Groups</td>
<td>False</td>
<td>The group must have one or more approvers.</td>
</tr>
<tr>
<td>Rule_2</td>
<td>Condition</td>
<td>Task.payload.</td>
<td>Applicable for approval of a new terms template of intent sell.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>getTermsTemplateResponse.result.intent</td>
<td></td>
</tr>
</tbody>
</table>
### Approval Rules Configurations

Approval rules are rules that you configure in Approval Management Extensions for the approval of contracts, contract clauses, and terms templates. Oracle Fusion Enterprise Contracts provides three predefined human tasks for contract approval, clause approval, and terms template approval. The contract approval human task has eight rule sets that are connected in a combination of series and parallel stages. The clause approval and terms template approval human tasks each provide one rule set. By using the BPM Worklist, you can define new approval rules or modify existing ones in AMX. To manage approval rules, you must be a BPM Worklist administrator.

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

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

If you're authorized to manage approval rules, click the Administration link in the BPM Worklist. To define new approval rules or modify existing ones, click the Task Configuration tab and select the appropriate approval task for Contracts from the panel beneath Tasks to be configured. Then navigate to the Rules tab. The participant tree displays all the stages of approval and the rule sets for each stage. Each rule set contains one or more approval rules. Each approval rule has an approval condition and a list of approvers. The list of approvers derived for each rule set is called a Participant. To modify rules, first click the Edit icon and then click the Participant. You can now modify or add rules. To generate the list of approvers, each rule requires a list builder to be associated with it.

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

### Modifying Existing Approval Rules

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

### Defining New Approval Rules

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

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

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

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

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

<table>
<thead>
<tr>
<th>View Object in Condition Browser</th>
<th>View Object Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PayloadType</td>
<td>getContractHeader</td>
<td>Contract identifier</td>
</tr>
<tr>
<td>PayloadType</td>
<td>getContractHeaderResponse</td>
<td>All contract header attributes listed under the Result sub-folder such as estimated contract amount, contract type, freight terms, payment type, tax, and risk code</td>
</tr>
<tr>
<td>PayloadType</td>
<td>getDeviationResponse</td>
<td>Deviation attributes listed directly under Payload Type such as invalid, nonstandard, and missing clauses, policy deviation, party, and submitter</td>
</tr>
<tr>
<td>PayloadType</td>
<td>articleVersionId</td>
<td>Clause version</td>
</tr>
<tr>
<td>PayloadType</td>
<td>clauseTitle</td>
<td>Clause title or name</td>
</tr>
<tr>
<td>PayloadType</td>
<td>getContractsClauseApprovalRuleAttributes</td>
<td>All contract clause attributes such as intent, clause type, organization, and display name</td>
</tr>
<tr>
<td>PayloadType</td>
<td>getTermsTemplate</td>
<td>Terms template identifier</td>
</tr>
<tr>
<td>PayloadType</td>
<td>getTermsTemplateResponse</td>
<td>All terms template attributes such as intent, layout name, organization, terms</td>
</tr>
</tbody>
</table>
Each approval notification generated from an approval rule must have a response type of Required or FYI. You specify the applicable response type in the THEN region on the Data driven configuration page of the BPM Worklist. If the approver should take an action in response to the notification, click Required. If the approval notification is designed as information only, click FYI.

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

<table>
<thead>
<tr>
<th>List Builder Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisory</td>
<td>Ascends the primary supervisory hierarchy, starting at the contract submitter or at a given approver, and generates the approval chain.</td>
</tr>
<tr>
<td>Job Level</td>
<td>Ascends the supervisory hierarchy, starting at a given approver and continuing until an approver with the appropriate job level is found.</td>
</tr>
<tr>
<td>Position</td>
<td>Ascends the position hierarchy, starting at a given approver’s position and continuing until an approver with the appropriate position is found.</td>
</tr>
<tr>
<td>Resource</td>
<td>A list of approvers. You can choose a user name or a function that returns a set of approvers.</td>
</tr>
<tr>
<td>Approval Group</td>
<td>Group of approvers. You can create approver groups consisting of a list of users for use in the rule sets.</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>List Builder Type</th>
<th>Field</th>
<th>Description</th>
<th>Values to Select and Sample Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource</td>
<td>Participants</td>
<td>Participants can be users, groups, or application roles. For users, use a static user name or a function to retrieve a user name.</td>
<td>For example, use customer_contract_manager_vision_operations as the user.</td>
</tr>
<tr>
<td>Approval Group</td>
<td>Approval Group</td>
<td>Enter the approval group name. To select an approval group as a list builder, you can use ContractApprovalGroup.</td>
<td>For example, use ContractApprovalGroup.</td>
</tr>
</tbody>
</table>
Creating Deviation-Based Rules and Rerouting Approval

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

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

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

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

Understanding and Applying Properties of Rules and Rule Sets

These are the properties of rules and rule sets that you need to understand and apply.

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

  **Caution:** Don’t deactivate rule sets you’re using for contract approvals.

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

Related Topics
- Overview of Approval Management
- How Reviewing Contract Deviations Work

Preconfigured Data and Processes
What are Profile Options, Lookups, and Scheduled Processes?

Profile options, lookup types, and scheduled processes let you configure application behavior and refresh data. Briefly, here’s what profile options, lookup types, and scheduled processes do:

- Profile options: Let you configure the application behavior.
- Lookup types: Provide the lists of values in applications. Many lookup types can be modified to fit your business needs.
- Scheduled processes: Refresh data in the applications.

Get additional information on profile options, lookup types, and scheduled processes in this chapter and in the related topics.

Related Topics
- How can I access predefined profile options
- How can I access predefined lookups

Profile Options

Overview of Profile Options

Profile options let you configure and control application data centrally. Administrators and setup users manage profile options in the Setup and Maintenance work area.

Profile options store various kinds of information. This table lists some examples:

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Profile Option Setting Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>User preferences</td>
<td>Set preferences at the user level</td>
</tr>
<tr>
<td>Installation information</td>
<td>Identify the location of a portal</td>
</tr>
<tr>
<td>Configuration choices</td>
<td>Change UI skins and actions</td>
</tr>
<tr>
<td>Processing options</td>
<td>Determine how much information to log</td>
</tr>
</tbody>
</table>

Profile Option Hierarchy Levels

Profile options can be set at different levels, such as site level or user level. The application gives precedence to certain levels over others, when multiple levels are set. The levels that are allowed to be set are preconfigured with the application.

In the predefined profile option levels, the hierarchy levels and their precedence are:

1. User: This level affects only the current user. It has the highest precedence, over Site and Product.
2. Product: This level affects a product or product family. The application gives it priority over Site level. However, if the user level is set, the user level takes precedence.
3. Site: This level affects all applications for a given implementation. The application gives it the lowest precedence when other levels are set. If no other levels are set, however, it’s the highest level.

As a best practice, set site-level profile option values before specifying values at any other level (where available). The profile option values specified at the site-level work as the default until profile option values are specified at the other levels.

This table shows an example of the predefined profile option hierarchy levels and their priorities.

<table>
<thead>
<tr>
<th>Level</th>
<th>Priority</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site</td>
<td>Lowest</td>
<td>Currency for a site is set to Euros.</td>
</tr>
<tr>
<td>Product</td>
<td>Supersedes Site</td>
<td>Currency for the product or set of products is set to UK pound sterling.</td>
</tr>
<tr>
<td>User</td>
<td>Highest, supersedes Product</td>
<td>Currency for a user is set to US dollars.</td>
</tr>
</tbody>
</table>

You can find additional information about profile options in the related topics.

**Related Topics**

- How can I access predefined profile options

**Set Profile Option Values**

Each profile option contains specific values that determine how it affects the application. You can add or modify the values for each profile option. Select or enter the value for one or more of the available levels (site, product, and user) so that each setting takes effect at the intended level.

**Setting the Profile Value**

1. In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task.
2. On the Manage Administrator Profile Values page, search for and select the profile option.
3. In the Profile Values section, click Add. A new row is added for you to specify the following conditions:
   - Profile Level: Specify the level at which the profile value is to be set. If the profile value applies to the entire site, select Site.
   - Product Name: If you select Product as the profile level, select a product and specify the associated profile value.
   - User Name: If you select User as the profile level, select the user name and specify the associated profile value.
   - Profile Value: Select or enter the value corresponding to the selected profile level.

   **Note:** For an existing entry, you can modify only the profile value.

4. Repeat step 3 to add more rows and set the profile values.
5. Click Save and Close.

**Note:** Changes in the profile values take effect for a user on the next sign in.
Create and Edit Profile Options

Use profile options to manage user preferences and control the general function of applications. For example, you can control user preferences involving language, date, time, currency, and other similar general settings.

You can create a profile option and also determine the **level** at which that profile option takes effect. You can also define the **profile values** for the profile option. The profile values appear on the Manage Administrator Profile Values page when you select the profile option.

Creating a Profile Option

1. In the Setup and Maintenance work area, go to the **Manage Profile Options** task.
2. On the page, click **Actions > New**.
3. On the Create Profile Option page, fill all the fields with relevant details with specific attention to the following:
   - Use the SQL Validation field to provide an SQL statement that displays the permissible profile values to be used. Using an SQL statement, you can select the values from another table and display them as a list of values.
     For example, to display the values **Yes** and **No** from a lookup table, you can use the following SQL statement:
     ```sql
     select MEANING, LOOKUP_CODE from FND_LOOKUPS where LOOKUP_TYPE='YES_NO'
     ```
     As a result, on the **Manage Administrator Profile Values** page, the profile values Yes and No are available for selection for that profile option.
   - You can specify a date range to keep the profile option active during that period. Beyond the specified duration, the profile option automatically becomes inactive. If you no longer require the profile option, you must manually delete it from the **Manage Profile Options** page.
4. Click **Save and Close**.
5. On the Manage Profile Options page, search for the newly created profile option and from the results, select it.
6. In the Profile Option Levels section, do the following:
   a. In **Enabled**, select the levels at which you want to enable the profile option.
      **Note:** You can enable a profile option at multiple levels, but a higher-level profile value overrides a lower-level value. Therefore, enable them only at the required levels.
   b. In **Updatable**, select the profile level at which you want implementors to have update privileges. Leave the check box deselected if you don't want the implementors to modify the profile values (they appear in read-only mode).
7. Click **Save and Close**.

To edit a profile option that you created, search for it and edit the necessary details.

**Note:** While creating and editing profile options and profile categories, you can translate the details to the preferred languages without changing the language session of the application. To specify the translations in all the enabled language rows, use the Translation Editor option. Once the updates are made, users can view the translated text for the specific details.

**Related Topics**

- Enter or Edit Translated Text
Hierarchy in Profile Levels
The hierarchy in profile levels determines the context for making a profile option effective.
You can enable a profile option at the following levels:

- Site level (lowest): The entire site of deployment
- User level (highest): A specific user

After you create or edit a profile option on the Manage Profile Options page, you must enable it. You can enable it at multiple levels. The setting at the highest enabled level takes precedence over the lower levels. User level is the highest in the hierarchy and always takes precedence over the settings at the site level.

On the Manage Administrative Profile Values page, set the profile value at any of the enabled levels of the profile option.

Example of Profile Option Hierarchy
The following table shows an example of setting the currency profile option at different levels.

<table>
<thead>
<tr>
<th>Profile Level</th>
<th>Hierarchy</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site</td>
<td>Lowest</td>
<td>Euro</td>
</tr>
<tr>
<td>User</td>
<td>Highest</td>
<td>US Dollar</td>
</tr>
</tbody>
</table>

For this example, there are two users, John and Lisa. For John, the user-level profile value currency is set to US Dollar. If the Currency profile option is enabled only at the site level, both John and Lisa would see Euro as the default currency. If the profile option is enabled at the user level, users having a different currency set as their currency profile value would see only that currency. In this case, John would see US Dollar as the default currency. If the Currency profile option is enabled at the user level and there is no user level currency defined, the site level setting takes effect. When both site and user levels are enabled, the value for the user level takes precedence over the site level value.

Lookups
Overview of Lookups
Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes, each code's translated meaning, and optionally a tag. End users see the list of translated meanings as the available values for an object.

Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. For example, an application might store the values Y and N in a column in a table, but when displaying those values in the user interface, Yes or No (or their translated equivalents) should be available for end users to select. For example, the two lookup codes Y and N are defined in the REQUIRED_INDICATOR lookup type.

The following table contains an example of a lookup type for marital status (MAR_STATUS) that has lookup codes for users to specify married, single, or available legal partnerships.
<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Meaning</th>
<th>Tag</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>Married</td>
<td>Not applicable</td>
</tr>
<tr>
<td>S</td>
<td>Single</td>
<td>Not applicable</td>
</tr>
<tr>
<td>R</td>
<td>Registered Partner</td>
<td>+NL</td>
</tr>
<tr>
<td>DP</td>
<td>Domestic Partner</td>
<td>-FR, AU</td>
</tr>
</tbody>
</table>

In this case, tags are used for localizing the codes. All legislations list Married and Single. Only the Dutch legislation lists Registered Partner. And all legislations except France and Australia also list Domestic Partner.

When managing lookups, you need to understand the following.

- Using lookups in applications
- Configuration levels
- Accessing lookups
- Enabling lookups
- The three kinds of lookups: standard, common, and set-enabled

Using Lookups in Applications

Use lookups to provide validation or a list of values for a user input field in a user interface.

An example of a lookup used for validation is a flexfield segment using a table-validated value set with values from a lookup type. An example of a lookup in a list of values is a profile option's available values from which users select one to set the profile option. Invoice Approval Status gives the option of including payables invoices of different approval statuses in a report. The lookup code values include All, so that users can report by all statuses: Approved, Resubmitted for approval, Pending or rejected, and Rejected.

Configuration Level

The configuration level of a lookup type determines whether the lookups in that lookup type can be edited. This applies data security to lookups.

Some lookup types are locked so no new codes and other changes can be added during implementation or later, as needed. Depending on the configuration level of a lookup type, you may be able to change the codes or their meanings. Some lookups are designated as extensible, so new lookup codes can be created during implementation, but the predefined lookup codes can't be modified. Some predefined lookup codes can be changed during implementation or later, as needed.

The configuration levels are user, extensible, and system. The following table shows the lookup management tasks permitted at each configuration level.

<table>
<thead>
<tr>
<th>Permitted Task</th>
<th>User</th>
<th>Extensible</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting a lookup type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
Permitted Task | User | Extensible | System
--- | --- | --- | ---
Inserting new codes | Yes | Yes | No
Updating start date, end date, and enabling the lookup code | Yes | Yes, only if the code isn’t predefined data | No
Deleting codes | Yes | Yes, only if the code isn’t predefined data | No
Updating tags | Yes | No | No
Updating module | Yes | No | No

Predefined data means LAST_UPDATED_BY = SEED_DATA_FROM_APPLICATION.

If a product depends on a lookup, the configuration level must be system or extensible to prevent deletion.

Once the configuration level is set for a lookup type, it can’t be modified. The configuration level for newly created lookup types is by default set at the User level.

Access to the REST Resources

Users can retrieve information about lookups using the following REST resources:

- standardLookupsLOV
- commonLookupsLOV
- setEnabledLookupsLOV
- genericLookupsLOV

However, you can control whether a lookup is a part of the LOV or not. On the UI, for each lookup you can specify the REST Access Secured value that in turn determines whether it’s included in the response or not. These values are:

- Anonymous: Lookup is available to a user having anonymous role or authenticated role.
- Authenticated: Lookup is available to a user having only the authenticated role.
- Secure: Lookup isn’t available to users as part of the generic resource. To make it available securely, you must create a specific resource, assign it to a role, and assign that role to select users.

For all lookups, the default value is set to Secure. So, if you want to make the lookup available to users through any of those resources, you must change the value to Authenticated or Anonymous, depending on who needs to access that information.

Standard, Common, and Set-Enabled Lookups

The following table shows the available types of lookups.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Lists the available codes and translated meanings.</td>
</tr>
</tbody>
</table>
### Lookup Types and Descriptions

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set-enabled</td>
<td>Associates a reference data set with the lookup codes.</td>
</tr>
<tr>
<td>Common</td>
<td>Legacy lookups or lookups that have attributes.</td>
</tr>
</tbody>
</table>

Standard lookups are the simplest form of lookup types consisting only of codes and their translated meaning. They differ from common lookups only in being defined in the standard lookup view. Common lookups exist for reasons of backward compatibility and differ from standard lookups only in being defined in the common lookup view. These can also be lookups having attribute columns. Set-enabled lookup types store lookup codes that are enabled for reference data sharing. At runtime, a set-enabled lookup code is visible because the value of the determinant identifies a reference data set in which the lookup code is present.

### Accessing Lookups

Standard, set-enabled, and common lookups are defined in the Standard, Set-enabled, and Common views, respectively. Applications development may define lookups in an application view to restrict the UI pages where they may appear.

In lookups management tasks, lookups may be associated with a module in the application taxonomy to provide criteria for narrowing a search or limiting the number of lookups accessed by a product specific task such as Manage Purchasing Lookups.

### Enabling Lookups

A lookup type is reusable for attributes stored in multiple tables.

Enable lookups based on the following.

- Selecting an **Enabled** check box
- Specifying an enabled start date, end date, or both
- Specifying a **reference data set determinant**

If you make changes to a lookup, users must sign out and back in before the changes take effect. When defining a list of values for display rather than validation, limit the number of enabled lookup codes to a usable length.

To view the predefined lookups and their lookup codes, use the following tasks in the Setup and Maintenance work area:

- Manage Standard Lookups
- Manage Common Lookups
- Manage Set-Enabled Lookups

### Translating Lookups

You can translate the lookups that you defined to the preferred language(s) without changing the language session of the application. Use the translation option available on the lookup code table. By default, for each lookup, all the permitted language rows in the translator dialog box appear in the source language (the current session language). When you edit a particular language entry, you can modify the translated meaning and description to the language in which you want the lookup to appear. Once the updates are made, the end-users can view the lookup in the translated text.
**Related Topics**

- How can I access predefined lookups
- Example of a Set-Enabled Lookup
- What's the difference between a lookup type and a value set
- Example of a Standard Lookup
- Enter or Edit Translated Text

### Overview of Lookup Types

**Lookup types** in the applications provide the lists of values in application fields that are drop-down lists. For example, when closing an opportunity, salespeople can pick a reason that an opportunity was won or lost from the Win/Loss Reason field, which is a drop-down list. The values in that list are derived from the lookup type, MOO_WIN_LOSS_REASON, which has several potential values known as lookups, each with its own unique lookup code and a meaning that displays in the UI.

### Configuring Lookup Types

You can configure many lookup types to fit your business needs. The level at which a lookup type is extensible determines whether the lookups in that lookup type can be edited. The levels are: User, Extensible, and System.

The following table shows which lookup management tasks are allowed at each level.

<table>
<thead>
<tr>
<th>Allowed Task</th>
<th>User</th>
<th>Extensible</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting a lookup type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Inserting new codes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Changing the wording that displays on the page</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>(Meaning field)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Updating start date, end date, and enabled fields</td>
<td>Yes, only if the code isn't predefined data</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Deleting codes</td>
<td>Yes</td>
<td>Yes, only if the code isn't predefined data</td>
<td>No</td>
</tr>
<tr>
<td>Updating tags</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Updating module</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
If a product depends on a lookup type, the configuration level must be System or Extensible to prevent deletion. After the configuration level is set for a lookup type, it can't be modified. The configuration level for lookup types created using the Define Lookups page is by default set at User level.

Sales Lookup Types

You find lookup types by accessing the associated task in the Sales offering in the Setup and Maintenance work area. Here are some of the common sales lookup tasks or task lists:

To access sales lookup types:

1. Sign in as a setup user and navigate to the Setup and Maintenance work area.
2. In Setup and Maintenance, go to the Sales offering.
3. In the list of functional areas, click the area where the lookup appears. See the list at the end of this procedure for more information.
   
   A list of tasks for the area is displayed.
4. In the list of tasks, click the lookups task.
5. In the lookup types page, modify the lookup type as needed.

The following are the Sales lookup type tasks and the functional areas where they appear:

- Sales Foundation functional area:
  - Manage Geography Lookups
  - Manage Applications Core Standard Lookups
  - Manage Activity Standard Lookups

- Users and Security functional area:
  - Manage Resource Role Lookups
  - Manage Resource Lookups

- Accounts and Contracts functional area
  - Manage Group Lookups
  - Manage Source System Lookups
  - Manage Hierarchy Lookups
  - Manage Trading Community Common Lookups
  - Manage Party Usage Lookups
  - Manage Relationship Lookups
  - Manage Contact Point Lookups
  - Manage Trading Community Organization Lookups
  - Manage Trading Community Location Lookups
  - Manage Trading Community Person Lookups
  - Manage Contact Lookups
  - Manage Customer Account Lookups
  - Manage Customer Center Lookups
• Sales Catalog and Products functional area:
  ◦ Manage Product Group Lookups

• Sales Campaigns functional area:
  ◦ Manage Marketing Standard Lookups

• Leads functional area:
  ◦ Manage Sales Lead Standard Lookups
  ◦ Manage Set Enabled Lookups

• Opportunities functional area:
  ◦ Manage Set Enabled Lookups

• Territories functional area:
  ◦ Manage Territory Management Non-extensible Lookups

• Business Plans functional area:
  ◦ Manage Business Plan Non-extensible Lookups
  ◦ Manage Objectives Non-extensible Lookups

• Partners functional area:
  ◦ Manage Partner Lookups

Set-Enabled Lookup Types
Several applications support lookup types at the reference set level, allowing you to present different lists of values for different business units. You can find these in the Manage Set Enabled Lookups task within the functional area that supports these lookup types.

Related Topics
• How can I access predefined lookups
• Reference Data Sets

How can I edit lookups?
On any of the Manage Lookups pages, you can edit the existing lookup codes of a lookup type or add new lookup codes. You can edit lookups using the following tasks in the Setup and Maintenance work area:
  • Manage Standard Lookups
  • Manage Common Lookups
  • Manage Set-enabled Lookups

Each task contains a predefined set of lookup types that are classified and stored. Open a task to search and edit the required lookup. However, you may not be able to edit a lookup if its configuration level doesn't support editing.

Why can't I see my lookup types?
Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. However, the generic tasks provide access to all lookup types of a kind, such as common lookups associated with the Manage Common Lookups task.
If the lookup types in an application are available in the standard, common, or set-enabled lookups view, they're are central to an application. However, lookup types defined for a specific application are managed using the task for that application.

Scheduled Processes

Overview of Scheduled Processes
Some tasks are too complicated or would take way too long if you had to do them manually, especially one record at a time. So, you can run scheduled processes that do the task for you, for example to import data or update the status for a bunch of records. Some processes give you printable output. Those processes might have **Report** in their name.

Jobs and Job Sets
Each scheduled process that you run is based on a job. The job is the executable that controls what the process can do and what parameters and other options you have for the process. A job set contains multiple jobs.

Process Sets
A process set is a scheduled process that's based on a job set. So, when you submit a process set, you're running more than one job.

**Note:** When you submit certain scheduled processes, the job logic causes other processes to automatically run. But in this case, you’re not submitting a process set that includes those other processes.

Submission
When you submit a scheduled process, you can use its parameters to control which records are processed and how. For example, a process includes only the transactions that were edited by the person you select for a Last Updated By parameter. Some processes don't have parameters.

As part of the submission, you can also set up a schedule for the process, for example to run once a week for two months. Every time a process runs, there's a unique process ID.

Output
Some scheduled processes provide output in PDF, HTML, and other formats. For example, a process can import records and also produce output with details about those records. There are many types of output, for example a tax document or a list of transactions.

Related Topics
- Process Sets
- Submit Scheduled Processes and Process Sets
- View Status and Other Details for Scheduled Processes
- Cancel or Make Changes to Scheduled Processes
- View Output from Scheduled Processes

Overview of Enterprise Scheduler Processes for Enterprise Contracts
Oracle Enterprise Contracts provides predefined Enterprise Scheduler Processes. The processes can be set up to run automatically at periodic intervals using the Scheduled Processes task from the Navigator.
This table lists the predefined scheduler processes and summarizes when they're needed:

<table>
<thead>
<tr>
<th>Enterprise Scheduler Process</th>
<th>Description</th>
<th>Related Feature</th>
<th>Recommended Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquires Usage Data from an External Web Service</td>
<td>Name of the process used to acquire usage information from an external web service.</td>
<td>Usage Billing</td>
<td>Align with shortest billing period or whenever the consumption data is available</td>
</tr>
<tr>
<td>Adopt Global Clauses for a New Business Unit</td>
<td>Adopts all approved global clauses for use in a new local business unit.</td>
<td>Terms Library Clause Adoption</td>
<td>Daily</td>
</tr>
<tr>
<td>Assign Contract Owner</td>
<td>Assigns a new contract owner or replaces an existing contract owner.</td>
<td>Contract Assignees</td>
<td>As needed</td>
</tr>
<tr>
<td>Automatically Renew Eligible Contracts and Contract Lines</td>
<td>Name of the process that's used to find and renew eligible contract lines.</td>
<td>Basic Automated Contract Renewal</td>
<td>Daily to weekly</td>
</tr>
<tr>
<td>Build Keyword Search Index for Contract Clauses</td>
<td>Enables clause searches in the Contract Terms Library using the Keyword field by building an index of the Clause Title, Display Title, Description, and Text fields.</td>
<td>Terms Library Search Clauses</td>
<td>Daily</td>
</tr>
<tr>
<td>Build Keyword Search Index for Contract Terms Templates</td>
<td>Enables contract terms template searches in the Contract Terms Library using the keyword field by building an index of the Terms Template Name and Description fields.</td>
<td>Terms Library Search Terms Templates</td>
<td>Daily</td>
</tr>
<tr>
<td>Fetch Pricing Information for Service Contracts</td>
<td>Name of the process that prices usage charges and reprices future periods for recurring charges on lines marked as Price During Billing. For example, Let's assume that you have already billed $100 per month for January to April. Now you change the price to $150 per month, so from May onward your customer will be billed at $150.</td>
<td>Service Contract Pricing</td>
<td>Daily</td>
</tr>
<tr>
<td>Fetch Service Contract Invoice Information from Receivables</td>
<td>Name of the process used to retrieve the service contract line invoice and credit memo information from accounts receivables.</td>
<td>Service Contract Billing</td>
<td>Daily</td>
</tr>
<tr>
<td>Enterprise Scheduler Process</td>
<td>Description</td>
<td>Related Feature</td>
<td>Recommended Frequency</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Generate Contract PDFs for Text Search</td>
<td>Used to generate PDF documents for all draft contracts to enable indexing of terms for text search.</td>
<td>Service Contract Billing</td>
<td>Daily</td>
</tr>
<tr>
<td>Import Contract Clauses from Interface Table</td>
<td>Validates clauses and variables in the open interface table and imports the valid clauses into the Contract Terms Library.</td>
<td>Terms Library Clause Import</td>
<td>As needed</td>
</tr>
<tr>
<td>Import Contract Clauses from XML File</td>
<td>Validates clauses and variables from an XML spreadsheet and imports the spreadsheet into the Contract Terms Library.</td>
<td>Terms Library Clause Import</td>
<td>As needed</td>
</tr>
<tr>
<td>Import Contract from External Systems</td>
<td>Imports contracts in bulk from external systems.</td>
<td>Contract Import</td>
<td>As needed</td>
</tr>
<tr>
<td>Import Default Coverage</td>
<td>Name of the process which is used to import default coverage.</td>
<td>Service Contracts Entitlements</td>
<td>As needed</td>
</tr>
<tr>
<td>Optimize Keyword Search Index for Contract Clauses</td>
<td>Optimizes the clause text index to improve clause performance of searches using the Keyword field in the Contract Terms Library.</td>
<td>Terms Library Clause Search</td>
<td>Daily</td>
</tr>
<tr>
<td>Optimize Keyword Search Index for Contract Terms Templates</td>
<td>Optimizes the contract terms template text index to improve performance of terms template searches using the Keyword field in the Contract Terms Library.</td>
<td>Terms Library Terms Template Search</td>
<td>Daily</td>
</tr>
<tr>
<td>Perform Timed Contract State Transitions</td>
<td>Name of the process that performs the timed transition of contracts from one state to another.</td>
<td>User Statuses and Transitions</td>
<td>Daily</td>
</tr>
<tr>
<td>Process Contracts Consolidated Reminder Events</td>
<td>The name of the program that processes consolidated reminder events in contracts.</td>
<td>Event Notification Rules and Template Sets</td>
<td>Daily</td>
</tr>
<tr>
<td>Process Contracts Event Notifications</td>
<td>The name of the process that’s used to process event notifications in contracts.</td>
<td>Event Notification Rules and Template Sets</td>
<td>Daily</td>
</tr>
<tr>
<td>Enterprise Scheduler Process</td>
<td>Description</td>
<td>Related Feature</td>
<td>Recommended Frequency</td>
</tr>
<tr>
<td>------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Process Installed Base Updates</td>
<td>Name of the process which is used to create and update contracts based on Installed Base updates.</td>
<td>Service Contracts Installed Base Integration</td>
<td>Daily</td>
</tr>
<tr>
<td>Purge Contract Clause Import Tables</td>
<td>Purges data from the clause interface table after clause import has completed.</td>
<td>Terms Library Clause Import</td>
<td>As needed</td>
</tr>
<tr>
<td>Purge Contract Import Interface Tables</td>
<td>Purges error records of the contract import interface tables.</td>
<td>Contract Import</td>
<td>As needed</td>
</tr>
<tr>
<td>Purge Contract Temporary Tables</td>
<td>Purges all contract temporary tables.</td>
<td>N/A</td>
<td>As needed</td>
</tr>
<tr>
<td>Send Contract Expiration Notifications</td>
<td>Sends contract expiration notifications to contract owners.</td>
<td>N/A</td>
<td>Daily</td>
</tr>
<tr>
<td>Send Contract Fulfillment Notifications</td>
<td>Sends notifications to contract fulfillment notification recipients based on the notification rules set up for the fulfillment line.</td>
<td>N/A</td>
<td>Daily</td>
</tr>
<tr>
<td>Send Contract Terms Deliverable Due Date Notifications</td>
<td>Sends due date notifications to the responsible party for the contract terms deliverable.</td>
<td>Contract Deliverables</td>
<td>Daily</td>
</tr>
<tr>
<td>Send Contract Terms Deliverable Escalation Notifications</td>
<td>Sends escalation notifications to the escalation contact, the internal contact, and the requester of contract terms deliverables. The requester is the internal employee who requested the deliverable.</td>
<td>Contract Deliverables</td>
<td>Daily</td>
</tr>
<tr>
<td>Send Contract Terms Deliverable Overdue Notifications</td>
<td>Sends overdue notifications to the requester and to the responsible party for a contract terms deliverable. When the responsible party is external, then the internal party is notified as well.</td>
<td>Contract Deliverables</td>
<td>Daily</td>
</tr>
<tr>
<td>Send Service Contract Billing Information to Receivables</td>
<td>Name of the process used to send the service contract line billing and credit information to accounts receivables.</td>
<td>Service Contract Billing</td>
<td>Daily</td>
</tr>
<tr>
<td>Enterprise Scheduler Process</td>
<td>Description</td>
<td>Related Feature</td>
<td>Recommended Frequency</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Track Electronic Signature Status</td>
<td>Track electronic signature status of contract.</td>
<td>Electronic Signature</td>
<td>Hourly</td>
</tr>
<tr>
<td>Track Purchasing Activity</td>
<td>Retrieve the number and the status of the purchasing documents created by the</td>
<td>N/A</td>
<td>As needed</td>
</tr>
<tr>
<td></td>
<td>integrated procurement application from the contract fulfillment line.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update Contract Status</td>
<td>Updates the status of contracts that are dependent on time. For example, updates</td>
<td>N/A</td>
<td>Daily</td>
</tr>
<tr>
<td></td>
<td>the status to expired when the end date is reached.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Validate Imported Contract</td>
<td>Validates imported contract and updates bill and revenue plan details.</td>
<td>N/A</td>
<td>As needed</td>
</tr>
</tbody>
</table>

**Caution:** Oracle recommends that you don't edit any existing Enterprise Scheduler Jobs.

How can I Manage Enterprise Scheduler Processes for Enterprise Contracts?

You can view the predefined enterprise scheduler jobs for Oracle Enterprise Contracts from the application:

1. Select **Navigator > Setup and Maintenance**.
2. Search for and select the **Enterprise Contracts** offering.
3. On the **Setup and Maintenance** page, click **Setup**.
4. Select the **Enterprise Contracts** functional area. The tasks available for Enterprise Contracts display.
5. Select the **Manage Custom Enterprise Scheduler Jobs for Enterprise Contracts** task.
6. In the **Manage Custom Enterprise Scheduler Jobs for Enterprise Contracts** page, enter search criteria to search and view available Enterprise Scheduler Jobs.

**Caution:** Don't edit any existing Enterprise Scheduler Jobs.

User Statuses and Transitions

User Statuses and Transitions

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

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

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

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

Setting Up The State-Based Event Model

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

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

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

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

- User Status History (new OKC logical entity)
- Contract Header (existing OKC logical entity)
- Contract User Statuses (new OKC logical entity)
- User Transitions (new OKC logical entity)
- States
  - State Model (existing QOC logical entity)
  - Transitions

Related Topics
- Contract Assignment and Workload Management

Contract Preview and Printing
Contract Printing and Layout Templates

Previewing and printing clauses, reports, contracts, and contract terms uses a number of Oracle Business Intelligence (BI) Publisher layout templates which specify what information is displayed in the contract and supply the table of contents, headers, footers, text style, and pagination. The layout templates are RTF files stored in the BI Presentation Catalog. The application comes with samples of all the required layout templates. You can copy the sample layout templates described here, and edit the copies to add your own boilerplate text, font styles, and logos.

You can copy and edit layout templates used for:

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

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

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

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

Printing Enterprise Contracts

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

- The contract layout template
  This layout template provides the layout for printing the contract except for the contract terms.
  You can assign a contract layout template to a contract in different ways. Here’s the priority order in which the application uses the contract layout template for printing a contract:
    a. Negotiations and Renewals tab on the edit contact page
    b. Manage Contract Rules in the Setup task side panel
    c. Manage Contract Types task from the Setup and Maintenance work area

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

<table>
<thead>
<tr>
<th>Sample Layout Template Name</th>
<th>Description</th>
<th>Location in BI Publisher Catalog Directory</th>
</tr>
</thead>
</table>
### Sample Layout Template Name

<table>
<thead>
<tr>
<th><strong>Sample Layout Template Name</strong></th>
<th><strong>Description</strong></th>
<th><strong>Location in BI Publisher Catalog Directory</strong></th>
</tr>
</thead>
</table>

- **The contract terms layout template**

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

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

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

This table describes the layout templates used for structured terms.

<table>
<thead>
<tr>
<th><strong>File Name</strong></th>
<th><strong>Description</strong></th>
<th><strong>Location in BI Publisher Catalog Directory</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>ContractTermsECM</td>
<td>The layout for printing the contract terms in enterprise contracts when the contract terms are authored in the application.</td>
<td>Enterprise Contracts/ Contract Terms Printing/ Contract Terms Download and Preview</td>
</tr>
<tr>
<td>ContractTermsAmendmentsOnlyECM</td>
<td>The layout for only printing a summary of the amendments made to contract terms in enterprise contracts.</td>
<td>Enterprise Contracts/ Contract Terms Printing/ Contract Terms Preview</td>
</tr>
<tr>
<td>ContractTermsPlusAmendmentsECM</td>
<td>The layout for printing the contract terms in enterprise contracts when the contract terms are authored in the application. In addition, for a contract that's under amendment, a summary of the amendments made to contract terms is included.</td>
<td>Enterprise Contracts/ Contract Terms Printing/ Contract Terms Preview</td>
</tr>
</tbody>
</table>

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

- The application uses the contract layout template, specified in the Contract Layout field of the contract type, to create a PDF of the contract. If the contract doesn't include any contract terms, this is the only layout template used.

