Oracle Fusion Cloud Sales Automation

How do I configure Enterprise Contracts?

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Get Help

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

Get Help in the Applications

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

Get Training

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Thanks for helping us improve our user assistance!

1 Introduction

Overview of Configuring Enterprise Contracts

Configuring Oracle Enterprise Contracts involves setting up various aspects like legal entities, business units, and contract management business functions. This includes defining contract types, managing user statuses and transitions, and configuring electronic signature settings. The process also involves setting up the Contract Terms Library, defining import and export setup features, and configuring approval processes.

Enterprise Contracts High-Level Setup Steps

Here's a summary of the enterprise contracts setup steps when you want to buy and sell intent contracts without lines and partner program enrollment contracts:

Enterprise contracts setup step	For for information
Configure Enterprise Contracts and create an implementation project.	*Common Implementation Overview*
Define legal entities.	*Define Legal Entities*
Define business units and assign business function and optionally assign ledger and legal entity.	*Define business units and assign business function and optionally assign ledger and legal entity*
Define users.	*Define Contracts Users*
Define document sequences.	*Define Document Sequences*
Configure contract management business functions.	*Configure Contract Management Business Functions*
Define customers and their addresses and contacts.	*Define Customers with Their Addresses and Contacts*
Define party roles, contact roles, and role sources.	*Define Party Roles, Contact Roles, and Role Sources*
Set up electronic signature.	*Set Up Electronic Signature*
Define contract line types.	*Define Contract Line Types*
Define contract types.	*Define Contract Types*
Manage user statuses and user transitions.	*How You Set Up User Statuses and User Transitions*
Set up common CRM business unit profile option.	*Set Up Common CRM Business Unit Profile Option*

Enterprise contracts setup step	For for information
Define contract lines descriptive flexfield.	*Define Contract Lines Descriptive Flexfields*
Define contract terms library components.	*Define Contract Terms Library Components*
Configure file-based import for Enterprise Contracts.	*Configure Import and Export Management for Enterprise Contracts*
Set up approval groups and approval task configurations.	*How You Set Up Approval Groups and Approval Task Configuration Rules*
Configure scheduled processes.	*Configure Scheduled Processes*
Set up contract terms and clause library configurations.	*How Contract Terms Library Setups Work Together*

For More Information

The following links provide more information about Enterprise Contract rich features and answers such questions as:

- *How do I use Enterprise Contracts?*

  Find out how to create and manage Oracle Enterprise Contracts.
- *How do I get started with Enterprise Contracts?*

  Learn how to get started with Enterprise Contracts.
- *How do I configure contract approval notifications?*

  Learn how to configure templates to meet your business requirements for sending contract approval notifications.
- *How do I configure and use Contract Requests?*

  Learn how to set up and use the Contract Requests feature so that salespeople and others can quickly raise requests for contracts and agreements.
- *How do I extract and classify key terms contract documents using Generative AI?*

  Learn how to set up, extract, and classify key terms from contract documents using Generative AI. Discover how to create key terms and prompts and categorize them based on your business rules.
- *How do I integrate applications using REST web services*

  Learn about Enterprise Contracts REST APIs.

Related Topics

- Plan Your Implementation

2 Contracts Common Configurations

Party Contact Roles

Set Up Party Contact Roles Lookups

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

This topic:

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

Predefined Contact Roles

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

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

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

Making Contact Roles Available for Use in Contracts

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

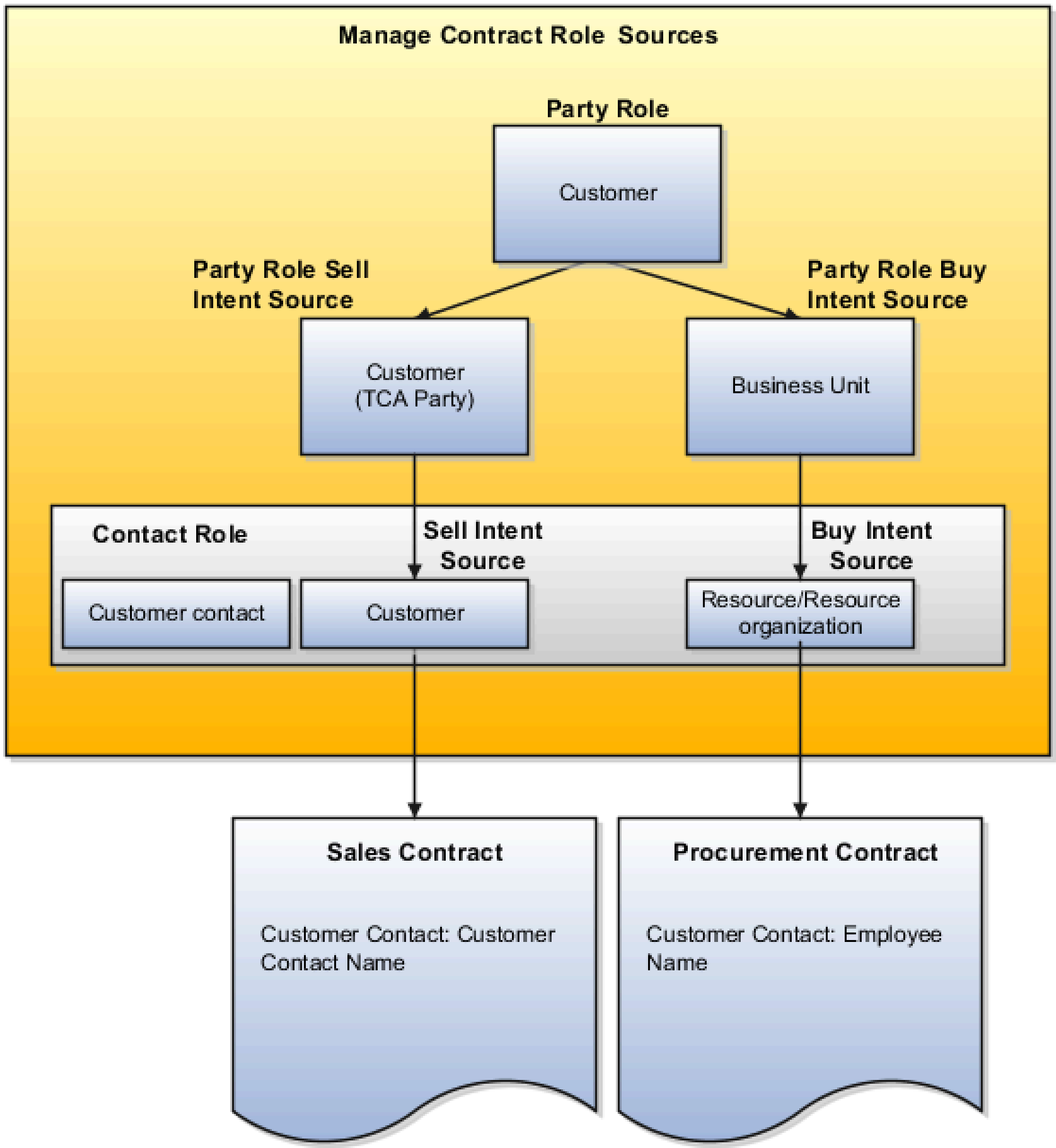
Make these entries for each party role where you want the contact role to be available:

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

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

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

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



Contract Party Roles and Sources

How You Set Up Contract Party Roles

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

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

Manage Party Roles

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

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

Make Party Roles Available for Use in Contracts

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

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

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

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

Party Source Code	Name	Description
OKX_PARTNER	Partner	Partners. This source is reserved for Oracle Fusion Partner Relationship Management

Reuse the Same Party in Buy and Sell Contracts

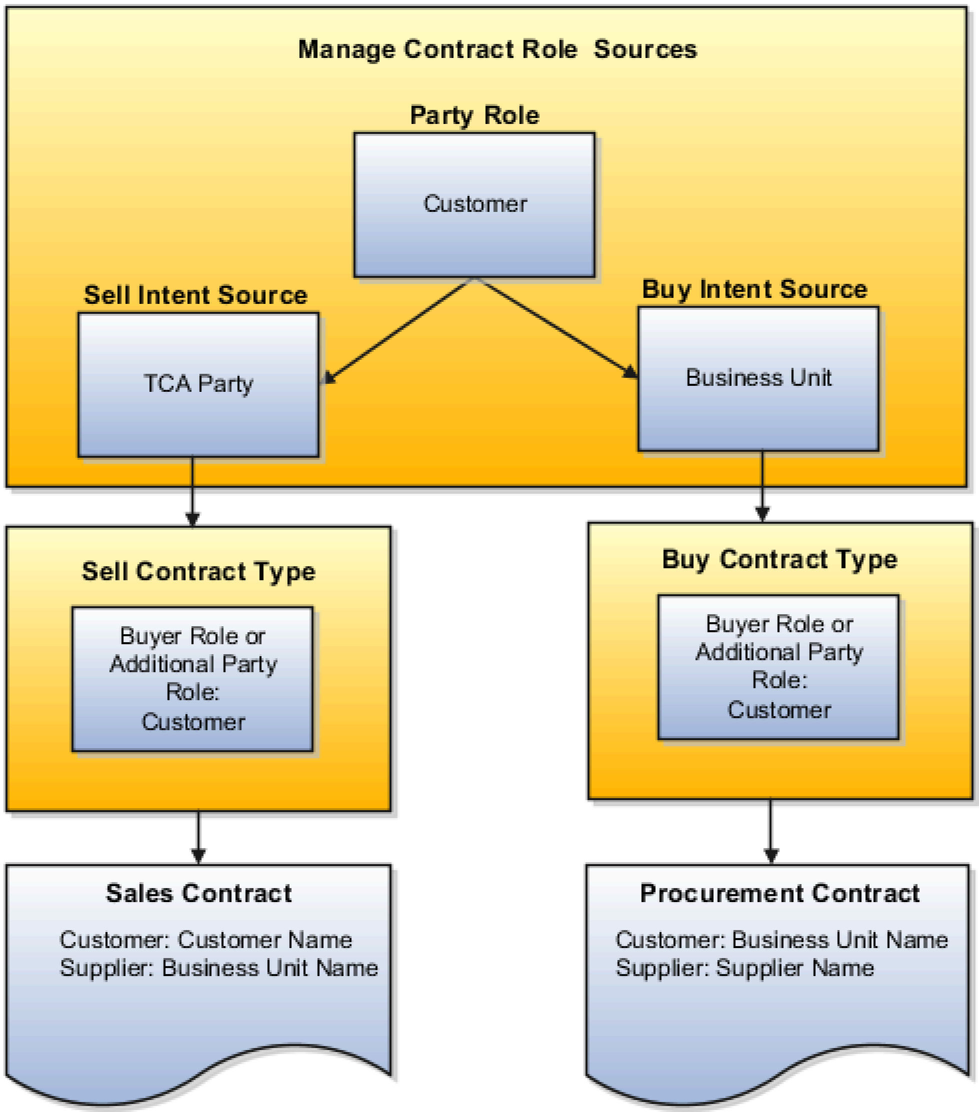
You can use the same party role for both buy-intent and sell-intent contracts by associating the party role with different sources. This figure shows how you can reuse the role, Customer, in both buy and sell contracts. The customer for sales contracts is a Customer Data Management (formerly known as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

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

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

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

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



View Primary Parties

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

To view the parties while creating contracts:

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

Contract Types

Contract Types

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

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

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

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

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

For each contract type you can:

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

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

Common Contract Type Entries

This table describes common contract type entries:

Field or Option	Description
Class	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. • Enterprise Contract: Used for authoring both buy and sell contracts where you're buying or selling items and services. Examples of contracts of this class include contract agreements (buy or sell intent), project contracts, and repository contracts. • Agreement: Used for authoring a buy or sell intent contract to create a sales agreement. • Partner Agreement: Used for Oracle Partner Management. You can't change the class after the contract type is created.
Set	Determines the data security for contracts of this type.
Name	The name of the contract type that you select when authoring contracts. We recommend you to avoid using special characters when entering the contract type name. For example, `& and @`.
Description	Description that you can see when managing contract types.
Allow lines	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.
Line Class	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".
Use external item master	Selecting this option lets you reference items from an external item source master. This option is available only for sell intent contracts if you selected the available Allow lines option.
Pricing Integration	Controls how sales agreements are priced and can be selected for contract types assigned to the class "Agreement". You can set the integration to use pricing functionality available within Oracle Order Management or Oracle CX Sales. Only contracts using Oracle Order Management pricing integration will be available when creating a sales order in Order Management.
Allow pricing during billing	Allows pricing of subscription services during contract billing rather than contract authoring. This attribute can be set when the class is Enterprise Contracts and the Line Class is Service.
Enable Automatic Numbering	Enables automatic numbering of contract lines during contract authoring. For more information, see the Define Document Sequences topic.