- If the contract includes structured terms, then the application uses the contract terms layout template specified in the Terms Layout Template field to create the contract terms PDF. To create the contract terms PDF, you must set the terms layout template in contract type.

- If you made amendments to the contract terms and the terms layout template specified includes an amendment summary, then the application creates a PDF document of the amendment summary. If amendments were made and the specified terms layout template includes both the amendment summary and the amended terms of the contract, then the application creates a PDF document of both.

- If the contract terms are attached as a file and the file retains the structured terms format, the application creates the contract terms PDF from the file. Contract terms attached as a file can retain the structured XML format if the file was downloaded from the application using the Download Contract action.

- The application then merges the two generated PDFs (one for the basic contract and the other for contract terms) into a single PDF.

- If the contract terms are attached in a file that isn't structured, then the application prints only the contents of the file. It doesn't print the contract information in the application or use either layout template. If you need help in editing the layout templates, download the sample XML file provided in Enterprise Contracts/Contract Printing/ContractPrintDm.
This figure outlines how the application uses the layout templates when you print an enterprise contract:

Printing of Contract Terms on Purchase Orders and Sourcing Documents
For printing purchasing documents with structured terms, Oracle Procurement uses two layout templates.

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

This table lists the sample files provided:
### File Name | Description | Location in BI Publisher Catalog Directory
--- | --- | ---
ContractTermsProcurement | The layout for printing the contract terms in enterprise contracts when you author contract terms in the application. | Enterprise Contracts/ Contract Terms Printing/ Contract Terms Download and Preview
ContractTermsAmendmentsOnlyProcurement | The layout for only printing a summary of the amendments made to contract terms in enterprise contracts. | Enterprise Contracts/ Contract Terms Printing/ Contract Terms Download and Preview
ContractTermsPlusAmendmentsProcurement | The layout for printing the contract terms in enterprise contracts when you author the contract terms in the application. In addition, for a contract that’s under amendment, a summary of the amendments made to contract terms is included. | Enterprise Contracts/ Contract Terms Printing/ Contract Terms Download and Preview

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

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

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

**Caution:** If you edit the **ContractTermsNoMerge** layout template, then you must save it under the same name in the same directory.

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

4. If the contract terms are attached as a file that isn't structured, then the application creates a small PDF of the message contained in the layout template **ContractTermsNoMerge**.

5. The application merges the two PDFs into a single document PDF.

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

---

**Printing the Contract Deviations Report**

The application uses the **contract deviations** layout template to generate a PDF report of deviations of a contract from company standards. This report can be automatically attached to the notification sent to the contract approvers during contract authoring. You can create different layout templates for each business unit. You specify which layout template you want to use in a specific business unit using either the **Specify Customer Contract Management Business**
Function Properties or the Specify Supplier Contract Management Business Function Properties tasks. These tasks are available in the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

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

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
<th>Location in BI Publisher Catalog Directory</th>
</tr>
</thead>
</table>

Previewing Contract Terms Templates

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

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

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

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

Here are the layout templates that supports table of contents:

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

You can create different layout templates for each contract terms template. You specify the layout template to be used for the preview on the General tab while editing the contract terms template. This table describes the sample layout template:
<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
<th>Location in BI Publisher Catalog Directory</th>
</tr>
</thead>
<tbody>
<tr>
<td>ContractTermsTemplate</td>
<td>This layout template specifies the layout of the contract terms template preview.</td>
<td>Enterprise Contracts/ Contract Terms Printing/ Contract Terms Download and Preview</td>
</tr>
</tbody>
</table>

### Previewing and Importing Clauses

The application uses the clause layout template for:

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

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

This table describes the sample layout template provided.

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
<th>Location in BI Publisher Catalog Directory</th>
</tr>
</thead>
<tbody>
<tr>
<td>ContractTermsLibraryClause</td>
<td>Specifies the layout of clause text in the Contract Terms Library.</td>
<td>Enterprise Contracts/ Contract Terms Printing/ Clause Export and Preview</td>
</tr>
</tbody>
</table>

### Related Topics

- Create and Edit Report Layouts
- How Contract Terms Templates Work
- How You Import Clauses into the Contract Terms Library

### Contract Preview and Printing FAQ

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

No, you can't print or create a PDF of a contract if contract layout template isn't there in the contract type that was used to create the contract. If you don't specify the terms layout template, you can't preview the contract terms as a PDF either.

**What's a layout template?**

A RTF document that contains the contract layout for printing and preview. The templates, which can include both formatting, graphics, text, and other layout elements, are stored in the Oracle BI Publisher library. You must specify layout templates when you create a contract type to enable printing and preview of contract, contract terms and conditions, and summary of amendments made to contract terms.
5 Procurement Contracts Configurations

Supplier Contract Business Function Properties

Supplier Contracts Business Unit Setup

You can specify a variety of business function settings for supplier contracts in a specific business unit using the **Specify Supplier Contract Management Business Function Properties** task, available by selecting Setup and Maintenance from the Navigator and searching on the task name.

The selections you make for these business functions impact how the Contract Terms Library behaves during supplier contract authoring.

**Note:** The customer must select a default currency in the customer or supplier business function properties page, if not automatically populated from the ledger assigned to the business unit in the assign business function setup task.

Managing Contract Terms Library Setup Options

The setup options available for the Contract Terms Library are applicable to both customer and supplier contracts, and are described in the business unit setup topic for the Contract Terms Library. That topic is available as a related link to this topic.

Set Up Supplier Ship-to Organization, Ship-to Location and Bill-to Location

To set up ship-to organization, create an Inventory Organization by using these steps:

1. Navigate to **Setup and Maintenance**.
2. Click Search in the Tasks side panel and type **Manage Inventory Organizations**. Then, select it from the options listed.
3. Click **Create** in the results table.
4. Enter **Name** and **Organization**, and select **Management Business Unit** and **Legal Entity** information from the Drop Down list. Then, click **Next**.
5. In the General tab, select **Schedule** and **Item Master Organization** information. Click **Save and Close**.

To set up a ship-to and bill-to location, create an Inventory Organization Location by using the following steps:

1. Search for **Manage Inventory Organization Locations** in the Tasks side panel.
2. Click **Manage Inventory Organization Locations** on the Search page.
3. Click **Create** in the results table.
4. Enter mandatory fields and select **Inventory Organization** in the drop-down list.
5. Click **Submit**.

**Related Topics**

- **Contract Terms Library Business Unit Setup**
### Contract Terms Library Business Unit Setup

You can specify a wide variety of Contract Terms Library settings for either customer or supplier contracts within each business unit, by using either the Specify Customer Contract Management Business Function Properties or the Specify Supplier Contract Management Business Function Properties tasks. These tasks are available in the Setup and Maintenance work area as part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

For the Contract Terms Library in each business unit, you can:

- Enable clause and template adoption.
- Set the clause numbering method.
- Set the *clause numbering level* for automatic clause numbering of contracts.
- For a contract with no assigned ledger or legal entity, set the document sequence to Global or Business Unit level.
- Enable the *Contract Expert* enabling feature.
- Specify the layout for printed clauses and *contract deviation* reports.

### Enabling Clause Adoption

Do this to use *clause adoption* in your implementation:

1. **Specify a global business unit**
   - Designate one of the business units in your organization as the global business unit by selecting the *Global Business Unit* option. This makes it possible for the other local business units to adopt and use approved content from that global business unit. If the *Global Business Unit* option isn't available for the business unit you're setting up, it means you have already designated a business unit as global.

2. **Enable automatic adoption**
   - If you're implementing the adoption feature, you can have all the global clauses in the global business unit automatically approved and available for use in the local business by selecting the *Autoadopt Global Clauses* option. If you don't select this option, the employee designated as the Contract Terms Library Administrator has to approve all the global clauses, before they can be adopted and used in the local business unit. This option is available only for local business units.

3. **Specify the administrator who approves clauses available for adoption**
   - You must designate an employee as the Contract Terms Library administrator if you're using adoption. If you don't enable automatic adoption, then the administrator must adopt individual clauses or *localize* them for use in the local business unit. The administrator can also copy over any contract terms templates created in the global business unit. The clauses and contract terms templates available for adoption are listed in the administrator's Terms Library work area.

4. **Adopt global clauses for new business unit**
   - If you're creating a new local business unit and have to adopt existing global clauses, run the Adopt Global Clauses for a New Business Unit process. Refer to the Enterprise Scheduler processes topic for more information.

### Setting Clause Numbering Options

You can set up automatic clause numbering for the clauses in the business unit by selecting Automatic in the *Clause Numbering* field and setting the clause numbering level. Then select the appropriate clause sequence category for the specified numbering level. You must have previously set up document sequences for the document sequence.
categories of global, ledger, and business unit. If clause numbering is manual, contract terms library administrators must enter unique clause numbers each time they create a clause.

You can choose to display the clause number in front of the clause title in contracts by selecting the **Display Clause Number in Clause Title** option.

**Set Up Consistent Clause Numbering**

When you skip numbering and suppress the title for a clause or section, the numbering format may look different when you download the contract. You get the difference in numbering format because your downloaded contract has the numbering format of Microsoft Word. To enable Microsoft Word numbering format for your contract in the Enterprise Contracts UI, you must set the **Consistent Microsoft Word Numbering for Contract Terms Enabled** profile option as **Yes**.

If this profile option is set as **No**, you may see inconsistent numbering when you download the contract as the Microsoft Word document.

Here are the steps to enable the profile option:

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task.
2. On the Manage Administrator Profile Values page, search for and select the **Consistent Microsoft Numbering for Contract Terms Enabled** profile option.
3. Set the profile option to **Yes**.
4. **Save and Close**.

**Enable Contract Expert**

Select the **Enable Contract Expert** option to use the Contract Expert feature in a business unit. This setting takes precedence over enabling Contract Expert for individual contract terms templates.

**Specify Printed Clause and Deviations Report Layouts**

For each business unit, you can specify the Oracle BI Publisher RTF file that serves as the layout for:

- The printed contract terms
  
  Enter the RTF file you want used for formatting the printed clauses in the **Clause Layout Template** field.

- The contract deviations report

  The RTF file you select as the **Deviations Layout Template** determines the appearance of the contract deviations report PDF. This PDF is attached to the approval notification sent to contract approvers.

**Related Topics**

- How Business Unit Affects Clauses and Other Objects in the Library
- How Contract Expert Works
- Contract Printing and Layout Templates

**Supplier Contract Fulfillment**
Types of Contract Fulfillment

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

Types of Contract Fulfillment You Can Create

You can create two types of contract fulfillment:

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

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

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

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

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

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

Contract fulfillment are of the two following types; contractual and noncontractual. The contractual contract fulfillment is inbound only whereas the noncontractual contract fulfillment is inbound as well as outbound. Here's the figure that
illustrates the different contract fulfillment types, the purchasing activity you can initiate, and track from each type is discussed in the next section.

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

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

- The contract is used for immediate purchases and has at least one contract line item defined.
  
  You can create purchase orders from the fulfillment lines of such contracts. The contract type class for such contracts must be **Enterprise Contract**.

- The contract is used for future purchases and has at least one contract line item defined.
  
  You can create blanket purchase agreements from the fulfillment lines of such contracts.

- The contract is used for future purchases and doesn't have contract line items defined.
  
  You can create contract purchase agreements from the fulfillment lines of such contracts.
This table that lists the purchasing documents that you can create from different contract fulfillment lines in Oracle Purchasing, the purchasing application that's integrated with Enterprise Contracts.

<table>
<thead>
<tr>
<th>Fulfillment Properties</th>
<th>Purchasing Document Created in Oracle Purchasing</th>
</tr>
</thead>
<tbody>
<tr>
<td>• The fulfillment is inbound.</td>
<td>Purchase order</td>
</tr>
<tr>
<td>• Contract is for immediate purchase.</td>
<td>You can create only one purchase order from each fulfillment line, but you can create multiple fulfillment lines for each contract line if you have to stagger the purchases or ship to different destinations, for example. You can also combine multiple fulfillment lines to create one purchase order.</td>
</tr>
<tr>
<td>• The contract includes contract lines.</td>
<td>Purchase order</td>
</tr>
<tr>
<td>• The fulfillment is inbound.</td>
<td>You can duplicate a fulfillment line to create multiple fulfillment lines if you have to create multiple purchase orders.</td>
</tr>
<tr>
<td>• Contract is for immediate purchase.</td>
<td>Blanket purchase agreement</td>
</tr>
<tr>
<td>• The contract has no contract lines.</td>
<td>You can create only one blanket purchase agreement from each fulfillment line, but you can create multiple fulfillment lines for each contract line if you have to stagger the purchases or ship to different destinations, for example. You can also combine multiple fulfillment lines to create one blanket purchase agreement.</td>
</tr>
<tr>
<td>• The fulfillment is inbound.</td>
<td>Contract purchase agreement</td>
</tr>
<tr>
<td>• Contract is for future purchase.</td>
<td>You can duplicate a fulfillment line to create multiple fulfillment lines if you have to create multiple contract purchase agreements.</td>
</tr>
<tr>
<td>• The contract includes contract lines.</td>
<td></td>
</tr>
</tbody>
</table>

How Contract Fulfillment Works

*Contract fulfillment* makes it possible for you to track goods, services, reports and other fulfillment items you're purchasing in buy-intent contracts. Depending on the type of contract you're creating, you can use contract fulfillment to initiate the creation purchase orders or purchase agreements within Oracle Fusion Purchasing or in other integrated purchasing applications and monitor their fulfillment from within the contract. This topic explains how you create and work with contract fulfillment.

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

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

2. Review the notifications that are sent automatically to interested parties regarding fulfillment progress and deadlines. The contract type can be set up to automatically specify who's notified and when. You can change and add additional notifications for the contract.
3. If you're using the fulfillment to initiate the purchase of goods and services using the integrated purchasing applications, then you must enter the required purchasing details. For autocreated fulfillment, these details are copied automatically from the corresponding contract lines.

4. When the contract is approved and becomes active, you can initiate the creation of the purchasing documents in one of the purchasing applications. When you do, the application validates the information you entered to make sure it meets all the requirements of the purchasing application and creates the purchasing document. If it doesn't, you must edit the fulfillment to enter additional information.

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

5. After the purchasing document is created in the purchasing application, you can monitor the progress of its execution.

6. You can mark a fulfillment as complete after execution of the purchasing document is completed.
This figure that illustrates how you can create and work with both *contractual* and *noncontractual* fulfillment lines and how you can initiate purchasing activity from those fulfillment lines.

### Creating a Contract Fulfillment

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

Select the **Create fulfillment** action in the Fulfillment tab to create a completely new fulfillment.

**Note:** The Create Fulfillment and Autocreate Fulfillment Lines actions aren't available for a contract that's under amendment.
Tip: You can create multiple fulfillment lines for a single contract line if you need the fulfillment line items to be shipped to different destinations, for example. This is accomplished by autocreating a fulfillment line, duplicating it, and then editing the fulfillment line information.

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

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

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

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

You can create one purchase document from multiple contract fulfillment lines. For example, selecting all the fulfillment lines created from contract lines when creating a purchase order, creates one PO with lines corresponding to each of the fulfillment lines.

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

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

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

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

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

Related Topics
- Can I create multiple contract fulfillment lines for a single contract line
- What Actions You Can Use on Contract Fulfillment Lines and When
- Example of Initiating a Single PO from a Contract Line to Ship Items to Different Destinations
• Create and Monitor Agreements in Oracle Fusion Purchasing
6 Service Contracts Configurations

Billing Templates

Manage Billing Templates

Billing templates of a service contract consist of attributes, which upon selection determine the billing schedules of the contract. Setting up of these billing attributes and the creation of a billing template is a mandatory step in contract setup. During contract creation, these templates are then selected by the sales administrator. For example, if you select Advance Invoice as the Invoicing Rule in the Billing Template, it guarantees that the billing takes place before the Period (Month, Quarter, Year) begins. You can change your billing attributes during contract creation as long as your status is Draft.

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

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

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

Basic Automated Contract Renewal

Contract Renewal makes a copy of the existing source contract. The source contract can be in an active or expired status. The effectivity and price details on the new renewal contract are changed based on the configured renewal defaults. Other attributes such as negotiation settings of the new renewal contract can also be changed. You can choose to activate contract renewal for service contracts on a header and line level. This means that you can choose to renew the entire contract or specific contract lines, or both.

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

- **Automatic**: This implies automatic contract renewal, which is generated by the Automatically Renew Eligible Contracts and Contract Lines scheduled process prior to contract expiration.  
  **Note**: For the scheduled process to pick the eligible contract, the renewal template must have mark-up, mark-down, or reprice enabled.

- **Manual**: This implies that the contract or line must be renewed manually. This can be done at any point during the contract lifecycle. You are notified prior to contract expiration.

- **Do not renew**: This implies that you don't want to opt for contract renewal. On selecting this, the Renewal Type column is removed from the dashboard columns list for all lines and covered assets of the contract.

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

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

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

Contracts can be renewed either manually or automatically. The user can manually renew a contract using the renew action, or the application can be configured to automatically renew a contract. The application uses renewal rules to determine the renewal defaults. The life cycle of a renewal contract is similar to a newly authored contract. However, you can configure a different life cycle for a renewal contract using the Event Model configuration. You can configure an event model to route the renewal contract to the customer for acceptance, or to the contract administrator for internal approval. You can also activate the contract without either Customer Acceptance or Internal Approval. The application, therefore, evaluates renewal rules template configured in the contract rules to retrieve the renewal process, customer acceptance criteria and internal approval criteria.

The following table provides an overview of the combinations of the Renewal Process, Customer Acceptance, and Internal Approval criteria:
Renewal Process | Customer Acceptance | Internal Approval | Description |
--- | --- | --- | --- |
Automatic | Not Required | Not Required | The application renews and activates the contract. |
Automatic | Not Required | Required | The application renews and submits the contract for approval. |
Automatic | Required | Required/Not Required | The application renews the contract and leaves it in the contract administrator’s queue for further action. You can configure event notification rules to automatically send the contract to the customer for acceptance. |
Manual | Required/Not Required | Required/Not Required | The application renews the contract and leaves it in the contract administrator’s queue for further action. |
Do not renew | N/A | N/A | The application doesn’t renew the contract. |

Related Topics
- Setup Event Notification Rules for Customer Communications
- Set Up Renewal Rules

How You Consolidate Multiple Renewal Contracts

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

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

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

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

**Note:** For the scheduled process to pick the eligible contract, the renewal template must have mark-up, mark-down, or reprice enabled.
Manage Event Notification Rules and Template Sets

This topic describes the process of enabling renewal notifications, through an example. Here, you're required to automatically send the renewal quote 90 days before the contract start date to the customer for acceptance. While the renewal contract is awaiting customer acceptance, you’re required to send two reminders at 60 days and 30 days before the contract start date, respectively. The notification events in the Event Notification Rules are sourced from the lookup `ORA_OKC_CUST_NOTIF_EVENTS` (Customer Notification Events). The following describes the notification events that are available:

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Lookup Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORA_SEND_QUOTE</td>
<td>Send Quote</td>
</tr>
<tr>
<td>ORA_SEND_FIRST_REMINDER</td>
<td>Send first reminder</td>
</tr>
<tr>
<td>ORA_SEND_SECOND_REMINDER</td>
<td>Send second reminder</td>
</tr>
<tr>
<td>ORA_SEND_THIRD_REMINDER</td>
<td>Send third reminder</td>
</tr>
<tr>
<td>ORA_SEND_CONS_REMINDER</td>
<td>Send consolidated reminder</td>
</tr>
</tbody>
</table>

Use the Event Models setup task to create the new notifications events for the business object, `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVO`. In this case, since you need to send the quote, send first reminder, and send second reminder, you must add `ORA_SEND_QUOTE`, `ORA_SEND_FIRST_REMINDER` and `ORA_SEND_SECOND_REMINDER` in your Event Model.

**Note:** Make these changes in a sandbox and test the changes in the test area before you commit them to the mainline application. For your reference, the ServiceContractHeaderDemo event model has been configured with the following customer notification events: Send Quote, Send first reminder, Send second reminder and Send third reminder. Refer to the setup task Set Up Event Notification Rules for Customer Communications: Procedure to understand the workflow.

**Related Topics**

- Setup Event Notification Rules for Customer Communications

Use State Model APIs to send Renewal Notifications

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

**SEND EMAIL:**

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

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

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

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

Signature:
getTemplate(Long contractId, String language, String event).

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

Return Values:
- String Array []:
  - 0- ContractLayoutTemplate
  - 1- TermsLayoutTemplate
  - 2- MessageTemplate
  - 3- AttachmentName

Example Code for SendEmail and GetTemplate:

Groovy Script:

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

boolean sri=eventModel.applicationModule.sendEmail(contractId, toAddress, ccAddress, bccAddress, language,
subject, messageTemplate, messageBody, contract
NOTIFYREP:

Signature:

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

Parameters:

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

Return Values:

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

Example Code for Notifyrep:

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

Renewal Contracts Pricing

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

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

Billing and Pricing

About Price During Billing

In the Manage Contract Types task within the Setup and Maintenance work area, you can create a sell intent contract type with Class set as Enterprise Contract and Line Class set as Service. You can then select the **Allow Pricing During**
Billing check box to allow pricing of subscription services during contract billing rather than contract authoring. Once the contract type is created, you can't update the value of check box again. This check box is available only when the class is Enterprise Contracts and Line Class is Service.

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

How the Fetch Pricing Information Process Supports Pricing While Billing

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

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

Related Topics
- Contract Types
- Define Contract Types For Service Contracts

Partial Period Billing

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

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

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

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

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

How Period Type Influences Duration

Let's take an example, where a service starts on 1st March 2019 and ends on 10th February 2020, and the period start date is tied to the service start date.
If the period type is actual, the duration is calculated as follows:

<table>
<thead>
<tr>
<th>Date</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st March 2019 - 31st January 2020</td>
<td>11 months</td>
</tr>
<tr>
<td>1st February 2020 - 10th February 2020</td>
<td>0.357 months (10/28)</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st March 2019 - 31st January 2020</td>
<td>11 months</td>
</tr>
<tr>
<td>1st February 2020 - 10th February 2020</td>
<td>0.333 months (10/30)</td>
</tr>
</tbody>
</table>

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

### How Period Start Influences Duration

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

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

<table>
<thead>
<tr>
<th>Date</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>15th January 2019 - 14th March 2019</td>
<td>2 months (2 full periods)</td>
</tr>
<tr>
<td>15th March 2019 - 10th April 2019</td>
<td>0.871 months (27/31)</td>
</tr>
</tbody>
</table>

The total duration is calculated as 2.871 months.

If the period start is calendar month, the duration is calculated as follows:
<table>
<thead>
<tr>
<th>Date</th>
<th>Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>15th January 2019 - 31st January 2019</td>
<td>0.548 months (17/31) - First partial period</td>
</tr>
<tr>
<td>1st February 2019 - 31st March 2019</td>
<td>2 months - 2 full periods tied to calendar months</td>
</tr>
<tr>
<td>1st April 2019 - 10th April 2019</td>
<td>0.333 (10/30) - Second partial period</td>
</tr>
</tbody>
</table>

The total duration is calculated as 2.881 months.
7 Reports and Analytics

Overview of Building Your Own Analytics

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

To get to BI:

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

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

This shows an example of the subject areas in BI.

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

This shows where you create new analytics, and the Sales - CRM Pipeline subject area.
For more information on Oracle CX Sales and B2B Service analytics, see the Creating and Administering Analytics guide.

**Related Topics**
- Creating and Administering Analytics

## Custom Analytics and Reports

### How You Create and Edit Reports

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

#### Report Components

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

<table>
<thead>
<tr>
<th>Report Component</th>
<th>Description</th>
<th>Tool for Modifying</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data model</td>
<td>Defines the data source, data structure, and parameters for the report. Multiple reports can use the same data model. Each report has one data model.</td>
<td>Data model editor in the application</td>
</tr>
</tbody>
</table>
Reports and Analytics

<table>
<thead>
<tr>
<th>Report Component</th>
<th>Description</th>
<th>Tool for Modifying</th>
</tr>
</thead>
</table>
| **Layout**       | Defines the presentation, formatting, and visualizations of the data. A report can have multiple layouts. Different types of layout templates are available, for example Excel and RTF. | Depending on the template file type:  
  - **XPT**: Layout editor in the application  
  - **RTF**: Microsoft Word  
  - **PDF**: Adobe Acrobat Professional  
  - **Excel**: Microsoft Excel  
  - **eText**: Microsoft Word |
| **Properties**   | Specifies formatting and other settings for the report. | Report editor in the application |

**What You Can Create or Edit**

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

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

**How You Access and Modify Report Components**

To create or edit reports, you must access the business intelligence (BI) catalog. In the catalog, objects of type Report represent the report definition, which includes report properties and layouts. Data models are separate objects in the catalog, usually stored in subfolders called Data Models.

**Accessing the BI Catalog**

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

- In the Reports and Analytics work area, click Browse Catalog to open the BI catalog, and find your report or data model in the Folders pane.
In the Reports and Analytics work area, find your report and select More to go to the report directly in the catalog. The data model associated with the report should be in the Data Models subfolder within the same folder as the report.

Sign in to the application directly (for example: http://host:port/analytics/saw.dll) to open the catalog.

Sign in to the BI Publisher server directly (for example: http://hostname.com:7001/xmlpserver) to open the catalog.

- Alternatively, once you are in the catalog using another method, for example, through the Reports and Analytics work area, change the final node of the URL. For example, change (http://host:port/analytics/saw.dll) to xmlpserver. So the URL you use would be: http://host:port/xmlpserver.

Predefined Reports

A special Customize option is available only:

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

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

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

Predefined Data Models

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

Related Topics

- Where to Save Analytics and Reports

How Data Is Structured for Analytics

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

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

Columns

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

<table>
<thead>
<tr>
<th>Column Type</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fact</td>
<td>Provides a measure of something, meaning that the values are numbers.</td>
<td>Total</td>
</tr>
<tr>
<td>Column Type</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>---------</td>
</tr>
<tr>
<td>Attribute</td>
<td>Represents a piece of information about a business object, with values that are dates, IDs, or text.</td>
<td>Start Date</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Attribute columns can be flexfield segments imported into the BI repository.</td>
<td></td>
</tr>
<tr>
<td>Hierarchy</td>
<td>Holds data values that are organized in a hierarchical manner.</td>
<td>Time, with sublevels:</td>
</tr>
<tr>
<td></td>
<td>• Year</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Quarter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Month</td>
<td></td>
</tr>
</tbody>
</table>

**Subject Areas**

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

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

**Folders**

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

- **Fact folders:**
  - Contain fact columns.
  - Are usually the last in a list of folders and are usually named after the subject area.

- **Dimension folders:**
  - Contain attribute and hierarchical columns.
  - Are joined to the fact folder within a subject area.

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

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

  If your analysis has columns from multiple subject areas, then you:
  - Should include columns only from dimension folders that are common to all of those subject areas. At least one such column is required.
  - Must include one column from the fact folder in each of those subject areas.

**Related Topics**

- Overview of Analytics Creation and Modification
Create Reports

Create a report when the predefined reports don’t provide the data you need. Or, if you want to use a predefined data model, and also want to change other aspects of the report other than layout. Save your report to Shared Folders > Custom in the business intelligence catalog. Saving content in the Custom folder is the only way to ensure that the content is maintained upon upgrade.

Create a Report

1. Open the Reports and Analytics work area.
2. Click click New and select Report.
3. Select the data model to use as the data source for your report.
   
   **Note:** Be sure that the data model you select has been validated. If you select a data model that has not been validated or has errors, when the report is run it will error indicating that the data model has not been validated or has an invalid status. To override this warning for a report, select the Ignore Data Model Validation Error option in the report properties.
4. Continue with the wizard to create the report layout, or choose to use the layout editor and close the wizard.
5. Define the layout for the report.
6. Click the Properties button in the report editor to set specific formatting, caching, and processing options for your report, including overriding data model validation errors.

Set Up Access

You or your administrator can:

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

Create and Edit Analyses Using a Wizard

Use the wizards to quickly create and edit your analytics. You can use a wizard to create and edit most of your analytics, for example to select columns, add filters or views. You can also use advanced business intelligence features to create or edit dashboards or manage analyses and other objects in the catalog.

Create an Analysis

1. Click Tools > Reports and Analytics in the Navigator.
2. In the Reports and Analytics work area or the Reports and Analytics panel tab (if available), click Create and select Analysis.
3. Select the subject area with columns you want to include.
4. Optionally, click Add/Remove Subject Areas and, in the Add/Remove Subject Areas dialog box, select more subject areas or remove any that you no longer need, then click OK.
5. Select the columns to include, set options for each column, and click Next.
6. Optionally, enter a title for the analysis.
7. Select the type of table or graph to include, specify the layout of the views, and click Next.
8. Optionally, set more options for the table or graph, and click **Next**.
9. Optionally, add sorts or filters based on any of the columns you included, and click **Next**.
10. If you have a table, optionally define conditional formatting for select columns, for example to display amounts over a certain threshold in a particular color. Click **Next**.
11. Enter the name of your analysis and select a folder in the Custom folder or My Folder to save it in.
12. Click **Submit**.

### Edit an Analysis

1. Click **Tools > Reports and Analytics** in the Navigator.
2. Select your analysis and edit it. In the Reports and Analytics work area, click **More** for the analysis and select **Edit**. In the Reports and Analytics panel tab, click the analysis, then click **Edit**.
3. Perform steps 4 through 10 from the preceding Create an Analysis task, as needed.
4. To update an existing analysis in the Custom folder, select the same name in the same folder. To save this analysis as a new copy, either name it with a new name or save it in a new folder in the Custom folder.
5. Click **Submit**.

### Related Topics
- Where to Save Analytics and Reports

### Manage Analytics with Advanced Features

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

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

### How to Create and Edit Analytics

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

<table>
<thead>
<tr>
<th>Tab</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>Select and define the columns to include.</td>
</tr>
<tr>
<td></td>
<td>Add filters.</td>
</tr>
<tr>
<td>Results</td>
<td>Add views and set options for results.</td>
</tr>
<tr>
<td>Prompts</td>
<td>Define prompts to filter all views in the analysis.</td>
</tr>
<tr>
<td>Tab</td>
<td>Task</td>
</tr>
<tr>
<td>-----------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>Advanced</td>
<td>View or update the XML code and logical SQL statement that the analysis generates.</td>
</tr>
<tr>
<td></td>
<td>Set options related to query performance.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> To create an analysis using SQL in the Advanced tab, you must be a Business Intelligence Administrator or have the Create Analysis From Simple SQL privilege.</td>
</tr>
</tbody>
</table>

4. Save your analysis.

More Actions on Analytics

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

Related Topics

- Where to Save Analytics and Reports

How You Modify Copies of Predefined Reports

The Customize option automatically creates a copy of a predefined report and stores it in the **Shared Folders > Custom** within the **business intelligence (BI) catalog**. The copy includes the report definition, folder structure, and original report permissions, and is linked internally to the original report. You can edit the copy of the report, leaving the original report intact. When users open or schedule the original report, they are actually using the newer version.

Benefits of the Customize Option

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

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

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

Accessing the Customize Option

To access the Customize option:

2. In the Folders pane, select the predefined report.
3. Select **Customize** from the **More** menu for the report.
4. The copied report in the Custom folder opens, so proceed to edit this report.
To edit the copied report again later, you don't need to be in the BI server. Just go to the BI catalog and either:

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

**Related Topics**

- Where to Save Analytics and Reports

### How Links Between Original and Modified Reports Are Managed

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

#### Maintaining the Link Between Reports

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

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

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

### Tasks Performed on Original Reports

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

<table>
<thead>
<tr>
<th>Task Performed on the Original Report</th>
<th>Result When There Is a Copied Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Opens the copied report.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Creates a report submission for the copied report.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edits the copied report.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the original report only. If you delete the copied report, the original report is not deleted.</td>
</tr>
<tr>
<td>Copy</td>
<td>Copies the original report.</td>
</tr>
<tr>
<td>Cut and Paste</td>
<td>Cuts and pastes the original report.</td>
</tr>
<tr>
<td>Rename</td>
<td>Renames the original report. The copied report name is not changed.</td>
</tr>
<tr>
<td>Task Performed on the Original Report</td>
<td>Result When There Is a Copied Report</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>--------------------------------------</td>
</tr>
<tr>
<td>Download</td>
<td>Downloads the copied report.</td>
</tr>
<tr>
<td>Customize</td>
<td>Edits the copied report.</td>
</tr>
<tr>
<td>History</td>
<td>Opens the job history of the copied report.</td>
</tr>
</tbody>
</table>

Caution: This breaks the link between the original and copied reports.

**Cross-Subject Area Analyses**

You can create analyses that combine data from more than one subject area. This type of query is referred to as a cross-subject area analysis. Cross-subject area analyses can be classified into three broad categories:

- Using common dimensions
- Using common and local dimensions
- Combining more than one result set from different subject areas using set operators such as union, union all, intersection, and difference.

**Common Dimensions**

A common dimension is a dimension that exists in all subject areas that are being joined in the report. For example, Workforce Management - Worker Assignment Real Time and the Workforce Management - Worker Assignment Event Real Time subject areas have Worker, Job, and Department available. These dimensions are considered common dimensions between these two subject areas and they can be used to build a cross-subject area report.

**Common and Local Dimensions**

The Worker Assignment Details dimension in the Workforce Management - Worker Assignment Real Time subject area isn't available in the Workforce Management - Worker Assignment Event Real Time subject area. Therefore it's a local dimension for the purposes of a cross-subject area query between these two subject areas.

**Related Topics**

- Where to Save Analytics and Reports
- How To Create a Cross-Subject Area Analysis for HCM

**How You Create an Absence by Department Report**

Here's how you can create an Oracle Business Intelligence Publisher report. In this example, you use a data model that you created using an Oracle Transactional Business Intelligence analysis for reporting on absence data by department.
These are the key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decision to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which data model to use?</td>
<td>Use the Absence by Department data model that you previously created.</td>
</tr>
<tr>
<td>Which layout options to use?</td>
<td>Select Landscape and select Chart and Pivot table.</td>
</tr>
<tr>
<td>Add any additional charts to the report?</td>
<td>Yes. Add a chart with the same configuration as the graph. Add this chart above the graph. When you click the different bars in the chart, it filters the graph by that criteria.</td>
</tr>
<tr>
<td>Are filters needed for the report?</td>
<td>Yes. Add filters to the chart, graph, and table to exclude records where the Reason for Absence is blank.</td>
</tr>
<tr>
<td>Is conditional highlighting needed?</td>
<td>Yes. Add conditional highlighting to the pivot table so that departments with 20 or more absences are highlighted in red.</td>
</tr>
</tbody>
</table>

Create a Report
1. Click **Browse Catalog** to open the BI Catalog.
2. On the OBI EE home page, under Published Reporting, click **Report** in the Create region.
3. In the Create Report window, verify that Use **Data Model** is selected.
4. Click **Search** in the **Data Model** field.
5. In the Select Data Model window, select the absence by department data model that you created.
6. Click **OK**.
7. On the Create Report page, verify that the **Guide Me** option is selected, and click **Next**.
8. On the Create Report, Select Layout page, select **Landscape** for the layout.
9. Select the **Page Header** and **Page Footer** options.
10. Select the **Chart and Pivot Table** option.
11. Click **Next**.
12. On the Create Report, Create Chart page, drag Number of Absences and drop it onto the **Drop Value Here** box.
13. Drag Reason for Absence and drop it onto the **Drop Series Here** box.
14. Drag Department and drop it onto the **Drop Label Here** box.
15. Click **Next**.
16. On the Create Report, Create Table page, review the location of each element in the table to make sure it's formatted correctly.
17. Click **Next**.
18. Select **View Report**, and then click **Finish**.
19. In the Save As window, save your report in My Folders, and name it Absence by Department Report.
20. Click **OK**.
21. The report appears.