Field or Option	Description
Requires Signature	Determines if customer signature is required for contract acceptance before this type of contract can become active. After approval, the contract is set to the Pending Signature status and requires you or the signer to enter the date of customer approval to make the contract active. If you plan to use the *Enable Electronic Signature* option, you can disable this feature at the individual contract level. Even if you disable this option at the contract level, the contract will still require manual signature.
Enable Electronic Signature	Determines if designated signers must sign the contract before the contract becomes active. In this case, after approval, the contract moves to the Pending Signature status, and when the contract is sent for signature, the contract moves to the Sent for Signature status.
Contract Numbering Method, Contract Numbering Level, and Contract Sequence Category	Specifies if you must enter the contract number manually or if it's generated automatically based on the numbering level and the document sequence category that you specify.
Intent	Contracts can have either a sell intent (project contracts and partner agreements) or buy intent (purchase contracts). You can't change the intent after the contract type is created.
Buyer Role	The party role of the recipient of the goods and services in the contract. For a sales or a project contract, this is the role you set up for the customer. For a purchasing contract, it's the role you set up for the business units in your organization. You can't edit the entry in this field after contract type creation. For sell-side contracts, the source of party role can be Customer, Internal Party or All Eligible Customers.
Seller Role	The party role of the party delivering the goods and services covered by the contract. For a sales or a project contract, this is the role you set up for one of the internal business units. For a purchasing contract, it's the role you set up for the supplier. You can't edit this field after contract type creation.
Contract Owner Role	The contact role assigned to the owner of the contract. Contract ownership is automatically assigned to the employee who creates the contract. The owner is automatically assigned the role you specify here.
Buyer Contact Role	The role you specify in this field specifies the role of the buyer that will be copied from the contract header to the contract fulfillment lines created for contract lines. This option is available for purchase contracts only:
Requester Contact Role	In purchase contracts only: The role of employee who will be used as the creator of a requisition in Oracle Fusion Purchasing.
Contract Layout Template	The Oracle Analytics Publisher template that's used to print the entire contract. This option isn't available if you enabled Use external item master.
Terms Layout Template	The Oracle Analytics Publisher template used to print the contract terms. This option isn't available if you enabled Use external item master.
Notify Before Expiration, Days to Expiration, and Contact Role to be Notified	Selecting this option sends a notification before contract expiration to the individual with the role specified in the Contact Role to Be Notified. The number of days is specified the Days to Expiration field.

Field or Option	Description
	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. When you run Send Contract Expiration Notifications, three people receive the expiration notification: • The person who submits the process • The contract owner of the contract that's expiring • The contract contact who has the role you have selected in the Contract Type Expiry notification setup

Line Types

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

This table describes the possible line types:

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

Line Type	Description	Line Type Source
Coverage	Enables the coverage of covered assets within a line in a service contract.	Coverage, sell
Warranty	Enables entry of items tracked in the inventory. It includes the sale of included and extended services in the contract.	Warranty
Product	Enables entry of a line representing the negotiated terms for future sale of an item.	Product, sell agreement, standalone
Product	Enables entry of a line representing the negotiated terms for future sale of an item.	Product, sell agreement, integrated
Group	Enables entry of a line representing the negotiated terms for future sale of a product group.	Group, sell agreement

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

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

Add Party Roles

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

Set Project Billing Options

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

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

Enable Contract Fulfillment Notifications for Purchase Contracts

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

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

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

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

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

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

Enable Contract Terms Authoring and Other Advanced Options

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

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

The advanced authoring options are described in this table:

Option	Description
Enable Terms Authoring	Displays the Contract Terms tab in contracts and enables contract terms authoring using contract terms templates from the Contract Terms Library. You must set up the content of the library from the Terms Library work area before you can take advantage of this feature. **Note:** When this option is disabled, you can attach contract terms along with other supporting documents.
Enable Risk Management	Enables the entry of contract risks. You must set up contract risks using the Manage Contracts Risks task in Setup and Maintenance.

Option	Description
Enable Related Contracts	Lets users relate contracts to each other.

Enable Electronic Signatures

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

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

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

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

Related Topics

- Define Document Sequences

Contract Line Types

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

Line Types

Line types are names you give to the contract lines.

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

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

Line Type Sources

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

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

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

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

Guidelines for Setting Up Contract Types for Different Contracts

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

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

- Customer Contracts

  Your organization is selling goods and services.
- Supplier Contracts

  Your organization is purchasing goods and services.

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

- Are you selling or buying?

  For Intent, you select either **Sell** or **Buy**.
- Are you buying or selling now or negotiating a long-term contract with terms, such as pricing, that will govern a future purchase or sale?

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

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

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

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

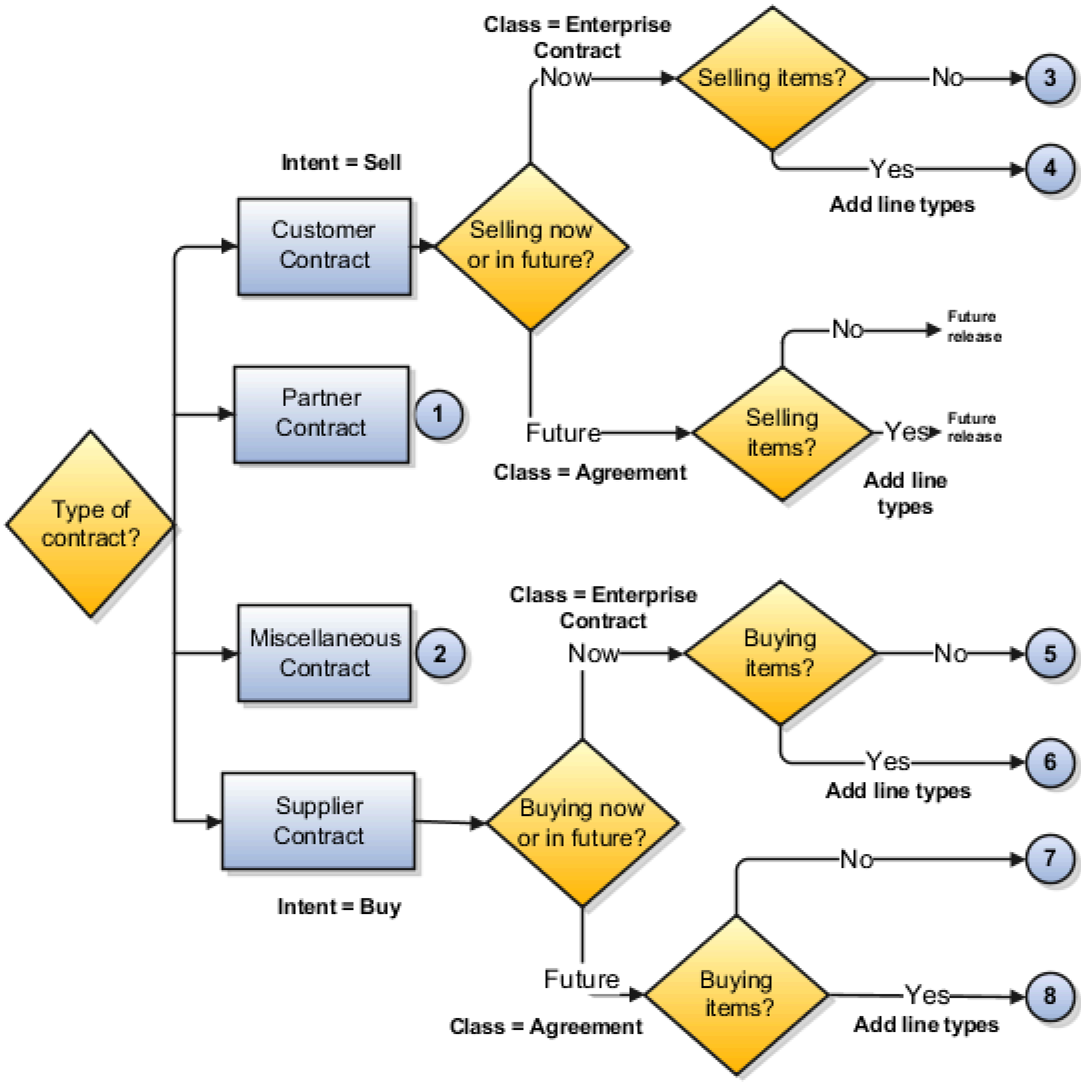
There are other special kinds of contracts where these questions are less relevant or don't apply. These include:

- Partner Agreements

  Contracts with partners.
- Miscellaneous Contracts

  Contracts such as nondisclosure agreements.

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



Customer Contracts

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

Case 3: Customer Contracts with No Lines

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

Purpose of Contract	Contract Type Settings
Simple customer contract with no lines.	• **Class**: **Enterprise Contract** • **Intent**: **Sell** • **Allow Lines** option: Deselected

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.

<table>
<tr><th>Purpose of Contract</th><th>Contract Type Settings</th></tr>
<tr><td>Sell items and services that are tracked and billed.</td><td>

Class: Enterprise Contract
Intent: Sell
Allow Lines option: 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.
</td></tr>
</table>

Case 5: Contracts for Future Sales Without Lines

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

<table>
<tr><th>Purpose of Contract</th><th>Contract Type Settings</th></tr>
<tr><td>Contract for future sales, without specifying the goods and services as contract lines.</td><td>

Class: Agreement
Intent: Sell
Allow Lines option: Leave not enabled

</td></tr>
</table>

Case 6: Contracts for Future Sales with Lines

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

Purpose of Contract	Contract Type Settings
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. **Note:** Only contracts using Oracle Order Management pricing integration will be available when creating a sales order in Order Management.	• **Class**: **Agreement** • **Intent**: **Sell** • **Allow Lines** option: Selected • You can add the following types of lines: ◦ Group ◦ **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.

Purpose of Contract	Contract Type Settings
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.