Add Additional Details to the Report
1. In the upper right corner of the Absence by Department Report tab, click **Actions** to view the options for exporting, editing, and so on.
2. Click **Edit Report**.
3. Click **Edit**.
4. On the Insert tab, select **Chart**.
5. Drag the Chart component down to the report area, and drop it directly below the report title.
   When you drag the chart component down to the report area, use the blue bar as a guide to decide where to drop the chart. Drop the chart when the blue bar is directly below the report title.
6. In the Data Source region, select Number of Absences, and drag and drop it onto the **Drop Value Here** box.
7. Click Reason for Absence and drag and drop it onto the **Drop Label Here** box.
8. Click the new graph. A yellow border appears.
9. Click the bottom right corner of the yellow border, and drag the corner to the right so that the graph occupies the entire page.
10. In the Filter options on the Chart tab, click **Filter**.
11. In the Filter window, select Reason for Absence from the **Data Field** menu.
12. In the **Operator** field, select is greater than or equal to from the drop-down list.
13. In the **Value** field, enter 0.
14. Click **OK**.
15. Toggle 3D Effect on and off and choose one of the settings, based on your preference.
16. Repeat steps 9 through 14 for the second graph.
17. Click the pivot table to refocus the page on the pivot table. The yellow border appears.
18. In the Filter options on the Table tab, click **Filter**.
19. In the Filter window, select Reason for Absence from the **Data Field** drop-down list.
20. In the **Operator** field, select is greater than or equal to from the drop-down list.
21. In the **Value** field, enter 0.
22. Click **OK**.
23. Click the cells in the Number of Absences column.
24. In the Conditional Formatting region of the Pivot Table Data tab, click **Highlight**.
25. In the **Operator** field, select is greater than or equal to from the drop-down list.
26. In the **Value** field, enter 20.
27. Click in the **Background Color** field.
28. In the **Color Picker** window, select Red (ff0000)
29. Click **OK**.
30. In the Highlight window, click **OK**.
31. Click **Save** to save the changes to your report.
32. Click **Return**.
33. Click **View Report**.
34. In the upper graph, click the different bars to see how the lower graph filters the results.

**Related Topics**
- **How You Create an Absences by Department Analysis**

### Layouts

#### Create and Edit Report Layouts

The layout determines what and how data is displayed on report output. Each report has at least one layout template. This topic describes the following aspects of report templates:

- Layout templates
- Layout template types
• Overall process of managing layouts
• Deleting layout templates

Layout Templates
To modify a layout, you edit the layout template, which:

• Defines the presentation components, such as tables and labeled fields.
• Maps columns from the data model to these components so that the data is displayed in the correct place.
• Defines font sizes, styles, borders, shading, and other formatting, including images such as a company logo.

Layout Template Types
There are a few types of template files to support different report layout requirements.

• RTF: Rich text format (RTF) templates created using Microsoft Word.
• XPT: Created using the application’s layout editor, these templates are for interactive and more visually appealing layouts.
• eText: These templates are specifically for Electronic Data Interchange (EDI) and electronic funds transfer (EFT) information.

You can also create and edit other types of templates using Adobe PDF, Microsoft Excel, Adobe Flash, and XSL-FO.

Overall Process to Create or Edit Layouts
Editing or creating report layout, for example using Microsoft Word or the layout editor, involves making the actual changes to the template file. But that task is just one part of the entire process for modifying layouts.

1. Copy the original report and save the new version in Shared Folders > Custom in the business intelligence (BI) catalog. You create or edit templates for the new copy of the report.
   Tip: You can use the Customize option if the original is a predefined report.
2. Review report settings for online viewing.
3. Generate sample data for the report.
4. Edit or create the layout template file.
5. Upload the template file to the report definition. Skip this step if you’re using the layout editor.
6. Configure the layout settings.

Deleting Layout Templates
To remove a layout template for a report:

1. Select your report in the BI catalog and click Edit.
2. In the report editor, click View a list.
3. Select the layout template and click Delete.

Make Reports Available for Online Viewing
Some reports are set up so that you can only view them through another application or submit them as scheduled processes. To view your report online while you’re editing it, you must define a few settings. When you’re done editing your report, make sure that you reset these settings as needed.
Updating Report Properties

1. Select your report in the *business intelligence catalog* and click *Edit*.
2. In the report editor, click *Properties*.
3. In the Report Properties dialog box, select *Run Report Online* and deselect *Report is Controlled by External Application*.

Updating Layout Settings

1. Back in the report editor, click *View a list*.
2. Make sure that the *View Online* check box is selected.

Generate Sample Report Data

Depending on the type of *report* layout changes you're making, sample data can be required or optional. You generate sample data, and then load it for use with your layout so that you can map data fields to layout components. For example, for the Start Date table column in your layout, you can set it so that the data displayed in that column comes from the Start Date field in the sample data.

You can generate sample data from the:

- Report *data model*
- Report viewer
- Scheduler

Generate Sample Data from the Data Model

Follow these steps:

1. Select your data model in the *business intelligence (BI) catalog* and click *Edit*. Alternatively:
   a. In the catalog, find the report to generate sample data for and click *Edit*.
   b. Click the data model name in the report editor.
2. In the data model editor, click *View Data*.
3. Enter values for any required parameters, select the number of rows to return, and click *View*.
4. To save the sample data to the data model, click *Save As Sample Data*.
   - If you're designing a .rtf template, click *Export* to save the file locally.
5. Save the data model.

Save Sample Data from the Report Viewer

For reports that are enabled for online viewing, you can save sample data from the report viewer:

1. Select the report in the BI catalog.
2. Click *Open* to run the report in the report viewer with the default parameters.
3. On the Actions menu, click *Export*, then click *Data*.
4. Save the data file.
Save Sample Data from the Scheduler

For reports that are enabled for scheduling (not necessarily as a scheduled process), you can save sample data from the scheduler:

1. Select the report in the BI catalog.
2. Click Schedule.
3. On the General tab, enter values for any report parameters.
4. On the Output tab, ensure that Save Data for Republishing is selected.
5. Click Submit.
7. On the global header, click Open, then click Report Job History.
8. Select your report job name in the Job Histories table.
9. On the details page, in Output and Delivery, click the XML Data Download icon button.

Configure Layout Settings for Reports

As part of creating or editing layout, you can set report properties related to layout. These settings determine, for example, which layouts users can choose from when viewing or scheduling the report. The settings apply only to your report.

Setting Layout Properties

1. Select your report in the business intelligence catalog and click Edit.
2. In the report editor, click View a list.
3. Set layout properties, some of which are described in this table.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output Formats</td>
<td>Depending on the requirements for a report, you may want to limit the output file formats (for example, PDF or HTML) that users can choose. The available output formats vary depending on the template file type.</td>
</tr>
<tr>
<td>Default Format</td>
<td>When multiple output formats are available for the report, the default output format is generated when users open the report in the report viewer.</td>
</tr>
<tr>
<td>Default Layout</td>
<td>When multiple layouts are available for the report, you must select a default layout to present it first in the report viewer.</td>
</tr>
<tr>
<td>Active</td>
<td>Active layouts are available for users to choose from when they view or schedule the report.</td>
</tr>
<tr>
<td>View Online</td>
<td>Select this check box so that layouts are available to users when they view the report. Otherwise, the layout is available only for scheduling the report.</td>
</tr>
</tbody>
</table>

4. Click Save Report.
Layout Templates

Create and Edit Report Layout Templates Using the Layout Editor

The layout editor in the application provides an intuitive, drag-and-drop interface for creating pixel-perfect reports with PDF, RTF, Excel, PowerPoint, and HTML output. The layout template files you create with this tool have an .xpt extension. The layout editor tool is the only editing tool that provides dynamic HTML output. Users can interact with this output in a browser, for example by sorting, applying filters, and so on.

Prerequisite

Make sure that sample data is generated from the data model that your report is using.

Using the Layout Editor

To create or edit XPT templates:

1. Select the report in the business intelligence (BI) catalog and click Edit.
2. In the report editor, click Edit to update a template.
   Or, click Add New Layout and select a template type in the Create Layout section.
3. Create or edit the layout.
4. Click Save to save the layout to the report definition.

Set Up for RTF and Excel Report Layout Templates

You can use Microsoft Word or Microsoft Excel to create or edit RTF and Excel layout templates, in addition to the layout editor in the application. If you use Word or Excel directly, you must download and install the appropriate add-in so that the Microsoft application has the features you need to design report layouts.

Note: If you’re designing a new layout for your report, consider using the layout editor instead unless you are an experienced layout designer.

Installing the Add-In

1. Open the Reports and Analytics work area.
2. Click the Browse Catalog button.
3. Click Home.
4. In the Get Started pane, click Download BI Desktop Tools.
5. Select the add-in for the type of template you’re working with.
   - Template Builder for Word: RTF templates
   - Analyzer for Excel: Excel templates
6. Save and then run the installer.

Protecting Reports by Using Passwords

You can assign a password to your report and protect it from unwanted access. You can do this by setting the runtime properties at the server level using the Runtime Configuration page. The same properties can also be set at the report level.
level, from the report editor’s Properties dialog. If different values are set for a property at each level, then report level takes precedence.

The following table describes the properties you can use to set passwords for reports in different formats.

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Property Name</th>
<th>Description</th>
<th>Default</th>
<th>Configuration Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOCX output</td>
<td>Open password</td>
<td>Use this property to specify the password that report users must provide to open any DOCX report.</td>
<td>NA</td>
<td>docx-open-password</td>
</tr>
<tr>
<td>PPTX output</td>
<td>Open password</td>
<td>Use this property to specify the password that report users must provide to open any PPTX report.</td>
<td>NA</td>
<td>pptx-open-password</td>
</tr>
<tr>
<td>XLSX output</td>
<td>Open password</td>
<td>Use this property to specify the password that report users must provide to open any XLSX output file.</td>
<td>NA</td>
<td>xlsx-open-password</td>
</tr>
</tbody>
</table>

Related Topics
- eText Report Layout Templates: Explained

Create and Edit RTF Report Layout Templates

An RTF template is a rich text format file that contains the layout instructions to use when generating the report output. Use Microsoft Word with the Template Builder for Word add-in to design RTF templates.

Prerequisites
Install the Template Builder for Word add-in, and generate sample data.

Using Template Builder for Word
To modify an RTF template:

1. If you are editing an existing layout:
   a. Select your report in the business intelligence catalog and click Edit.
   b. In the report editor, click the Edit link of the layout to download the RTF file.

   If you are creating a new layout, skip this step.

2. Open the downloaded RTF template file in Microsoft Word. Or, if you’re creating a new template, just open Microsoft Word.

3. Load the sample data that you generated.
4. Edit or create the layout template.
5. Save the file as Rich Text Format (RTF).

Upload the Layout Template File to the Report Definition

If you’re creating or editing a report layout using the layout editor, the layout is automatically saved to the report definition, so you can skip this step. For all other layout types, for example RTF, upload the template file to the report definition after you’re done making layout changes.

Uploading the Template File

1. Select your report in the business intelligence catalog and click Edit.
2. In the report editor, click View a list.
3. In the table that lists the layouts, click Create.
4. Click Upload in Upload or Generate Layout.
5. In the Upload Template File dialog box:
   a. Enter a layout name.
   b. Browse for and select the layout template file that you created or edited.
   c. Select the template file type.
   d. Select the locale, which you can’t change once the template file is saved to the report definition.
   e. Click Upload.
6. Save the report definition.

Related Topics

• eText Report Layout Templates: Explained

Custom Dashboards

Create and Edit Dashboards

You can create and edit dashboards and define their content and layout to organize your analytics and other objects to create meaningful and navigable palettes of information. In addition to objects in the business intelligence (BI) catalog, such as analyses, reports, and prompts, you can add text, sections, and more to a dashboard.

Create a Dashboard

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab (if available).
2. Click Browse Catalog.
3. Click New and select Dashboard.
4. Enter the dashboard’s name and description, and select a folder to save in.
5. With the Add content now option selected, click OK.
6. Optionally, add more pages, or tabs, within the dashboard.
7. Bring items from the Dashboard Objects or Catalog pane to add content to a page.
8. Click Save.
Note: The first dashboard page is saved with the page 1 name by default. To rename this page:
1. Click the Catalog link.
2. In the Folders pane, select your dashboard.
3. For page 1, click More and select Rename.
4. Enter the new name and click OK.

Edit a Dashboard

1. In the Reports and Analytics work area or the Reports and Analytics panel tab (if available) select your dashboard in the pane and click More.
2. Select your dashboard in the pane and click More.
3. Click Edit.
4. Perform steps 6 and 7 from the preceding Creating Dashboards task, and make other changes as needed, for example:
   - Remove content from the dashboard.
   - Move content around.
   - Change the layout of a page.

Related Topics
- Where to Save Analytics and Reports

Data Structure

Data Models

Modify Data Models

A data model defines where data for a report comes from and how that data is retrieved. To create a modified data model if you need additional data not included in the existing model, you can copy and edit an existing data model in the Custom folder in the catalog. You must be a BI Administrator to create data models.

Note: Connecting to any external data source is greatly discouraged and not supported.

Create a Data Model

1. In the business intelligence (BI) catalog, click New and select Data Model in Published Reporting.
2. Optionally click the Properties node in the Data Model pane to set properties for the data model.
3. Click the Data Sets node in the Data Model pane to create or edit data sets, which determine where and how to retrieve data. Click New Data Set and select a data set type. It’s best practice to use the BI repository as a data source, so you should select either:
   - SQL Query: To use a Query Builder tool to define what to use from the repository. Select Oracle BI EE as the data source.
Oracle BI Analysis: To use columns from a selected analysis.

4. Optionally, to limit the data included in the report output, click the Parameters node in the Data Model pane to define variables that users can set when they use the report. You can set parameters as mandatory if they’re required, for example to filter data by a prompted value to improve query performance. These are indicated by an asterisk when you run the report. Mandatory report parameters are required before you can run a report using the View Data option or online, or schedule it.

   **Note:** The order of parameters is important if there are job definitions defined for reports that use your data model. If you change the order in the data model, also update the job definitions.

5. Click Validate to view query and performance warnings.
6. Save your data model in Shared Folders > Custom.

### Data Model Supported SQL Statements

Data models support standard SQL select statements and non-standard SQL, including:

- Database procedures
- Cursor statements that return nested result sets
- Reference cursor functions that support explicit static SQL select statements
- SQL query parameters used in a WHERE clause
- Conditional queries that execute multiple SQL queries in a single data set using an if-else expression

Data models don’t support SQL statements with these keywords: DELETE, INSERT, UPDATE, DROP, EXECUTE, ALTER, MERGE, DBMS_SQL, CREATE, AUTONOMOUS_TRANSACTION, PRAGMA, WRITETEXT, UPDATETEXT, LOAD, UNLOAD, DATABASE, GRANT, REVOKE, TRUNCATE.

### Edit a Data Model

1. Copy the predefined data model.
   a. Find the data model in the BI catalog and click Copy.
   b. Paste within Shared Folders > Custom in a subfolder that has a folder path similar to the folder that stores the original data model.
   c. For the data model you pasted, click More, and select Edit.
2. Optionally click the Data Model node in the Data Model pane to set properties for the data model.
3. Click the Data Set node in the Data Model pane to create or edit data sets.

Most predefined data models are of type SQL Query, and are set up to get application data from the following tables:

   - **ApplicationDB_FSCM:** Financials, Supply Chain Management, Project Management, Procurement, and Incentive Compensation
   - **ApplicationDB_CRM:** Sales
   - **ApplicationDB_HCM:** Human Capital Management

4. Perform steps 4 through 6 from the preceding Create a Data Model task, as needed.

### Related Topics

- Set Data Model Properties
How to Create a New Data Model for an HCM Report

Here’s how to create a data model for an Oracle Business Intelligence Publisher report. In this example, you create a data model using an absence by department analysis that you created previously.

Create a Data Model

1. Navigate to the Reports and Analytics work area and click Browse Catalog to open the Oracle Business Intelligence Catalog.
2. On the OBI EE home page under Create, Published Reporting, click More and select Data Model.
3. On the Diagram tab, click New Data Set and select Oracle BI Analysis.
4. In the New Data Set - Oracle BI Analysis window enter a name for your data model.
5. In the Oracle BI Analysis field, click Search.
6. In the Oracle BI Catalog window, click Users.
7. Click the name of the person who created the analysis.
8. Locate and select the absence by department analysis that you have previously created.
9. In the Time Out field, enter 120.
10. Click OK.
11. Click the Structure tab.
12. In the XML Tag Name field for the Department Name, replace the default value with DEPT_NAME, and replace the default value in the Display Name with Department.
13. In the XML Tag Name field for the Absence Reason, replace the default value with ABSENCE_REASON, and replace the default value in the Display Name with Reason for Absence.
14. In the XML Tag Name field for the Assignment Absences, replace the default value with NUMBER_ABSENCES, and replace the default value in the Display Name with Number of Absences.
15. Click the Data tab.
17. View the report structure and click Save As Sample Data.
18. Click OK.
19. In the upper-right corner, click Save.
20. In the Save As window, select My Folders, and enter Absence by Department Data Model.

Advanced Procedures

How You Set Up Reports to Run as Scheduled Processes

You can create a job definition for predefined or modified reports so that users can run them as scheduled processes. Use the Define Custom Enterprise Scheduler Jobs task in the Setup and Maintenance work area to create job definitions. Otherwise, users can open reports (which are set up to be run online) through the Reports and Analytics work area or panel tab, or open and schedule them from the business intelligence catalog.

General Job Definition Information

This table describes the general information to enter for your job definition.
### Parameters

You can define parameters to be available to users when they submit scheduled processes based on your job definition. When users run the scheduled process, the values they enter for the parameters:

- Are passed to the *data model* that the report is using.
- Determine the data to be included in the report.

The parameters that you define must be in the same order as parameters in the data model. For example, the data model has parameters in this order:

- P_START_DATE
- P_END_DATE
- P_CURRENCY

You create parameters as follows:

- Start Date
- End Date
- Currency

**Note:** Because you define parameters using the list of values sources from the Define Custom Enterprise Scheduler Jobs task, you should not define lists of values in the data model.

### User Property

The only user property you must define is `EXT_FortletContainerWebModule`. Only lists of values associated with the application that you select are made available for parameters in this job definition.

### Set Up Reports for Scheduling

You can set up reports as scheduled processes, which means users can submit them from the Scheduled Processes and other work areas. If you want users to also submit these scheduled processes from the Reports and Analytics work area and panel tab, then you must configure properties for the corresponding reports.
Enabling a Report for Scheduling
To enable scheduling in the Reports and Analytics work area and panel tab:

1. In the Reports and Analytics work area or panel tab, edit the report in the business intelligence catalog.
2. Click Properties.
3. On the General tab in the Properties dialog box, enter the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Scheduler Job Package Name</td>
<td>The path for the job definition, for example: / oracle/ apps/ ess/&lt;product family&gt;/ &lt;product&gt;/ &lt;business area&gt;/ Jobs</td>
</tr>
<tr>
<td>Enterprise Scheduler Job Definition Name</td>
<td>The job definition name (not display name), for example: ABCDEFG</td>
</tr>
</tbody>
</table>

Related Topics
- Set Up the Reports and Analytics Panel Tab

Enable Descriptive Flexfields for Oracle Business Intelligence
You can use descriptive flexfields in Oracle Transactional Business Intelligence. If you haven't already created flexfield segments, you first create them, then deploy them, and then import them into Oracle Transactional Business Intelligence. After you import your descriptive flexfields into Transactional Business Intelligence, you can create analyses that include the flexfield segments.

To use descriptive flexfields with Transactional Business Intelligence:
- Define flexfield segments.
- Run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process.
- Create an analysis in Transactional Business Intelligence.

Define Flexfield Segments
To define flexfield segments:

1. Navigate to the Setup and Maintenance work area.
2. Open the Manage Descriptive Flexfields task.
3. Search for and select the flexfield code that you want to use, and edit it.
4. Select the BI Enabled option.
5. Save the flexfield and deploy it.

Run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence Process
To run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process:

1. Navigate to the Scheduled Processes page.
2. In the Search Results region of the Overview page, click **Schedule New Process**.
3. In the Schedule New Process window, click the **Search: Name** arrow in the Name field, and click the **Search** link at the bottom of the list.
4. In the Search and Select: Name window, enter Import Oracle Fusion Data Extensions for Transactional Business Intelligence in the **Name** field.
5. Select the row for Import Oracle Fusion Data Extensions for Transactional Business Intelligence, and click **OK**.
6. In the Schedule New Process window, click **OK**.
7. In the Process Details window, click **Submit**.
8. In the Confirmation window, click **OK**.
9. In the Process Details window, click **Close**.
10. On the Scheduled Processes, Overview page, enter Import Oracle Fusion Data Extensions for Transactional Business Intelligence in the **Name** field.
11. Click **Search** to see the status of the job.

   **Note:** The job may take several minutes, depending on your system.

### Create an Analysis in Transactional Business Intelligence

After you have successfully run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process:

1. In the Navigator menu under Tools, select **Reports and Analytics**.
2. In the Reports and Analytics work area, click **Create** and select **Analysis**.
3. In the Select Subject Area window, find and select the subject area that contains the flexfield that you deployed and imported.

### Related Topics

- Human Capital Management Descriptive Flexfields for Oracle Transactional Business Intelligence

### What happens to modified analytics and reports when a release update is applied?

Updates don't affect the Custom folder or My Folder in the catalog. Anything saved there is preserved, including the **analytics** and **reports** you edited or created. But anything saved outside those folders, in the predefined catalog, is preserved only if the update doesn't include a new version of those BI objects.

If an update includes a new version of a predefined object that you edited outside the Custom folder, the changes you made are saved as a new object. The new version from the update overwrites the existing predefined object. And a copy of the existing object (with your edits) is automatically created in the same folder, with a new name that indicates it's a new version.

If the update includes a new version of both the predefined object and a folder in its file path, the new folder name, along with the new version of the object, overwrites the existing predefined folder and object. And a copy of the existing folder (along with your edited object) is automatically created. The folder is renamed to indicate that it's a new version, but your edited object isn't renamed.

**Note:** Future updates won't affect renamed objects or anything within a renamed folder.
8 Data Import and Export

Importing Contracts

Overview of Importing Contracts

You can use file-based import to bring existing legacy contracts into Oracle Applications. To do this, you must first upload the source file and then map fields in the source file to import object attributes. After you do that, when you schedule an import activity, the interface tables are populated with data as per the mapping. You can then bring them in as new contracts.

Summary of Features

Here are the key features of importing contracts:

- Upload the source file to the file repository.
- Identify the target import objects.
- Map import object attributes to fields in the source file you uploaded.
- Schedule the import activity to populate the interface tables with the data.
- Import contract attachments.

Resources

To help you get started, you can use the document and example templates provided in Document ID 2151576.1 on My Oracle Support.

Import Contracts

You can import contracts from a source file into the application. To set up file-based data import for importing contract data, select the Manage File Import Objects and Manage File Import Mappings tasks. To schedule your contract imports, select the Manage File Import Activities task. These tasks in the Setup and Maintenance work area are part of the Enterprise Contracts offering in the Enterprise Profile functional area.

File-based import supports the import of data from an external text or XML file to interface tables, and from interface tables to target application tables.

This topic describes:
- What you can import
- The interface table
- The import process
What You Can Import

All contracts can be imported except for those in Expired status. The import file can use names as well as IDs to identify data, for example, Party ID or Party Name. You can import only one version for each contract, with this data:

- Contract header
- Primary party (supplier, customer, or partner)
- One contract owner: depending on the owner role, this is either an employee or salesperson of the contract's business
- One primary contract party: a supplier or partner or customer
- Primary contract document as an attachment
- Additional attachments: the import file lists the attachments which are imported using the file import user interface (UI), either individually or as a ZIP file.

You can import new contracts as well as update or delete a contract using import. The same restrictions apply to update and delete as are applied when you perform those same actions in the application UI.

Interface Table

The table describes that the application uses these database tables for importing contracts:

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKC_IMP_CONTRACT_HEADERS</td>
<td>The interface table used to load contract data from external systems. This table maps to logical contract data: contract header, contract party, contract party contact, contract terms, and contract attachments.</td>
</tr>
<tr>
<td>OKC_IMP_CONTRACT_ADDR</td>
<td>Interface table for importing contract addresses.</td>
</tr>
<tr>
<td>OKC_IMP_CONTRACT_CNTACTS</td>
<td>Interface table for importing contract contacts.</td>
</tr>
<tr>
<td>OKC_IMP_CONTRACT_LINES</td>
<td>Interface table for importing contract lines.</td>
</tr>
<tr>
<td>OKC_IMP_CONTRACT_PARTIES</td>
<td>Interface table for importing contract parties.</td>
</tr>
<tr>
<td>OKC_IMP_CONTRACT_RELNS</td>
<td>Interface table for importing contract relationships.</td>
</tr>
<tr>
<td>OKC_K_SALES_CREDITS_INT</td>
<td>Interface table for sales credits.</td>
</tr>
<tr>
<td>PJB_BILL_PLANS_INT</td>
<td>Interface table for importing project billing plans.</td>
</tr>
<tr>
<td>PJB_BILLING_CONTROLS_INT</td>
<td>Interface table for importing project billing controls.</td>
</tr>
<tr>
<td>PJB_CNTRCT_PROJ_LINKS_INT</td>
<td>Interface table for importing project procurement links.</td>
</tr>
</tbody>
</table>
Details about the fields and valid values for import are available from Contracts section of the Oracle CX Tables and Views for CX Sales and B2B Service guide See Related Topics.

**Importing Contracts from a Source File**

To import contracts, use the file-based import feature and upload contract data into the interface table. To access this feature, select the Manage File Import Activities task. This task in the Setup and Maintenance work area is part of the Enterprise Contracts offering in the Enterprise Profile functional area.

**Note:** The Edit Import Activity: Map Fields page contains an import mapping that details the mapping between source file columns and contract attributes, but you may define additional import mappings.

**Related Topics**
- [Overview of File-Based Import Mapping](#)

**Import Activity Source File Options**

The Import Activity is a step-by-step guided process to help you create an import activity for a given object. This topic describes the source file options defined in the Import Activity that are used by the import process to locate and parse the source file data.

**Source File Data**

Enter attribute details pertaining to the source file as described in this table.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Type</td>
<td>Source file must be either Text, ZIP, or XML.</td>
</tr>
<tr>
<td>Data Type, Delimiter, and Header Row Included</td>
<td>A Text file type can further be defined based on how the data is delimited and if the source file is expected to include a row of headings for each column.</td>
</tr>
<tr>
<td>Import Mapping</td>
<td>Displays a list of predefined mappings for the object selected for this import activity. The selected mapping will be used as the basis for mapping your source file in the next Import Activity step.</td>
</tr>
</tbody>
</table>

**Source File Location**

This table provides the available options when locating your source file for import.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload From</td>
<td>You can upload the source file from the following locations:</td>
</tr>
<tr>
<td></td>
<td>• Desktop</td>
</tr>
<tr>
<td></td>
<td>If you select Desktop, then a File Name field with an associated Update button is displayed. Click Update and browse to search and select the file you want to upload.</td>
</tr>
</tbody>
</table>
Option | Description
---|---
• WebCenter Content Server | If you select **WebCenter Content Server**, then a **File Name** field with an associated **Browse** button is displayed. Click and browse to search and select the file you want to upload.

**How You Import Contracts**

You can use the information in this topic to import contracts. You will also learn how to:

- Identify and associate records
- Access and use reference files to evaluate attributes

Use the file-based import objects and target objects in this table to import contracts.

<table>
<thead>
<tr>
<th>Import Object</th>
<th>Target Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract</td>
<td>ImportContractHeader1</td>
</tr>
<tr>
<td>Contract Party</td>
<td>ImportContractParty1</td>
</tr>
<tr>
<td>Contract Party Contact</td>
<td>ImportContractPartyContact1</td>
</tr>
<tr>
<td>Contract Lines</td>
<td>ImportContractLines1</td>
</tr>
<tr>
<td>Associated Projects</td>
<td>ContractProjectLinkageImport1</td>
</tr>
<tr>
<td>Bill Plans</td>
<td>BillPlanImport1</td>
</tr>
<tr>
<td>Billing Controls</td>
<td>BillingControlImport1</td>
</tr>
<tr>
<td>Contract Sales Credit</td>
<td>ImportContractSalesCredit1</td>
</tr>
<tr>
<td>Contract with no lines (Non-Hierarchical)</td>
<td>ImportContractHeader1</td>
</tr>
</tbody>
</table>

Use the file-based import objects and target objects in this table to import service contracts.
<table>
<thead>
<tr>
<th>Import Object</th>
<th>Target Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract</td>
<td>ImportContractHeader1</td>
</tr>
<tr>
<td>Contract Bill Line</td>
<td>ImportContractBillLine1</td>
</tr>
<tr>
<td>Contract Charge</td>
<td>ImportContractCharge1</td>
</tr>
<tr>
<td>Contract Charge Component</td>
<td>ImportContractChargeComponent1</td>
</tr>
<tr>
<td>Contract Covered Asset</td>
<td>ImportContractCoveredAsset1</td>
</tr>
<tr>
<td>Contract Line</td>
<td>ImportContractLine1</td>
</tr>
<tr>
<td>Contract Manual Adjustment</td>
<td>ImportContractManualAdjustment1</td>
</tr>
<tr>
<td>Contract Party</td>
<td>ImportContractParty1</td>
</tr>
<tr>
<td>Contract Party Contact</td>
<td>ImportContractPartyContact1</td>
</tr>
<tr>
<td>Contract Relationship</td>
<td>ImportContractRelObject1</td>
</tr>
</tbody>
</table>

**Note:** In the Contracts.csv file, the **Auto Generate Billing** option is set to N. If you need to generate the invoice bills, then change the **Interfaced** option to Y.

**Contract Target Import Objects**

You use the Contract import objects to import basic contract information and party information about the customer or supplier, the organization or business unit, and party contacts. The Contract target import object organizes the individual attributes of the contract such as the contract number and contract type. The Contract Party target import object includes the individual attributes of the party information such as the business unit, contract owner, and the primary party. The Contract Party Contact target import object includes the primary party contact information. You use the contract header attributes to import contract headers.

The employee of the associated business unit is the contract owner. The external party can be the customer, the supplier, or the partner. The contract type determines the properties of the contract. For example, the type of permitted contract lines, contract validation checks, and contract acceptance signature requirements.

**Note:** Line auto-numbering wasn’t enabled for contracts imported in older versions of Oracle Applications Cloud. You need to enable Line auto-numbering only for new contracts. Contracts that already exist will continue to require manual line numbering.

**Identify and Associate Records with Each Other**

To create or update existing contracts using file-based import, your source file must contain information about the contract and the associated business unit and contract owner, and external party and external party contact. When you import the data, a record is created for each contract. Each contract record in the application has a unique ID. This ID is
often referred to as the internal ID or object key. You can use these IDs to uniquely identify the records when importing updates.

When the source of your data isn't an external application and you don't plan to regularly update the data, you don't need the source record information such as the contract number and the contract type. To import updates to your existing data, you can export the Oracle record ID and add it to your source file. The import process uses the record ID to identify the existing record. This image shows how you can import contracts.

Before You Start

The minimum data required to import contract information depends on:

- The purpose of the import. The data is different when you create both the party and the contract in the same import batch, add new contracts to an existing party, or update a contract record.
- Identifying records. You can select the attributes you need for the import process when identifying and associating records. The values provided in your source file may require a setup task or manual step to ensure that they're validated at the time of import. Before preparing the source file, complete the prerequisite steps to determine the data values and then include those values in your source file.

Evaluate Attributes with Reference Files

For more information about import attributes, see the Oracle CX File-Based Data Import for CX Sales and B2B Service guide available on the Oracle Help Center. See the topic for your import object, which includes links to reference files for target import objects.

Review a reference file to see attributes that are available to import and information for each attribute, including requirement for inclusion in an import, validation requirements, default value, data type, data length, and description.
Additional Tips
You can explore related topics by entering the following keywords in the Oracle Help Application search. The Help Application is available from any Oracle Application page by clicking Applications Help from the Settings and Actions menu.

- Importing customers
- Importing suppliers
- Importing partners
- Importing contacts

Import Attachments Using File-Based Data Import
You can include attachments when you use the Manage File Import Activities task.

Import Attachments
To import attachments using file-based data import:

1. Add one or more of the columns listed in this table to the source file you’re importing.
   The ATTACHMENT_FILE_NAME header is the only required header. All other headers are optional. The Manage File Import Activities task reserves these header names for their described usage. You must not use them for any other purpose.
   This table describes each of the supported column headers.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ATTACHMENT_FILE_NAME</td>
<td>The .zip file selected when defining the import activity must contain a file with the specified ATTACHMENT_FILE_NAME value. Your attachment file name should not contain special characters such as the Pound symbol or the pipe symbol (</td>
</tr>
<tr>
<td>ATTACHMENT_FILE_DESC</td>
<td>A description of the file to be attached to the record.</td>
</tr>
<tr>
<td>ATTACHMENT_FILE_TITLE</td>
<td>Enter the file title. This isn’t a required field. If you don’t specify a file title, then the Manage File Import Activities task uses the file name as the title. For example, if the file name is abc.txt, and the ATTACHMENT_FILE_TITLE column value isn’t explicitly passed in the CSV, then the file title defaults to abc.</td>
</tr>
<tr>
<td>ATTACHMENTCATEGORY_NAME</td>
<td>Specify the attachment category. An attachment category is used to classify and secure attachments. You must define every attachment UI with at least one category so that users can add attachments. For example, you can categorize attachments for an expense report as a receipt, scanned invoice image, and so on.</td>
</tr>
</tbody>
</table>

2. In every row of the source file, enter the name of the attachment file that the Manage File Import Activities task must attach to the record.
   This table lists some attachment files for Leads. For example, you enter file_1.doc as the attachment file for Lead 1.
3. To specify the same attachment file for more than one record, enter the same file name for each record in the ATTACHMENT_FILE_NAME column. For example, you can specify file_1.doc for Lead 1 and for Lead 2.

   **Note:**
   - You can specify multiple attachments for any type of business object or custom object.
   - If you specify more than one attachment for the same record, and if you add any of the optional attachment columns, then you must repeat all the columns in the same order for each attachment file.

4. Create a .zip file that includes the files that you must attach.
   For example, create a file named myfiles.zip that includes these files:
   - file_1.doc
   - file_2.doc
   - file_3.doc
   - file_4.doc

   You can also use a JAR file. You can organize these files in folders and subdirectories.

5. Sign in to the application.
6. Navigate to the following in the Setup and Maintenance work area:
   - Offering: Sales
   - Functional Area: Data Import and Export
   - Task: Manage File Import Activities

7. In the Search Results list, click the link for the task.
8. In the Manage Import Activities page, click the Create icon.
9. In the Create Import Activity: Enter Import Options page, select an object from the Object drop-down list that supports attachments.
10. In the Attachments section, click Browse, and then locate your .zip file.

   **Note:**
   - You can upload only one .zip file.
   - You can’t add more attachments after you upload the .zip file.
11. Enter the data in the remaining fields and activate the file-based data import activity. The Manage File Import Activities task recognizes the reserved column header names, so you don’t have to map them in the Create Import Activity: Map Fields page.