Purpose of Contract	Contract Type Settings
Purchase goods and services. This type of contract makes it possible for contract authors to create purchase orders in Oracle Fusion Purchasing or another integrated purchasing application from individual contract lines by adding contract deliverables. You can monitor the status of each purchase order directly from the deliverables.	• **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.

Purpose of Contract	Contract Type Settings
Contract for future purchases, without specifying the goods and services as contract lines. This type of contract makes it possible for contract authors to create a contract purchase agreement. Contract authors can create contract purchase agreements with suppliers to agree on specific terms and conditions without indicating the goods and services.	• **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.

Purpose of Contract	Contract Type Settings
Create this type of contract when you know the detail of the goods or services you plan to buy from a specific supplier in a period, but you don't yet know the detail of your delivery schedules. You	• **Class**: **Agreement** • **Intent**: **Buy** • **Allow Lines** option: Selected

Purpose of Contract	Contract Type Settings
can use this type of contract, sometimes called a blanket purchase agreement, a standing order, or a blanket order, to specify negotiated prices for your items before actually purchasing them. Use this type of contract when you have negotiated volume discounts and want to 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.	• You can add the following types of lines: ◦ **Free-form** To purchase items not tracked by inventory. ◦ **Item** To purchase items tracked by inventory.

Special Contracts

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

Case 1: Partner Agreements

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

Purpose of Contract	Contract Type Settings
Partner enrollment agreement	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. • **Class**: **Partner Agreement** • **Intent**: **Sell** • You must enable contract terms authoring by selecting the **Enable Terms Authoring** option.

Case 2: Miscellaneous Contracts

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

Purpose of Contract	Contract Type Settings
Nondisclosure agreement	• **Class**: **Enterprise Contract** • **Intent**: **Sell** • **Allow Lines** option: Leave not enabled

Related Topics

- Contract Types
- Contract Line Types

Why can't I delete a contract type?

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

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

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

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

Contract Risks

How can I set up contract risk?

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

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

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

Related Topics

- How can I specify contract risk?

How can I specify contract risk?

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

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

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

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

Contract Relationships

Contract Relationships

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

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

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

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

Related Topics

- Contract Types

Contract Scheduled Processes

Overview of Contracts Scheduled Processes

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

Note: See *Manage Contracts Scheduled Processes* learn how to view and schedule Contracts scheduled processes.

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

Scheduled Process	Description	Related Feature	Recommended Frequency
Acquires Usage Data from an External Web Service	Name of the process used to get usage information from an external web service.	Usage Billing	Align with shortest billing period or whenever the consumption data is available
Adopt Global Clauses for a New Business Unit	Adopts all approved global clauses for use in a new local business unit.	Terms Library Clause Adoption	Daily
Assign Contract Owner	Assigns a new contract owner or replaces an existing contract owner.	Contract Assignees	As needed
Automatically Renew Eligible Contracts and Contract Lines	Name of the process that's used to find and renew eligible contract lines.	Basic Automated Contract Renewal	Daily to weekly
Build Keyword Search Index for Contract Clauses	Enables clause searches in the Contract Terms Library using the Keyword field by building an index of the Clause Title, Display Title, Description, and Text fields.	Terms Library Search Clauses	Daily
Build Keyword Search Index for Contract Terms Templates	Enables contract terms template searches in the Contract Terms Library using the keyword field by building an index of the Terms Template Name and Description fields.	Terms Library Search Terms Templates	Daily
Fetch Pricing Information for Service Contracts	Name of the process that prices usage charges and reprices future periods for recurring charges on lines marked as Price During Billing. For example, Let's assume that you've already billed $100 per month for January to April. Now you change the price to $150 per month, so from May onward your customer will be billed at $150.	Service Contract Pricing	Daily
Fetch Service Contract Invoice Information from Receivables	Name of the process used to retrieve the service contract line invoice and credit memo information from accounts receivables.	Service Contract Billing	Daily
Generate Contract PDFs for Text Search	Used to generate PDF documents for all draft contracts to enable indexing of terms for text search.	Service Contract Billing	Daily
Import Contract Clauses from Interface Table	Validates clauses and variables in the open interface table and imports the valid clauses into the Contract Terms Library.	Terms Library Clause Import	As needed

Scheduled Process	Description	Related Feature	Recommended Frequency
Import Contract Clauses from XML File	Validates clauses and variables from an XML spreadsheet and imports the spreadsheet into the Contract Terms Library.	Terms Library Clause Import	As needed
Import Contract from External Systems	Imports contracts in bulk from external systems.	Contract Import	As needed
Import Default Coverage	Name of the process which is used to import default coverage.	Service Contracts Entitlements	As needed
Optimize Keyword Search Index for Contract Clauses	Optimizes the clause text index to improve clause performance of searches using the Keyword field in the Contract Terms Library.	Terms Library Clause Search	Daily
Optimize Keyword Search Index for Contract Terms Templates	Optimizes the contract terms template text index to improve performance of terms template searches using the Keyword field in the Contract Terms Library.	Terms Library Terms Template Search	Daily
Perform Timed Contract State Transitions	Name of the process that performs the timed transition of contracts from one state to another.	User Statuses and Transitions	Daily
Process Contracts Consolidated Reminder Events	The name of the program that processes consolidated reminder events in contracts.	Event Notification Rules and Template Sets	Daily
Process Contracts Event Notifications	The name of the process that's used to process event notifications in contracts.	Event Notification Rules and Template Sets	Daily
Process Installed Base Updates	Name of the process which is used to create and update contracts based on Installed Base updates.	Service Contracts Installed Base Integration	Daily
Purge Contract Clause Import Tables	Purges data from the clause interface table after clause import has completed.	Terms Library Clause Import	As needed
Purge Contract Import Interface Tables	Purges error records of the contract import interface tables.	Contract Import	As needed
Purge Contract Temporary Tables	Purges all contract temporary tables.	NA	As needed

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

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

Related Topics

- What are scheduled processes?

Manage Contracts Scheduled Processes

To view and manage Contracts scheduled processes:

Note: See *Overview of Contracts Scheduled Processes* for a list of Contracts scheduled processes.

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

Related Topics

- What are scheduled processes?

Contract Approvals

Predefined Approval Flows for Oracle Contracts

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

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

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

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

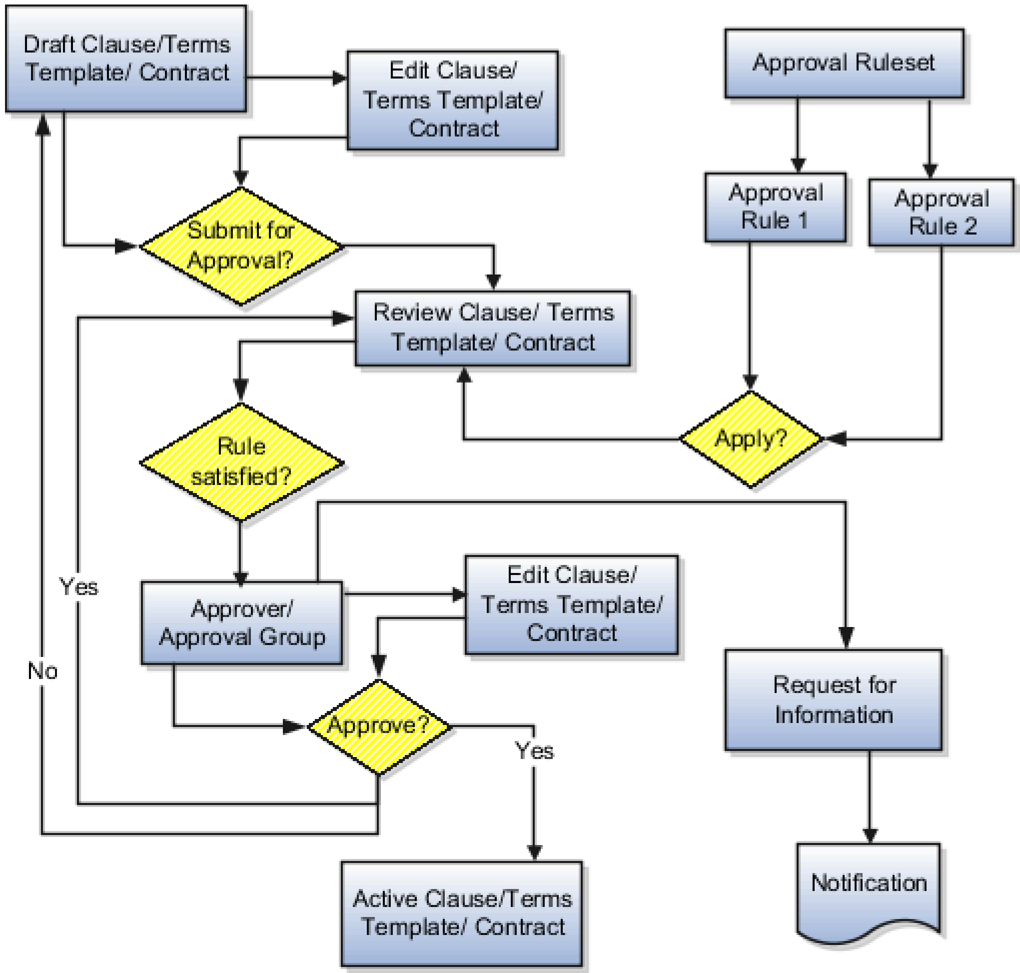
As a contract administrator, you can see an Administration link displayed in the BPM Worklist. To create new rules or change existing rules, click the Administration link, click the Task Configuration tab, select the required task in the side panel, click the Data Driven tab, and select the appropriate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

To create or change approval groups:

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

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

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



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

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

The approval process is:

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

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

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

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

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

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

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

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

Approval of Contract Based on Estimated Contract Amount

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

The predefined rules include the following:

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

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

Rule	Field	Predefined Value	Description
Estimate_Amount_Rule1	Condition	Task.payload.getContractHeaderRes	Applicable for a total estimated contract amount of 30,000 or less.
Estimate_Amount_Rule1	List Builder	Resource	The name of the approver
Estimate_Amount_Rule1	Response Type	Required	The approval notification requires a response.

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

Approval by Clause Approval Group Based on Contract Intent

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

This rule set has two predefined rules:

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

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

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

Approval by Template Approval Group Based on Contract Intent

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

This rule set has two predefined rules:

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

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

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

Related Topics

- Approval Rules Configurations
- Disable or Enable Workflow Notifications
- Synchronize Notifications in the Global Header and Home Page with Workflow Tasks

Approval Rules Configurations

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

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

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

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

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

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

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

1. Click the **Task Configuration** tab and select the appropriate approval task for Contracts from the panel beneath Tasks to be configured.
2. Navigate to the **Rules** tab.

   The participant tree displays all the stages of approval and the rule sets for each stage. Each rule set contains one or more approval rules. Each approval rule has an approval condition and a list of approvers. The list of approvers derived for each rule set is called a Participant.
3. To modify rules, first click the **Edit** icon and then click the **Participant**.

   You can now modify or add rules. To generate the list of approvers, each rule requires a list builder to be associated with it.