Constraints for Business Objects
You can import attachments only for these business objects:

- Account
- Activity
- Contact
- Contract
- Campaign
- Household
- Lead
- Opportunity
- Partner
- Notes
- Sales custom object
- Common custom object

You can’t delete the file attachments from a record using file-based data import activities.

Related Topics
- File-Based Data Import Objects
- File-Based Import Monitoring

Import Activity Options
You can use the import options available in CX Sales and B2B Service to create import activities.

Source File Data Transformation
You use the options in this table to identify the formatting of source file data so that the data can be correctly interpreted and transformed by the import process.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decimal Separator</td>
<td>The format of the fractional portion of numeric values in columns mapped to attributes with a decimal attribute type.</td>
</tr>
<tr>
<td>Date Format</td>
<td>The format for values in columns mapped to attributes with a date attribute type.</td>
</tr>
<tr>
<td>Time Stamp Format</td>
<td>The format for values in columns mapped to attributes with a time stamp attribute type.</td>
</tr>
</tbody>
</table>
### Interface to Target Import Options

Depending on the object you’re importing and the application modules you implemented, you need to select some options. All the options are provided in this table.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Encoding</td>
<td>The overall encoding of the characters within the file.</td>
</tr>
<tr>
<td>Import Mode</td>
<td>To import leads and employee resources, you have the option of specifying if you want to create and update records or only update records. If you select update, then any new records will be ignored by the import process. For all other import objects, both create and update operations are available.</td>
</tr>
</tbody>
</table>
| Allowable Error Count         | The Allowable Error Count threshold determines if the import operations need to be automatically canceled, if the number of consecutive rows with validation errors exceeds the user defined threshold value. The default value for Allowable Error Count is 2000 but you can change this value when configuring your import. During the “Preparing Data for Import” step, if the number of consecutive rows in your input file with a validation error exceeds the Allowable Error Count value, then the import will be canceled. If the Allowable Error Count isn't reached in this step, then the import will proceed. Errors encountered during the “Importing Data” step aren’t counted as part of the Allowable Error Count. Validation errors include:  
  - Missing required values  
  - Values that exceed the attribute length  
  - Invalid identifiers and lookup codes  
  Duplicates found using matching configurations for Customer Data Management objects don’t contribute to the error count. |
| Notification E-Mail           | The e-mail of the intended recipient of import processing notifications. Currently this option is supported only for Opportunity, Lead, and user-defined objects.                                                |
| Customer Data Management Duplicates | You can select the options in the Customer Data Management LOV for handling duplicates when you’re importing accounts and legal entities either alone or as part of another object. |

**Note:** You can use the Customer Data Management Duplicates LOV to retrieve duplicates only if you have licensed the data quality functionality. Once licensed, you must rebuild the keys for your matching configuration using the Manage Enterprise Data Quality Matching Configurations task. For more information, see the Implementing Customer Data Management for CX Sales and B2B Service guide.

The duplicates are determined using the following matching configurations:

- Address Duplicate Identification
## Option Description

- Contact Duplicate Identification
- Account Duplicate Identification

Using this option, which is available only if you licensed the data quality functionality, you can select different options for handling duplicates when you're importing accounts and legal entities either alone or as part of another object.

The duplicates are determined using these matching configurations:

- Batch Location Basic Duplicate Identification
- Batch Person Basic Duplicate Identification
- Batch Organization Basic Duplicate Identification

You can select from one of the following:

- don't Import Duplicate Records
  - If the main object of the Import Activity is an account or a legal entity object, then the rows that are matched to existing records aren't imported. These duplicates records are reported in the Exception and Error reports.
  - If the Customer Data Management objects are components of another object and one or more matches are found, then the existing duplicate records are evaluated to determine the most recent record. The most recent record will be associated with the main object being imported.
- Import Duplicate Records
  - The Customer Data Management objects will be imported even if matched records exist.
- Import Duplicate Records and Create Resolution Request
  - The Customer Data Management objects will be imported even if matched records exist.
  - In addition, a duplicate resolution request is created and displayed in the Customer Data Management, Duplicate Resolution work area.

### Duplicate Look Back Days

This option applies only to the Lead import object. Only existing leads created within the period determined by the look back days value are evaluated for duplicates based on the attributes selected for duplicate validation in the predefined import mapping. If a duplicate is found, the lead isn't imported and the duplicate record will be reported on the Exception report. Duplicate leads are included in the calculation of the allowable error count threshold.

### Execute Groovy Scripts and Workflows

Selecting this option enables import to trigger the execution of Groovy Scripts and Workflows that have been configured for the object being imported. This option is enabled only if your source file has low-volume data records and the object to be imported supports Turbo Import.

---

### Overview of Import Activity Field Mapping

After entering your import options, the second step of the import activity process is to map fields in the source file to the corresponding target attributes.

- Mapping the Fields
- Saving the Import Mapping
- Constant Values
Map the Fields

The Map Fields section comprises source file columns and target attribute columns. The source column header value is derived from one of the following:

- Predefined mapping, if one is selected
- The source file, if the **Header Row Included** option is selected in the first step of the import activity definition. This is for Text file type only.
- Generic values of Column A, Column B, and so on, if the **Header Row Included** option isn't selected. This is for Text file type only.
- XML tagging structure. This is for XML file type only.

The source columns are explained in this table.

<table>
<thead>
<tr>
<th>Source Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column Header</td>
<td>Represents the column header for Text file types and the tagging structure for XML file types.</td>
</tr>
<tr>
<td>Example Value</td>
<td>Values are derived from the first source file saved with the predefined mapping. If you didn't select a predefined mapping, then the example values are taken from the first data row in the source file selected in the first step of the Import Activity definition.</td>
</tr>
<tr>
<td>Ignore</td>
<td>Select this option if you don't want to import the source file data in that column.</td>
</tr>
</tbody>
</table>

The target columns are explained in this table.

<table>
<thead>
<tr>
<th>Target Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object</td>
<td>The group of import objects that represent the components of the business object being imported.</td>
</tr>
<tr>
<td>Attribute</td>
<td>The attribute name that represents the corresponding interface table column for the object.</td>
</tr>
</tbody>
</table>

Save the Import Mapping

The mapping between source file information and target attributes is saved as a reusable mapping when the import activity is saved, using the import activity name and date to derive a mapping name. If you have selected a predefined mapping, then the modifications to an unlocked mapping in the Import Activity updates and saves the import activity to the predefined mapping. If the predefined mapping is locked, then a modified mapping is saved as a new mapping. To specify a mapping name for new mappings, select the **Save As** option from the Map Fields **Actions** menu.

Constant Values

Constant values provide a way to specify a value for a target attribute that all imported objects inherit. When you configure a constant value, the value set for a target attribute is at the record level. For example, if a source file doesn't contain a column for business unit and all of the objects in the file belong to the same business unit, then enter a
constant value for the object and business unit attribute. Each imported record has the specified attribute set to the constant value. The Constant value takes precedence over any values mapped or ignored in the Map Fields section. This value applies to all import file types.

Related Topics

- Overview of File-Based Import Mapping

### File Import Activity Statuses

You need to know the different import activity statuses when you import data from a file using the Manage File Import Activities task.

The import activity statuses are listed and described in this table.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queued for import</td>
<td>The import request is queued for processing.</td>
</tr>
<tr>
<td>Preparing data for import</td>
<td>The data is being staged to be imported.</td>
</tr>
<tr>
<td>Importing data</td>
<td>The data is being validated and imported.</td>
</tr>
<tr>
<td>Importing attachments</td>
<td>The attachments are stored in the file repository. This step is displayed only if the import object supports the import of file attachments.</td>
</tr>
<tr>
<td>Completing import activity</td>
<td>The cleanup tasks, such as the generation of log files, are in progress.</td>
</tr>
<tr>
<td>Completed</td>
<td>All records were processed and loaded into the application tables.</td>
</tr>
<tr>
<td>Completed with errors</td>
<td>The import activity found errors in the data file that you must correct. You can view details about the errors by clicking the status link.</td>
</tr>
<tr>
<td>Completed with warnings</td>
<td>The import activity found warnings (but no errors) in the data file. You can view details about the warnings by clicking the status link.</td>
</tr>
<tr>
<td>Unsuccessful</td>
<td>The import activity encountered system error and the import is unsuccessful.</td>
</tr>
</tbody>
</table>

Related Topics

- Import Data from a File
- File-Based Data Import Objects
Overview of Contract Import

You might have existing business contracts and want to continue to use them as part of the Oracle Contracts terms library. You can import contract data from an external data source into Sales and B2B Service using the File-Based Data Import feature.

Use the contract business object to store information about the contract such as the terms and conditions of a legally binding or valid agreement between two or more entities in which there is an offer and an acceptance of that offer.

Consider this when importing your data:

- How does your legacy or source system store and represent the contract information when compared to Sales and B2B Service?
- Do you have to configure values in Sales and B2B Service to map your existing data to the Contract import object?
- Do you have to extend Sales and B2B Service to add attributes?
- What import features are available to import your business data?
- How do I verify my imported data?

How Business Objects Are Structured

You must understand how your contract data corresponds with the data in Sales and B2B Service to map your legacy data to the data in Sales and B2B Service.

One table stores the contract definition or header information and another table optionally stores line details for that contract. A contract line is an entitlement to a specific valuable consideration with its own terms and conditions, which businesses offer to their customers as part of a contract. You can associate one or many contract lines to a contract.

How Business Object Attributes are Structured

Each import object is a collection of attributes that help to map your data to the Oracle Applications data and to support one-to-many relationships between the structural components of a contract.

You must know the attribute details of the import objects so that you can prepare your import data. You can use the import reference guide (File-Based Data Import for Engagement) files that contain:

- Attribute descriptions
- Values that populate attributes by default when you don’t provide values
- Validation information for each attribute

The validation information includes the navigation path to the task where you can define values in Oracle Application Cloud. For example, if you have values in your data that correlate to a choice list in Oracle Application Cloud, then the validation information provides the task name where you can define your values. For additional information, such as a list of reference guide file names and locations, see the topic How Contract Import Objects Work Together.

**Note:** You can use the keywords importing contracts to search for related topics in Applications Help.

Configurable Attributes

Here is how you can configure the objects to import your legacy or source data:

- Use the Application Composer to design your object model extensions and to generate the required artifacts to register your extensions.
• Make the artifacts available for importing the object.

You can map these configurable attributes to your source file data. You can use the same source file to import both the configurable attributes and the standard import object attributes.

How You Import Accounts Using File-Based Data Import
You must first prepare a source data file to import contracts. The source file can be either an XML file or a text file, such as a CSV files.

You use the file import process to:

1. Read the data in your source file.
2. Populate the interface tables according to your mapping.
3. Import the data into the application destination tables.

The Define File Import Setup and Maintenance task list includes the tasks required to:

• Configure the import objects
• Create source-file mappings
• Schedule the import activities

You can also access these tasks from the Data Import and Export functional area of the Sales offering. You submit file import activities for each import object. When you’re creating a new contract, you use the Contract object to import your data. You must have the Customer Relationship Management Application Administrator job role to access and submit the import activities for contracts.

Alternatively, you ensure that the user’s job role includes these privileges:

• Run File Import Scheduler (functional security privilege)
• View Contract Import Data (data security privilege)

You either add these privileges to a job role for which you want to enable Contract import, or use one of these prepackaged job roles, which include these privileges:

• ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB
• ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB
• ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB

How You Verify Your Imported Data
You can use the File Import activity reports to verify imported data. Alternatively, you can also navigate to the Contracts work area to view the contract information that you have imported.

Related Topics
• About File-Based Import Documentation
How Contract Import Objects Work Together

You use the Contract import object to import contracts and objects related to the account. This topic describes the Contract import object and introduces:

- Target objects
- Target import object attributes
- Target import object attribute reference guide files used for evaluating and mapping source file data

Overview of Contract Target Import Objects

Use the Contract import object to import basic contract information and party information about the customer or supplier, the contract organization and party contacts. The Contract target import object organizes the individual attributes of the contract and party information. To map the source data in your import file to the target attributes in Oracle Applications, you must understand the target object and the attributes that are included in the target object.

The target import object in the Contract import object contains information about the contract and information about the parties. The party information includes the customer or supplier organization, a person who’s a consumer or supplier, and a person who’s a contact of the customer or supplier. The Contract Import objects consist of basic
information about the contact, line information, party information, and contact information. This figure provides information about the common contract import objects.

A single contract includes specific information about the products that you can exchange between the customer or supplier and the organization that owns the contract. The contract can include one or more goods or services. The Contract target object includes the attributes that are required to import this information. If the customer or supplier is an organization and an existing party, then you can associate the customer or supplier with the contract by using the Contract target object.

**Contract Target Import Object Attributes**

Compare attributes that you want to import with the available target object attributes and their valid values. Use a reference file to evaluate your source data and CX Sales and B2B Service attributes for mapping and validation. See the File-Based Data Import for CX Sales and B2B Service guide (https://docs.oracle.com/en/cloud/saas/sales/20a/oefbs/index.html). See the topic for your import object, which includes links to reference files for target import objects. A reference guide file includes:

- Attribute descriptions
- Default values
- Validations for the attributes

Review the validation for each attribute to know if you need to do any setup tasks.
Define and Manage Import Mappings

You must define a mapping between your source data and a combination of the target object and target object attributes to import your source file data. To define and manage import mappings, do one of these:

1. Predefine the mappings in the Setup and Maintenance work area:
   - Offering: Sales
   - Functional Area: Data Import and Export
   - Task: Manage File Import Mappings

2. Define the mapping when creating an import activity in the Setup and Maintenance work area:
   - Offering: Sales
   - Functional Area: Data Import and Export
   - Task: Manage File Import Activities

Reference Files for Contract Target Import Objects

To access reference files for this object's target import objects, see the File-Based Data Import for CX Sales and B2B Service guide (https://docs.oracle.com/en/cloud/saas/sales/20a/oefbs/index.html). See the topic for your import object, which includes links to reference files for target import objects.

Here is a list of reference files and their target import objects.

<table>
<thead>
<tr>
<th>Target Import Object</th>
<th>Description</th>
<th>Reference Guide File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract</td>
<td>Contract and party information</td>
<td>OKC_IMP_CONTRACT_HEADERS_Reference</td>
</tr>
</tbody>
</table>

Related Topics

- About File-Based Import Documentation

File-Based Import and Export Overview

Overview of Import and Export

You can use Oracle's import and export tools to import and export a wide range of application data. For example, you can import records for sales business objects into the applications so that you don't have to create the records in the UI.

**Note:** Oracle discontinues File-Based Data Import support for CX Sales and B2B Service Objects with the 20D Update. We strongly recommend that you move to the new Import Management application (available in Navigator > Tools > Import Management) to continue importing data after 20D.

For more information, see the related links.
Related Topics

- Options for Importing Data Into Your Application
- Getting Started with Your Sales Implementation
- Understanding Import and Export Management for CX Sales and B2B Service guide

File-Based Data Import: Highlights

You can import application data from external sources into Oracle CX Sales and B2B Service by using the Define File-Based Data Import group of tasks available from the Setup and Maintenance work area. The primary source of documentation on file-based data import is the Oracle CX Understanding File-Based Data Import and Export for CX Sales and B2B Service guide available on the Oracle Help Center. See the related topics for a link to this guide.

Oracle CX Understanding File-Based Data Import and Export for CX Sales and B2B Service

The Oracle CX Understanding File-Based Data Import and Export for CX Sales and B2B Service Guide is a collection of topics that helps you in using file-based data import by providing:

- High-level information about the file-based data import process, architecture, and tools
- Detailed information for importing specific objects and their related objects
- Guidance on importing a minimal set of fields for specific objects

Related Topics

- Using Customer Data Management
- File-Based Data Import for CX Sales and B2B Service
- Understanding File-Based Data Import and Export for CX Sales and B2B Service

How File-Based Data Import Works

The Define File Import group of tasks relies on integration with different architecture components, such as interface tables and application base tables. This topic provides an overview of these components to help you understand the import process and the different import activity statuses.

The following figure provides an overview of the major application components used when you import data from a file. These components include:

- Import object
- Import mapping
- Import activity
- File repository
- Application Composer
- Interface tables
- Base tables
You select the import object during setup. The import mapping is used in the import mapping step. The import file you upload is stored in a file repository. The additional attributes that you create in the Application Composer are stored in a separate extensions repository and are available for import and in the import mapping.

**Note:** If you change the NLS_LANG and the DATE_FORMAT environment variables, you must restart the Oracle Fusion applications.

**Import Objects, Import Mapping, and Import Activity**

When you create an import activity, the import objects you select are provided by Oracle. You manage these import objects using the Manage File Import Objects task.

**Note:** Avoid concurrent submission of File Import jobs for the same import object. Concurrent submission of multiple import jobs with same content results in creation of duplicate object records.

When you create an import activity, you must specify a mapping of the fields in your file to the attributes of the import object. You can create the mapping while creating an import activity or separately using the Manage File Import Mappings task. The mapping is stored and managed as a separate object.
File Repository
The text or XML data file that you upload during import is stored in a file repository. If you upload any attachments, they’re also stored in the same repository.

Application Composer Extensions
When you create additional attributes for data import using the Application Composer, the extensions are stored in a separate repository and are available for import and export.

Interface Tables
The import activity populates the application interface tables with your data.

Base Tables
The import activity loads your data into the base tables to complete the import.

Related Topics
• Import Data from a File

Use Predefined Templates to Import Data
You can use predefined templates to import data using file-based data import. To import data using the predefined templates, you must:
• Download the import templates
• Understand the import templates
• Adapt the import templates to your needs

Download Import Templates
CX Sales and B2B Service provides templates to help you import data using File-Based Data Import tool. The templates are spreadsheets that include the commonly used fields, in addition to the required fields. Every import object could have one or more templates associated with itself. This table lists the objects and the templates for the object. Predefined mappings are highlighted in bold.

<table>
<thead>
<tr>
<th>Import Object</th>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Data Cloud Account Import - Advanced</td>
<td>Predefined mapping to import files generated from Data Cloud and Insight service into CX Sales and B2B Service for account enrichment.</td>
</tr>
<tr>
<td>Account</td>
<td>Account Create and Update Predefined Mapping</td>
<td>This mapping lets the user create or update accounts with the most basic information.</td>
</tr>
<tr>
<td>Account</td>
<td>Quick Create Account Predefined Mapping</td>
<td>Predefined mapping to create Accounts with basic information. This mapping can’t</td>
</tr>
<tr>
<td>Import Object</td>
<td>Template</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Account</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Account</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Activity</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Activity</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Contact</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Contact</strong></td>
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<tr>
<td></td>
<td></td>
<td><strong>Contract</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Contract</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Customer Sales Team</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Customer hierarchy</strong></td>
</tr>
</tbody>
</table>

**Import Object**

- **Account**: Template used to update any attribute other than those mapped to the Account object.
- **Account**: Template that lets the user create or update multiple addresses for existing accounts.
- **Account**: Template that lets users associate an account with one or multiple contacts.
- **Activity**: Template to import activity predefined mapping (Import Task).
- **Activity**: Template to import activity predefined mapping (Import Appointment).
- **Contact**: Template to import files generated from Data Cloud and Insight service into CX Sales and B2B Service for contact enrichment.
- **Contact**: Template that lets the user create or update contacts with the most basic information. Additionally, this template can be used to associate individual contacts with existing accounts.
- **Contact**: Template that creates Contacts with basic information. This mapping can't be used to update any attribute other than the ones mapped to the Contact object. Use Original System and Original System Reference fields to establish the relationship between Contacts and Accounts.
- **Contract**: Template to map hierarchical objects.
- **Contract**: Template to map contract objects.
- **Customer Sales Team**: Template to import sales account resource team.
- **Customer hierarchy**: Template that is used to create a customer hierarchy. Customers who are part of this hierarchy should be created first using the "Create or update account" template.
<table>
<thead>
<tr>
<th>Import Object</th>
<th>Template</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer hierarchy member</td>
<td>Customer Hierarchy Member Create Predefined Mapping</td>
<td>This template can be used to add customers (nodes) to an existing customer hierarchy (tree).</td>
</tr>
<tr>
<td>Employee Resource</td>
<td><strong>Employee Resource Seeded Mapping - Comprehensive</strong></td>
<td>Template to import Employee Resource with role, resource organization and hierarchy information</td>
</tr>
<tr>
<td>Lead</td>
<td>Lead Predefined Mapping Import Leads</td>
<td>Template to import Leads with contact and company information.</td>
</tr>
<tr>
<td>Lead</td>
<td>Lead Predefined Mapping - Import Leads with Qualification information</td>
<td>Template to import Leads with contact and qualification information.</td>
</tr>
<tr>
<td>Note</td>
<td>Note Predefined Mapping - Default required Set with identifiers</td>
<td>Template to import Note - Default required Set with identifiers</td>
</tr>
<tr>
<td>Note</td>
<td>Note Predefined Mapping - Default required Set with original system reference</td>
<td>Template to import Note - Default required Set with original system reference</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Opportunity Predefined Mapping - All related objects</td>
<td>Template to import Opportunity with all related objects.</td>
</tr>
<tr>
<td>Partner</td>
<td>Oracle Fusion Hierarchical File Import Map for Partner - Includes Child objects</td>
<td>Template to import Partners including child objects.</td>
</tr>
<tr>
<td>Partner</td>
<td>Oracle Fusion Hierarchical File Import Map for Partner</td>
<td>Template to hierarchically import partners with minimum attributes</td>
</tr>
<tr>
<td>Partner</td>
<td>Oracle Fusion File Import Map for Partner Update</td>
<td>Template to import updates to partners</td>
</tr>
<tr>
<td>Partner</td>
<td>Oracle Fusion File Import Map for Partner</td>
<td>Template to import partners with minimum attributes</td>
</tr>
<tr>
<td>Partner Contact</td>
<td>Oracle Fusion File Import Map for Partner Contacts</td>
<td>Template to import partner contacts</td>
</tr>
</tbody>
</table>
### Import Object | Template | Description
--- | --- | ---
Partner Program Enrollments | Oracle Fusion File Import Map for Enrollment Update | Template to import updates to enrollment
Partner Program Enrollments | Oracle Fusion File Import Map for Enrollment | Template to import enrollments with minimum attributes
Product Group | Product Group Predefined Mapping - Product Group Header and Child Entities | Template to import product groups, items related to product groups and product group relationships used to define a hierarchy.
Quota | Quota Predefined Mapping - Territory and Resource Quotas | Template to import Territory and Resource Quotas
Sales Promotion | Sales Promotion Predefined Mapping - Header and Coupons | Template to import promotions and coupons associated with promotions.
Territory | Territory Import Seeded Map | Template to import territory
Territory Geographies | Territory Geographies Import Mapping | Template to migration import territory geographies
Territory Geographies | Territory Geographies Incremental Import Mapping | Template to import territory geographies incrementally

**To download an import template:**

1. In the Setup and Maintenance work area, navigate to:
   - Offering: Sales
   - Functional Area: Data Import and Export
   - Task: Manage File Import Mappings
2. In the **Manage File Import Mappings** page, select the object for which you need the template (such as Account) from the Object drop-down list.
3. Select the **Seeded** option.
4. Click **Search**.
5. Click the template you want to download from the search results. The **Edit Import Mapping** page is displayed.
6. In the **Edit Import Mapping** page, click Download Template.
7. Save the .csv file to a location on your desktop.

**Understand the Import Templates**

You must understand the columns in the import templates to populate the templates with the correct data. To update existing records, your source file must include the attributes that enable the import process to identify these records. These values are source system and source system reference value combination, internal ID, or public unique identifiers,
such as business keys or external IDs. When the source of your data isn’t an external system and you don’t intend to regularly update the data, you don’t need the source system information.

**Note:** Oracle recommends that you include the source system information, as requirements change over time.

**Copy and Modify a Predefined Mapping**

The template file includes a header row with columns that map to the attributes for the objects. You can use the mapping that’s used to download the template and also to map columns to attributes during import. The columns are arranged in the same order as the mapping in CX Sales and B2B Service. You can add additional attributes to the file by adding them after the last column. In case you add additional attributes, you must copy and modify the predefined mapping to create a user-defined mapping that includes these additional attributes. To copy and modify a predefined mapping:

1. In the Setup and Maintenance work area, navigate to:
   - Offering: Sales
   - Functional Area: Data Import and Export
   - Task: Manage File Import Mappings
2. In the Manage File Import Mappings page, select the object for which you need the template (such as Account) from the Object drop-down list.
3. Select the **Seeded** option. Click **Search**.
4. Click the template you want to copy or modify from the search results. The **Edit Import Mapping** page is displayed.
5. In the Edit Import Mapping page, click **Copy Mapping**.
6. The target object attributes can be edited. You can also add attributes to the object by clicking the Create icon.
7. Click **Save** to save the modified template file.

**Note:** Perform these steps to view the Language Independent Code of the target attributes:

1. In the Setup and Maintenance work area, navigate to:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. In the **Administrator Profile Values** page, search for the profile option ZCA_IMPORT_ENABLE_LIC_COLUMN.
3. Set the Profile Value to TRUE.
4. In the **Edit Import Mapping** page, select Language Independent Code from the **View** menu.

**Adapt the Import Templates**

You may want to add additional attributes to your files to import additional information for your import data. You can review all available attributes for your import object in a reference file located in File-Based Data Import for CX Sales and B2B Service guide available on the Help Center (https://docs.oracle.com/en/cloud/saas/sales/20a/oefbs/index.html). Review the reference file to explore other attributes that are available for import and the possible prerequisite steps for those attributes.

The reference file includes the following information:

- All attributes available for your import object.
- The attribute descriptions, including the user interface display name for the attribute if the attribute is displayed on the user interface.
• The data type, length, and validation logic, including the task or work area where you can view or define valid values before importing data.
• The logic for default values, if values aren’t provided in your source file.

Select the Import Template
To select the template that you downloaded during the import process:

1. In the Setup and Maintenance work area, navigate to:
   - Offering: Sales
   - Functional Area: Data Import and Export
   - Task: Manage File Import Activities
2. In the Manage Import Activities page, click the Create icon.
3. In the Create Import Activity page, provide the import name and object to import. Provide the file type, select Header row included and Seeded options.
4. From the Import Mapping drop-down list, select one of the predefined templates
5. Click Next to view the mapping and schedule the activation of import process.

File-Based Data Import FAQs

What determines the list of File-Based Data Import objects displayed?
A single import object can have multiple associated components that are considered objects by themselves. Whether or not an associated object can be grouped as a component of another object for the purpose of file import is determined by the complexity of the object structure and how the object is stored in the data model. Sales and B2B Service provides import objects predefined to meet the file processing import requirements. Consequently, in some cases, more than one source file may be required to capture all associated components of an object.

What happens if I inactivate an Import Activity?
The Import Activity will not stop the currently running process. However, it will cause the next scheduled process plus any future repeating file import activities not to start. You can always activate the process at a later stage.

What happens if I add a marketing list in the Import Activity definition?
File-based data import enables you to record consumers and organization contacts in a marketing list when importing consumer, lead, and response import objects. Select an existing list or create a new one. A marketing list is assigned the list type value of Imported if created while defining an import activity. After the objects are imported successfully, the consumers and contacts are added as members of the marketing list.

Bulk Export

Overview of Bulk Data Export
You can extract large volumes of data using bulk export. You can either extract a full set of records for an object, or perform incremental extracts. For example, you can extract complete set of account data or extract updated set of...
records every week. Bulk export creates comma separated or tab delimited files, which are attached to the export process.

How Bulk Export Process Components Work Together

You use bulk data export to export data, by leveraging export maps. To export files using bulk export, you create a process definition, map files for full and incremental extract processes, and then schedule the data export process.
Bulk Data Export Process Components

This image shows the bulk data export process components comprising the process name, export process ID, and the export map ID.

Bulk data export process includes these three components:

- **Process name**: A name for the export process that lets you easily refer the export process rather than using the computer generated ID such as 100000019897192.
- **Export process ID**: A unique, application generated identifier for the export process definition for the export process. The process ID ties the export map with its export objects, filters, and the export schedule.
- **Export map ID**: A unique identifier for the export map. You can reuse the export map in different process definitions. For example, you create a process definition to export all the data from the Customer export object. You can then reuse that export map and apply a new filter on the data to create an incremental export, such as data accrued since the last export date.

Perform Bulk Export

You can extract large volumes of data using bulk export. You can either extract full set or records for an object, or perform incremental extracts. Bulk export creates comma separated or tab delimited files, which are attached to the export process after exporting the data.

To perform bulk data export:

1. Create the export process definition. The export process definition is made up of the export map and the processing schedule.
2. In the export map of the export process definition:
   a. Select attributes for the export
   b. Filter data for the export
3. Schedule the export job.
4. Activate the export job.

**Define Bulk Export**

After defining the mapping files, you create an export process to export an object’s data using the mapping files created.

To define a bulk export process:

1. Navigate to the following in the Setup and Maintenance work area:
   a. Offerings: Sales
   b. Functional Area: Data Import and Export
   c. Task: Schedule Export Processes
2. Select **Create** from the Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map.
4. Click **Next** to view the Create Export Process Definition: Configure Export Objects page.
   - In this page, you define the export object you want to export and the mapping you want use for the export process.
5. Optionally, you can enter a name for the mapping if you would like to reuse this mapping for other export processes. An object’s mapping file determines what data is exported every time an object is exported. You can have multiple mapping files for an export object for various object details you want to export.
   - **Note:** The export mapping is optional. You don’t need to select an existing mapping to perform an export.
6. Select **Create from the Actions** menu to view the Manage Export Objects dialog box.
7. Select objects from the **Available Objects** list and move them to the **Selected Objects** list and click **Done**.
8. Define the attributes you want to export in the Detail region of the page. You can define:
   a. Attributes you want to export. Select Enabled for the attributes you want to export.
   b. Header text of the attributes. Edit the header text in the Header text column. This value is used as the column header in the files generated by the export process.
9. Define the filters to determine the data you want to export by clicking the button in the **Edit Filter Criteria** column.
   - **Note:** For the incremental extracts, you can create filters using time stamps to determine which rows to export.
10. Click **Next** to view Create Export Process Definition: Create Schedule page.
11. Select if you want to run the export process immediately or at a later time. Two types of scheduled exports are supported:
    a. Incremental Export
    b. Normal Export
12. Click Next to view the Create Export Process Definition: Review page.
13. Review the export process details and click **Activate**.
After each export process executes and completes, a comma or tab delimited data file is created and stored as an attachment to the data export process. If the number of records matching the view criteria exceeds one million records, or if the generated export file size exceeds 100 MB, then the data export process generates multiple files. The generated export files are numbered using the extension "_NNN" starting at "_001".

You can also use web services to schedule and start an export process. In this case, you can use the getAttachment web service to download the data file.

Data Export FAQs

Which data objects do I need to select for successful data export?
Review the requirements for the data to be exported and determine the source view objects that hold the attributes you want.

How can I create a subset of data for export?
Full sets of data aren’t always required for export. To create a subset of data, use filter criteria to determine the time frame or scope of data, based on values of the attributes. To find activities for a specific date range, for example 1/1/11 through 3/31/11, navigate to the Export Objects Detail Sub Page and click the filter icon. Fill in the filter criteria dialog for the project start dates to select the data to be exported. You run the export by navigating to the following in the Setup and Maintenance work area:

- Offerings: Sales
- Functional Area: Data Import and Export
- Task: Schedule Export Processes

How can I see my exported data?
You can view the Schedule Export Processes, Overview page to see the History subpage. The column Exported Data File shows a hyperlink to your output file. This file will be a comma separated variable or a tab delimited file. Click that link to open the file and see the exported data.

What happens if I change the sequence number or header text in an exported data file?
Changing the sequence number changes the order of the attributes in the exported data file. Changing the header text enables you to give a more intuitive meaning to the attribute and the associated data.

What happens if I need data from multiple export view objects?
Select as many view objects as required for the export process. Select the individual attributes required from every export object.
Overview of Extending the CX Sales Applications

Oracle CX applications offer many different ways to configure, extend, and integrate its services, components, and modules.

Here are just a few of the capabilities:

- Modify objects and user interfaces (UIs).
- Change the appearance and theme of the UIs.
- Configure the Home page by adding announcements and changing navigation.
- Change the structure of the springboard and modify the Navigator.
- Modify the help configuration.
- Create interactive guides to help your users learn about the applications.
- Access a rich set of subject areas around which to build your own reports.
- Configure reporting dashboards by adding new reports or changing the layout.
- Create copy maps to map fields or add information between copied business objects.
- Configure security components.
- Use web services to integrate the services.
- Export data, modify it, and then import it back into the services.
- Integrate with other applications to enhance the functionality, including synchronizing Financials Accounts to the sales applications.

**Note:** For more information about configuring online help, see the Common Components chapter.

Modify Pages and Change Text

Use Oracle’s configuration tools, Application Composer and Page Composer, to modify application pages. Use the strings editor to modify text in the application pages.

For example:

- Create a new object and related fields, then create new pages where that object and its fields are exposed to users.
- Add tabs hidden by default to application pages.
- Edit the UI at runtime by showing or hiding fields and tables.
- Change the order of regions, or change a dashboard page layout.
- Change the default text in the UI, for example, by replacing a term with another term throughout the applications.

Map Fields Between Applications

Copy maps are default mappings of fields between objects. For example, when you convert a lead to an opportunity, the application uses the copy map defined for the Lead and Opportunity objects to determine what to name the leads fields.
that are carried over to the newly created opportunity. Using Oracle Application Composer, you can create copy maps for several sales business objects, thus allowing you to control the mapping.

Here are some use cases:

- Create maps to change the default mapping between fields when:
  - Leads and opportunities are copied from responses
  - Opportunities are created from leads
  - Opportunities are created from partner deal registrations
  - Opportunities are copied from existing opportunities
- Use Groovy scripting to include information about the lead on a new opportunity converted from a lead.

### Integrate Applications with Web Services and Use Import and Export

You can use web services to integrate with your external applications. You can also use import management to import and export large amounts of data into and out of the applications.

Example web service integrations include:

- Integrate sales applications with back-office applications.
- Create web-based portal applications that access sales applications through a web services interface.

Example import use cases include:

- Import products into the product catalog
- Import users
- Import sales accounts

### Configure Security Components

If the predefined security configuration doesn’t meet your business needs, then you can make changes. For example, the predefined Sales Representative job role includes sales forecasting duties. If some business groups in your organization have the sales managers perform forecasting tasks instead of the sales representatives, then you can create a company-defined Sales Representative role without those duties. Alternatively, if a predefined job role is too narrowly defined, then you can create a job role with a greater range of duties than its predefined equivalent. See the Securing CX Sales and B2B Service guide for more information.

### Synchronize Financials Accounts to Sales Applications

After users create accounts and contacts in Oracle Financials, use the scheduled process, Synchronize Financials Cloud Accounts and Contacts, to synchronize the data into the sales applications. See the related link in this topic for more information.

### Integrate Sales Applications with Other Products

For additional functionality, you can integrate your sales applications with other products, including, Oracle E-Business Suite, JD Edwards EnterpriseOne, Siebel CRM, Oracle Eloqua, and Oracle Configure, Price, and Quotes (Oracle CPQ).
Summary of This Topic and Where to Find More Information

To find out where to get more information about the extensions and configurations discussed in this topic, see this table:

<table>
<thead>
<tr>
<th>Functionality or Configuration</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure the help system</td>
<td>See:</td>
</tr>
<tr>
<td></td>
<td>• Common Components chapter in this guide</td>
</tr>
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<td></td>
<td>• Oracle Applications Cloud Configuring and Extending Applications</td>
</tr>
<tr>
<td>Create interactive guides to help your users learn about the</td>
<td>See the related topic, below: Manage Guided Learning</td>
</tr>
<tr>
<td>applications</td>
<td></td>
</tr>
<tr>
<td>Configure the Home page, the Navigator, and the springboard</td>
<td>See:</td>
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<tr>
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<td>• Common Components chapter in this guide</td>
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<tr>
<td>Change the UI</td>
<td>See:</td>
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<tr>
<td></td>
<td>• Oracle Applications Cloud Configuring Applications Using Application Composer guide</td>
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<tr>
<td></td>
<td>• Oracle Applications Cloud Configuring and Extending Applications</td>
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<tr>
<td></td>
<td>• The chapters on extending sales business objects in this guide</td>
</tr>
<tr>
<td>Use Copy Maps</td>
<td>The Leads, Opportunities, and Extend Leads and Campaigns chapters in this guide</td>
</tr>
<tr>
<td>Use Oracle Business Intelligence reports and analytics</td>
<td>Oracle CX Creating and Administering Analytics guide</td>
</tr>
<tr>
<td>Synchronize Financials Accounts to the Sales Applications</td>
<td>See the related topic, below: Synchronize Financials Accounts</td>
</tr>
<tr>
<td>Integrate Applications Using Web Services and Use Import/ Export</td>
<td>The chapter in this guide on import and export, as well as the article on sales web services (1354841.1) available on My Oracle Support.</td>
</tr>
<tr>
<td>Integrate the Sales Applications with Other Products</td>
<td>See the article on sales integrations (1962226.1) available on My Oracle Support.</td>
</tr>
</tbody>
</table>

Related Topics

- Define Home Page Appearance
- View Output from Scheduled Processes
- Synchronize Financials Accounts
- Manage Guided Learning
Web Services

Oracle Engagement Cloud comes with RESTful Web services and several categories of SOAP Web services that you can use to:

- Develop cloud applications that call on and integrate with Oracle Engagement Cloud to deliver some of their functionality. You could sell these applications in the Oracle Cloud Marketplace. These applications might deliver other functionality independently or by integrating with third-party applications.
- Integrate suites of applications from third party vendors to Oracle Engagement Cloud.
- Integrate different types of Oracle applications suites, such as Oracle E-Business Suite, with Oracle Engagement Cloud.
- Configure and extend Oracle Engagement Cloud applications to your business needs.

Oracle Engagement Cloud web services provide you an alternative way of interacting with Oracle Engagement Cloud applications. These Web services ensure that you’re not limited by the UI. They enable you to quickly perform simple and complex one time and recurring operations.

Key Resources
For more information about using web services in Oracle Engagement Cloud, see the following articles on My Oracle Support (support.oracle.com):

- Using RESTful Web Services: (1981941.1)
- Using Simplified SOAP Web Services: (1938666.1)
- Web Services: (1354841.1)
- Performing File-Based Data Import Using Web Services: (1605219.1)

RESTful Web Services
Oracle Engagement Cloud includes the following RESTful Web services.

Oracle Engagement Cloud RESTful services include child resources that let you manage the child objects such as addresses, relationships, and so on. Some of the child resources may in turn have other child resources. The child resources are documented in the parent resource.

<table>
<thead>
<tr>
<th>Resource Title</th>
<th>Resource Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
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</tr>
<tr>
<td>Contact</td>
<td>contacts</td>
</tr>
<tr>
<td>Household</td>
<td>households</td>
</tr>
<tr>
<td>Resource Title</td>
<td>Resource Name</td>
</tr>
<tr>
<td>----------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Activity</td>
<td>activities</td>
</tr>
<tr>
<td>Resource</td>
<td>resources</td>
</tr>
<tr>
<td>Leads</td>
<td>leads</td>
</tr>
<tr>
<td>Opportunity</td>
<td>opportunities</td>
</tr>
</tbody>
</table>

For more information about using RESTful Web Services in Oracle Engagement Cloud, see Using RESTful Web Services (1981941.1) on My Oracle Support.

**SOAP Web Services**

Oracle Engagement Cloud SOAP web services includes the following:

- Simplified SOAP web services
- Other SOAP web services

**Simplified SOAP Web Services**

The new and simplified SOAP web services are a subset of Engagement Cloud web services. These web services make it easy to integrate accounts, contacts, and households with other spoke systems. Simplified object structures represent logical views of accounts, contacts, and households. You don't need to know the full data model to use the services correctly. Instead of calling multiple granular web services to orchestrate a set of customer record updates, you can perform the most common customer data management actions with simplified APIs. For example, you can use one API call to create an account with locations and associate the account with existing contacts.

The following top-level SOAP services are available:

- Account
- Contact
- Household

Use these services to create, edit, find, merge, and delete account, contact, and household objects. The services support commonly used profile attributes: one set of industry classification and parent node information attributes required to create an account hierarchy, address attributes, and one instance of different contact point type attributes such as phone, mobile, fax, and e-mail.

The following child services are also available and allow you to manage multiple addresses and relationships for the three top-level objects:

- Address
- Relationship
Steps to Enable
There are no steps necessary to enable these enhancements.

Tips and Considerations

- Attributes that are available on the simplified pages by default are available within each of the top-level services.
- The Account service supports the management of an account hierarchy for a given account.
- The Address service can be used only if there's more than one address related to the top-level object.
- The top-level services don't support any relationships. Use the Relationship service to manage relationships between any two top-level objects.

For more information about using Simplified SOAP web services in Oracle Engagement Cloud, see Using Simplified SOAP Web Services (1938666.1) on My Oracle Support.

Other Services
In addition to the Simplified SOAP web services, Engagement Cloud has an extensive list of other services using which you can perform complex operations. These web services can be transactional data access services and migration services.

- Transactional data access services are services that provide access to the ADF Business objects and provide create, read, update and delete (CRUD) operations to these objects (for example, Opportunity web service).
- Migration services are used primarily for moving data from various systems into Engagement Cloud. They can be either private services used only internally or may be exposed publicly on a case-by-case basis (for example, bulk import web service).

For more information about using Simplified SOAP web services in Oracle Engagement Cloud, see Using Simplified SOAP Web Services (1938666.1) on My Oracle Support.

Overview of Import and Export Web Services
You can use Web services to implement file-based data import and export.

Import Web Services

These Web services are available for importing your data into Oracle Applications Cloud:

- File Import Activity Service (ImportPublicService): Service related to file-based import activity. You use this service to submit an import activity and monitor its status.
- Metadata Public Service (MetadataPublicService): Service used to retrieve the object descriptions. This service provides the getObjectDefinitions method that retrieves the object descriptions.

For more information about using import Web services in Oracle Applications Cloud, see the topic Using Web Services for File-Based Data Import.
Export Web Service
You can use the Bulk Export Service V2 (BulkExportService) to export your data from Oracle Applications Cloud. This service is used to extract data in a batch process. You do one of the following to use this service:

- Web Service proxy clients
- Business Process Execution Language
- Connections architecture

For more information about using Bulk Export Service V2 (BulkExportService), see the topic Using Web Services for File-Based Data Export.

Related Topics
- Use Web Services for File-Based Data Export
- Operations Supported by the Bulk Export Service
- Use Web Services for File-Based Data Import
- Import Web Services Reference Information

User Assistance

Set Up Help
You don’t have to set anything up for help to work. But you can do optional setup, for example to give people access to add help content. First enable help features, then do some tasks in the Application Extensions functional area.

Enable Features
In the Offerings work area, review these features at the offering level.

- Local Installation of Help: Make sure to leave this enabled.
- Access to Internet-Based Help Features: This feature isn’t used, so it doesn’t matter if you enable it or not.
- Help Content Management: Enable this feature if you want some people to be able to add company-specific help to help windows or the Getting Started work area.
- Security for Added Help: Enable this feature if you want certain help to be available only to a restricted set of user roles.

Caution: Enable this feature only if you have this requirement, because the feature can affect performance.

Related Topics
- Configure Offerings
- How You Manage Different Types of Help
- Hide or Show Help Icons
- Give People Access to Create and Edit Help
• Create Groups to Limit Access to Added Help
10 Applications Common Components

Application Toolkit

Overview of Application Toolkit Configuration

Oracle Fusion Application Toolkit (ATK) provides many components that are available to users of all product families. These components include Applications Help, the Reports and Analytics pane, and the Watchlist. In the Setup and Maintenance work area, use the Application Toolkit tasks in the Application Extensions functional area to set up some of these components.

**Note:** The tasks are available only if the Application Toolkit Component Maintenance feature is enabled.

**Tasks**

Use these tasks in the Application Extensions functional area:

- **Map Reports to Work Areas:** Determine what’s available in the Reports and Analytics pane for specific work areas.
- **Set Watchlist Options:** Define settings that affect what’s displayed in the Watchlist and how often items are refreshed.
- **Manage Application Toolkit Administrator Profile Values:** Set profile options to affect how some Application Toolkit components work.
- Use other Application Toolkit tasks in this functional area to set up help:
  - Set Help Options
  - Assign Help Text Administration Duty
  - Manage Help Security Groups

**Related Topics**

- Set Up the Reports and Analytics Panel Tab
- Set Up the Worklist Region on My Dashboard
- Set Up Help

Attachments

Attachments

You can use attachments to provide supplementary information to specific business objects. Attachments can be URLs, desktop files, text, or repository folders. For a business object you may view, create, delete, or edit attachments, depending on your role and granted privileges. For more information on attachments, see the Oracle Fusion Applications Developer's Guide.
Repository
Attachments are stored in a content management repository provided by Oracle WebCenter Content Server. Users managing attachments can't interact with the repository unless the repository mode is enabled. When enabled, users can share attachments among objects, update attachments, and perform other tasks. Access to the attachment files is controlled by a digital signing mechanism.

All attachments are scanned for viruses before they’re stored on the content management repository. If a virus is detected at the time of upload, the attachment request fails and the user is notified about it.

Security
Data security applicable to a specific business object also applies to its attachments. For example, if a user has no access to a specific expense report, then that user can't access its attachments. You can also use attachment categories to control access and actions on attachments, based on roles associated with that category. For more information on securing attachments, see the Oracle Fusion Applications Developer’s Guide.

Related Topics
- Attachment Entities
- What's an attachment category

What's the size limit for attachment files in the sales applications?
Users can attach files, such as PDFs and Word docs, to both standard and custom objects. By default, the file size limit for an individual, attached file is 100 MB. You can decrease this limit, but you can't increase it. For more information, see the article File attachment Size Limit And Allowed Extensions (Doc ID 2324330.1) on My Oracle Support.

Attachments Troubleshooting
Attachments UIs are very user-friendly and easy to work with. You may encounter issues in certain cases such as you modify the attachments, for example create additional attachment categories, or implement data security on them.

Issue: Can't View, Add, Update, or Delete Attachments
You may encounter the following issues when trying to view attachments or perform actions such as adding attachments.

- You can no longer see specific attachments that were earlier visible.
- You can no longer update or delete attachments.
- You get an error stating that you don't have permission to add attachments.

Resolution
Use the Manage Attachment Entities page to ensure that attachment categories are associated to the relevant attachment entity. You might need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or what categories to assign.

If data security is implemented on the categories for the attachment entity, verify that the Enable Security check box is selected in the Manage Attachment Entities page for that entity. Also, make sure that users have a role that has the necessary privileges. The following table lists the privileges required to view, add, update, or delete attachments with a specific attachment category.
<table>
<thead>
<tr>
<th>Action</th>
<th>Privilege</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Read Application Attachment (FND_READ_APPLICATION_ATTACHMENT_DATA)</td>
</tr>
<tr>
<td>Add or Update</td>
<td>Update Application Attachment (FND_UPDATE_APPLICATION_ATTACHMENT_DATA)</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete Application Attachment (FND_DELETE_APPLICATION_ATTACHMENT_DATA)</td>
</tr>
</tbody>
</table>

For example, if users have the Read Application Attachment privilege for all categories associated with the expense report attachment entity, except the Receipts attachment category, then they can view all expense report attachments except those created with the Receipts category. Likewise, if users don't have the Update Application Attachment privilege for any attachment categories tied to the expense report attachment entity, then they can't create any attachments for the expense reports.

For more information on attachment category data security, see the Oracle Fusion Applications Developer's Guide.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

**Issue: Missing Attachment Category**

You can view existing attachments but the attachments no longer have an attachment category associated with them.

**Resolution**

When the attachment was added, at least one category existed for the corresponding attachment entity. Since then, the entity was edited so that it no longer has any assigned categories, so the user can't see the category associated with that attachment.

Use the Manage Attachment Entities page to reassign attachment categories to the relevant attachment entity. For example, if users can no longer see the Receipts attachment category for an attachment to an expense report, then search for the expense report attachment entity and assign to it the Receipts category. You may need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or any additional categories to assign.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

**Related Topics**

- Attachment Entities
- How Attachment Entities and Attachment Categories Work Together
- What's an attachment category

**Calendar**
Create the Accounting Calendar

You usually create a single accounting calendar as part of your implementation. The accounting calendar defines the time periods used in the applications. When you create the calendar, you specify the exact dates for each period. These defined periods, often called enterprise periods, are used for many purposes in the applications. Examples include:

- Reports that provide amounts by enterprise period, such as a sales pipeline analysis
- Metrics calculations by period for territory analysis
- The ability to adjust forecast amounts by time period
- Distribution of quota amounts by time period

**Note:** If you used the Getting Started with Your Sales Implementation guide to create your accounting calendar, then you don’t need to do the steps listed here.

Here are the high-level steps:

1. Plan your calendar periods and start year. See the Implementation Considerations section in this topic for more information.
2. Create the first-year calendar periods and generate the periods for each additional year. See the Create the Calendar section in this topic for more information.
3. Set the accounting calendar profile option. See the Set the Calendar Profile Option section in this topic for more information.
4. Run a scheduled process. See the Run the Time Dimension Process section in this topic for more information.

**Caution:** After your calendar is being used in transaction, you can’t change the calendar options. For example, after you have generated forecasts, you can’t change the calendar options.

Implementation Considerations

Since you can’t change the calendar after it’s in use, ahead of time, you need to:

- Plan which periods your calendar will use.
- Decide which year you want the calendar to start. Consider setting the date to the first date that your company was created. Then you can upload historical data later, if necessary.

Period frequency is an important decision for your calendar, because the period frequency set in your fiscal calendar is the shortest period you can use. Here are some examples:

- Let’s say you set the period frequency to yearly. Then, your reports and activities can be for each year, but can’t be broken down by month.
- If you set the period frequency to monthly, then you can break down activities and reports by month and summarize by quarter and year.
- Say you want to set the period frequency to weekly. In this case, then you can perform activities and reports by week, quarter, and year, but not by month because the number of weeks per month varies.

Create the Calendar

When you create the accounting calendar, you’re establishing the exact start and end dates for each period, for each year. Here’s a procedure that uses the fictitious Vision Corporation to guide you through the steps:

1. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
Task: Manage Accounting Calendars

2. On the Manage Accounting Calendars page, click Create.

3. In the Create Accounting Calendar: Calendar Options page:
   a. Name your calendar, for example, Sales Calendar.
   b. Leave the Adjusting Period Frequency set to None.
   c. For Start Date, Vision Corporation uses 1/1/10.
   d. For Period Frequency, select the shortest time period you want to use for reports and activities. Vision Corporation is using Monthly. The period starts on the first of the month and ends on the last day of the month, regardless of the number of days or weeks in each month.
   e. Vision Corporation selects None for the Separator.
   f. Select the Format to use for period names.

4. Click Next. The Create Accounting Calendar: Period Details page appears, showing the generated periods. The image shows multiple columns, including:
   a. Period name, which is month name, one for each month of the year
   b. Year, which is 2010
   c. Period number, one for each month
   d. Quarter number for each period, assuming four quarters in the year
   e. Start and end dates for the periods
   f. A check box used to indicate whether a period is an adjusting period
Here's an example of the Create Accounting Calendar: Period Details page:

5. If you need to, manually change the details for each period.
6. Click **Save and Close**.
7. Now you need to generate the periods for each additional year, including the current, or coming year. Open the calendar.
8. Click **Add Year**.
9. Click **Save and Close**.
10. Repeat the last three steps for each year you want to add.
11. Click **Done**.

**Note:** You can't change your calendar options after you start using the calendar, such as by generating forecasts.

**Set the Calendar Profile Option**

After you finish creating your calendar, set the accounting calendar profile option. This profile option setting tells the applications which calendar to use. Use these steps:

1. In Setup and Maintenance, go to the following:
   - **Offering:** Sales
   - **Functional Area:** Company Profile
   - **Task:** Manage Calendar Profile Option
   - **Option:** Manage Calendar Profile Option
2. Select the **Accounting Calendar Default** profile option.
3. In the Profile Values table, click New.
4. For Profile Value, select Site.
5. Click the Profile Value list, and select the name of the calendar you created.
6. Click Save and Close.

Run the Time Dimension Process
You need to run the Refresh Denormalized Time Dimension Table for BI process to make calendar time periods available for analytics and reports. Use these steps:

1. Click Navigator > Scheduled Processes.
3. In the Schedule New Process dialog box, click the menu next to the Name field and click Search.
4. In the Search dialog box, enter %Refresh%, and click Search.
5. Select the Refresh Denormalized Time Dimension Table for BI process in the results that are returned and click OK.
6. Click Ok again, if needed.
7. In the Process Details window, click Submit.

Related Topics
• Accounting Calendar Options
• Accounting Calendar Setup Tasks Setup Assistant Completes for You

Messages

Common Messages
Message names that begin with FND_CMN are common messages. Each common message can appear in multiple places in any product family across Oracle Applications Cloud. For example, the FND_CMN_NEW_SRCH message can be used for any search to indicate that no results were found. Common messages of type error or warning are part of the message dictionary.

Creating and Editing Common Messages
You can create common messages for use in multiple places. However, ensure that you follow the predefined naming convention and numbering series associated with the application or module.

| Note: | Don't use FND_CMN as the prefix for the messages you create because all the predefined common messages begin with it. |

Common messages can be used in any application. Therefore, consider the ramifications if you edit any aspect of the message, including incident and logging settings. Changes would be reflected in all instances where the message is used. For example, if you change the message text, ensure that the text is generic and applies to the entire site of Oracle Applications Cloud implementation.

Miscellaneous Features
Set Up the Mapping Service for Contextual Addresses

A contextual address is marked with an orange triangle, the More icon. When users hover over the triangle, an icon appears, which they can click to display the address on a map.

Set Up Mapping Service

You can specify the mapping service to be used to display the map.

1. In the Setup and Maintenance work area, go to the Manage Application Toolkit Administrator Profile Values task in the Application Extensions functional area.
2. Search for the Mapping Service for Contextual Addresses (ATK_CONTEXT_ADDRESS_MAP_OPTION) profile option.
3. In the Profile Values section, enter a full URL of a mapping service in the Profile Value field.

Caution: By default, the Profile Value field is blank. Until you enter a valid value for this profile option, users continue to get an error when they try to open a map for any contextual address.

Here are a few examples of mapping service URLs:

- http://bing.com/maps/?v=2&encType=1&where1=

Tip: You can include parameters in the URL. For example, to avoid a locator box in Google Maps, you can add &iwloc=& to the URL. So, the mapping service URL you would enter in the Profile Value field is: http://maps.google.com/maps?iwloc=&amp;&output=embed&q=

Related Topics

- Set Profile Option Values
- Why can't I see the map for contextual addresses

Set Privacy Statement URL

A privacy statement is legal content that tells you how a company collects and manages user data. You can add a link to your company's statement in the About This Application dialog box.

1. In the Setup and Maintenance work area, go to the Manage Applications Core Administrator Profile Values task in the Application Extensions functional area.
2. Search for the Privacy Statement URL (PRIVACY_PAGE) profile option.
3. In the Profile Values section, update the Profile Value field with the full URL of the web page that has the privacy content. By default, this profile value is N.

Caution: Don't enter any other value, such as Y, because that causes a broken link.

4. Click Save and Close.

And that’s it! Your users can now view the Privacy Statement link by clicking their user image or name in the global header and selecting About This Application.
Overview of Public Unique IDs

When users create records in the database, the applications use document sequencing as they generate a unique ID for each business object record. Understandably, these numbers aren’t easy to read or use because of their length and complexity. To overcome the issue of long IDs, you can set up the applications to make these IDs more user-friendly and readable. This user-friendly value is called the public unique ID (PUID).

These PUID are used in:

- The data model
- Unique sequence generation when you use advanced setup
- Global search by PUID attributes

"Advanced setup" means you have set up the unique sequence generation of PUIDs that’s a specific prefix and radix configuration. You set these for each business object. In addition, keep in mind that PUID specifications mandate that users can search for all supported business objects by PUID and PartyNumber.

Many of the business objects support PUIDs, as described here:

<table>
<thead>
<tr>
<th>Top-Level Object Name</th>
<th>Model Support (PUID Attribute Name)</th>
<th>Object PUID Generation</th>
<th>Global Search By PUID</th>
<th>PUID Exposed in List Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>PartyNumber (RegistryID)</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Action</td>
<td>ActionNumber</td>
<td>Supported</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Action Plan</td>
<td>ActionPlanNumber</td>
<td>Supported</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Activity</td>
<td>Activity_number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Asset</td>
<td>AssetNumber</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Business Plans</td>
<td>BusinessPlanNumber</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Campaign</td>
<td>CampaignNumber</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Competitor (called Sales Competitor in Application Composer)</td>
<td>PartyNumber</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Contact</td>
<td>PartyNumber (RegistryID)</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Custom Objects</td>
<td>Custom Attribute</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Top-Level Object Name</td>
<td>Model Support (PUID Attribute Name)</td>
<td>Object PUID Generation</td>
<td>Global Search By PUID</td>
<td>PUID Exposed in List Management</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-------------------------------------</td>
<td>------------------------</td>
<td>-----------------------</td>
<td>---------------------------------</td>
</tr>
<tr>
<td>Deal Registration</td>
<td>Deal Number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Interaction</td>
<td>InteractionNumber</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Lead (called Sales Lead in Application Composer)</td>
<td>Lead_Number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>MDF Budget, MDF Claim, MDF Claim Settlement, MDF Request</td>
<td>MDF Claim: Code (ClaimCode)</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td></td>
<td>MDF Request: Code (FundRequestCode)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>MDF Budget: Code (BudgetCode)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>MDF Claim Settlement: Code (ClaimSettlementCode)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Objective</td>
<td>ObjectiveNumber</td>
<td>Supported</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Opty_Number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Partner</td>
<td>Company_Number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Quote (called Sales Orders in Application Composer)</td>
<td>OrderHeaderNumber</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Price Book</td>
<td>PriceBook_Code</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Product</td>
<td>ItemNumber</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
<tr>
<td>Product Group</td>
<td>Reference_Number</td>
<td>Supported</td>
<td>Supported</td>
<td>NA</td>
</tr>
<tr>
<td>Program Enrollment</td>
<td>Enrollment Number</td>
<td>Supported</td>
<td>NA</td>
<td>Supported</td>
</tr>
<tr>
<td>Promotion</td>
<td>Sales Promotion Code</td>
<td>Supported</td>
<td>NA</td>
<td>Supported</td>
</tr>
<tr>
<td>Resource</td>
<td>Party Number</td>
<td>Supported</td>
<td>Supported</td>
<td>Supported</td>
</tr>
</tbody>
</table>
### Setup Options

You have these options for setup:

- Use the default setup, where no implementation steps are required.
- Use the basic setup, which is configurable to a certain degree. If you use this setup, the default setup isn’t used.
- Use an advanced setup which is more complex and configurable. The default and basic setups apply to all objects. Advanced setup is on a per-object basis.

Here’s a list of setup options and where to find more information about the setup.

<table>
<thead>
<tr>
<th>Setup Option</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Setup</td>
<td>In this setup, no implementation steps are required. The application automatically generates a unique 15-digit numeric ID for each record. The document sequencing begins with a 1.</td>
<td>No additional documentation, other than this introduction</td>
</tr>
<tr>
<td>Basic Setup</td>
<td>In this setup, you set two profile options where you configure the radix (or base numbers and characters) and prefix to use. The application generates an alphanumeric public unique ID instead of the default numeric public unique ID for each record.</td>
<td>See the Public Unique ID Basic Setup section in this topic</td>
</tr>
<tr>
<td>Advanced Setup</td>
<td>In this setup, you define a radix and prefix for each object. It isn’t required for the</td>
<td>See the Public Unique ID Advanced Setup section in this topic</td>
</tr>
</tbody>
</table>
Public Unique ID Basic Setup

In the basic setup, you can define a single prefix that's shared across all business objects in the implementation. In addition, you have several different radix values that can be used. Together these values form the PUIDs.

To perform the basic setup, you set two profile options:

- CRM Public Unique ID String Encoding profile option: Controls the characters used in the encoding of the public unique ID based on a radix, or base number.
- CRM Public Unique ID Prefix profile option: Defines the optional prefix value for the public unique ID.

CRM Public Unique ID String Encoding profile option (ZCA_PUID_RADIX):

This profile option determines the set of numbers and letters used in creating the public unique ID. The default value is null. After you set the radix, the application converts the public unique ID into user-friendly IDs, using alphanumeric characters instead of numeric digits.

These base values are available:

- Numbers 0-9, letters A-F
- Letters A-Z, upper case
- Numbers 2-9, letters BCDFGHJKLMNPQRSTVWXYZ
- Numbers 0-9, letters ABCDEFGHJKLMNPQRTUWXY
- Numbers 0-9, letters A-Z, upper case
- Numbers 0-9, letters A-Z, letters a-z
- No alphanumeric conversion

The values for the radix are stored in the lookup type, ZCA_PUID_ENCODING. This lookup type is accessible using the Manage Standard Lookups task in Setup and Maintenance.

CRM Public Unique ID Prefix profile option (ZCA_PUID_PREFIX):

In this profile option, you optionally define the prefix for the public unique ID at the site level. After you set this profile option to the prefix you want, application inserts the prefix before the public unique ID base encoded document sequence value. For example, you may want the records for the pharmaceutical divisions of your company to be denoted with public unique IDs and the prefix Pharma or Pharma1, Pharma2, and so on. By default, the prefix has no value.

Keep these points in mind:

- If you enter a prefix value, then you must set a radix value. The length of a prefix value is 5. You can't use the prefix setting by itself.
- If you require a delimiter, then include it as part of the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.

Here's how to set the profile options.

1. Sign in as a setup user.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Public Unique Identifier Profile Options

3. On the Manage Public Unique Identifier Profile Options page, click the ZCA_PUID_RADIX option.
4. In the ZCA_PUID_RADIX: Profile Values section of the page, click the Profile Option Values list of values and select the base numbering value.
5. Click Save and Close.
6. Optionally, click the ZCA_PUID_PREFIX option.
7. In the ZCA_PUID_PREFIX: Profile Values section of the page, in the Profile Value box, enter the prefix and the delimiter you want, if any. For example, enter CDRM_.
8. Click Save and Close.

Public Unique ID Advanced Setup

In the advanced setup, you can define a different prefix and numbering radix for each business object for example, Accounts, Contacts, Opportunities.

Keep these points in mind:

- If you enter a prefix value, you must set a radix value. You can't use the prefix setting by itself. The length of a prefix value is 5.
- If you require a delimiter, then include it as part of the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.

Use these steps to configure the radix and optionally, the prefix in the advanced setup.

1. Sign in as a setup user.
2. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Public Unique Identifier Sequence Generation

3. On the Manage Public Unique Identifier Sequence Generation page, if you're configuring these values for the first time, add a row to the table.
4. In the Object list of values, select the object for which you're configuring the public unique ID.
5. In the Radix list of values, select the base numbering to use. This list of possible radix values is the same list of values that are provided in the ZCA_PUID_RADIX profile option.
6. In the Prefix box, enter the prefix you want to use for the object and unique ID.
   - Enter a maximum of five characters.
   - The allowed characters are: 0-9, A-Z, a-z, and these special characters: period, hyphen, comma, and underscore.
7. Repeat for other objects.
8. Click Save and Close.

This table lists options for RADIX in the Manage Public Unique Identifier Sequence Generation task. For example, the sequence looks as follows if a Lead Number is in the format of "LeadNumber":

- "CDRM_2452" if the Advance Setup for Lead object isn't setup.
• If the Advance Setup for Lead object is setup, then the LeadNumber is created in the form of "LeadNumber" = "LEAD_106065",
• PREFIX is LEAD_ and RADIX is "106065" which is in the format of "No Alphanumeric Conversion".
• RADIX is in the format of "Letters A-Z, Upper Case". "LeadNumber": "LEAD_GAXM",

<table>
<thead>
<tr>
<th>Prefix</th>
<th>Radix</th>
</tr>
</thead>
<tbody>
<tr>
<td>NULL</td>
<td>NULL</td>
</tr>
<tr>
<td>NULL</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
<tr>
<td>NULL</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
<tr>
<td>Null</td>
<td>No alphanumeric conversion</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-Z, letters a-z</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-Z upper case</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters ABCDEFGHJKLMNPQRSTUWXYZ</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters BCDFGHJKLMNPQRSTVWXYZ</td>
</tr>
<tr>
<td>A-</td>
<td>Letters A-Z, Upper Case</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-F</td>
</tr>
</tbody>
</table>

**Related Topics**

- Document Sequences
- Guidelines for Managing Document Sequences

**Notes**
Define Notes

A note is a record attached to a business object. Notes capture nonstandard information received as you do business. When setting up notes for your application, you should consider the following points:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.

Note Types

Note types are assigned to notes when they’re created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type. When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.

Note Type Mappings

If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.
- If no other note types appear, then note type mapping doesn't exist for that object and the default note types are used. Select Default Note Types to see which default note types exist in the application.
- If you modify a default note type, it affects all the business objects that don't have a note type mapping.

Suppose you decide to add a new note type of Analysis for your product area of Sales-Opportunity Management. You use note type mapping to map Analysis to the Opportunity business object. Now, every time you create or edit a note for an opportunity, you see Analysis as an available note type option.

When deciding which note types to map to business objects, you should keep the same considerations in mind that you did when you decided which note types to include.

Related Topics

- About Application Composer

Task Templates

How can I create a task template that is available to associate with assessment templates?

Create the task template with a subtype of Assessment.

What are the statuses a task can be in?

Tasks can have the following statuses by default. You can change or delete these statuses, or add more to fit your needs.
Here's a list of task statuses and their meanings.

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceled</td>
<td>The task was canceled.</td>
</tr>
<tr>
<td>Complete</td>
<td>The task was completed. You can change this status to another one as needed.</td>
</tr>
<tr>
<td>In progress</td>
<td>The task is currently active and being worked on.</td>
</tr>
<tr>
<td>Not started</td>
<td>The task hasn't yet been started.</td>
</tr>
<tr>
<td>On hold</td>
<td>The task isn't actively being worked on, but hasn't yet been completed.</td>
</tr>
</tbody>
</table>

If a task is set to Complete, the Percentage Complete field for the task is set to 100 percent, and the end date is set to the current date.

**Note:** If you change the status of a Complete task to something else, the Percentage Complete field value doesn't change automatically.

### Define Tasks

A task is a unit of work to be completed by one or more people by a specific completion date. Creating tasks can be simplified by using task templates, which are groups of tasks.

**Define Tasks**

You define a task with a description, due date, and category. Each task has an owner, who oversees or is responsible for the task, and one or more assignees who perform the work.

You can associate tasks with a business object, such as an opportunity, a customer, or one or more external contacts. Tasks can also have notes for general information and attachments for tracking email or project documents.

**Define Task Templates**

Often, a process includes a set of tasks that users need to do repeatedly. To make repetitive tasks quicker and easier, you can define task templates that salespeople then use when working on a particular business object. The salesperson simply selects the appropriate task template for the process at hand, and the application creates the tasks and associates them with the business object being worked.

**Note:** You can modify the task object using Application Composer. For more information, see the Extending CX Sales and B2B Service guide.

**Related Topics**

- Create Tasks from a Task Template
Example of Turning a Business Process into a Task Template

This example illustrates how to create a task template that represents a business process.

Scenario
A sales manager wants to create a task template for her department's client product demonstration process.

Client Product Demonstration Activities
The client product demonstration process occurs regularly. The sales manager doesn't want to manually create tasks for this process every time it occurs, so she creates a task template that includes the business process activities. Each time she repeats the business process, she can use the task template to automatically generate the appropriate tasks that need to be performed.

Analysis
The business process consists of these activities:

- Book a conference room.
- Create an agenda.
- Confirm the date and time with the client.
- Make arrangements with presenters.
- Deliver product demonstration.
- Follow up with client.

Client Product Demonstration Task Template
Based on the analysis of the business process, here's the task template she creates:

Task Template Name: Client Product Demonstration

<table>
<thead>
<tr>
<th>Task</th>
<th>Category</th>
<th>Lead Days</th>
<th>Duration Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book conference room</td>
<td>Preparation</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Create agenda</td>
<td>Preparation</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Confirm date and time with client</td>
<td>Call</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Schedule presenters</td>
<td>Preparation</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Deliver demonstration</td>
<td>Demonstration</td>
<td>7</td>
<td>1</td>
</tr>
<tr>
<td>Follow up with client</td>
<td>Call</td>
<td>10</td>
<td>1</td>
</tr>
</tbody>
</table>
Watchlist

Disable or Enable Watchlist Categories and Items

To disable or enable predefined Watchlist categories and items for all users, use the following in the Setup and Maintenance work area:

- Functional Area: Application Extensions
- Task: Set Watchlist Options

Ultimately, what users see in their own Watchlist would be the categories and predefined items that you enable in the Set Watchlist Options page:

- Plus any saved searches that the user is using as Watchlist items
- Minus any categories or items that the user decides to hide using Watchlist preferences
- Minus any items with no results found, if the user decides to hide such items using Watchlist preferences

Any Category or Item

When you disable any category or item, you also disable the processes that calculate the Watchlist item counts. These processes include creating data caches, performing security checks, calling services across domains, running queries, and so on.

Predefined Watchlist Items

An item with the Predefined type represents the actual predefined Watchlist item that appears in the Watchlist. If you disable this type of Watchlist item, then:

- The item isn’t available for users to display in their Watchlist.
- The item is removed from any Watchlist where it’s currently displayed.

If you disable a Watchlist category, then the category isn’t available for users to include in their Watchlist. All Watchlist items within the category are also disabled.

User-Created Saved Search Watchlist Items

A Watchlist item with the User-Created Saved Search type doesn’t appear in the Watchlist. It controls the display of the Manage Watchlist button on pages with saved searches. If you disable this type of Watchlist item, then:

- The Manage Watchlist option isn’t available on the corresponding page, so users can’t use their own saved searches as Watchlist items.
- Any user-defined saved searches (from that page) already used as Watchlist items are removed from the users’ Watchlist. The saved searches are still available for searching, but not for the Watchlist.
Watchlist Category

If you disable a Watchlist category, then:

- The category isn't available for users to include in their Watchlist.
- All Watchlist items within the category are also disabled.

**Note:** You can see the Watchlist icon in the global header only if your default home page layout is Panel or Banner.

**Related Topics**

- Refresh Intervals for Watchlist Items
- How can I change predefined Watchlist category and item names
- Create Watchlist Items
- Show or Hide Watchlist Items
- Why can't I see some icons in the global header
11 Enterprise Contracts Setup Checklist

Overview of Enterprise Contracts Setup

This chapter helps you set up Oracle Enterprise Contracts by configuring only those features that are required to have a functioning application. Once you have a working application, run the full install offering task list in Setup and Maintenance, to take advantage of all the features in your application.

Note: Due to differences in the sequence of common setup tasks in the Enterprise Contracts offering and the intent of this chapter, there may be some differences in the order that set up tasks are presented here.

Set Up Enterprise Contracts

Learn about all that you need to do to set up Oracle Enterprise Contracts.