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

Create New Approval Rules

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

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

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

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

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

View Object in Condition Browser	View Object Attribute	Description
PayloadType	getContractHeader	Contract identifier

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

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

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

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

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

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

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

Modify Existing Approval Rules

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

Create Deviation-Based Rules and Rerouting Approval

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

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

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

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

Understand and Apply Properties of Rules and Rule Sets

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

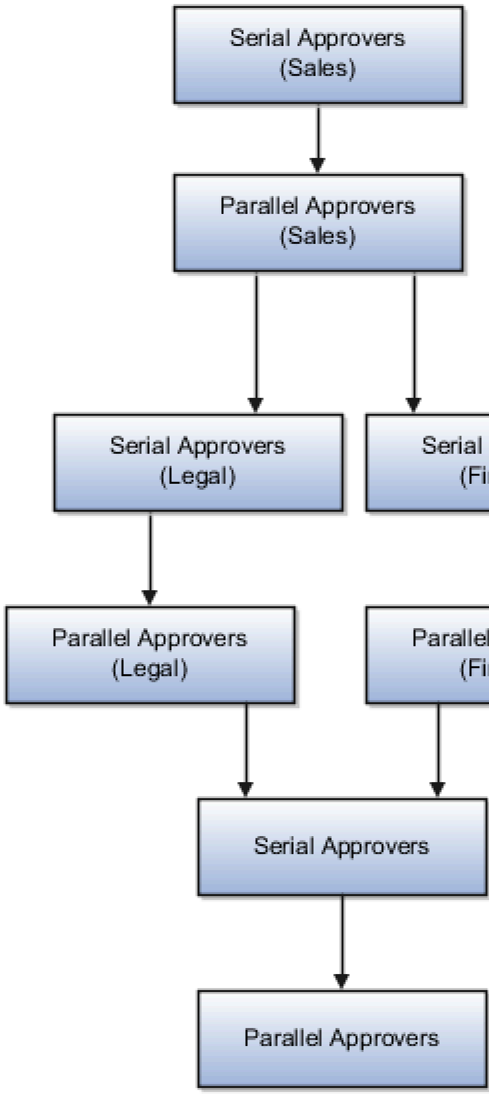
- New rule sets can only be created using Oracle JDeveloper.

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

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

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

This figure shows how rule sets are executed:



Related Topics

- Predefined Approval Flows for Oracle Contracts
- How Reviewing Contract Deviations Works

Configure Approval Rule Sets and Rules

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

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

Configure Rule Sets

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

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.

   > **Note:** You may see a message saying that flexfields have been modified. This means someone used Application Composer to create new fields, which creates flexfields on the back end. Click the Start Synchronization button to get the latest set of flexfields that you can use for the rules in this task.

4. Click the Assignees subtab.
5. If the diagram mapping out the workflow task is big, click the **Switch to Vertical Layout** link.
6. In the diagram, find the participant you want to work on. Click the **Go to rule** icon and select **Go to rule**. Or, select the participant and, in the pane after the diagram, click the link in the **Business rule** field.
7. Go on to work on the rule set that's displayed on the Rules tab. Or, from the drop-down list with rule set names, select another rule set to edit, or select **Add New Rule Set**.
8. Click the **View Properties** link after the rule set name to see the **Effective Date** setting and **Active** check box. The rule set needs to be effective and active to apply when people create workflow tasks. It's a good idea to leave the effective date set to Always.

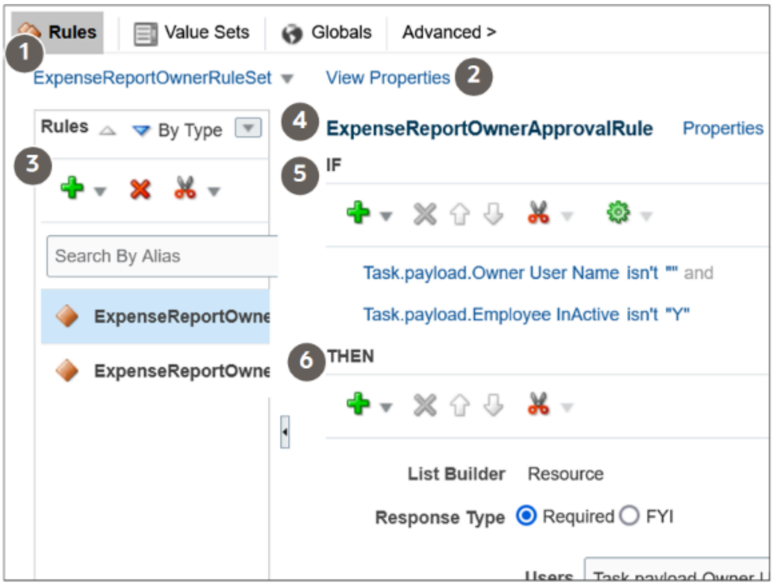
   > **CAUTION:** From here, you can also click the **Delete Rule Set** link. Before you delete any predefined rule sets, make sure you're really not using it and never will. Don't delete the predefined Modification Rules and Substitution Rules rule sets.

9. In the Rules pane, you can add, edit, or delete rules in the rule set. Expand the rule if it's not already. As with the rule set, you can click the **Show Advanced Settings** icon for a rule to make sure that the rule is effective and active.

   - Create: Click the **Advanced Add or Modify Options** icon and select **General Rule**.
   - Edit: Select the rule if it's not already.
   - Delete: Select the rule and click the **Delete** icon in the toolbar in the Rules pane.

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

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



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

Configure the If Section in Rules

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

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

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

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

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

Configure the Then Section in Rules

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

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

Field	What This Is
Response Type	Required: The assignee needs to take action, for example to approve or reject. FYI: The assignee doesn't need to take action.
Number of Levels	Number of levels required for the task to be completely approved, from the starting participant to the top participant.
Starting Participant	The first assignee in the approval chain.
Top Participant	The last assignee in the approval chain if the chain goes up that high. Approvals don't go beyond this participant, for example in the supervisory hierarchy.
Auto Action Enabled	If set to True, there's an automatic action that is taken on the task when the rule conditions are met.
Auto Action	"APPROVE": The task is automatically approved. "REJECT": The task is automatically rejected.
Rule Name	The name of the rule with the Then section that you want to use. ◦ Leave the field with the name of the rule you're working on, to indicate that this rule will use the Then section defined here for this rule. ◦ Or, you can enter the name of an existing rule from any task, enclosed with quotation marks, and leave all the other fields in this Then section blank. The Then section in the

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

To select the starting or top participant:

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

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

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

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

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

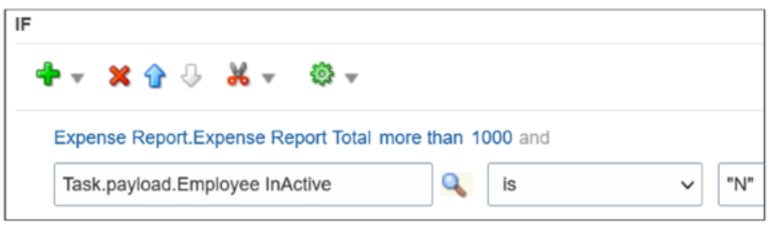
Part of the Participant Value	What This Means
`getManager`	You selected the Get Manager option.
`"supervisory"`	You selected the Supervisory list builder.
`Task.payload.Owner User Name`	For the **Reference User** field, you went to Task > payload > Owner User Name in the Variables tab to select the Owner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

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

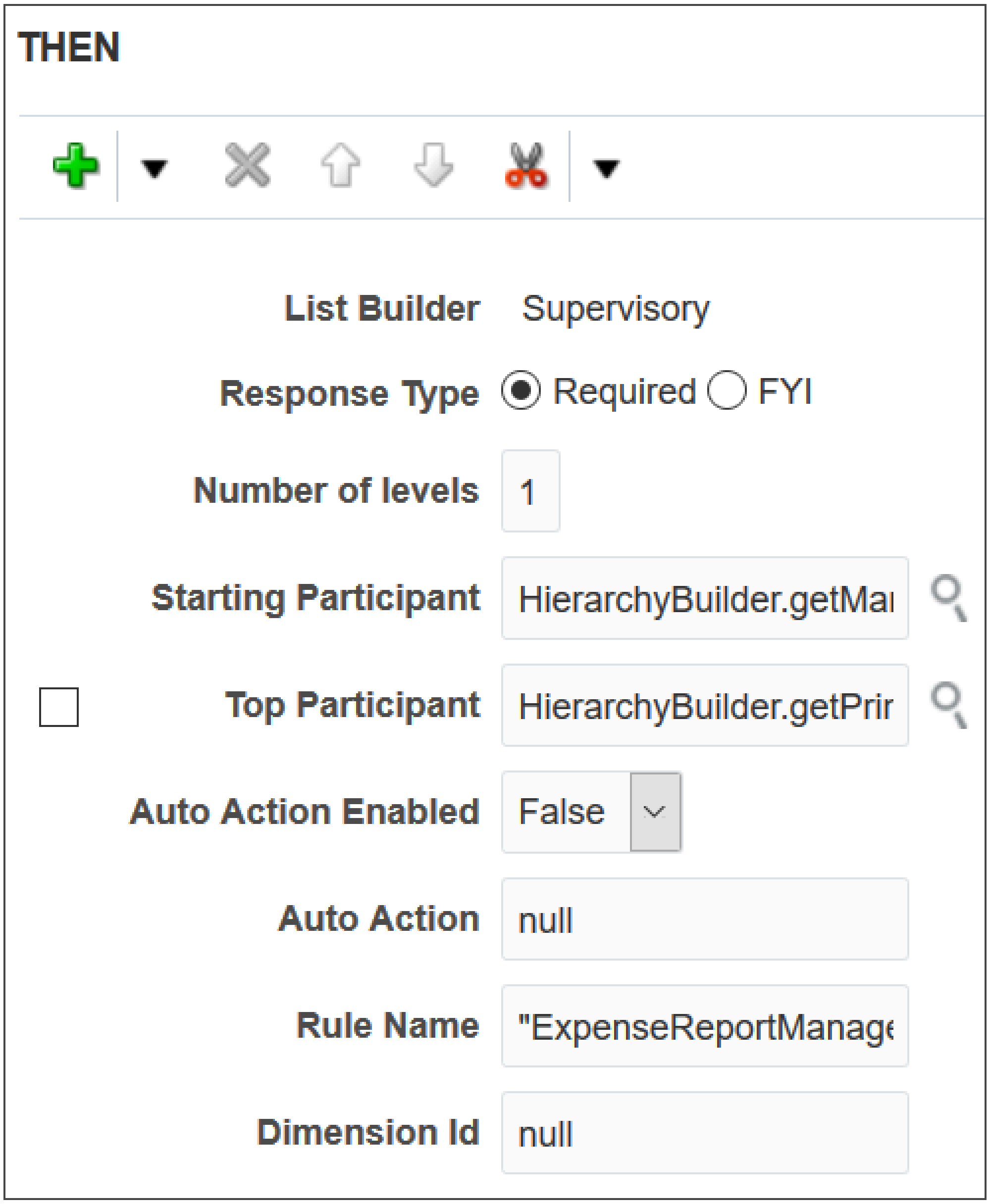
Part of the Participant Value	What This Means
`getPrincipal`	You selected the Get User option.
`"KLEE"`	For the **Reference User** field, you entered "KLEE".
`"",""`	You left the **Hierarchy Type** and **Effective Date** fields blank, so there's nothing between the quotation marks.

Example of a Rule

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



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



Test and Apply Your Rule Set

1. Click the **Validate** button in the Assignees tab to see if there's anything wrong with the rules that needs to be fixed. Results appear in the Business Rule Validation – Log subtab after the Rules subtab.
2. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes.

Related Topics

- Search for Workflow Tasks to Configure
- Overview of Flexfields
- Define Fields
- Assignments

Contract Previewing and Printing

Contract Printing and Layout Templates

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

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

You can copy and edit layout templates used for:

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

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

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

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

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

Printing Enterprise Contracts

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

- The contract layout template

  This layout template provides the layout for printing the contract, except for the contract terms.

  You can assign a contract layout template to a contract in different ways. Here's the priority order in which the application uses the contract layout template for printing a contract:

a. Negotiation and Renewal tab on the edit contract page
b. Manage Contract Rules in the Setup task side panel
c. Manage Contract Types task from the Setup and Maintenance work area

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

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

- The contract terms layout template

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

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

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

  This table describes the layout templates used for structured terms.

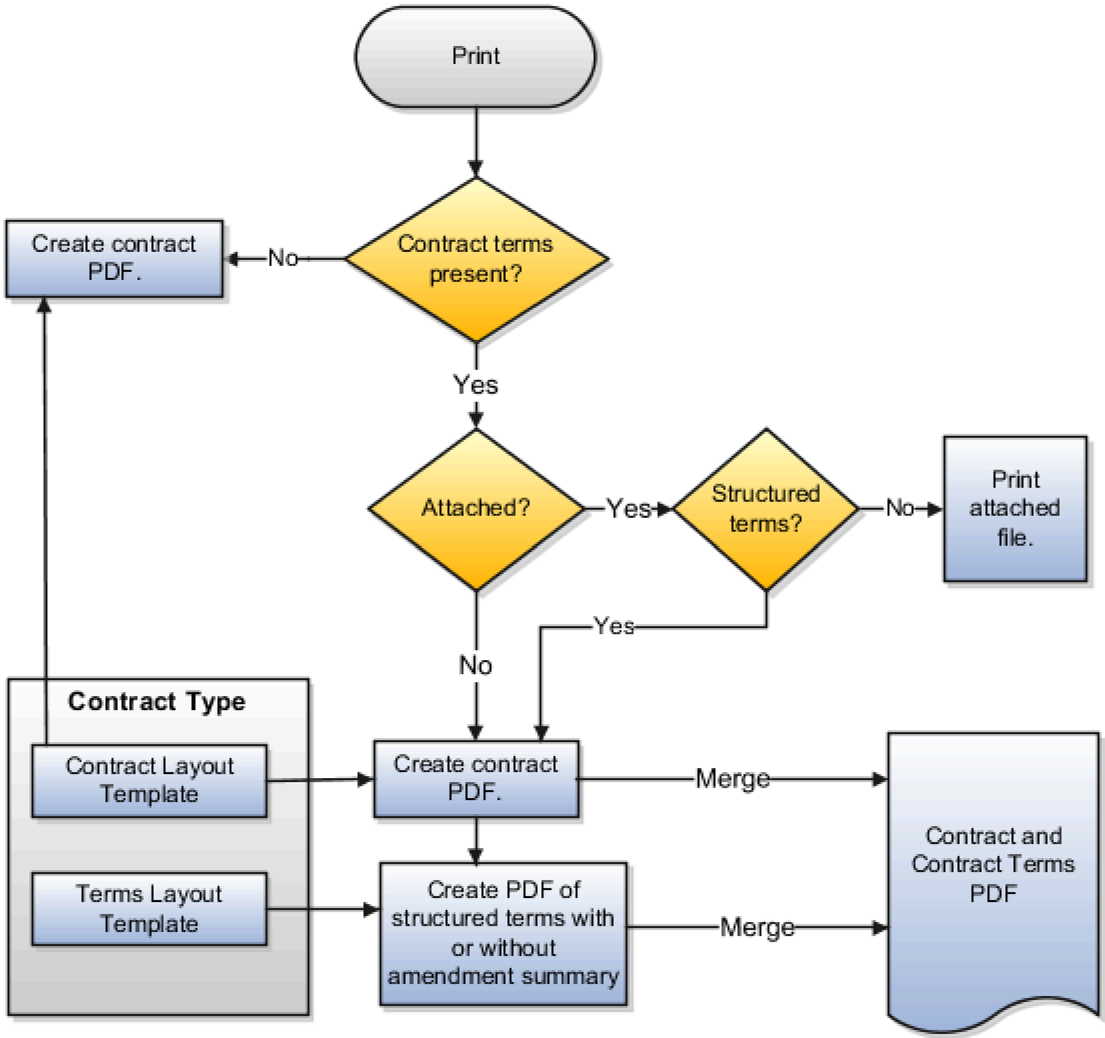
File Name	Description	Location in Analytics Publisher Catalog Directory
`ContractTermsECM`	The layout for printing the contract terms in enterprise contracts when the contract terms are authored in the application.	**Enterprise Contracts/Contract Terms Printing/Contract Terms Download and Preview**
`ContractTermsAmendmentsOnlyECM`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

File Name	Description	Location in Analytics Publisher Catalog Directory
`ContractTermsPlusAmendmentsECM`	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.	**Enterprise Contracts/Contract Terms Printing/Contract Terms Preview**

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

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

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



Printing of Contract Terms on Purchase Orders and Sourcing Documents

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

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

This table lists the sample files provided:

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

File Name	Description	Location in Analytics Publisher Catalog Directory
`ContractTermsAmendmentsOnlyProcure`	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**
`ContractTermsPlusAmendmentsProcure`	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:

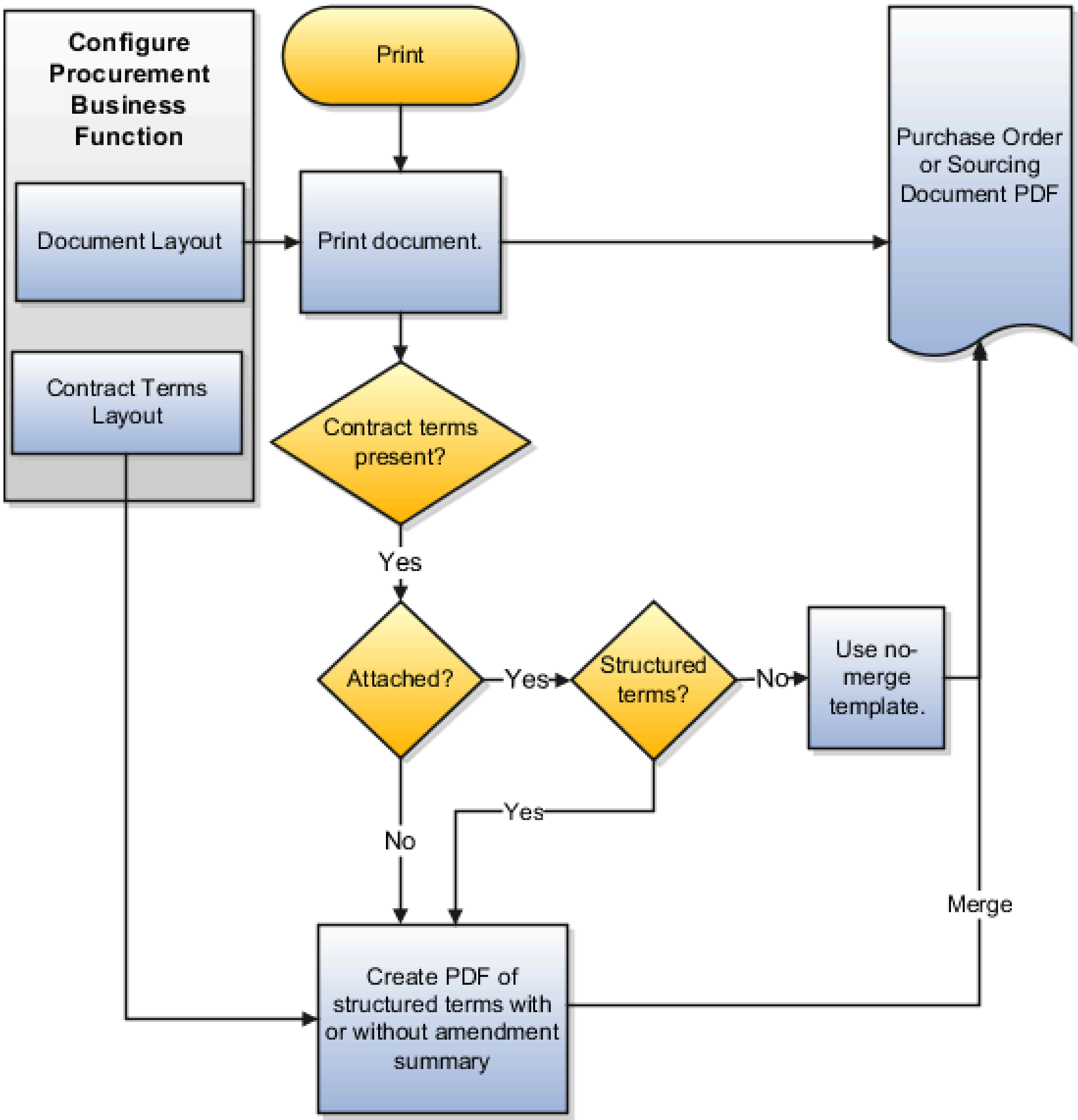
File Name	Description	Location in Analytics Publisher Catalog Directory
`ContractTermsNoMerge`	This layout template includes the following text: `The contract terms for this {doc type} are listed in a separate document which is either attached to the e-mail you received or sent separately. These contract 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:



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

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

Printing the Contract Deviations Report

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

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

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

How to Customize the Contract Deviation Report

Here are the steps to customize the deviation report:

- Install Oracle Analytics Publisher Desktop

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

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

Use this procedure to download Oracle Analytics Publisher Desktop:

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

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

- Download Data XML

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

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

- Customize the Deviation Report Layout Template

  Follow the steps to customize layout templates:

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

Preview Contract Terms Templates

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

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

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

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

Here are the layout templates that supports table of contents:

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

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

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

Previewing and Importing Clauses

The application uses the clause layout template for:

- Formatting individual clauses for preview:

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

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

This table describes the sample layout template provided.

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

Related Topics

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

What's a layout template?

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

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

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

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

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

Related Topics

- What's a layout template?

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

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

Simply ask your administrator to change the value of the profile option, Page Number on Contract Print Hidden (ORA_OKC_HIDE_DEFAULT_PAGE_NUM_IN_PREVIEW_PDF), from no to yes. After the change, the page footer will be hidden.

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

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

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

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

Related Topics

- Create and Edit Report Layout Templates Using the Layout Editor
- Upload the Layout Template File to the Report Definition
- Configure Layout Settings for Reports

How can I change the logo in the layout template?

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

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

Related Topics

- Create and Edit Report Layout Templates Using the Layout Editor
- Upload the Layout Template File to the Report Definition
- Configure Layout Settings for Reports

How can I remove the signature table from the contract?