Especially, do this if you want to set up buy and sell intent contracts without lines and partner program enrollment contracts:

1. Configure Enterprise Contracts and create an implementation project.
2. Define legal entities.
3. Define business units and assign business function and optionally assign ledger and legal entity.
4. Define users.
6. Define layout templates in BI publisher.
7. Configure contract management business functions.
8. Define customers and their addresses and contacts.
9. Define party roles, contact roles, and role sources.
10. Define contract line types.
11. Define contract types.
12. Manage user statuses and user transitions.
13. Set up electronic signature.
14. Set up common CRM business unit profile option.
15. Define contract lines descriptive flexfield.
18. Set up approval groups and approval task configurations.
20. Configure scheduled processes.
How You Create An Enterprise Contracts Implementation Project

Here's how you can configure Enterprise Contracts and create an implementation project:

1. Navigate to My Enterprise and select **Offerings**.
2. On the Setup and Maintenance work area, select the Enterprise Contracts offering then click **Opt In Features**.
3. On the Opt In page, select the **Enable** check box for Enterprise Contracts.
4. Click the **Features** icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
5. Navigate to **Setup and Maintenance**.
6. Open the Tasks side panel and click **Manage Implementation Projects**.
7. On the Implementation Project page, click **Create** to create a new project.
8. Enter your project name and move to **Next**.
9. Select **Include** for Enterprise Contracts and click **Save and Open Project**.
10. Expand Enterprise Contracts in the Implementation Project page to be used in the remaining steps in this chapter.

Related Topics

- Configure Offerings

Define Legal Entities

Here are the steps to define legal entities for use with Contracts:

1. In the Setup and Maintenance work area, create an implementation project that includes the Manage Legal Addresses task.
2. Select a country from the Country drop down list, and a new location.
3. Enter the new location information on the Location Create dialog.
4. **Save and Close**.
5. In your implementation project, search for the Define Legal Entities for Enterprise Contracts task list and open the **Manage Legal Entity** task.
6. Click **Create New**.
7. Click the new icon, and enter the required information by selecting the options Legal Employer and Payroll Statutory Unit. Click **Save**.
8. On the Create Legal Entity page, enter the required information and then **Save and Close**.
9. On the Scope Selection: Legal Entity dialog box, click **Select and Add**.
10. Select the legal entity you created and click **Save and Close**.
11. In your implementation project, select **Define Legal Entities for Enterprise Contracts** from the task list.
12. Click the + on the tool bar, then search for and add the tasks **Manage Legislative Data Groups** and **Manage Legal Entity HCM Information** to the Define Legal Entities for Enterprise Contracts folder.
13. Open the task **Manage Legislative Data Groups**.
14. Search and then click **Create**.
15. Enter the required information and click **Submit**.
16. Search again to verify that the legislative data group is created, and click **Done**.
17. Navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Legal Entities for Enterprise Contracts and open the task Manage Legal Entity HCM Information.

18. Search for and click the legal entity you added.

19. Select Update from the Edit options at the top. Enter a past date in the Update Legal Entity dialog and click OK.

20. Enter the required information under the Legal Employer tab and select the Payroll Statutory Unit tab. Enter the required information and click Submit.

Define Business Units, Assign Business Function, and Assign Ledger and Legal Entity

Here are the steps to define a business unit (BU) and assign a business function, ledger, or legal entity:

1. In the Setup and Maintenance work area, create an implementation project that includes the Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Business Units for Enterprise Contracts, and Manage Business Unit tasks.
   a. Click Create.
   b. Enter the required information on the Create Business Unit page. Select Create from the Default Set drop-down list.
   c. Create a reference data set and click OK.
   d. Select the reference data set created from the Default Set drop-down list and Save and Close.

2. Navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Business Units for Enterprise Contracts, and click Select for the task Assign Business Unit Business Function to select the business unit you created as the task list scope.
   a. Click Select and Add in the dialog to set the BU you created as the task list scope.
   b. Open the task Assign Business Unit Business Function.
   c. Enter the required information and Save and Close. Click the up arrow, and select Enterprise Contracts to go to the main folder structure.

   Note: If the implementation doesn't need to create financial transactions from contracts, assigning a primary ledger and default legal entity in the Assign Business Function page is optional. For service contracts, it isn't optional.


   Note: Anytime you create a new BU, be sure to run the Adopt Global Clauses for a New Business Unit scheduled process. Otherwise, new clauses aren't automatically adopted into the new business unit.
Define Contracts Users

Do this to define contracts users:

1. Navigate to **Define Common Applications Configuration for Enterprise Contracts, Define Security for Customer Relationship Management, Define Users for Customer Relationship Management**, and open the **Manage HCM Role Provisioning Rules** task.
   
   a. Click **Create (+)**.
   b. Enter the required information to create a new role mapping and **Save and Close**.

   
   a. Click **Create (+)**.
   b. Enter the required information to create a user with an e-mail ID, who can author and submit contracts for approval. Enter a **Resource Role** and select an **Organization** in the **Resource Information** section.
   c. Click **Auto-provision Roles**. The provisioned roles from HCM role mapping defined previously are automatically populated. **Save and Close** and then click **Done** to go back to main folder structure.
   d. Repeat the previous steps to create as many Oracle Contracts users as required for this phase of the implementation.
   
   e. Get users and passwords from the e-mail recipients.

   **Note:** For information about steps to create Read-only contracts, refer to the document in My Oracle Support.

**Related Topics**
- Role Provisioning Options
- Methods of Creating Users

Define Document Sequences

Define document sequences for contracts only if you need to auto-number contracts or clauses, or when you are doing the setup for the partner agreement type of contracts. Here are the steps to define the document sequences:

1. Navigate to **Define Contracts Common Configuration, Define Document Sequences**, and open the **Manage Document Sequence Categories** task.
   
   a. Search for the document sequence categories of the Enterprise Contracts module. You should see the document sequence categories for the contract header table OKC_K_HEADERS_ALL_B and the clause table OKC_ARTICLES_ALL already exist.
   
   b. Create a new document sequence category for the table OKC_K_HEADERS_ALL_B to store contract header information. You don't have to create document sequences for the table OKC_ARTICLES_ALL that stores clauses, because you will number the clauses manually. **Save and Close**.
   
   c. If you want to create partner program enrollment contracts from the Partner Relationship Management application, create a new document sequence category for the table OKC_K_HEADERS_ALL_B to store contract header information. **Save and Close** to return to the main folder structure.
Enterprise Contracts Setup Checklist

   a. Search for the document sequences of the Enterprise Contracts module.
   b. Create a document sequence in the primary table and assign it to the document category created for the contract header in the child table. Select the primary ledger for the determinant value that is used to determine the document auto-numbering scope. Save and Close.
   c. If you want to create partner program enrollment contracts from the Partner Relationship Management application, create a document sequence in the primary table and assign it to document category created for contract header in the child table. Select the primary ledger for the determinant value that is used to determine the document auto-numbering scope. Save and Close.

   Note: Document sequences for contracts can be defined at global, ledger, legal entity, and business unit level. Document sequences for clauses can be defined at global, ledger, and business unit level.

Define Layout Templates in BI Publisher

Do this to define layout templates in BI publisher:

1. Navigate to Navigator > Tools and open Reports and Analytics. Sign in to BI publisher with author or administrator privileges.
2. Click the Browse Catalog icon.
3. Open the Enterprise Contracts folder and click the Contract Printing node.
4. Click Edit under the Customer Contract sample layout template and save a copy for future edits. For instance, you may change the Amount boilerplate text in the newly saved copy to Contract Amount and save the file.
5. Click + to add a new layout.
6. Click Upload under the Upload or Generate Layout region.
7. Enter the required information to add the modified template file and click Upload.
8. The contract preview should show the added layout template. To modify layouts for other contracts, repeat from step 4 to step 6. Save and then click Catalog.
9. Using BI Publisher you can create a new layout template using the Contract Data Model attributes supplied with the application. To view the attributes included as part of Contract Preview Sample Data model, click Edit under Contract Preview Sample Data Model link.
10. Click the ContractSample.xml attachment to view the predefined contract attributes.
11. The data model XML file appears. You can scroll down to view all the attributes included across all contract entities. Close the browser and click Catalog. If a save warning appears, do not save the changes.
12. You can use the above steps to change the clause layout templates, download contract terms layout templates, and contract deviation layout templates as well.

Configure Contract Management Business Functions

Here are the steps to configure contract management business functions:

2. Click **Select** in the Selected Scope column for the Specify Customer Contract Management Business Function task.

3. Click **Select and Add** in the dialog to select a business unit, then **Apply and Go To Task**.

4. Select the BU that you created and click **Save and Close** to save the task list scope to the BU.

5. On the Specify Customer Contract Management Business Function Properties page select the default currency, enter the required information in the Terms Library region and click **Save and Close**. These settings are common for standalone sell and partner program enrollment type of contracts. Ignore the other values in the page for now.


7. Enter the required information and click **Save and Close**.

---

**Define Customers with Their Addresses and Contacts**

Here are the steps to define customers and their addresses and contacts:

1. Navigate to **Define Contracts Common Configuration** and note the following manual tasks. Manual tasks need to be performed outside the Setup and Maintenance work area.

   **Note:** As partner management enrollment contracts are created and managed from the Oracle Partner Management application, partner creation and other Partner Management setups are part of the Sales offering implementation.

2. Navigate to **Sales** and then **Accounts**.
   
   a. Click **Create Account** to create an account type of Customer. Enter a name, sell-to-address, contact (if you have created one).
   
   b. Click **Save and Close**.

3. Navigate to **Manage Customers** through the Global Search in the side panel and create Sites associated with the Sales Accounts you have created. Ensure that there is at least one Site with the Purpose "Bill to".

---

**Define Party Roles, Contact Roles, and Role Sources**

Do this to define party roles, contact roles, and role sources:

1. In the Setup and Maintenance work area, create an implementation project that includes the **Define Contracts Common Configuration** task.

2. Create new party roles as needed.

3. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Contact Roles** task.

4. Create new contact roles as needed.

5. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Role Sources** task.

6. For each party role set up in the previous step, enter the required information for the associated contact roles.

---

**Related Topics**

- How You Set Up Contract Party Roles
Define Contract Line Types

Here’s how you can define contract line types:

1. In your implementation project, navigate to **Define Contracts Common Configuration** and expand the task list.
2. Click the + on the toolbar, then search for and add the task **Manage Contract Line Types** to the selected Define Contracts Common Configuration task list.
3. Scroll down to and open the **Manage Contract Line Types** task.
4. Click **Create** and define four line types each with a different source as follows:
   - Buy agreement, free-form
   - Buy agreement, item
   - Buy intent, free-form
   - Buy intent, item
5. Click **Done** to return to the main folder structure.

**Related Topics**

- Contract Line Types

Define Contract Types

Here’s how you can define contract types:

1. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Types** task.
2. Click **Create** and enter the required information.
3. Click **Continue** to create the contract type you require.
4. Enter the required information. **Save and Close** to return to the Manage Contract Types page.

**Related Topics**

- Contract Types

How You Set Up User Statuses and User Transitions

While defining user statuses, ensure that you select **Allow Assignment** for each of the user transitions. This enables you to assign the contract to named assignees during a user transition. Here are the steps to define user and status transitions:

1. Open the Manage Contract User Statuses and Transitions task.
2. Use the **Event Models** task from the Contracts work area to create new events and actions for the business object `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVO`.
   a. Add a new state associated with the new user status to the appropriate event model.
b. Set the action associated with the “Entry” event of the new state, to update the user status code to the new user status.

The user status code that you use for the groovy script must exactly match with the user status you set up using the Manage User Status and Transitions task.

c. Add any other possible events for this new state.

d. Link to the existing state by adding a new event for the “DRAFT” state so that your new status is available for a contract in Draft status.

The event name must exactly match with the transition code defined in Manage User Statuses and Transitions.

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

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

User statuses and transitions apply only to contracts that fulfill the condition defined in the Event Model. They cannot be used for contract templates.

**Related Topics**
- User Statuses and Transitions

**Set Up Electronic Signature**

Here are the steps to set up an electronic signature:

1. In the Setup and Maintenance work area, go to your implementation project and open the Manage Contract Electronic Signature task.
2. Select DocuSign or eSignLive as the solution provider.
3. If you chose DocuSign, proceed as follows:

   a. Enter the user ID and password of the DocuSign Administrator user and the appropriate DocuSign endpoint URL. The account ID is the API account ID mentioned on the DocuSign website.
   b. Click Validate and when the validation status changes to Complete, Save and Close.
4. If you chose eSignLive, proceed as follows:

   a. Enter the user ID of the eSignLive account user, the API key, and the appropriate eSignLive endpoint URL.
   b. Save the settings.

Note: You must have obtained a license from DocuSign and created an Administrator account on the DocuSign website to proceed with the following steps.

Having setup the electronic signature process, you will have to set up your contract type to enable it for electronic signature. See the step Define Contract Types.

For a contracts user to be able to send contracts for signature, the following are required:

1. The Contracts user must have a valid electronic signature account.
2. The electronic signature user name must be the same as the email address of the user that is set up in Oracle Contracts.
3. The Contracts user must be a member of the solution provider account.

Set Up Common CRM Business Unit Profile Option

In the Manage Common CRM Business Unit Profile Options task, you can select:
- The HZ_ENABLE_MULTIPLE_BU_CRM profile option when you want to use more than one business unit.
- The HZ_DEFAULT_BU_CRM profile option when you only want to use only one business unit.

Here is how you can define your default business unit (BU) profile options:

1. Navigate to **Define Contracts Common Configuration** and open the **Manage Common CRM Business Unit Profile Options** task.
2. Click the default BU profile. Set the profile value to the business unit that should be the default, and click **Save and Close**.
3. Set the default multiple BU profile value to Yes. This means the contracts users are allowed to access multiple business units.
4. **Save your changes**.
5. Click **Done**.

Define Contract Lines Descriptive Flexfield

An optional step required if you are going to use sales agreement lines with descriptive flexfields. For details see the related topic titled "Descriptive Flexfields for Oracle Contracts."

**Related Topics**
- Descriptive Flexfields for Contracts

Define Contract Terms Library Components

Here are the steps to define contract terms library components (clauses and terms templates):
1. In the Setup and Maintenance work area, go to your implementation project, navigate to the **Define Contract Terms and Clause Library Configuration** task list, and go to the **Manage Contract Terms Value Sets** task.
   a. Search for value sets created for the Enterprise Contracts module. Value sets are required to define questions and rules in Terms library work area. Click **Create**.
   b. Enter the required information to create a value set. Save and click **Done**.
2. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Manage Contract Clause Types** task.
3. Create a new clause type and save.
4. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Specify Contract Clause Import XML File Location** task.
5. Set the profile value to the required value in your Enterprise Scheduling Service (ESS) server. Specify the ESS server directory where the import clauses from XML File process uploads and imports files into the Contract Terms Library.

6. Navigate to Define Contract Terms and Clause Library Configuration and open the Manage Contract Standard Clauses, Templates, and Expert Rules task. This is not a setup and maintenance task, but a manual task that is performed from the Terms Library work area.

7. To create terms clauses navigate in the application to Contract Management, then the Terms Library work area.
   a. Click the Create Clause task.
   b. Enter the required information to create a clause and click Submit.

   The Title name should be unique for both buy and sell clauses.
   c. Once you have submitted a new clause for approval, it will need to be approved by the clause approver.
   d. Once approved, you should now search for the clauses to verify that they are in Approved status.

8. To create terms templates navigate in the application to Contract Management, then the Terms Library work area.
   a. Click the Create Terms Template task.
   b. Enter the required template information and click Save to enable the Document Types table.
   c. Select a contract type in the document type table and click the Clauses tab.
   d. Click the Add Section action.
   e. In the Add Section dialog box, enter a section name in the New Section box and click OK.
   f. Select your new section and click + to add a clause.
   g. In the AddClauses dialog box, search for your clause, select the row, and click OK.
   h. Open your section, and click the clause title. Click the refresh icon in the toolbar to view the section and clause in the terms template preview pane. Click Submit.
   i. Check for and resolve any warnings or errors, and then click Submit.
   j. Save and close.
   k. Repeat the previous steps to add more term templates as needed.
   l. Click Submit and then click Submit again on the next page to submit it for approval.
   m. Once you have submitted a new template for approval, it will need to be approved by the template approver.
   n. Once approved, you should now search for the templates to verify that they are in Approved status.

Related Topics
- How Contract Terms Templates Work
- How You Import Clauses into the Contract Terms Library

Enable Table of Contents in Contract Preview

Here are the steps to add table of contents in contract preview:
1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click Change Feature Opt In.
3. On the Opt In page, click the Edit icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the Enable option for Add Table of Contents to Contract Terms.
Configure File-Based Import and Export for Enterprise Contracts

Here are the steps to configure file-based import for Enterprise Contracts:

1. In your implementation project, go to the **Define File-Based Data Import** task list, and open the **Manage File Import Objects** task.
   a. Select the row for **contract** and click **Edit**.
   b. Enter default values for the attributes of objects **ContractImportJob1** and **Import ContractHeader1**.
   c. Select the Map and Required check boxes as required and click **Save and Close** twice.
2. Navigate to **Define File-Based Data Import**, and open the **Manage File Import Mappings** task.
   a. Select **Contract** in the Object drop down list and click **Search** to view the available mappings. Click **Create** to define a new mapping.
   b. Enter the required information and click **Save and Close**.
   c. Click a contract import mapping. Add column mappings as required. Ensure the source column header values match the column names in the data file and click **Save and Close**.
   d. Again click **Save and Close** to return to main folder structure.
3. Navigate to **Define File-Based Data Import**, and open the **Manage File Import Activities** task.
   a. Click **Create** to schedule an import job.
   b. Enter the required information and click **Next**.
   c. Enter constant values for the import object attributes or click **Next**.
   d. Select a schedule from the Repeat Unit drop down list and click **Next**.
   e. Click **Activate** to schedule the import job.

Follow these steps to configure file-based export for Enterprise Contracts:

1. In your implementation project, go to the **Manage Bulk Data Export** task list, and open the **Schedule Export Processes** task.
2. Select **Create** from the Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map, in the page.
4. Select **Create** from the Actions menu to view the Manage Export Objects dialog box.
5. Select the objects you want to export and click **Done**.
6. Specify the attributes and filters you want used to export.
7. Click **Next** to view the Create Export Process Definition: Create Schedule page.
8. Select the schedule for your export.
9. Click **Next** to view the Create Export Process Definition: Review page.
10. Review the export process details, and click **Activate**.

**Related Topics**
- Overview of Contract Import
- Perform Bulk Export
How You Set Up Approval Groups and Approval Task Configuration Rules

Here’s how you set up approval groups and approval task configuration rules for contracts:

1. In Setup and Maintenance go to the following:
   - Offerings: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Approval Groups
2. On the Manage Approvals page, click the Approval Groups tab.
3. In the Groups region, select the plus sign icon to begin creating a new approval group.
   a. Enter a name for the new group.
   b. Click Save.
4. Add a member to the group. Click the Add Member icon to retrieve the Add to Group dialog window. In the search box, enter the email address of the user created earlier and click OK.
5. Click Save.
6. Repeat the previous steps to create an approval group that includes both level-one and level-two approvers.
7. Click the Task Configuration tab.
8. In the Tasks to be configured region, search for ContractsApproval.
9. Click the ContractsApproval task to access a set of subtabs where you can set up rules for the approval task.
   - For example, under Configuration, you can set the assignment and routing policy attributes to suit your business needs. If you want to let the initiator add ad hoc approvers and configure notifications as the approval progresses, select the Allow initiator to add participants option.
10. You can create rules to suit your business needs. Edit the ContractsApproval task.
11. Click Rules
12. Expand each rule.
13. Click Edit to create rules for the ContractsApproval stage rule set.
14. Delete all three rules.
15. Create a new rule.
16. Enter the rule name. Click the arrow. Under the IF label, click the list icon next to the first field.
17. As an example, in the Condition Browser, expand ContractsApprovalPayloadType, ContractDetails, result, and select the estimatedAmount payload attribute.

   **Note:** Set up this rule for contracts starting with zero dollars: `ContactDetails.estimatedAmount` is null or `ContactDetails.estimatedAmount.value.doubleValue()` is same or above 0.00.

Here’s another example with contract_type_id, organization_id, amount null, and agreed amount 0 or agreed amount smaller than 2000 dollars:

   IF `ContractDetails.org_id` is {org_id} and `ContractDetails.contractTypeId` in {contract_type_id} and (`contractdetails.agreedAmount` is null or (`contractdetails.agreedAmount` isn't null and `contractdetails.agreedAmount.value.doubleValue()` is same or less than 2000))

18. Select 'isn't' from the operator drop-down list, and select null as the comparison value of the IF condition.
19. Click the down arrow in IF condition and select simple test to add a new IF condition.
20. Select the comparison field of the new IF condition from the condition browser.

21. Similarly add another IF condition as follows: select estimatedAmount for the comparison field, select same or less than as the operator, and select a value such as 30000 as the comparison value.

22. Select Approval Group from the List Builder drop-down list under THEN, and click Create Action to create the List builder action 1 region.

23. Select level 1 approver and enter the required information for the List builder action 1 region.

24. Click + next to Estimate_Amount_Rule1 to create a second rule, give it a name such as Estimate_Amount_Rule2, and expand it.

25. Create a second rule to route to higher level approvers for higher contract amounts.

26. Create a third rule such that, if contract estimated amount isn’t entered, it’s routed to level 1 approver.

27. Click the Save button and then the Commit task button to commit the rules to the database. Expand all the rules.

Note that you could also add rules based on:

- Policy deviations (ContractsApprovalPayloadType.policyDeviation = Y or N)
- Terms amended rule (ContractsApprovalPayloadType.termsAmended = Y or N)
- Nonstandard clauses added (ContractsApprovalPayloadType.nonStdClause = Y or N)
- Missing (deleted) standard clauses (ContractsApprovalPayloadType.missingStdClause = Y or N)
- Standard clause (not on the terms template) added (ContractsApprovalPayloadType.stdClauseAdded = Y or N)
- Clause deviation category codes (TermsDeviations.deviationCategory = "<<Code>>")
- Deviation codes (TermsDeviations.deviationCode = "<<Code>>")

Add steps to define such approval rules referring to the following table which lists the deviation codes:

<table>
<thead>
<tr>
<th>Clause Deviation Category Code</th>
<th>Clause Deviation Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKC_NON_STD_ARTICLES</td>
<td>NA</td>
<td>A nonstandard clause exists on the contract.</td>
</tr>
<tr>
<td>OKC_MISSING_STD_ARTICLES</td>
<td>NA</td>
<td>A standard clause from the terms template was deleted from the contract.</td>
</tr>
<tr>
<td>OKC_MANDATORY</td>
<td>MISSING_MANDATORY</td>
<td>A mandatory clause is missing.</td>
</tr>
<tr>
<td>OKC_EXPERT_ARTICLE</td>
<td>MISSING_EXPERT_ARTICLE</td>
<td>A conditional clause based on an expert rule is missing.</td>
</tr>
<tr>
<td>OKC_OPTIONAL_ARTICLE</td>
<td>MISSING_OPTIONAL_ARTICLE</td>
<td>An optional clause is missing.</td>
</tr>
</tbody>
</table>
### Enterprise Contracts Setup Checklist

<table>
<thead>
<tr>
<th>Clause Deviation Category Code</th>
<th>Clause Deviation Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKC_INVALID ARTICLES</td>
<td>NA</td>
<td>An invalid clause exists on the contract.</td>
</tr>
<tr>
<td>OKC_INVALID ARTICLES</td>
<td>ARTICLE_EXPIRED</td>
<td>The clause is expired.</td>
</tr>
<tr>
<td>OKC_INVALID ARTICLES</td>
<td>ARTICLE_ON_HOLD</td>
<td>The clause is on hold.</td>
</tr>
<tr>
<td>OKC_INVALID ARTICLES</td>
<td>EXPERT_ARTICLE_NOT_REQUIRED</td>
<td>The rule conditions no longer apply for a clause added by Contract Expert.</td>
</tr>
<tr>
<td>OKC_STD_ARTICLES_ADDED</td>
<td>NA</td>
<td>A standard clause was added.</td>
</tr>
<tr>
<td>OKC_STD_ARTICLES_ADDED</td>
<td>ADDED_STD_ARTICLE</td>
<td>A standard clause from the library was added.</td>
</tr>
<tr>
<td>OKC_STD_ARTICLES_ADDED</td>
<td>REPLACED_ALT</td>
<td>A standard clause was replaced with an alternate clause.</td>
</tr>
</tbody>
</table>

28. Alternatively, to bypass the approval hierarchy and have automatic approval, create only the following rule.

   Edit IF condition to 1 is 1
   Under Then block Choose
   List builder: Supervisory Response type: Required Number of levels: 1 Starting
   Participant: HierarchyBuilder.getPrincipal("<User Id>",-1,null,null) Top Participant: HierarchyBuilder.getPrincipal("<User Id>",-1,null,null)
   Auto action enabled: True Auto Action: "APPROVE"
   Save and commit.

29. Click the Approval Group tab to create an approval group for Clause Approval.
30. Click the Task Configuration tab to create rules for clause approval human task. Click the human task ContractClauseApproval and then click the rules subtab.
31. Click the Approval Group tab to create an approval group for Template Approval.
32. Click the Task Configuration tab to create rules for Contracts Template Approval human task, click the TemplateApprovalHumanTask human task, and then click the rules subtab.
33. Repeat the rule creation steps described for contract approvals.

**Note:** To create a dynamic list of approvers, you can create a dynamic approval group based on a Java class file. The Java class can refer to approval task payload parameters, for example, contract identifier.

**Related Topics**

- Overview of Approval Management
- Approval Rules Configurations
Enable Contracts for use in Oracle Social Network

Do this to enable contracts as a collaborative object:

1. In your implementation project, navigate to Define Extensions for Enterprise Contracts, Maintain Common Reference Objects and open the Manage Oracle Social Network Objects task.
2. Expand the Enterprise Contracts Business Object.
3. Select Contract and click Enable Object.

Configure Scheduled Processes

Configure scheduled processes to change a set of records for a specific business need, or to get a printable output with information about certain records. These processes are predefined but not pre-configured. The following list identifies those that are critical for smooth operation of Oracle Contracts:

- Indexing Schedules (For text searching. See the help topic: "Setting Up Contract Text Search: Highlights.")
- Deliverables notifications scheduled processes:
  - Send Contract Terms Deliverable Due Date Notifications
  - Send Contract Terms Deliverable Escalation Notifications
  - Send Contract Terms Deliverable Overdue Notifications
- Expiration notification scheduled process:
  - Send Contract Expiration Notifications
- Fulfillment notification scheduled process:
  - Send Contract Fulfillment Notifications
- Service Contract Billing scheduled process:
  - Send Service Contract Billing Information to Receivables
  - Import Auto-invoice
  - Fetch Service Contract Invoice Information from Receivables
- Process Installed Base Updates

Related Topics

- Set Up Contract Text Search
- Overview of Enterprise Scheduler Processes for Enterprise Contracts

Enable Purge Contracts

Here's how you enable the purge contract feature:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for Enterprise Contracts.
4. On the Edit Features page, select the **Enable** option for Purge Contracts.
5. Click **Done**.
12 Procurement Contracts Setup Checklist

Overview of Procurement Contracts Quick Setup

Learn how to quickly set up Oracle Procurement Contracts by configuring only those features that are required to have a functioning application. Once you have a working application, follow the entire install offering task list in the Setup and Maintenance work area, to get full advantage of all the features.

Note: Due to differences in the sequence of common setup tasks in the Enterprise Contracts offering and the intent of this chapter, there may be some differences in the order that set up tasks are presented here.

Set Up Procurement Contracts

Learn about all that you need to do to set up Oracle Procurement Contracts.

1. Configure Enterprise Contracts and create an implementation project.
2. Define legal entities.
3. Define business units and assign business function and optionally assign ledger and legal entity.
4. Define item organizations.
5. Define users.
7. Define layout templates in BI publisher.
8. Configure contract management business functions.
9. Define suppliers and their addresses and contacts.
10. Define party roles, contact roles, and role sources.
11. Define contract line types.
12. Define contract types.
13. Manage user statuses and user transitions.
15. Set up common CRM business unit profile option.
17. Define items.
18. Define payment terms.
19. Define FOB and freight terms.
20. Define contract lines descriptive flexfield.
23. Set up approval groups and approval task configurations.
24. Enable contracts for use in Oracle Social Network.
25. Configure scheduled processes.

Related Topics
- Set Up Enterprise Contracts
How You Create A Procurement Contracts Implementation Project

Here are the steps to configure Procurement Contracts and create an implementation project, proceed:

1. In the Setup and Maintenance work area, select the Enterprise Contracts offering and click **Change Feature Opt In**.
3. Click the **Features** icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
4. Navigate to **Setup and Maintenance** work area.
5. Open the Tasks side panel and click **Manage Implementation Projects**.
6. On the Implementation Project page, click **Create** to create a new project.
7. Enter your project name and move to **Next**.
8. Select **Include** for Enterprise Contracts and Procurement Contracts. **Save and open the project**.
9. Expand the Enterprise Contracts task list on the Implementation Project page to be used in the remaining steps in this chapter.

**Related Topics**
- Configure Offerings

Define Legal Entities

Here are the steps to define legal entities for use with Contracts:

1. In the Setup and Maintenance work area, create an implementation project that includes the Manage Legal Addresses task.
2. Select a country from the Country drop down list, and a new location.
3. Enter the new location information on the Location Create dialog.
4. **Save and Close**.
5. In your implementation project, search for the Define Legal Entities for Enterprise Contracts task list and open the **Manage Legal Entity** task.
6. Click **Create New**.
7. Click the new icon, and enter the required information by selecting the options Legal Employer and Payroll Statutory Unit. Click **Save**.
8. On the Create Legal Entity page, enter the required information and then **Save and Close**.
9. On the Scope Selection: Legal Entity dialog box, click **Select and Add**.
10. Select the legal entity you created and click **Save and Close**.
11. In your implementation project, select **Define Legal Entities for Enterprise Contracts** from the task list.
12. Click the + on the tool bar, then search for and add the tasks **Manage Legislative Data Groups** and **Manage Legal Entity HCM Information** to the Define Legal Entities for Enterprise Contracts folder.
13. Open the task **Manage Legislative Data Groups**.
14. Search and then click **Create**.
15. Enter the required information and click **Submit**.
16. Search again to verify that the legislative data group is created, and click **Done**.
17. Navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Legal Entities for Enterprise Contracts and open the task Manage Legal Entity HCM Information.
18. Search for and click the legal entity you added.
19. Select Update from the Edit options at the top. Enter a past date in the Update Legal Entity dialog and click OK.
20. Enter the required information under the Legal Employer tab and select the Payroll Statutory Unit tab. Enter the required information and click Submit.

Define Business Units, Assign Business Function, and Assign Ledger and Legal Entity

Here are the steps to define a business unit (BU) and assign a business function, ledger, or legal entity:

1. In the Setup and Maintenance work area, create an implementation project that includes the Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Business Units for Enterprise Contracts, and Manage Business Unit tasks.
   a. Click Create.
   b. Enter the required information on the Create Business Unit page. Select Create from the Default Set drop-down list.
   c. Create a reference data set and click OK.
   d. Select the reference data set created from the Default Set drop-down list and Save and Close.
2. Navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Business Units for Enterprise Contracts, and click Select for the task Assign Business Unit Business Function to select the business unit you created as the task list scope.
   a. Click Select and Add in the dialog to set the BU you created as the task list scope.
   b. Open the task Assign Business Unit Business Function.
   c. Enter the required information and Save and Close. Click the up arrow, and select Enterprise Contracts to go to the main folder structure.

**Note:** If the implementation doesn't need to create financial transactions from contracts, assigning a primary ledger and default legal entity in the Assign Business Function page is optional. For service contracts, it isn't optional.


**Note:** Anytime you create a new BU, be sure to run the Adopt Global Clauses for a New Business Unit scheduled process. Otherwise, new clauses aren't automatically adopted into the new business unit.
Define Item Organizations For Enterprise Contracts

Here are the steps to define item organizations:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Workforce Structures for CRM, and open the task Manage Locations.
   
   a. Click Create.
   b. Enter the required information and Submit. Click Done to return to the main folder structure.

2. To start creating item organizations, navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Facilities for Enterprise Contracts, and open the Manage Facility Shifts task.
   
   a. Click Create.
   b. Enter the required information and Save and Close. Click Done.

   
   a. Click Create.
   b. Enter the required information and Submit Click Done.

   
   a. Click Create.
   b. Enter the required information and Submit. Click Done.

   
   a. Click Create.
   b. Enter the required information and go to Next page.
   c. Enter the required information and Save and Close.
   d. Search again to view the item organization created, and click Done.

Related Topics

- Create Item Organizations
Define Contracts Users

Do this to define contracts users:

   
   a. Click Create (+).
   b. Enter the required information to create a new role mapping and Save and Close.

   
   a. Click Create (+).
   b. Enter the required information to create a user with an e-mail ID, who can author and submit contracts for approval. Enter a Resource Role and select an Organization in the Resource Information section.
   c. Click Auto-provision Roles. The provisioned roles from HCM role mapping defined previously are automatically populated. Save and Close and then click Done to go back to main folder structure.
   d. Repeat the previous steps to create as many Oracle Contracts users as required for this phase of the implementation.
   e. Get users and passwords from the e-mail recipients.

| Note: For information about steps to create Read-only contracts, refer to the document in My Oracle Support. |

Related Topics

- Role Provisioning Options
- Methods of Creating Users

Define Document Sequences

Define document sequences for contracts only if you need to auto-number contracts or clauses, or when you are doing the setup for the partner agreement type of contracts. Here are the steps to define the document sequences:

1. Navigate to Define Contracts Common Configuration, Define Document Sequences, and open the Manage Document Sequence Categories task.
   
   a. Search for the document sequence categories of the Enterprise Contracts module. You should see the document sequence categories for the contract header table OKC_K_HEADERS_ALL_B and the clause table OKC_ARTICLES_ALL already exist.
   b. Create a new document sequence category for the table OKC_K_HEADERS_ALL_B to store contract header information. You don't have to create document sequences for the table OKC_ARTICLES_ALL that stores clauses, because you will number the clauses manually. Save and Close.
   c. If you want to create partner program enrollment contracts from the Partner Relationship Management application, create a new document sequence category for the table OKC_K_HEADERS_ALL_B to store contract header information. Save and Close to return to the main folder structure.
   
   a. Search for the document sequences of the Enterprise Contracts module.
   
   b. Create a document sequence in the primary table and assign it to the document category created for the contract header in the child table. Select the primary ledger for the determinant value that is used to determine the document auto-numbering scope. Save and Close.
   
   c. If you want to create partner program enrollment contracts from the Partner Relationship Management application, create a document sequence in the primary table and assign it to document category created for contract header in the child table. Select the primary ledger for the determinant value that is used to determine the document auto-numbering scope. Save and Close.

   **Note:** Document sequences for contracts can be defined at global, ledger, legal entity, and business unit level. Document sequences for clauses can be defined at global, ledger, and business unit level.