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

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

To remove a signature table:

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

Related Topics

- Create and Edit Report Layout Templates Using the Layout Editor
- Upload the Layout Template File to the Report Definition
- Configure Layout Settings for Reports

User Statuses and Transitions

User Statuses and Transitions

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

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

Defining User Statuses and Transitions

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

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

Setting Up The State-Based Event Model

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

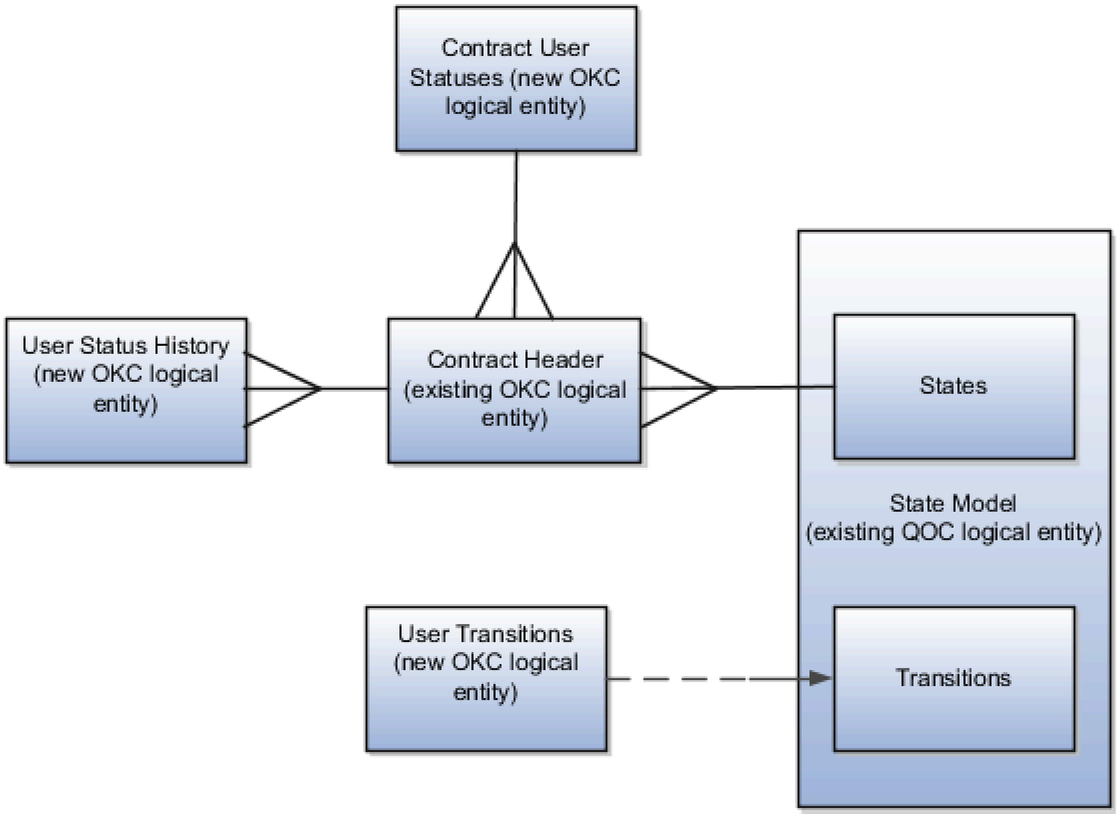
Set these events up for each To and From state of the user transition. For predefined states you can select from available events and actions. An example of an action could be a Groovy script.

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

Note:

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

This figure shows the user statuses and their transitions:



Related Topics

- Contract Assignment and Workload Management
- How You Set Up User Statuses and User Transitions

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

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

See the related topic for more information.

Related Topics

- How You Set Up User Statuses and User Transitions

How You Set Up User Statuses and User Transitions

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

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

Start by creating user statuses and transitions:

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

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

Here's how you can configure an event model:

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

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

7. Click the **Initial** State and configure it as defined in the `DefaultContractHeader` event model.

   The **Initial** state is a special state that enables you to initiate contract creation. The `DefaultContractHeader` event model has `CREATE` and `CREATE_FROM_COPY` events associated with it.
8. Click the **General** State and configure it as defined in the `DefaultContractHeader` event model.

   The **General** state is a common state and any event or action defined in this state becomes available for contracts in all the states. The `DefaultContractHeader` event model has the Validate event that's available for a contract in all the states.
9. Add new states based on your business requirements.

   You can create a standalone or a child of a parent state. Examples of standalone states are Draft and Canceled. A parent state is a collection of one or more child states. You can use the parent state when events or actions apply to more than one state. In the `DefaultContractHeader` event model, the Approved Composite state is a parent state for the Approved and Hold states. The events defined for the Approved Composite state are applicable for all the child states defined under it.
10. Create events for every state based on your business requirements.

    Events are the transitions for a specific state. Events control the actions you can take on a contract in the application. For example, while the contract is in the Draft state, some allowable actions are Cancel, Submit for Approval, and Create Version.
11. Create actions associated with every event. You can use the `DefaultContractHeader` event model to find groovy script examples associated with various events and actions.
12. Click **Save and Close**.
13. After testing these changes, publish the sandbox according to your company's business practices.

Example of Adding Legal Review as Custom Status in Event Model

Here's an example for including Legal_Review as the custom status in the event model:

1. Create user statuses and transitions.

   a. Navigate to the **Setup and Maintenance** work area.
   b. Search and select the **Manage Contract User Statuses and Transitions** task.
   c. From the User Statuses section, click the **Add** icon and enter `Legal_Review` in the Code column and **Legal review** in the Name column.
   d. From the User Transitions section, Enter `SEND_FOR_LEGAL_REVIEW` as user transition value and **Send for legal review** as name.
   e. Click **Save and Close**.
2. Sign in to the application as a setup user.
3. Ensure you're working in an active sandbox.
4. Navigate to Contracts in Contract Management.
5. Open the Tasks side panel and click **Event Models** in the Setup tasks.
6. In the Events Models page, for the `oracle.apps.contracts.coreAuthoring.contractService.view.ContractHeaderVO` business object, select an existing event model and click the **Edit** icon.
7. In the States section, click the **New** icon.

   a. In the Create State window, enter `Legal_Review` in the **Name** field and click **OK**.
   b. Select State in the Type column.
   c. Select General in the Parent State column.
8. In the LEGAL_REVIEW: Details section, click the **New** icon.
   a. In the Create Event window, select **Entry** in the **Type** field and click **OK**.
   b. In the Create Event window, select **Named event** in the **Type** field and enter `CANCEL` in the name field. Click **OK**.
   c. For the CANCEL event, enter `stsCode=='DRAFT'` in the Guard Condition column.
   d. Similarly create the `SUBMIT, ACTIVATE, and VERSION` events.
9. After adding all events, click the Entry event.
10. In the Entry section, click the **New** icon to add the condition that changes user status to **Legal_Review**.
11. In the Create Event window:
    a. Select **Groovy Script** in the **Type** field.
    b. In the Script field enter:

```
UserStatusCode='LEGAL_REVIEW';

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

    c. Click **OK**.
12. From the States section, select the `DRAFT` state.
13. In the DRAFT: Details section, click the **New** icon.
    a. In the Create Event window, select **Named event** in the **Type** field and enter `SEND_FOR_LEGAL_REVIEW` in the name field. Click **OK**.

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

    b. For this new event, select `Legal_Review` in the To State column.
14. Click **Save and Close**.
15. To test this new status, create a new contract.
16. From the Edit Contract page, click **Actions** > **Send for legal review**.
17. The user status for contract changes to Legal review.

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

How to Raise a Business Event

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

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

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

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

5. Select **Configure Business Objects** and click **Create** to create the sandbox, or **Create and Enter** to enter or activate the sandbox after creating it.

Here are the steps to raise business events for contracts:

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

      ```
      oracle.jbo.NameValuePairs plist = new oracle.jbo.NameValuePairs();
      plist.setAttribute("contractId", ContractId);
      eventModel.execute(`stsMgtAM').raiseBusinessEvent(plist);
      ```
   c. Click **OK**.
8. Click **Save and Close**.
9. To test this new status, create a new contract.

Contract Assignment and Workload Management

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

The key aspects of contract workload management are as follows:

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

Summary Bin

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

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

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

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

Assignments Bin

The Assignment bin of the Manage Workload page displays

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

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

- Assign unassigned contracts to individual resources. When selecting a new assignee, add the assignee to the contract team to ensure that they have full access to the contract.
- Remove assigned contracts from a particular resource and reassign to other resources to balance resource workload. You can assign or remove from assignment multiple contracts together by selecting them in the Assignments area.

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

Related Topics

- User Statuses and Transitions

Deep Links

Deep Links

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

For more information, see *Deep Links*

Deep Links for Contracts

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

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

URL Pattern of Deep Links

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

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

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

Parameter	Description	Example of Parameter Values
`pod-name`	The host name	`pod.oraclecloud.com`
`objType`	The object type.	`CONTRACT`

`objKey`	The object identifier	`contractId`
		`contractPuid`
		`chrId & majorVersion`

`action`	The action that users can do on the page that the URL opens up, for example to edit something. Here are a few things to know: • If you don't add any value for the action parameter, this value is considered as `NONE` by default and will take users to the landing page. • If the value you added for the action parameter doesn't match with any action on the UI, the URL won't work.	`NONE` `EDIT`

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

Product	Deep Link	Short Description of Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
Oracle Enterprise Contracts	Contracts (CONTRACT, NONE)	Opens the Contracts search page.	N	NA	NA
Oracle Enterprise Contracts	Contract Details (CONTRACT, EDIT)	Opens a specific contract for editing on the Edit Contract page.	Y	contractId: A unique identifier of a contract.	CONTRACT_ID column in the OKC_K_HEADERS_ALL_B table.

Product	Deep Link	Short Description of Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
Oracle Enterprise Contracts	Contract Details (CONTRACT, EDIT)	Opens a specific contract for editing on the Edit Contract page.	Y	contractPuid: The public unique identifier of a contract.	CONTRACT_PUID column in the OKC_K_HEADERS_ALL_B table.
Oracle Enterprise Contracts	Contract Details (CONTRACT, EDIT)	Opens a specific contract for editing on the Edit Contract page.	Y	chrId: A unique identifier for the latest version of a contract. **Note:** You can optionally add majorVersion to edit a specific version of a contract.	ID column in the OKC_K_HEADERS_ALL_B table. MAJOR_VERSION column in the OKC_K_HEADERS_ALL_B table.

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

Here's an example for the Contracts deep link:

```
https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=CONTRACT&action=NONE
```

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

```
https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=CONTRACT&objKey=contractId=1234567&action=EDIT
```

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

Contracts Descriptive Flexfields

Overview of Descriptive Flexfields

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

Descriptive Flexfields for Contracts

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

Defining Descriptive Flexfield Segments

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

Oracle Contracts supplies these four descriptive flexfields:

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

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

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

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

- Contract Headers
  - ChrType: This is the contract type code. It represents the link between the contract type and the context segment. You can look for the desired contract type in the Manage Contract Types task and ensure that it has a code.
  - Intent: When defining the Context, set the context code as B for Buy intent and S for Sell intent.
  - ContractId: This is the ID that represents the contract.

- Contract Line
-
  - LineTypeCode: This is the line type code. It represents the link between the line type and the context segment. You can look for the desired contract line type in the Manage Contract Line Types task and ensure that it has a code.
  - LineId: This is the Id that represents the line.
  - LineClassCode: This is a unique code for a line class. It controls the line types you can assign to a contract type.

This table lists the possible line class codes:

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

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

Activating Descriptive Flexfields

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

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

Related Topics

- Overview of Descriptive Flexfields
- Considerations for Planning Descriptive Flexfields
- Overview of Flexfields

Example of Setting Up an Automated Contract Header Descriptive Flexfield

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

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

Summary of Tasks

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

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

Next, complete these tasks in the Contracts work area:

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

Create Contract Header Value Set

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

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

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

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.

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

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

Create Context Segments

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

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:

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

Field	Value

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

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

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

Field	Value
Name	Budget
Data Type	Character
Value Set	`OKC_CH_TYPE_DFF`

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

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

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

18. Click **Save and Close** to return to the Edit Context: Commercial page.
19. On the Context Sensitive Segments tool bar, click the **Create** icon.

20. Create another segment for the Commercial context by clicking **Create** and enter the values as shown in this table:

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

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

Deploy the Modified Contracts Header Descriptive Flexfield

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

1. In the Setup and Maintenance work area, go to the following:
   - 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:

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

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

Create a Contract and Associate User-Defined Criteria

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

1. Click the Create Contracts task.

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

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

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

Related Topics

- Overview of Descriptive Flexfields
- Descriptive Flexfields for Contracts
- Considerations for Managing Descriptive Flexfields

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

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

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

- FROM: okc_k_headers_all_b a, okc_k_party_roles_b b, POZ_SUPPLIER_SITES_ALL_M c, POZ_SUPPLIERS d
- VALUE COLUMN NAME: VENDOR_SITE_CODE
- WHERE CLAUSE:
    - `a.id = b.chr_id`

- `and a.major_version = b.major_Version`
- `and b.RLE_CODE = 'SUPPLIER'`
- `and c.VENDOR_ID = d.vendor_id`
- `and c.PRC_BU_ID = a.org_id`
- `and d.party_id = b.OBJECT1_ID1`
- `and a.contract_id = :{PARAMETER.ContractId}`

3 Enterprise Contracts Setup

Overview of Enterprise Contracts Setup

This chapter helps you set up Oracle Enterprise Contracts by configuring only those features that are required to have a functioning application.

Once you have a working application, run the full install offering task list in Setup and Maintenance, to take advantage of all features.

> **Note:** Due to differences in the sequence of common setup tasks in the Enterprise Contracts offering and the intent of this chapter, there 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.
5. Define document sequences.
6. Configure contract management business functions.
7. Define customers and their addresses and contacts.
8. Define party roles, contact roles, and role sources.
9. Set up electronic signature.
10. Define contract line types.
11. Define contract types.
12. Manage user statuses and user transitions.
13. Set up common CRM business unit profile option.
14. Define contract lines descriptive flexfield.
15. Define contract terms library components.
16. Configure file-based import for Enterprise Contracts.
17. Set up approval groups and approval task configurations.
18. Enable contracts for use in Oracle Social Network.
19. Configure scheduled processes.

How You Create An Enterprise Contracts Implementation Project

Here's how you can configure Enterprise Contracts and create an implementation project:

1. Navigate to My Enterprise and select **Offerings**.
2. On the Setup and Maintenance work area, select the Enterprise Contracts offering then click **Opt In Features**.
3. On the Opt In page, select the **Enable** check box for Enterprise Contracts.
4. Click the **Features** icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.
5. Navigate to **Setup and Maintenance**.
6. Open the Tasks side panel and click **Manage Implementation Projects**.
7. On the Implementation Project page, click **Create** to create a new project.
8. Enter your project name and move to **Next**.
9. Select **Include** for Enterprise Contracts and click **Save and Open Project**.
10. Expand Enterprise Contracts in the Implementation Project page to be used in the remaining steps in this chapter.

Related Topics

- Configure Offerings

Define Legal Entities

Here are the steps to define legal entities for use with Contracts:

1. In the Setup and Maintenance work area, create an implementation project that includes the Manage Legal Addresses task.
2. Select a country from the Country drop down list, and a new location.
3. Enter the new location information on the Location Create dialog.
4. **Save and Close**.
5. In your implementation project, search for the Define Legal Entities for Enterprise Contracts task list and open the **Manage Legal Entity** task.
6. Click **Create New**.
7. Click the new icon, and enter the required information by selecting the options Legal Employer and Payroll Statutory Unit. Click **Save**.
8. On the Create Legal Entity page, enter the required information and then **Save and Close**.
9. On the Scope Selection: Legal Entity dialog box, click **Select and Add**.
10. Select the legal entity you created and click **Save and Close**.
11. In your implementation project, select **Define Legal Entities for Enterprise Contracts** from the task list.
12. Click the **+** on the tool bar, then search for and add the tasks **Manage Legislative Data Groups** and **Manage Legal Entity HCM Information** to the Define Legal Entities for Enterprise Contracts folder.
13. Open the task **Manage Legislative Data Groups**.
14. Search and then click **Create**.
15. Enter the required information and click **Submit**.

16. Search again to verify that the legislative data group is created, and click **Done**.
17. Navigate to Define Common Applications Configuration for Enterprise Contracts, Define Enterprise Structures for Enterprise Contracts, Define Legal Entities for Enterprise Contracts and open the task **Manage Legal Entity HCM Information**.
18. Search for and click the legal entity you added.
19. Select **Update** from the Edit options at the top. Enter a past date in the Update Legal Entity dialog and click **OK**.
20. Enter the required information under the Legal Employer tab and select the Payroll Statutory Unit tab. Enter the required information and click **Submit**.

Define Contracts Users

Do this to define contracts users:

1. Navigate to**Define Common Applications Configuration for Enterprise Contracts** > **Define Security for Customer Relationship Management** > **Define Users for Customer Relationship Management** and open the **Manage HCM Role Provisioning Rules** task.
   a. Click **Create**.
   b. Enter the required information to create a new role mapping and **Save and Close**.
2. Navigate to **Define Common Applications Configuration for Enterprise Contracts** > **Define Security for Customer Relationship Management** > **Define Users for Customer Relationship Management** and open the **Users, Roles and Delegations** task.
   a. Click **Create**.
   b. Enter the required information to create a user with an email ID, who can author and submit contracts for approval. Enter a **Resource Role** and select an **Organization** in the **Resource Information** section.
   c. Click **Auto-provision Roles**. The provisioned roles from HCM role mapping defined previously are automatically populated. **Save and Close** and then click **Done** to go back to main folder structure.
   d. Repeat the previous steps to create as many Oracle Contracts users as required for this phase of the implementation.
   e. Get users and passwords from the email recipients.

Privilege That Controls Deleting or Editing Mandatory Clauses

The privilege, Override Contract Terms and Conditions Controls (OKC_AUTHOR_CONTRACT_TERMS_AND_CONDITIONS_OVERRIDE_PRIV), controls whether a user can delete or edit mandatory clauses on contracts.

Roles for Tracking Purchasing Activity Processes

Here are the roles needed to track the completion of purchasing activity processes:

- ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB
- ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT
- ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB
- ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB
- ORA_OKC_SUPPLIER_CONTRACT_TEAM_MEMBER_ABSTRACT

For more information about how to perform user setups, see the Securing Sales and Fusion Service guide. For more information on the roles required for Contracts users, see the Security Reference for Enterprise Contracts guide.

Related Topics

- Role Provisioning Options
- Ways to Create Sales Users

Define User as Resource

The list of business units that a user can access is based on the resource organization the user is mapped to as a resource. To associate a resource organization with business units:

1. Sign in to the application as an administrator or a setup user.
2. In the Navigator, select **Resource Directory**.
3. On the Resource Directory page, click the **Tasks** panel tab and select **Identify Resources**.
4. Search for the user you want to include as a resource.
5. Click **Add as Resource**.
6. Click **Done**.

For every business unit you set up, you can define internal resource organizations associated with the business unit. A resource organization represents the internal organization and structure for the business unit.

Once you add a user as a resource, the user becomes available in the **Parties** tab on the Edit Contract page.

Related Topics

- How do I enable desktop pages for Resource Directory?
- Overview of Managing Resources

Set Up Read-Only Contract User

Here are the steps you can use to set up a read-only contract user after creating a new user and associating him to a resource organization:

1. Sign in as a user with Security Console access.
2. From the Navigator, select **Tools** > **Security Console**.
3. From the Roles subtab, click **Create Role**.
4. On the Create Role: Basic Information page, perform these steps:
    a. Enter the role name.
    b. Enter the role code.
    c. Select **Common - Job Roles** from the **Role Category** drop-down list.
    d. Optionally, enter the description.
    e. Click **Next**.
5. On the Create Role: Function Security Policies page, perform these steps:
    a. Click **Add Function Security Policy**.

   b. In the Add Function Security Policy page, search and select the **Enable Sell Intent** privilege.
   c. Click **Add Privilege to Role**.
   d. Search and select the **Enable Buy Intent** privilege and click **Add Privilege to Role**.
   e. Click **Next**.
6. On the Create Role: Data Security Policies page, optionally, you can set your data security policies according to your requirements and click **Next**.
7. On the Create Role: Role Hierarchy page, perform these steps:

   a. Click **Add Role**.
   b. On the Add Role Membership page, search and select **Contract Search and View Access** with the `ORA_OKC_CONTRACT_SEARCH_VIEW_DUTY` code.
   c. Click **Add Role Membership**.
   d. Click **Next**.
8. On the Create Role: Users page, perform these steps:

   a. Click **Add User**.
   b. In the Add User page, search and select a user.
   c. Click **Add User to Role**.
   d. Click **Next**.
9. On the Create Role: Summary page, review your changes.
10. Click **Save and Close**.

How can I protect supporting documents from deletion?

You can protect your supporting documents from being inadvertently deleted. Adding the new privilege, Delete Supporting Documents by Contract Status, to the required roles lets you restrict the deletion of supporting documents in all contract statuses other than Draft and Under Amendment.

To restrict the deletion of supporting documents in all contract statuses, revoke the existing privilege, Delete Supporting Documents, for specific roles.

This table describes how you can configure the privileges

Delete Supporting Documents Privilege	Delete Supporting Documents by Contract Status Privilege	Result
Yes	Yes	User can delete supporting documents in all contract statuses
Yes	No	User can delete supporting documents in all contract statuses
No	No	User can't delete supporting documents in any contract status
No	Yes	User can delete supporting documents only in Draft and Under Amendment contract status

The supplied privilege, Delete Supporting Documents by Contract Status Privilege, isn't assigned to any role by default. Add the privilege to the necessary roles and revoke the existing privilege, Delete Supporting Documents.

For information about how to add and remove privileges to user roles, see the *Edit Your Custom Job or Abstract Roles* topic.

Generate Data Model XML

Use the BI Publisher to create a new contract layout template by adding the contract data model attributes. Use the Generate Data model XML to find the latest data model attributes.