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**Define Layout Templates in BI Publisher**

Do this to define layout templates in BI publisher:

1. Navigate to Navigator > Tools and open Reports and Analytics. Sign in to BI publisher with author or administrator privileges.
2. Click the Browse Catalog icon.
3. Open the Enterprise Contracts folder and click the Contract Printing node.
4. Click Edit under the Customer Contract sample layout template and save a copy for future edits. For instance, you may change the Amount boilerplate text in the newly saved copy to Contract Amount and save the file.
5. Click + to add a new layout.
6. Click Upload under the Upload or Generate Layout region.
7. Enter the required information to add the modified template file and click Upload.
8. The contract preview should show the added layout template. To modify layouts for other contracts, repeat from step 4 to step 6. Save and then click Catalog.
9. Using BI Publisher you can create a new layout template using the Contract Data Model attributes supplied with the application. To view the attributes included as part of Contract Preview Sample Data model, click Edit under Contract Preview Sample Data Model link.
10. Click the ContractSample.xml attachment to view the predefined contract attributes.
11. The data model XML file appears. You can scroll down to view all the attributes included across all contract entities. Close the browser and click Catalog. If a save warning appears, do not save the changes.
12. You can use the above steps to change the clause layout templates, download contract terms layout templates, and contract deviation layout templates as well.

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**Configure Contract Management Business Functions**

Here are the steps to configure contract management business functions:

2. Click **Select** in the Selected Scope column for the Specify Customer Contract Management Business Function task.

3. Click **Select and Add** in the dialog to select a business unit, then **Apply and Go To Task**.

4. Select the BU that you created and click **Save and Close** to save the task list scope to the BU.

5. On the Specify Customer Contract Management Business Function Properties page select the default currency, enter the required information in the Terms Library region and click **Save and Close**. These settings are common for standalone sell and partner program enrollment type of contracts. Ignore the other values in the page for now.


7. Enter the required information and click **Save and Close**.

Define Customers with Their Addresses and Contacts

Here are the steps to define customers and their addresses and contacts:

1. Navigate to **Define Contracts Common Configuration** and note the following manual tasks. Manual tasks need to be performed outside the Setup and Maintenance work area.

   **Note:** As partner management enrollment contracts are created and managed from the Oracle Partner Management application, partner creation and other Partner Management setups are part of the Sales offering implementation.

2. Navigate to **Sales** and then **Accounts**.
   
   a. Click **Create Account** to create an account type of Customer. Enter a name, sell-to-address, contact (if you have created one).
   
   b. Click **Save and Close**.

3. Navigate to **Manage Customers** through the Global Search in the side panel and create Sites associated with the Sales Accounts you have created. Ensure that there is at least one Site with the Purpose "Bill to".

Define Party Roles, Contact Roles, and Role Sources

Do this to define party roles, contact roles, and role sources:

1. In the Setup and Maintenance work area, create an implementation project that includes the **Define Contracts Common Configuration** task.

2. Create new party roles as needed.

3. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Contact Roles** task.

4. Create new contact roles as needed.

5. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Role Sources** task.

6. For each party role set up in the previous step, enter the required information for the associated contact roles.

**Related Topics**

- How You Set Up Contract Party Roles
Define Contract Line Types For Procurement Contracts

Do this to define procurement contract line types:

1. Return to the Setup and Maintenance work area. In your project under Define Procurement Contracts Configurations, open the Manage Contract Line Types task. Select and Add your business unit if requested.
2. Click Create and create line types each with the following seeded line type sources:
   - Buy agreement, free-form
   - Buy agreement, item
   - Buy intent, free-form
   - Buy intent, item
3. Click Done to return to the main task list.

Define Contract Types For Procurement Contracts

Here are the steps to define contract types:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to Define Contracts Common Configuration, and open the Manage Contract Types task.
2. Click Create to create a buy intent contract type. Enter the required information and click Continue.
3. Enter the required information and save.
4. Click the Fulfillment Notifications tab.
5. Create a fulfillment notification and check what notification types are available.
6. Select the Enable Terms Authoring check box and click Save and Close.
7. Click Create again to create a purchase agreement contract type by repeating the previous steps.
8. Click Done and return to the main task list.

How You Set Up User Statuses and User Transitions

To define user and status transitions:

1. Define user statuses and their transitions using the task Manage Contract User Statuses and Transitions.

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

2. Use the Event Models task from the Contracts work area to create new events and actions for the business object oracle.apps.contracts.coreAuthoring.header.model.view.ContractHeaderVO.
   a. A new state associated with the new user status must be added to the appropriate event model.
   b. The action associated with the "Entry" event of the new state is then set to update the user status code to the new user status.
The user status code that you use for the groovy script must exactly match with the user status you set up using the Manage User Status and Transitions task.

c. Add any other possible events for this new state.

d. Link to the existing state by adding a new event for the "DRAFT" state so that your new status is available for a contract in Draft status.

The event name must exactly match with the transition code defined in Manage User Statuses and Transitions.

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

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

User statuses and transitions apply only to contracts that fulfill the condition defined in the Event Model. They cannot be used for contract templates.

Related Topics

- User Statuses and Transitions

Set Up Electronic Signature

Here are the steps to set up an electronic signature:

1. In the Setup and Maintenance work area, go to your implementation project and open the Manage Contract Electronic Signature task.
2. Select DocuSign or eSignLive as the solution provider.
3. If you chose DocuSign, proceed as follows:

   a. Enter the user ID and password of the DocuSign Administrator user and the appropriate DocuSign endpoint URL. The account ID is the API account ID mentioned on the DocuSign website.
   b. Click Validate and when the validation status changes to Complete, Save and Close.

4. If you chose eSignLive, proceed as follows:

   a. Enter the user ID of the eSignLive account user, the API key, and the appropriate eSignLive endpoint URL.
   b. Save the settings.

Having setup the electronic signature process, you will have to set up your contract type to enable it for electronic signature. See the step Define Contract Types.

For a contracts user to be able to send contracts for signature, the following are required:

1. The Contracts user must have a valid electronic signature account.
2. The electronic signature user name must be the same as the email address of the user that is set up in Oracle Contracts.
3. The Contracts user must be a member of the solution provider account.

Set Up Common CRM Business Unit Profile Option

In the Manage Common CRM Business Unit Profile Options task, you can select:

- The HZ_ENABLE_MULTIPLE_BU_CRM profile option when you want to use more than one business unit.
- The HZ_DEFAULT_BU_CRM profile option when you only want to use only one business unit.

Here is how you can define your default business unit (BU) profile options:

1. Navigate to Define Contracts Common Configuration and open the Manage Common CRM Business Unit Profile Options task.
2. Click the default BU profile. Set the profile value to the business unit that should be the default, and click Save and Close.
3. Set the default multiple BU profile value to Yes. This means the contracts users are allowed to access multiple business units.
4. Save your changes.
5. Click Done.

Assign Procurement Contracts Business Functions

Here are the steps to assign business functions for Procurement Contracts:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, and open the Define Business Units for Enterprise Contracts task list.
   a. Click Select from the Select Scope column for the Assign Business Unit Business Function task.
   b. In the Select Scope dialog, select Select and Add from the Business Unit drop down list and then click Apply and Go To Task.
   c. Search for your business unit, select it, and then save.

Define Items For Procurement Contracts

Do this to define items:

1. In the Setup and maintenance work area, search for your implementation project, navigate to Define Procurement Contracts Configurations, and add two tasks: Manage Units of Measure and Manage Item Classes. Open the Manage Units of Measure task.
   a. Click Manage UOM Classes in the table.
   b. Click + to create an UOM class and save.
   c. Enter the base UOM created as part of UOM class creation in previous step to verify whether the UOM got created automatically. Save the changes. Ignore conversions for now as there is only one unit in the UOM class.
2. Navigate to Define Procurement Contracts Configurations, and open the Manage Item Classes task.
   a. In the Manage Item Classes task, click Root Item Class in the search results table.
   b. Click the Security tab and use the + icon to add a row for Item Class People. Under Actions in the child table, add all actions starting with C for create privileges, V for view privileges, and M for maintain privileges, and save.
   c. Click the Item Templates tab. Click the filter icon in the table and search for Purchased.
   d. Click Create. Enter the required information in the dialog and click OK.
   e. Enter the required information. Save and then click Done.
3. This next step is a manual task to be performed in the Item work area and requires you leave the setup and maintenance work area.
4. Navigate in the application to Product Management and then Items.
   a. Click Create Item task.
   b. Enter the required information to create a purchasable item and click OK.
   c. Enter the required information and click the Specifications tab.
   d. Click Purchasing under Item Organization under the Specifications tab. Ensure the values are as follows and save the changes:
      • Purchased = Yes
      • Purchasable = Yes
      • User Approved Supplier = No
      • Allow Purchasing Document = Yes
      • Taxable = Yes

Define Payment Terms For Procurement Contracts

Do this to define payment terms:
1. You may have already set up payment terms as part of a Procurement implementation. If you haven't set up yet, then, add this task to your implementation project. Navigate to Define Procurement Contracts Configurations and with that task list selected add the Manage Payment Terms task.
2. Open the Manage Payment Terms task and Select and Add your business unit if needed.
3. Click Create to create a simple payment term of NET 30.
4. Enter the required information and save your changes.

Define FOB and Freight Terms For Procurement Contracts

Here are the steps to define FOB and freight terms:
1. You may have already set up FOB and freight terms as part of a Procurement implementation. If you haven't setup yet then, add these tasks to your implementation project. Navigate to Define Procurement Contracts Configurations and with that task list selected add the Manage FOB Lookup and Manage Freight Terms Lookup tasks.
2. Open the Manage FOB Lookup task. Select and add your business unit if needed.
3. Click Create to create a lookup. For example, FOB is commonly used.
4. Open the Manage Freight Terms Lookup task.  
5. Click Create to create a lookup. For example, FREIGHT TERMS.

Define Contract Lines Descriptive Flexfield

An optional step required if you are going to use sales agreement lines with descriptive flexfields. For details see the related topic titled "Descriptive Flexfields for Oracle Contracts."

Related Topics
- Descriptive Flexfields for Contracts

Define Contract Terms Library Components

Here are the steps to define contract terms library components (clauses and terms templates):

1. In the Setup and Maintenance work area, go to your implementation project, navigate to the Define Contract Terms and Clause Library Configuration task list, and go to the Manage Contract Terms Value Sets task.
   a. Search for value sets created for the Enterprise Contracts module. Value sets are required to define questions and rules in Terms library work area. Click Create.
   b. Enter the required information to create a value set. Save and click Done.
2. Navigate to Define Contract Terms and Clause Library Configuration and open the Manage Contract Clause Types task.
3. Create a new clause type and save.
4. Navigate to Define Contract Terms and Clause Library Configuration and open the Specify Contract Clause Import XML File Location task.
5. Set the profile value to the required value in your Enterprise Scheduling Service (ESS) server. Specify the ESS server directory where the import clauses from XML File process uploads and imports files into the Contract Terms Library.
6. Navigate to Define Contract Terms and Clause Library Configuration and open the Manage Contract Standard Clauses, Templates, and Expert Rules task. This is not a setup and maintenance task, but a manual task that is performed from the Terms Library work area.
7. To create terms clauses navigate in the application to Contract Management, then the Terms Library work area.
   a. Click the Create Clause task.
   b. Enter the required information to create a clause and click Submit.  
      The Title name should be unique for both buy and sell clauses.
   c. Once you have submitted a new clause for approval, it will need to be approved by the clause approver.
   d. Once approved, you should now search for the clauses to verify that they are in Approved status.
8. To create terms templates navigate in the application to Contract Management, then the Terms Library work area.
   a. Click the Create Terms Template task.
   b. Enter the required template information and click Save to enable the Document Types table.
   c. Select a contract type in the document type table and click the Clauses tab.
   d. Click the Add Section action.
1. In the Add Section dialog box, enter a section name in the New Section box and click OK.
2. Select your new section and click + to add a clause.
3. In the Add Clauses dialog box, search for your clause, select the row, and click OK.
4. Open your section, and click the clause title. Click the refresh icon in the toolbar to view the section and clause in the terms template preview pane. Click Submit.
5. Check for and resolve any warnings or errors, and then click Submit.
6. Save and close.
7. Repeat the previous steps to add more term templates as needed.
8. Click Submit and then click Submit again on the next page to submit it for approval.
9. Once you have submitted a new template for approval, it will need to be approved by the template approver.
10. Once approved, you should now search for the templates to verify that they are in Approved status.

Related Topics
- How Contract Terms Templates Work
- How You Import Clauses into the Contract Terms Library

Configure File-Based Import and Export for Enterprise Contracts

Here are the steps to configure file-based import for Enterprise Contracts:

1. In your implementation project, go to the Define File-Based Data Import task list, and open the Manage File Import Objects task.
   a. Select the row for CONTRACT and click Edit.
   b. Enter default values for the attributes of objects ContractImportJob1 and Import ContractHeader1.
   c. Select the Map and Required check boxes as required and click Save and Close twice.
2. Navigate to Define File-Based Data Import, and open the Manage File Import Mappings task.
   a. Select Contract in the Object drop down list and click Search to view the available mappings. Click Create to define a new mapping.
   b. Enter the required information and click Save and Close.
   c. Click a contract import mapping. Add column mappings as required. Ensure the source column header values match the column names in the data file and click Save and Close.
   d. Again click Save and Close to return to main folder structure.
3. Navigate to Define File-Based Data Import, and open the Manage File Import Activities task.
   a. Click Create to schedule an import job.
   b. Enter the required information and click Next.
   c. Enter constant values for the import object attributes or click Next.
   d. Select a schedule from the Repeat Unit drop down list and click Next.
   e. Click Activate to schedule the import job.

Follow these steps to configure file-based export for Enterprise Contracts:

1. In your implementation project, go to the Manage Bulk Data Export task list, and open the Schedule Export Processes task.
2. Select Create from the Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map, in the page.
4. Select Create from the Actions menu to view the Manage Export Objects dialog box.
5. Select the objects you want to export and click Done.
6. Specify the attributes and filters you want used to export.
7. Click Next to view the Create Export Process Definition: Create Schedule page.
8. Select the schedule for your export.
9. Click Next to view the Create Export Process Definition: Review page.
10. Review the export process details, and click Activate.

Related Topics
- Overview of Contract Import
- Perform Bulk Export

Enable Table of Contents in Contract Preview

Here are the steps to add table of contents in contract preview:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click Change Feature Opt In.
3. On the Opt In page, click the Edit icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the Enable option for Add Table of Contents to Contract Terms.
5. Click Done.

How You Set Up Approval Groups and Approval Task Configuration Rules

Here's how you set up approval groups and approval task configuration rules for contracts:

1. In Setup and Maintenance go to the following:
   - Offerings: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Approval Groups
2. On the Manage Approvals page, click the Approval Groups tab.
3. In the Groups region, select the plus sign icon to begin creating a new approval group.
   - Enter a name for the new group.
   - Click Save.
4. Add a member to the group. Click the Add Member icon to retrieve the Add to Group dialog window. In the search box, enter the email address of the user created earlier and click OK.
5. Click Save.
6. Repeat the previous steps to create an approval group that includes both level-one and level-two approvers.
7. Click the Task Configuration tab.
8. In the Tasks to be configured region, search for ContractsApproval.
9. Click the ContractsApproval task to access a set of subtabs where you can set up rules for the approval task.

For example, under Configuration, you can set the assignment and routing policy attributes to suit your business needs. If you want to let the initiator add ad hoc approvers and configure notifications as the approval progresses, select the Allow initiator to add participants option.

10. You can create rules to suit your business needs. Edit the ContractsApproval task.
11. Click Rules
12. Expand each rule.
13. Click Edit to create rules for the ContractsApproval stage rule set.
14. Delete all three rules.
15. Create a new rule.
16. Enter the rule name. Click the arrow. Under the IF label, click the list icon next to the first field.
17. As an example, in the Condition Browser, expand ContractsApprovalPayloadType, ContractDetails, result, and select the estimatedAmount payload attribute.

**Note:** For contracts starting with zero dollars, set the rule up as follows:
ContactDetails.estimatedAmount is null or ContractDetails.estimatedAmount.value.doubleValue() is same or above 0.00.

18. Select isn't from the operator drop-down list, and select null as the comparison value of the IF condition.
19. Click the down arrow in IF condition and select simple test to add a new IF condition.
20. Select the comparison field of the new IF condition from the condition browser.
21. Similarly add another IF condition as follows: select estimatedAmount for the comparison field, select same or less than as the operator, and select a value such as 30000 as the comparison value.
22. Select Approval Group from the List Builder drop-down list under THEN, and click Create Action to create the List builder action 1 region.
23. Select level 1 approver and enter the required information for the List builder action 1 region.
24. Click + next to Estimate_Amount_Rule1 to create a second rule, give it a name such as Estimate_Amount_Rule2, and expand it.
25. Create a second rule to route to higher level approvers for higher contract amounts.
26. Create a third rule such that, if contract estimated amount is not entered, it is routed to level 1 approver.
27. Click the Save button and then the Commit task button to commit the rules to the database. Expand all the rules.

Note that you could also add rules based on:
- Policy deviations (ContractsApprovalPayloadType.policyDeviation = Y or N)
- Terms amended rule (ContractsApprovalPayloadType.termsAmended = Y or N)
- Nonstandard clauses added (ContractsApprovalPayloadType.nonStdClause = Y or N)
- Missing (deleted) standard clauses (ContractsApprovalPayloadType.missingStdClause = Y or N)
- Standard clause (not on the terms template) added (ContractsApprovalPayloadType.stdClauseAdded = Y or N)
- Clause deviation category codes (TermsDeviations.deviationCategory = "<<Code>>")
- Deviation codes (TermsDeviations.deviationCode = "<<Code>>")

Add steps to define such approval rules referring to the following table which lists the deviation codes:
<table>
<thead>
<tr>
<th>Clause Deviation Category Code</th>
<th>Clause Deviation Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKC_NON_STD_ARTICLES</td>
<td>NA</td>
<td>A nonstandard clause exists on the contract.</td>
</tr>
<tr>
<td>OKC_NON_STD_ARTICLES</td>
<td>ADDED_NON_STD</td>
<td>A new nonstandard clause was added.</td>
</tr>
<tr>
<td>OKC_NON_STD_ARTICLES</td>
<td>MODIFIED_STD</td>
<td>A standard clause was modified and made nonstandard.</td>
</tr>
<tr>
<td>OKC_MISSING_STD_ARTICLES</td>
<td>NA</td>
<td>A standard clause from the terms template was deleted from the contract.</td>
</tr>
<tr>
<td>OKC_MISSING_STD_ARTICLES</td>
<td>MISSING_MANDATORY</td>
<td>A mandatory clause is missing.</td>
</tr>
<tr>
<td>OKC_MISSING_STD_ARTICLES</td>
<td>MISSING_EXPERT_ARTICLE</td>
<td>A conditional clause based on an expert rule is missing.</td>
</tr>
<tr>
<td>OKC_MISSING_STD_ARTICLES</td>
<td>MISSING_OPTIONAL_ARTICLE</td>
<td>An optional clause is missing.</td>
</tr>
<tr>
<td>OKC_INVALID ARTICLES</td>
<td>NA</td>
<td>An invalid clause exists on the contract.</td>
</tr>
<tr>
<td>OKC_INVALID ARTICLES</td>
<td>ARTICLE_EXPIRED</td>
<td>The clause is expired.</td>
</tr>
<tr>
<td>OKC_INVALID ARTICLES</td>
<td>ARTICLE_ON_HOLD</td>
<td>The clause is on hold.</td>
</tr>
<tr>
<td>OKC_INVALID ARTICLES</td>
<td>EXPERT_ARTICLE_NOT_REQUIRED</td>
<td>The rule conditions no longer apply for a clause added by Contract Expert.</td>
</tr>
<tr>
<td>OKC_STD_ARTICLES_ADDED</td>
<td>NA</td>
<td>A standard clause was added.</td>
</tr>
<tr>
<td>OKC_STD_ARTICLES_ADDED</td>
<td>ADDED_STD_ARTICLE</td>
<td>A standard clause from the library was added.</td>
</tr>
<tr>
<td>OKC_STD_ARTICLES_ADDED</td>
<td>REPLACED_ALT</td>
<td>A standard clause was replaced with an alternate clause.</td>
</tr>
</tbody>
</table>

28. Alternatively, to bypass the approval hierarchy and have automatic approval, create only the following rule.

   Edit IF condition to 1 is 1
   Under Then block Choose
   List builder : Supervisory Response type: Required Number of levels: 1 Starting
   Participant: HierarchyBuilder.getPrincipal("<User Id>",-1,null,null) Top Participant:
   HierarchyBuilder.getPrincipal("<User Id>",-1,null,null)
   Auto action enabled: True Auto Action: "APPROVE"
Save and commit.

29. Click the Approval Group tab to create an approval group for Clause Approval.
30. Click the Task Configuration tab to create rules for clause approval human task. Click the human task ContractClauseApproval and then click the rules subtab.
31. Click the Approval Group tab to create an approval group for Template Approval.
32. Click the Task Configuration tab to create rules for Contracts Template Approval human task, click the TemplateApprovalHumanTask human task, and then click the rules subtab.
33. Repeat the rule creation steps described for contract approvals.

Note: To create a dynamic list of approvers, you can create a dynamic approval group based on a Java class file. The Java class can refer to approval task payload parameters, for example, contract identifier.

Related Topics
- Overview of Approval Management
- Approval Rules Configurations

Enable Contracts for use in Oracle Social Network

Do this to enable contracts as a collaborative object:
1. In your implementation project, navigate to Define Extensions for Enterprise Contracts, Maintain Common Reference Objects and open the Manage Oracle Social Network Objects task.
2. Expand the Enterprise Contracts Business Object.
3. Select Contract and click Enable Object.

Configure Scheduled Processes

Configure scheduled processes to change a set of records for a specific business need, or to get a printable output with information about certain records. These processes are predefined but not pre-configured. The following list identifies those that are critical for smooth operation of Oracle Contracts:

- Indexing Schedules (For text searching. See the help topic: “Setting Up Contract Text Search: Highlights.”)
- Deliverables notifications scheduled processes:
  - Send Contract Terms Deliverable Due Date Notifications
  - Send Contract Terms Deliverable Escalation Notifications
  - Send Contract Terms Deliverable Overdue Notifications
- Expiration notification scheduled process:
  - Send Contract Expiration Notifications
- Fulfillment notification scheduled process:
  - Send Contract Fulfillment Notifications
- Service Contract Billing scheduled process:
  - Send Service Contract Billing Information to Receivables
Procurement Contracts Setup Checklist

- Import Auto-invoice
- Fetch Service Contract Invoice Information from Receivables

- Process Installed Base Updates

Related Topics

- Set Up Contract Text Search
- Overview of Enterprise Scheduler Processes for Enterprise Contracts
13 Service Contracts Setup Checklist

Overview of Service Contracts Setup

This chapter explores how to quickly set up Oracle Service Contracts by configuring only those features that are required to have a functioning application. It is recommended that you follow the full install offering task list in the Setup and Maintenance work area once you have a working application to insure that you are taking full advantage of all features.

Note: Due to differences in the sequence of common setup tasks in the Enterprise Contracts offering and the intent of this chapter, you may find some differences in the order that set up tasks are presented here.

Set Up Service Contracts

The following overview is designed to summarize how to set up Oracle Service Contracts.

Here is a summary of the setup steps that you will need to perform for setting up service contracts:

1. Configure Enterprise Contracts and create an implementation project.
2. Define legal entities.
3. Define business units and assign business function and assign ledger and legal entity.
4. Define item organizations.
5. Define users.
7. Define layout templates in BI publisher.
8. Configure contract management business functions.
9. Define customers and their addresses and contacts.
10. Define party roles, contact roles, and role sources.
11. Define contract line types.
12. Define contract types.
13. Manage user statuses and user transitions.
15. Set up common CRM business unit profile option.
16. Define coverage.
17. Define items.
18. Manage time unit mappings.
19. Define order management parameters.
20. Define pricing.
22. Define contract default values.
23. Manage contract rules.
24. Define contract terms library components.
26. Set up approval groups and approval task configurations.
27. Enable contracts for use in Oracle Social Network.
28. Configure scheduled processes
Create A Service Contracts Implementation Project

Here are the steps to configure Service Contracts and create an implementation project:

1. In the Setup and Maintenance work area, select the Enterprise offering and click Change Feature Opt In.
2. On the Opt In page, enable Enterprise Contracts and Service Contracts.
3. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select Done when complete.
4. Navigate to Setup and Maintenance.
5. Open the Tasks side panel and click Manage Implementation Projects.
6. On the Implementation Project page, click Create to create a new project.
7. Enter your project name and click Next.
8. Select Include for Enterprise Contracts and Service Contracts, then click Save and Open Project.
9. Expand Enterprise Contracts in the Implementation Project page to be used in the remaining steps in this chapter.

Related Topics
- Configure Offerings

Define Legal Entities

Here are the steps to define legal entities for use with Contracts:

1. In the Setup and Maintenance work area, create an implementation project that includes the Manage Legal Addresses task.
2. Select a country from the Country drop down list, and a new location.
3. Enter the new location information on the Location Create dialog.
4. Save and Close.
5. In your implementation project, search for the Define Legal Entities for Enterprise Contracts task list and open the Manage Legal Entity task.
6. Click Create New.
7. Click the new icon, and enter the required information by selecting the options Legal Employer and Payroll Statutory Unit. Click Save.
8. On the Create Legal Entity page, enter the required information and then Save and Close.
10. Select the legal entity you created and click Save and Close.
11. In your implementation project, select Define Legal Entities for Enterprise Contracts from the task list.
12. Click the + on the tool bar, then search for and add the tasks Manage Legislative Data Groups and Manage Legal Entity HCM Information to the Define Legal Entities for Enterprise Contracts folder.
13. Open the task Manage Legislative Data Groups.
14. Search and then click Create.
15. Enter the required information and click Submit.
16. Search again to verify that the legislative data group is created, and click Done.
17. Navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Legal Entities for Enterprise Contracts and open the task Manage Legal Entity HCM Information.
18. Search for and click the legal entity you added.
19. Select Update from the Edit options at the top. Enter a past date in the Update Legal Entity dialog and click OK.
20. Enter the required information under the Legal Employer tab and select the Payroll Statutory Unit tab. Enter the required information and click **Submit**.

### Define Business Units, Assign Business Function, and Assign Ledger and Legal Entity

Here are the steps to define a business unit (BU) and assign a business function, ledger, or legal entity:

1. In the Setup and Maintenance work area, create an implementation project that includes the Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Business Units for Enterprise Contracts, and **Manage Business Unit** tasks.
   
   a. Click **Create**.
   b. Enter the required information on the Create Business Unit page. Select **Create** from the Default Set drop-down list.
   c. Create a reference data set and click **OK**.
   d. Select the reference data set created from the Default Set drop-down list and **Save and Close**.

2. Navigate to **Define Common Applications Configuration for Enterprise Contracts**, **Define Enterprise Structures for Enterprise Contracts**, **Define Business Units for Enterprise Contracts**, and click **Select** for the task Assign Business Unit Business Function to select the business unit you created as the task list scope.
   
   a. Click **Select and Add** in the dialog to set the BU you created as the task list scope.
   b. Open the task **Assign Business Unit Business Function**.
   c. Enter the required information and **Save and Close**. Click the up arrow, and select Enterprise Contracts to go to the main folder structure.
   
   **Note:** If the implementation doesn't need to create financial transactions from contracts, assigning a primary ledger and default legal entity in the Assign Business Function page is optional. For service contracts, it isn't optional.

   
   **Note:** Anytime you create a new BU, be sure to run the Adopt Global Clauses for a New Business Unit scheduled process. Otherwise, new clauses aren't automatically adopted into the new business unit.

### Define Item Organizations For Enterprise Contracts

Here are the steps to define item organizations:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to **Define Common Applications Configuration for Enterprise Contracts**, **Define Enterprise Structures for Enterprise Contracts**, **Define Workforce Structures for CRM**, and open the task **Manage Locations**.
   
   a. Click **Create**.
b. Enter the required information and **Submit**. Click **Done** to return to the main folder structure.

2. To start creating item organizations, navigate to **Define Common Applications Configuration for Enterprise Contracts**, **Define Enterprise Structures for Enterprise Contracts**, **Define Facilities for Enterprise Contracts**, and open the **Manage Facility Shifts** task.
   a. Click **Create**.
   b. Enter the required information and **Save and Close**. Click **Done**.

   a. Click **Create**.
   b. Enter the required information and **Submit** **Click** **Done**.

   a. Click **Create**.
   b. Enter the required information and **Submit**. Click **Done**.

   a. Click **Create**.
   b. Enter the required information and go to **Next** page.
   c. Enter the required information and **Save and Close**.
   d. Search again to view the item organization created, and click **Done**.

**Related Topics**
- Create Item Organizations

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### Define Contracts Users

Do this to define contracts users:

   a. Click **Create** (+).
   b. Enter the required information to create a new role mapping and **Save and Close**.

   a. Click **Create** (+).
   b. Enter the required information to create a user with an e-mail ID, who can author and submit contracts for approval. Enter a **Resource Role** and select an **Organization** in the **Resource Information** section.
   c. Click **Auto-provision Roles**. The provisioned roles from HCM role mapping defined previously are automatically populated. **Save and Close** and then click **Done** to go back to main folder structure.
d. Repeat the previous steps to create as many Oracle Contracts users as required for this phase of the implementation.

e. Get users and passwords from the e-mail recipients.

**Note:** For information about steps to create Read-only contracts, refer to the document in My Oracle Support.

**Related Topics**
- Role Provisioning Options
- Methods of Creating Users

### Define Document Sequences

Define document sequences for contracts only if you need to auto-number contracts or clauses, or when you are doing the setup for the partner agreement type of contracts. Here are the steps to define the document sequences:

1. Navigate to Define Contracts Common Configuration, Define Document Sequences, and open the **Manage Document Sequence Categories** task.
   a. Search for the document sequence categories of the Enterprise Contracts module. You should see the document sequence categories for the contract header table OKC_K_HEADERS_ALL_B and the clause table OKC_ARTICLES_ALL already exist.
   b. Create a new document sequence category for the table OKC_K_HEADERS_ALL_B to store contract header information. You don't have to create document sequences for the table OKC_ARTICLES_ALL that stores clauses, because you will number the clauses manually. **Save and Close.**
   c. If you want to create partner program enrollment contracts from the Partner Relationship Management application, create a new document sequence category for the table OKC_K_HEADERS_ALL_B to store contract header information. **Save and Close** to return to the main folder structure.

2. Navigate to Define Contracts Common Configuration, Define Document Sequences, and open the **Manage Document Sequences** task.
   a. Search for the document sequences of the Enterprise Contracts module.
   b. Create a document sequence in the primary table and assign it to the document category created for the contract header in the child table. Select the primary ledger for the determinant value that is used to determine the document auto-numbering scope. **Save and Close.**
   c. If you want to create partner program enrollment contracts from the Partner Relationship Management application, create a document sequence in the primary table and assign it to document category created for contract header in the child table. Select the primary ledger for the determinant value that is used to determine the document auto-numbering scope. **Save and Close.**

**Note:** Document sequences for contracts can be defined at global, ledger, legal entity, and business unit level. Document sequences for clauses can be defined at global, ledger, and business unit level.
Define Layout Templates in BI Publisher

Do this to define layout templates in BI publisher:

1. Navigate to Navigator > Tools and open **Reports and Analytics**. Sign in to BI publisher with author or administrator privileges.
2. Click the Browse Catalog icon.
3. Open the Enterprise Contracts folder and click the Contract Printing node.
4. Click **Edit** under the Customer Contract sample layout template and save a copy for future edits. For instance, you may change the Amount boilerplate text in the newly saved copy to Contract Amount and save the file.
5. Click + to add a new layout.
6. Click **Upload** under the Upload or Generate Layout region.
7. Enter the required information to add the modified template file and click **Upload**.
8. The contract preview should show the added layout template. To modify layouts for other contracts, repeat from step 4 to step 6. **Save** and then click **Catalog**.
9. Using BI Publisher you can create a new layout template using the Contract Data Model attributes supplied with the application. To view the attributes included as part of Contract Preview Sample Data model, click **Edit** under Contract Preview Sample Data Model link.
10. Click the `ContractSample.xml` attachment to view the predefined contract attributes.
11. The data model XML file appears. You can scroll down to view all the attributes included across all contract entities. Close the browser and click **Catalog**. If a save warning appears, do not save the changes.
12. You can use the above steps to change the clause layout templates, download contract terms layout templates, and contract deviation layout templates as well.

Configure Contract Management Business Functions

Here are the steps to configure contract management business functions:

1. Navigate to **Define Contracts Common Configuration, Define Contract Management Business Function Configuration**.
2. Click **Select** in the Selected Scope column for the Specify Customer Contract Management Business Function task.
3. Click **Select and Add** in the dialog to select a business unit, then **Apply and Go To Task**.
4. Select the BU that you created and click **Save and Close** to save the task list scope to the BU.
5. On the Specify Customer Contract Management Business Function Properties page select the default currency, enter the required information in the Terms Library region and click **Save and Close**. These settings are common for standalone sell and partner program enrollment type of contracts. Ignore the other values in the page for now.
7. Enter the required information and click **Save and Close**.

Define Customers with Their Addresses and Contacts

Here are the steps to define customers and their addresses and contacts:

1. Navigate to **Define Contracts Common Configuration** and note the following manual tasks. Manual tasks need to be performed outside the Setup and Maintenance work area.
Note: As partner management enrollment contracts are created and managed from the Oracle Partner Management application, partner creation and other Partner Management setups are part of the Sales offering implementation.

2. Navigate to Sales and then Accounts.
   a. Click Create Account to create an account type of Customer. Enter a name, sell-to-address, contact (if you have created one).
   b. Click Save and Close.

3. Navigate to Manage Customers through the Global Search in the side panel and create Sites associated with the Sales Accounts you have created. Ensure that there is at least one Site with the Purpose "Bill to".

Define Party Roles, Contact Roles, and Role Sources

Do this to define party roles, contact roles, and role sources:
1. In the Setup and Maintenance work area, create an implementation project that includes the Define Contracts Common Configuration task.
2. Create new party roles as needed.
3. Navigate to Define Contracts Common Configuration and open the Manage Contract Contact Roles task.
4. Create new contact roles as needed.
5. Navigate to Define Contracts Common Configuration and open the Manage Contract Role Sources task.
6. For each party role set up in the previous step, enter the required information for the associated contact roles.

Related Topics
• How You Set Up Contract Party Roles

Define Contract Line Types For Service Contracts

Here's how you can define contract line types:
1. In the Setup and Maintenance work area, search for your implementation project, navigate to Define Contracts Common Configuration and expand the task list.
2. Click the + on the toolbar, then search for and add the task Manage Contract Line Types to the selected Define Contracts Common Configuration task list.
3. Scroll down to and open the Manage Contract Line Types task.
4. Click Create and define line types with the following seeded line type sources:
   o Subscription, sell
     Recurrent sale of subscription products, for example, Cloud Service.
   o Coverage, sell
     Sale of coverage based products such as extended warranty, maintenance service and so on.
   o Warranty
     Sale of warranty included in the product.
5. Click Done to return to the main folder structure.

Define Contract Types For Service Contracts

Do this to define contract types:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to, Define Contracts Common Configurations, and open the Manage Contract Types task.
2. Click Create to create a sell intent contract type. Enter the required information and click Continue.
   - For subscription and coverage line types, the contract type Class must be Enterprise Contract and the Line Class must be Service. You can select Allow pricing during billing if you choose to have your lines get the most current unit price every time an invoice is generated.
   - For warranty type, the Line Class must be Warranty.
3. Click Create and enter all other required and additional information.
4. Click Continue to create the contract type you require.
5. Add the desired line types and click Save and Close to return to the Manage Contract Types page.
6. Click Done and return to the main task list structure.

Related Topics
- Contract Types

How You Set Up User Statuses and User Transitions

To define user and status transitions:

1. Open the Manage Contract User Statuses and Transitions task.
2. Use the Event Models task from the Contracts work area to create new events and actions for the business object oracle.apps.contracts.coreAuthoring.header.model.view.ContractHeaderVO.
   - Add a new state associated with the new user status to the appropriate event model.
   - Set the action associated with the "Entry" event of the new state, to update the user status code to the new user status.
     - The user status code that you use for the groovy script must exactly match with the user status you set up using the Manage User Status and Transitions task.
   - Add any other possible events for this new state.
   - Link to the existing state by adding a new event for the "DRAFT" state so that your new status is available for a contract in Draft status.
     - The event name must exactly match with the transition code defined in Manage User Statuses and Transitions.
3. Set these events up for each To and From state of the user transition. For seeded states you can select from available events and actions. An example of an action could be a groovy script.
4. Save this new State based event model and specify the condition or contract type that can use this. For contracts of the specified condition, the user statuses and transitions that you created are available as Action menu items. You can use these action menu items to pass a contract between teams for review before submitting the contract for approval.
User statuses and transitions apply only to contracts that fulfill the condition defined in the Event Model. They cannot be used for contract templates.

Related Topics
- User Statuses and Transitions

Set Up Electronic Signature

Here are the steps to set up an electronic signature:

1. In the Setup and Maintenance work area, go to your implementation project and open the Manage Contract Electronic Signature task.
2. Select DocuSign or eSignLive as the solution provider.
3. If you chose DocuSign, proceed as follows:
   a. Enter the user ID and password of the DocuSign Administrator user and the appropriate DocuSign endpoint URL. The account ID is the API account ID mentioned on the DocuSign website.
   b. Click Validate and when the validation status changes to Complete, Save and Close.
4. If you chose eSignLive, proceed as follows:
   a. Enter the user ID of the eSignLive account user, the API key, and the appropriate eSignLive endpoint URL.
   b. Save the settings.

Note: You must have obtained a license from DocuSign and created an Administrator account on the DocuSign website to proceed with the following steps.

Having setup the electronic signature process, you will have to set up your contract type to enable it for electronic signature. See the step Define Contract Types.

For a contracts user to be able to send contracts for signature, the following are required:

1. The Contracts user must have a valid electronic signature account.
2. The electronic signature user name must be the same as the email address of the user that is set up in Oracle Contracts.
3. The Contracts user must be a member of the solution provider account.

Set Up Common CRM Business Unit Profile Option

In the Manage Common CRM Business Unit Profile Options task, you can select:

- The HZ_ENABLE_MULTIPLE_BU_CRMS profile option when you want to use more than one business unit.
- The HZ_DEFAULT_BU_CRMS profile option when you only want to use only one business unit.

Here is how you can define your default business unit (BU) profile options:

1. Navigate to Define Contracts Common Configuration and open the Manage Common CRM Business Unit Profile Options task.
2. Click the default BU profile. Set the profile value to the business unit that should be the default, and click Save and Close.
3. Set the default multiple BU profile value to Yes. This means the contracts users are allowed to access multiple business units.
4. Save your changes.
5. Click Done.

Define Coverage

Here are the steps to define coverage for service contracts:

2. Open the Tasks side panel and go to Standard Coverage in the Setup tasks.
3. Click Create and enter Name, Description, Entitlement Type, and Start Date. Click Continue.
4. In the Actions task, click Channel Type and then, Next.
5. Choose the required Optional Result columns - First Response Metric, First Response Warning Threshold, Resolution Metric, and Resolution Warning Threshold, and click Finish.
6. Choose options for Severity, Channel Type and Calendar from the drop down list, add numeric values, in 'Minutes', for the remaining fields and choose a Start Date.
7. Click Save and Close.
8. Click Default Coverage in the Setup tasks to link standard coverage values with Default Level and Default Level Value. If the Default Level is Business Unit, you can select a specific Business Unit in Default Level Value.
9. Choose Start Date and End Date and then click Save and Close.

For details on coverage for service contracts, see the Managing Pricing Algorithms, Service Mappings, and Matrix Classes chapter in the Oracle SCM Cloud, Administering Pricing guide.

Define Items For Service Contracts

Here's how you can define items:

1. In the Setup and Maintenance work area, search for your implementation project, navigate to Define Service Contracts Configurations, and add two tasks: Manage Units of Measure and Manage Item Classes. Open the Manage Units of Measure task.
   a. Click Manage UOM Classes in the table.
   b. Click + to create a Time UOM class with time units, such as Year, Month, Day. Click Save and Close.
   c. Enter the base UOM created as part of UOM class creation in previous step to verify whether the UOM got created automatically. Click Save and Close. Ignore conversions for now as there is only one unit in the UOM class.
2. Search for task Manage Administrator Profile Values.
   a. Click the task and search for the profile code: RCS_DEFAULT_UOM_CLASS_CODE_FOR_SVC_DURATION and set the value to the Time UOM Class as defined in step 1.
3. Navigate to Define Service Contracts Configurations, and open the Manage Item Classes task.
   a. The Manage Item Classes page will open in a new window, as it's a work area by itself. Click Root Item Class in the search results table.
   b. Click the Security tab and use the + icon to add a row for Item Class People. Under Actions in the child table, add all actions starting with C for create privileges, V for view privileges, and M for maintain privileges, and Save.
c. Click the **Item Templates** tab. Click the filter icon in the table and search for Finished Goods.

d. Click **Create**. Enter the required information in the dialog and click **OK**.

e. Enter the required information and click **Save and Close**, then click **Done**.

4. Navigate in the application to **Product Management and then Items**.

5. Click **Create Item** task.

6. Do this to setup an Included Warranty:

   a. Select **Organization, Number of Items, Item Class** from the Drop Down list. Ensure that the Selected List doesn't contain any templates. Click **OK**.

   b. Edit the Item name and **Description** along with the **Item Status** and **Lifecycle Phase**.

   c. Ensure that the Primary Unit of Measure is from the same UOM Class set in profile 'SCM Common: Default Service Duration Class' in the Overview tab.

   d. Ensure that the following information is added:

      - Service Duration Type should be '**Fixed**'.
      - Service Start Type should be '**Milestone**'. Presently, this refers to the customer asset shipment date.
      - Service Start Delay should be in '**Days**'. Included Warranty Start Date will be calculated as Asset Shipment Date + Service Start Delay.
      - Associate '**Platinum Coverage SLAs**' to Standard Coverage.

   e. Set **Enable Asset Tracking** to **Customer Asset** and **Enable Contract Coverage** to **Yes**, to complete the setup.

   f. Create relationship for the included warranty item and ensure that the relationship Type is set to Warranty, in the **Relationships** tab, **Related Items** subtab.

7. Do this to setup a Coverage Item:

   a. Select **Organization, Number of Items, Item Class** from the Drop Down list. Ensure that the Selected List doesn't contain any templates. Click **OK**.

   b. Edit the Item name and **Description** along with the **Item Status** and **Lifecycle Phase**.

   c. Ensure that the Primary Unit of Measure is from the same UOM Class set in profile 'SCM Common: Default Service Duration Class', in the Overview tab.

   d. Set the Service Duration Type to '**Open Ended**'.

   e. Set **Customer Ordered** and **Customer Orders Enabled** to 'Yes'.

   f. Set **Sales Product Type** to one of the coverage item types in the Drop Down: 'Extended Warranty', 'Service Level Agreement', 'Software Maintenance', or 'Preventive Maintenance'.

8. Do this to setup a Subscription Item:

   a. Select **Organization, Number of Items, Item Class** from the Drop Down list. Ensure that the Selected List doesn't contain any templates. Click **OK**.

   b. Edit the Item name and **Description** along with the **Item Status** and **Lifecycle Phase**.

   c. Ensure that the Primary Unit of Measure is set to 'Each'.

   d. Set **Customer Ordered** and **Customer Orders Enabled** to 'Yes'.

   e. Set **Sales Product Type** to **Subscription**.
Specify Time Unit Mappings

Time unit mappings are used to convert the service duration and period between different time units.

To define time unit mappings:
1. Open the Manage Units of Measure Profiles task.
2. Search for the Profile Option Code `RCS_DEFAULT_UOM_CLASS_CODE_FOR_SVC_DURATION`.
3. Select the Profile Value to specify a default unit of measure class.
4. Click Save and Close.

Define Order Management Parameters

Do this to define Order Management Parameters:
1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Subscriptions
   - Task: Manage Order Management Parameters
2. Search for Manage Order Management Parameters in the Search Tasks.
3. Select Business Unit from the drop down list and click Apply and Go to Task.
4. Enter Name, Location or Manager and select it in Manage Business Units and click Save and Close.
5. Click Item Validation Organization in the General tab and choose Business Unit and Organization from the Drop Down list. Add and remove rows, if necessary.
6. Click Save and Close.

**Note:** Ensure that Service Contracts is enabled in the Change Feature Opt-in work area.

Define Pricing

To define pricing for subscriptions, you must set up price list lines for the subscription items.

Use this high-level procedure for quick setup of pricing lines, after your full pricing setups are done in Oracle Supply Chain Management (SCM) Cloud. See the related topics for additional details.

1. Navigate to the Pricing Administration work area.
2. In the Pricing Rules tab, open the price list to which this item is associated.
3. Create a price list line for a coverage item. Open Associated Items to define unit price and percent price based on covered items.
4. Enter the recurring price details of the item.
5. Create a price list line for a subscription item.
6. Create different charges such as one-time setup fee, recurring flat monthly fee, or recurring usage-based fee.

For details, refer to the Oracle SCM Cloud, Administering Pricing guide.
Define Customer Billing Configuration

Do this to define customer billing configuration for service contracts:

1. Drill down to the Define Customer Billing Configuration for Service Contracts task in Define Service Contracts Configuration.
2. Click each task within Define Customer Billing Configuration for Service Contracts.
   - Define payment terms in the Manage Receivables Payment Terms page.
   - Define rules based on your Business Unit in the Manage AutoAccounting Rules page.
   - Ensure that the seeded transaction source: ORA_Enterprise Contracts is present in the Manage Transaction Sources page. You must use this transaction source when you run your program.
   - Ensure that the seeded transaction type: ORA_OKC_Credit Memo and ORA_OKC_Invoice is present in the Manage Transaction Types.
3. Click Save and Close.

After you complete the steps, you must add information for the task Register Third-Party Contract Usage Data Acquisition Service. This is to retrieve subscription usage data for billing.

Follow these steps to define subscription usage-based billing for service contracts:

1. Drill down to the Define Customer Billing Configuration for Service Contracts task and click Register Third-Party Contract Usage Data Acquisition Service.
2. Enter URL, User Name and Password, and click Save and Close.

For details about Managing AutoInvoice, see the Managing AutoInvoice section in the Oracle Financials Cloud, Using Receivables Credit to Cash guide.

Define Contract Default Values

Here are the steps to define default values to be used on service contracts:

1. Go to Contracts work area and navigate to Home, Contract Management, Contracts, and open the Contract Default Values task.
2. Select the Included Warranty Creation group you want to define values for and click Create to create a set of default values.
   - Set Contract Default Values at a Global Level, used to create a new included warranty contract when a customer asset is created. Contract Default Values can also be set at Asset Selling Business Unit level, which takes precedence over Global Settings. In order to create an Included Warranty contract upon asset creation in Installed Base, this setup is mandatory.
3. Select the Installed Base Update attribute group you want to define values for and click Create to create a set of default values.
   - Set Contract Default Values for Installed Base update attribute group which can be set at different levels in the following precedence:
     - Business Unit + Asset Transaction Type
     - Global + Asset Transaction Type
• Global
  ◦ These default values will default to impacted contracts for return or expiry asset transaction in Reprocess Installed Base Updates UI. The asset transaction will be 'On Hold' in Reprocess Installed Base Updates UI. For the contract to automatically update based on updates to assets in Installed Base, this setup is mandatory.

4. Enter this information and click Save and Close.
5. Click Create Entry to create default renewal values.

**Note:** You can create default values at three different levels depending on your business requirements.

### Manage Contract Rules

Here are the steps to manage contract rules in service contracts:

1. Navigate to the **Contracts** work area in the Contract Management region.
2. Open **Manage Contract Rules** in the Setup task side panel.
3. Click **Add Row**.
4. You may select the **Contract Type** condition and **Business Unit** condition. You may also enter **Primary Party** condition.
5. Enter **Precedence** value, if necessary. You can select the results for a given combination of conditions - Billing Templates, Event Notification Templates and Renewal Templates.
6. **Save and Close** the rules.

**Note:** The Renewal Rule Templates, the Billing Templates and Event Notification Rules and Template Sets are defined in the side panels of the same work area.

### Generate Data Model XML

Use the BI Publisher to create a new contract layout template by adding the contract data model attributes. Use the Generate Data model XML to find the latest data model attributes.

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

- Standard contract attributes
- Custom contract attributes
- Standard child entities such as contract parties, lines, and contacts
- Custom child entities created through Application Composer
- Descriptive flexfields for Oracle Contracts

### Download Data Model XML

Here are the steps to download the latest data model XML:

2. Open the Tasks side panel and click **Generate Data Model XML** in the Setup tasks.
3. On the Generate Data Model XML page, click **Download**.
Enable Table of Contents in Contract Preview

Here are the steps to add table of contents in contract preview:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the **Enable** option for **Add Table of Contents to Contract Terms**.
5. Click **Done**.

Set Up Billing Templates

Do this to manage billing templates in service contracts:

1. Navigate to **Manage Contract Rules** from the Setup tasks side panel.
2. In the Billing Templates tab, click **Create** and fill in the required fields based on your Business Unit. These include **Name**, **Description**, **Bill Service**, **Invoicing Rule**, **Billing Frequency**, **Billing Date**, **Accounting Rule**, **Transaction Type**, **Payment Terms**, **Period Start**, **Period Type**, and **Termination Credit Method**.
3. Add attributes for **Subscription Invoice Text** and **Coverage Invoice Text**.
4. **Save and Close**.
5. You can also edit your billing template on the same tab, if necessary.
6. Click **Manage Contract Rules** to view the Result Columns based on your Business Unit.

**Related Topics**

- Manage Billing Templates

Set Up Renewal Rules

Do this to set up renewal rules for service contracts:

1. Navigate to **Manage Contract Rules** from the Setup tasks side panel.
2. In the Renewal Rules Templates tab, click **Create**.
4. Along with that, provide **Coterminate**, **Renewal Level**, **Customer Acceptance**, and **Internal Approval**.
5. Set the **Price Adjustment Type** to enable Price Adjustment Basis and Price Adjustment Value.
6. Choose the Billing Template you created in the Billing Templates tab.
7. **Save and Close** the renewal rules.
## Setup Event Notification Rules for Customer Communications

Follow these steps to set up event notification rules for customer communications in service contracts:

1. Navigate to **Manage Contract Rules** from the Setup tasks side panel.
2. In the Event Notification Rules and Template Sets tab, click **Create**.
3. Enter **Name**, **Sender Email ID**, and **Start Date**. Add **Description** and **End Date** as well.
4. Set the conditions related to the notifications:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event</td>
<td>Set an event in the contract life cycle. The values are sourced from the contract event model.</td>
</tr>
<tr>
<td>Days before contract start date</td>
<td>The number of days before the renewal contract start date you would like to send the notification.</td>
</tr>
<tr>
<td>Notification Type</td>
<td>Set a suitable notification type:</td>
</tr>
<tr>
<td></td>
<td>◦ Quote</td>
</tr>
<tr>
<td></td>
<td>◦ Reminder</td>
</tr>
<tr>
<td></td>
<td>◦ User Defined</td>
</tr>
<tr>
<td>Customer Acceptance</td>
<td>Set whether customer acceptance is Required or Not Required. When you set to 'Not Required', if you set as 'Not Required', notification will in case the contract renewal is automatic and doesn't require customer acceptance for renewal.</td>
</tr>
<tr>
<td>Communication Channel</td>
<td>Set the mode of communication. For example, if you set the mode as email, customer receives contract quote as an email. If you select 'Custom', it includes third party portals. The application raises a business event with the message and attachment details.</td>
</tr>
</tbody>
</table>

5. In the Message, click (+), choose the **Language**, **Message Template** and **Message Subject** along with the Start and End dates. You can use token `<CON_NUM>` and `<EXPIRY_DATE>` in the message subject.
7. **Save and Close** the event notification.

**Note:** The notifications are sent by the ESS Job - **Process Contracts Event Notifications**.

**Related Topics**

- Manage Event Notification Rules and Template Sets
Define Contract Terms Library Components

Here are the steps to define contract terms library components (clauses and terms templates):

1. In the Setup and Maintenance work area, go to your implementation project, navigate to the Define Contract Terms and Clause Library Configuration task list, and go to the Manage Contract Terms Value Sets task.
   a. Search for value sets created for the Enterprise Contracts module. Value sets are required to define questions and rules in Terms library work area. Click Create.
   b. Enter the required information to create a value set. Save and click Done.
2. Navigate to Define Contract Terms and Clause Library Configuration and open the Manage Contract Clause Types task.
3. Create a new clause type and save.
4. Navigate to Define Contract Terms and Clause Library Configuration and open the Specify Contract Clause Import XML File Location task.
5. Set the profile value to the required value in your Enterprise Scheduling Service (ESS) server. Specify the ESS server directory where the import clauses from XML File process uploads and imports files into the Contract Terms Library.
6. Navigate to Define Contract Terms and Clause Library Configuration and open the Manage Contract Standard Clauses, Templates, and Expert Rules task. This is not a setup and maintenance task, but a manual task that is performed from the Terms Library work area.
7. To create terms clauses navigate in the application to Contract Management, then the Terms Library work area.
   a. Click the Create Clause task.
   b. Enter the required information to create a clause and click Submit.
      The Title name should be unique for both buy and sell clauses.
   c. Once you have submitted a new clause for approval, it will need to be approved by the clause approver.
   d. Once approved, you should now search for the clauses to verify that they are in Approved status.
8. To create terms templates navigate in the application to Contract Management, then the Terms Library work area.
   a. Click the Create Terms Template task.
   b. Enter the required template information and click Save to enable the Document Types table.
   c. Select a contract type in the document type table and click the Clauses tab.
   d. Click the Add Section action.
   e. In the Add Section dialog box, enter a section name in the New Section box and click OK.
   f. Select your new section and click + to add a clause.
   g. In the Add Clauses dialog box, search for your clause, select the row, and click OK.
   h. Open your section, and click the clause title. Click the refresh icon in the toolbar to view the section and clause in the terms template preview pane. Click Submit.
   i. Check for and resolve any warnings or errors, and then click Submit.
   j. Save and close.
   k. Repeat the previous steps to add more term templates as needed.
   l. Click Submit and then click Submit again on the next page to submit it for approval.
   m. Once you have submitted a new template for approval, it will need to be approved by the template approver.
n. Once approved, you should now search for the templates to verify that they are in Approved status.

Related Topics

- How Contract Terms Templates Work
- How You Import Clauses into the Contract Terms Library

Configure File-Based Import and Export for Enterprise Contracts

Here are the steps to configure file-based import for Enterprise Contracts:

1. In your implementation project, go to the Define File-Based Data Import task list, and open the Manage File Import Objects task.
   a. Select the row for CONTRACT and click Edit.
   b. Enter default values for the attributes of objects ContractImportJob1 and Import ContractHeader1.
   c. Select the Map and Required check boxes as required and click Save and Close twice.

2. Navigate to Define File-Based Data Import, and open the Manage File Import Mappings task.
   a. Select Contract in the Object drop down list and click Search to view the available mappings. Click Create to define a new mapping.
   b. Enter the required information and click Save and Close.
   c. Click a contract import mapping. Add column mappings as required. Ensure the source column header values match the column names in the data file and click Save and Close.
   d. Again click Save and Close to return to main folder structure.

3. Navigate to Define File-Based Data Import, and open the Manage File Import Activities task.
   a. Click Create to schedule an import job.
   b. Enter the required information and click Next.
   c. Enter constant values for the import object attributes or click Next.
   d. Select a schedule from the Repeat Unit drop down list and click Next.
   e. Click Activate to schedule the import job.

Follow these steps to configure file-based export for Enterprise Contracts:

1. In your implementation project, go to the Manage Bulk Data Export task list, and open the Schedule Export Processes task.
2. Select Create from the Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map, in the page.
4. Select Create from the Actions menu to view the Manage Export Objects dialog box.
5. Select the objects you want to export and click Done.
6. Specify the attributes and filters you want used to export.
7. Click Next to view the Create Export Process Definition: Create Schedule page.
8. Select the schedule for your export.
9. Click Next to view the Create Export Process Definition: Review page.
10. Review the export process details, and click Activate.
How You Set Up Approval Groups and Approval Task Configuration Rules

Here's how you set up approval groups and approval task configuration rules for contracts:

1. In Setup and Maintenance go to the following:
   - Offerings: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Approval Groups
2. On the Manage Approvals page, click the Approval Groups tab.
3. In the Groups region, select the plus sign icon to begin creating a new approval group.
   a. Enter a name for the new group.
   b. Click Save.
4. Add a member to the group. Click the Add Member icon to retrieve the Add to Group dialog window. In the search box, enter the email address of the user created earlier and click OK.
5. Click Save.
6. Repeat the previous steps to create an approval group that includes both level-one and level-two approvers.
7. Click the Task Configuration tab.
8. In the Tasks to be configured region, search for ContractsApproval.
9. Click the ContractsApproval task to access a set of subtabs where you can set up rules for the approval task.
   For example, under Configuration, you can set the assignment and routing policy attributes to suit your business needs. If you want to let the initiator add ad hoc approvers and configure notifications as the approval progresses, select the Allow initiator to add participants option.
10. You can create rules to suit your business needs. Edit the ContractsApproval task.
11. Click Rules
12. Expand each rule.
13. Click Edit to create rules for the ContractsApproval Stage rule set.
14. Delete all three rules.
15. Create a new rule.
16. Enter the rule name. Click the arrow. Under the IF label, click the list icon next to the first field.
17. As an example, in the Condition Browser, expand ContractsApprovalPayloadType, ContractDetails, result, and select the estimatedAmount payload attribute.

**Note:** Set up this rule for contracts starting with zero dollars: ContractDetails.estimatedAmount is null or ContractDetails.estimatedAmount.value.doubleValue() is same or above 0.00.

Here's another example with contract_type_id, organization_id, amount null, and agreed amount 0 or agreed amount smaller than 2000 dollars:
IF ContractDetails.org_id is {org_id} and ContractDetails.contractTypeId in {contract_type_id} and (contractdetails.agreedAmount is null or (contractdetails.agreedAmount isn't null and contractdetails.agreedAmount.doubleValue() same or less than 2000))

18. Select 'isn't' from the operator drop-down list, and select null as the comparison value of the IF condition.
19. Click the down arrow in IF condition and select simple test to add a new IF condition.
20. Select the comparison field of the new IF condition from the condition browser.
21. Similarly add another IF condition as follows: select estimatedAmount for the comparison field, select same or less than as the operator, and select a value such as 30000 as the comparison value.
22. Select Approval Group from the List Builder drop-down list under THEN, and click Create Action to create the List builder action 1 region.
23. Select level 1 approver and enter the required information for the List builder action 1 region.
24. Click + next to Estimate_Amount_Rule1 to create a second rule, give it a name such as Estimate_Amount_Rule2, and expand it.
25. Create a second rule to route to higher level approvers for higher contract amounts.
26. Create a third rule such that, if contract estimated amount isn’t entered, it’s routed to level 1 approver.
27. Click the Save button and then the Commit task button to commit the rules to the database. Expand all the rules.

Note that you could also add rules based on:
- Policy deviations (ContractsApprovalPayloadType.policyDeviation = Y or N)
- Terms amended rule (ContractsApprovalPayloadType.termsAmended = Y or N)
- Nonstandard clauses added (ContractsApprovalPayloadType.nonStdClause = Y or N)
- Missing (deleted) standard clauses (ContractsApprovalPayloadType.missingStdClause = Y or N)
- Standard clause (not on the terms template) added (ContractsApprovalPayloadType.stdClauseAdded = Y or N)
- Clause deviation category codes (TermsDeviations.deviationCategory = "<<Code>>")
- Deviation codes (TermsDeviations.deviationCode = "<<Code>>")

Add steps to define such approval rules referring to the following table which lists the deviation codes:

<table>
<thead>
<tr>
<th>Clause Deviation Category Code</th>
<th>Clause Deviation Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OKC_ NON_ STD_ARTICLES</td>
<td>NA</td>
<td>A nonstandard clause exists on the contract.</td>
</tr>
<tr>
<td>OKC_ NON_ STD_ARTICLES</td>
<td>ADDED_NON_STD</td>
<td>A new nonstandard clause was added.</td>
</tr>
<tr>
<td>OKC_ NON_ STD_ARTICLES</td>
<td>MODIFIED_STD</td>
<td>A standard clause was modified and made nonstandard.</td>
</tr>
<tr>
<td>OKC_ MISSING_STD_ARTICLES</td>
<td>NA</td>
<td>A standard clause from the terms template was deleted from the contract.</td>
</tr>
<tr>
<td>OKC_ MISSING_STD_ARTICLES</td>
<td>MISSING_ MANDATORY</td>
<td>A mandatory clause is missing.</td>
</tr>
<tr>
<td>Clause Deviation Category Code</td>
<td>Clause Deviation Code</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>OKC_MISSING_STD_ARTICLES</td>
<td>MISSING_EXPERT_ARTICLE</td>
<td>A conditional clause based on an expert rule is missing.</td>
</tr>
<tr>
<td>OKC_MISSING_STD_ARTICLES</td>
<td>MISSING_OPTIONAL_ARTICLE</td>
<td>An optional clause is missing.</td>
</tr>
<tr>
<td>OKC_INVALID_ARTICLES</td>
<td>NA</td>
<td>An invalid clause exists on the contract.</td>
</tr>
<tr>
<td>OKC_INVALID_ARTICLES</td>
<td>ARTICLE_EXPIRED</td>
<td>The clause is expired.</td>
</tr>
<tr>
<td>OKC_INVALID_ARTICLES</td>
<td>ARTICLE_ON_HOLD</td>
<td>The clause is on hold.</td>
</tr>
<tr>
<td>OKC_INVALID_ARTICLES</td>
<td>EXPERT_ARTICLE_NOT_REQUIRED</td>
<td>The rule conditions no longer apply for a clause added by Contract Expert.</td>
</tr>
<tr>
<td>OKC_STD_ARTICLES_ADDED</td>
<td>NA</td>
<td>A standard clause was added.</td>
</tr>
<tr>
<td>OKC_STD_ARTICLES_ADDED</td>
<td>ADDED_STD_ARTICLE</td>
<td>A standard clause from the library was added.</td>
</tr>
<tr>
<td>OKC_STD_ARTICLES_ADDED</td>
<td>REPLACED_ALT</td>
<td>A standard clause was replaced with an alternate clause.</td>
</tr>
</tbody>
</table>

28. Alternatively, to bypass the approval hierarchy and have automatic approval, create only the following rule.

   Edit IF condition to 1 is 1
   Under Then block Choose
   List builder : Supervisory Response type: Required Number of levels: 1 Starting
   Participant: HierarchyBuilder.getPrincipal("<User Id>",-1,null,null) Top Participant: HierarchyBuilder.getPrincipal("<User Id>",-1,null,null)
   Auto action enabled: True Auto Action: "APPROVE"
   Save and commit.

29. Click the Approval Group tab to create an approval group for Clause Approval.
30. Click the Task Configuration tab to create rules for clause approval human task. Click the human task ContractClauseApproval and then click the rules subtab.
31. Click the Approval Group tab to create an approval group for Template Approval.
32. Click the Task Configuration tab to create rules for Contracts Template Approval human task, click the TemplateApprovalHumanTask human task, and then click the rules subtab.
33. Repeat the rule creation steps described for contract approvals.

Note: To create a dynamic list of approvers, you can create a dynamic approval group based on a Java class file. The Java class can refer to approval task payload parameters, for example, contract identifier.

Related Topics
- Overview of Approval Management
- Approval Rules Configurations
Enable Contracts for use in Oracle Social Network

Do this to enable contracts as a collaborative object:

1. In your implementation project, navigate to Define Extensions for Enterprise Contracts, Maintain Common Reference Objects and open the Manage Oracle Social Network Objects task.
2. Expand the Enterprise Contracts Business Object.
3. Select Contract and click Enable Object.

Configure Scheduled Processes

Configure scheduled processes to change a set of records for a specific business need, or to get a printable output with information about certain records. These processes are predefined but not pre-configured. The following list identifies those that are critical for smooth operation of Oracle Contracts:

- Indexing Schedules (For text searching. See the help topic: "Setting Up Contract Text Search: Highlights.")
- Deliverables notifications scheduled processes:
  - Send Contract Terms Deliverable Due Date Notifications
  - Send Contract Terms Deliverable Escalation Notifications
  - Send Contract Terms Deliverable Overdue Notifications
- Expiration notification scheduled process:
  - Send Contract Expiration Notifications
- Fulfillment notification scheduled process:
  - Send Contract Fulfillment Notifications
- Service Contract Billing scheduled process:
  - Send Service Contract Billing Information to Receivables
  - Import Auto-invoice
  - Fetch Service Contract Invoice Information from Receivables
- Process Installed Base Updates

Related Topics

- Set Up Contract Text Search
- Overview of Enterprise Scheduler Processes for Enterprise Contracts
Glossary

action
The kind of access, such as view or edit, named in a security policy.

alternate clause
A clause with an alternate relationship to another clause. Contract authors can substitute an alternate clause for the standard clause in their contracts.

analysis
A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.

analytics
Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

business function
A business process or an activity that can be performed by people working within a business unit. Describes how a business unit is used.

business intelligence catalog
The repository where all business intelligence objects, including analyses, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and modified objects.

business intelligence repository
The metadata that determines all of the columns, or pieces of data, that you can include in analytics. You can also use the repository as a source of data for reports.

chart of accounts
The account structure your organization uses to record transactions and maintain account balances.

clause adoption
Reusing a clause from the global business unit in local business units either by adopting the clause without change or by localizing it.
clause localization
A type of clause adoption where the adopted clause is edited to suit the local business unit needs.

clause numbering level
Specifies the determinant type of the document sequence for automatic clause numbering

contact role source
Source of the contact role list of values, such as employees, salespeople, and customer contacts.

context
A grouping of flexfield segments to store related information.

context segment
The flexfield segment used to store the context value. Each context value can be associated with a different set of context-sensitive segments.

context-sensitive segment
A flexfield segment that may or may not appear depending upon a context. Context-sensitive segments are attributes that apply to certain entity rows based on the value of the context segment.

contract deviations
Differences between the contract terms in a contract and those in the contract terms template applied to that contract and any deviations from company policies as determined by Contract Expert feature rules.

Contract Expert
A feature of the application that permits you to create business rules in the Contract Terms Library to enforce corporate policies and standards for contracts.

contract fulfillment
Tracks the progress of contractual and noncontractual commitments by interested parties in a procurement enterprise contract and can initiate purchasing activity in integrated purchasing applications.

Contract Terms Library
A repository of standard clauses, contract terms templates, and business rules built using Contract Expert.

contract terms template
A template of standard clauses set up in the Contract Terms Library applied during contract authoring either automatically by the application or manually by contract authors.

contract type
A setup that specifies enterprise contract content, including the presence of contract terms and contract lines.
**contractual fulfillment**
Contract fulfillment lines that covered by the terms of the contract.

**conversion rate**
Ratio at which the principal unit of one currency can be converted into another currency.

**conversion rate type**
Type of conversion used to convert or exchange foreign currency transactions to your functional currency. For example, a user rate or a corporate rate.

**dashboard**
A collection of analyses and other content that gives in-depth insight to help with business decisions.

**data model**
The metadata that determines where data for a report comes from and how that data is retrieved.

**data security**
The control of access and action a user can take against which data.

**descriptive flexfield**
Expandable fields used for capturing additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

**determinant**
A value that specifies the use of a reference data set in a particular business context.

**division**
A business-oriented subdivision within an enterprise. Each division is organized to deliver products and services or address different markets.

**document sequence**
A unique number that is automatically or manually assigned to a created and saved document.

**document sequence category**
A classification that groups the documents of a particular type that need to be assigned a particular document sequence.
EDI
Abbreviation for electronic data interchange.

EFT
Acronym for Electronic Funds Transfer. A direct transfer of money from one account to another, such as an electronic payment of an amount owed a supplier by transferring money from a payer’s disbursement bank account into the supplier’s bank account.

enterprise contract
A contract created in the Oracle Fusion Enterprise Contracts application.

feature
Business practices or methods applicable to the functional areas that enable the fine-tuning of business functionality.

flexfield
A flexible data field that you can configure such that it contains one or more segments or stores additional information. Each segment has a value and a meaning.

flexfield segment
An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.

global header
The uppermost region in the user interface that remains the same no matter which page you're on.

intent
Specifies if an object in the Contract Terms Library is used for procurement contracts or for sales contracts.

interface table
Database table that stores data during data transfer between applications or between databases that reside inside and outside of an Oracle Fusion application.

job definition
The metadata that determines what a job does and what options are available to users when they submit the scheduled process. A job is the executable for a scheduled process.

layout template
RTF document that contains the contract layout for printing and preview.

legal entity
An entity identified and given rights and responsibilities by commercial law through the registration with country's appropriate authority.
lookup code
An option available within a lookup type, such as the lookup code BLUE within the lookup type COLORS.

lookup type
The label for a static list that has lookup codes as its values.

mandatory clause
Clause from the Contract Terms Library that you cannot edit or delete without special permission.

marketing list
A static selection of contacts for the purpose of communicating a marketing message by email, direct mail or phone.

noncontractual fulfillment
Contract fulfillment lines that are not negotiated as part of the contract, but are used to monitor the progress or quality of contractual fulfillment.

nonstandard clause
A clause created during contract terms authoring by editing a standard clause or by creating a new clause that is not in the Contract Terms Library.

offering
Grouping of setup tasks that support specific business functions, such as Sales, Service, and Product Management.

party source
Source of the list of values for entering contract parties, such as business units, customers, suppliers, and partners.

primary contract document
A file containing the contract terms and conditions. This file can be generated automatically by the application from the structured terms or attached to the contract by the contract author.

primary ledger
Main record-keeping ledger.

profile option
User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.
profile option level
The category or layer that defines a profile option. Site, Product, and User are the predefined levels.

profile option value
The setting mapped to the level of a profile option. A profile option may have multiple values set at different levels, such as Site or User.

prompt
A parameter that you set when you use analytics, limiting the data in the analysis or in all analyses on the dashboard or dashboard page (tab).

protected clause
Standard clause that you cannot edit unless you are granted special permission by the Contract Terms library administrator.

purchasing document
A document such as a purchase order, a purchase agreement, or a blanket purchase agreement created in an integrated purchasing application from a contract deliverable.

reference data set
Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

report
An output of select data in a predefined format that's optimized for printing.

repository contract
An enterprise contract with no contract or fulfillment lines, such as a nondisclosure agreement or an employment agreement.

resource
People designated as able to be assigned to work objects, for example, service agents, sales managers, or partner contacts. A sales manager and partner contact can be assigned to work on a lead or opportunity. A service agent can be assigned to a service request.
role
Controls access to application functions and data.

scheduled process
A program that you run to process data and, in some cases, generate output as a report.

set enabled
A property that describes entities that an organization shares as reference data. For example, you can indicate a lookup, customer, location, or document attachment as set enabled.

standard clause
Legally approved language that is part of the terms and conditions in the Contract Terms Library.

structured terms
Contract terms that are authored within the Oracle Fusion Enterprise Contracts application.

subject area
A set of columns, or pieces of data, related to a specific business object or area.

value set
A predefined set to validate the values that a user enters in the application. The set may be hierarchical.

view
A specific way to present the results of an analysis, for example as a table or graph. Other types of views, such as the title view, show other components of the analysis.

work area
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.