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

- Standard contract attributes
- Custom contract attributes
- Standard child entities such as contract parties, lines, and contacts
- Custom child entities created through Application Composer
- Descriptive flexfields for Oracle Contracts

Download Data Model XML

Here are the steps to download the latest data model XML:

1. Navigate to Contracts in Contract Management.
2. Open the Tasks side panel and click **Generate Data Model XML** in the Setup tasks.
3. On the Generate Data Model XML page, click **Download** .

Define Document Sequences

Define document sequences for contracts only if you need to autonumber contracts or clauses, or when you're doing the setup for the partner agreement type of contracts.

> **Note:** If you're unfamiliar with the setup of document sequences, be sure to read the topics in the *Document Sequences chapter* in the *Oracle Fusion Cloud Applications Implementing Applications* guide.

You can define document sequences for contracts at these levels:

- Global
- Ledger
- Legal Entity
- Business Unit

You can define document sequences for clauses at these levels:

- Global
- Ledger
- Business Unit

> **Note:** Each contract type you're using can have a different sequence.

Here are the steps to define the document sequences:

1. In Setup and Maintenance, search for the **Manage Document Sequence Categories** task.
2. In the Application field, search for **Enterprise Contracts**.

   You should see document sequence categories for the contract header table, OKC_K_HEADERS_ALL_B, and the clause table, OKC_ARTICLES_ALL.
3. Create a new document sequence category for the table, OKC_K_HEADERS_ALL_B, to store contract header information.

   You don't need to create document sequences for the table, OKC_ARTICLES_ALL, that stores clauses, because you'll number the clauses manually.
4. Save your changes.
5. To create partner program enrollment contracts from the Partner Relationship Management application, create a new document sequence category for the table, OKC_K_HEADERS_ALL_B, to store contract header information.
6. Save your work.
7. Next, search for the **Manage Document Sequences** task.
8. In the Application field, search for **Enterprise Contracts**.
9. Create a document sequence in the primary table and assign it to the document category created for the contract header in the child table.

   The assignment start date needs to be before the contract type assignment start date.

   Select the primary ledger for the determinant value that's used to determine the document autonumbering scope and save your work.
10. To create partner program enrollment contracts from the Partner Relationship Management application, create a document sequence in the primary table and assign it to document category created for contract header in the child table.

    Select the primary ledger for the determinant value that's used to determine the document autonumbering scope and save your work.

> **Note:** A contract created when autonumbering is disabled must have the line number provided, even if in the meantime you've changed the line type option back to autonumbering. The change won't propagate to the already created contract.

Related Topics

- Document Sequences
- Document Sequence Categories
- Guidelines for Managing Document Sequences
- How can I set up autonumbering in contracts?

Configure Contract Management Business Functions

Here are the steps to configure contract management business functions:

1. Navigate to **Define Contracts Common Configuration** > **Define Contract Management Business Function Configuration**.
2. Click **Select** in the Selected Scope column for the Specify Customer Contract Management Business Function task.
3. Click **Select and Add** in the dialog to select a business unit, then **Apply and Go To Task**.
4. Select the BU that you created and click **Save and Close** to save the task list scope to the BU.
5. On the Specify Customer Contract Management Business Function Properties page select the default currency, enter the required information in the Terms Library region and click **Save and Close**. These settings are common for standalone sell and partner program enrollment type of contracts. Ignore the other values in the page for now.
6. Open the Specify Supplier Contract Management Business Function Properties task.
7. Enter the required information and click **Save and Close**.

Define Customers with Their Addresses and Contacts

Here are the steps to define customers and their addresses and contacts:

1. Navigate to **Define Contracts Common Configuration** and note the following manual tasks. Manual tasks need to be performed outside the Setup and Maintenance work area.

   > **Note:** As partner management enrollment contracts are created and managed from the Oracle Partner Management application, partner creation and other Partner Management setups are part of the Sales offering implementation.

2. Navigate to **Sales** and then **Accounts.**
   a. Click **Create Account** to create an account type of Customer. Enter a name, sell-to-address, contact (if you have created one).
   b. Click **Save and Close**.
3. Navigate to **Manage Customers** through the Global **Search** in the side panel and create Sites associated with the Sales Accounts you have created. Ensure that there is at least one Site with the Purpose "Bill to".

Define Party Roles, Contact Roles, and Role Sources

You can designate approvers, specify approval routing, and define rule priority. After you assign the role source, you can update the Oracle Business Process Management (BPM) workflow rules to define approval rules as specified by the Contract Role Code.

Use these steps to route the contract approval to the contract owner. Do this to define party roles, contact roles, and role sources:

1. In the Setup and Maintenance work area, create an implementation project that includes the **Define Contracts Common Configuration** task.
2. Create new party roles as needed.
3. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Contact Roles** task.
4. Create new contact roles as needed.
5. Navigate to **Define Contracts Common Configuration** and open the **Manage Contract Role Sources** task.
6. For each party role set up in the previous step, enter the required information for the associated contact roles.

Related Topics

- How You Set Up Contract Party Roles
- Approval Rules Configurations
- How You Set Up Approval Groups and Approval Task Configuration Rules
- Manage Workflow Rules Using a Spreadsheet

Set Up Electronic Signature

After you set up the electronic signature functionality, contracts users can submit contracts that can be signed electronically.

Before you start

Contracts Prerequisites

- When you create contract types, you specify whether an electronic signature is required for contract acceptance and activation.
- An electronic signature contract type is set up with:
  - The **Requires signature** checkbox set to Yes.
  - The **Electronic signature** checkbox set to Yes.
  - The **Solution Provider** is DocuSign or OneSpan.
  - Entry of a meaningful value for the email subject and email message.
- An electronic signature contract terms layout template must be set up with the signature table and with the standard tags in the signature table. This layout template is selected as the default contract terms layout template for the contract type to be used for electronic signatures.
- The contract author who plans to send the contract for signature must have a valid email address and must be set up as a user in the account that's specified in the electronic signature setup.

See *Define Contract Types* for more information.

Electronic Signature Prerequisites

- Your organization must first register and obtain a license directly from a supported third-party electronic signature service provider. The supported providers are DocuSign and OneSpan.
- After the license is obtained, you must set up an account for your organization on the service provider's website. You must create an administrator account on the site. Note that this is a one-time activity.

- Note down the account key, provider URL, user name, and password from the solution provider's site.

Here's what to do

1. In the Setup and Maintenance work area, search for and select the Manage Contract Electronic Signature task.
2. Select DocuSign or OneSpan as the solution provider.
3. If you're using DocuSign:
    a. Enter the User ID (a 32-digit GUID from DocuSign) that's associated with the user profile that has administrator privileges.
    b. Enter the Account ID, which is the API account ID mentioned on the DocuSign website.
    c. Enter the Endpoint URL, which is the Account Base URL mentioned on the DocuSign website.
    d. Provide the OAuth URL:
        - Development account: `https://account-d.docusign.com`
        - Production account: `https://account.docusign.com`

    > **Note:** Developer accounts let you test and develop with DocuSign functionality for free. Developer accounts operate in the DocuSign development (demo) environment, which is similar to production except:
    > - Documents sent in this environment aren't legally binding and have test stamps on them.
    > - Developer accounts don't expire.
    > - Developer accounts have enterprise-level features enabled for development and testing purposes.

    e. Click **Validate** to provide one-time user consent to use DocuSign integration.
    f. Click **ALLOW ACCESS** to grant consent.

       You'll receive a confirmation message on the linking of Oracle Enterprise Contracts and DocuSign.
    g. Click **Validate**, and after the validation status changes to Complete, **Save and Close**.
4. If you're using OneSpan:
    a. Enter the user ID of the OneSpan account user, the API key, and the appropriate OneSpan endpoint URL.
    b. Save the settings.

What to do next

After you set up the electronic signature process, you must set up your contract types to enable them for electronic signatures. The enabling at the contract type level works with the Enable electronic signature checkbox on individual contracts. So, if enabled for a particular type, by default, any contract you create of that type will also have the Enabled electronic signature box checked. Still, you can decide to deselect it and turn off the electronic signature specifically for that contract. You can edit this checkbox if the contract hasn't yet been signed. However, once the contract reaches Pending acceptance status, you'll need to continue with the electronic signing process. See the topic, *Define Contract Types*, for more information.

Keep in mind these user requirements to be able to send contracts for signature:

- Users must have a valid electronic signature account.

- Users' electronic signature user names must match their email addresses in Oracle Person Management.
- In the solution provider's account, the users must be defined as members with permission to send contracts for signing.

For more information on Contracts user tasks, see *How Capturing Contract Acceptance with Electronic Signatures Works*.

Define Contract Line Types

Here's how you can define contract line types:

1. In your implementation project, navigate to **Define Contracts Common Configuration** and expand the task list.
2. Click the + on the toolbar, then search for and add the task **Manage Contract Line Types** to the selected Define Contracts Common Configuration task list.
3. Scroll down to and open the **Manage Contract Line Types** task.
4. Click **Create** and define four line types each with a different source as follows:
   - Buy agreement, free-form
   - Buy agreement, item
   - Buy intent, free-form
   - Buy intent, item
5. Click **Done** to return to the main folder structure.

Related Topics
- Contract Line Types

Define Contract Types

Here's how you can define contract types:

1. In Setup and Maintenance, navigate to **Define Contracts Common Configuration** and open the **Manage Contract Types** task.
2. Click **Create** and enter the required information.
3. Click **Continue** to create the contract type you require.
4. Enter the required information. **Save and Close** to return to the Manage Contract Types page.

Related Topics
- Contract Types

Set Up Contract Text Search

Here's a summary of the tasks that you must perform to set up the Search Contracts by Text feature:

- Enable Search Contracts with Oracle Search Extension Framework Using Opt In
- Set Up Profile Options
- Assign the Search Contracts security privilege to required users.
- Configure Attachment Search
- Run Scheduled Processes

Enable Search Contracts with Oracle Search Extension Framework Using Opt In

Here's how you can enable the search contract by text feature:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the **Enable** option for **Search Contracts with Oracle Search Extension Framework**.
5. Click **Done**.

Set Up Profile Options

To set up the track audit feature:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Administrator Profile Values** task.
3. Search and find these profile options:
    - **Enable/Disable Search Ext Framework**: Use this profile to check if Search Extension is enabled.
    - **Enable Search Attachments**: Use this profile to enable attachment support within the Search Infrastructure.
4. Click the **Enable/Disable Search Ext Framework** profile option and set the **Profile Value** as **Yes** to enable this feature to use Oracle Search Extension Framework.
5. Click the **Enable Search Attachments** profile option and set the **Profile Value** as **Yes** to enable search across the attached documents.
6. Click **Save and Close**.

Configure Attachment Search

Here's how you can configure the attachment search using the Manage Global Search Configurations task:

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Global Search Configurations** task.
3. Click **Configure Attachment Search**.
4. Add one or more new rows to enable search across your file types.
5. To enable the same preference for all file types:
    a. Add one row and enter `*/*` in **Content Type**.
    b. Select the index name **fa-crm-contract**.
    c. Set **Enable File Search** to **Yes**.

d. Set **Enable Content Search** to **Yes**. If set to **No**, the content is excluded and only the file metadata, such as the file name, is included in the search.
e. Set the **Maximum File Size** and **Maximum Content Size**.

   - The file size is the size of the attachment on your system. Files greater than the maximum size aren't loaded and only the file metadata, such as the file name, is included in the search.
   - The content size is the number of bytes of data taken from the file and added to the business object index to be included in the search. **Maximum Content Size** is always less than **Maximum File Size** as it's the content that remains after removing file formatting and metadata.

6. Optionally, you can click the **Create from Sample** button to select how to search for different file content types.

Run Scheduled Processes

Using the Scheduled Processes task in Tools, run these processes at least once in this order, to include existing contracts data into the search:

- ESS job to create index definition and perform initial ingest to OSCS

  This process ensures that all existing contract data is included before you start using this feature. To ingest all contracts data, enter the index name **fa-crm-contract** for the **Index Name to Reingest** parameter. Leaving the index name parameter blank creates and ingests data for all indices.
- Ingest attachments to OSCS

  This process ensures that the content of the attached contract documents is included in the search.

We also recommend you to run these scheduled processes at least daily, in same sequence, for the contracts to be searched accurately with most updated data:

- ESS job to run Bulk ingest to OSCS
- Ingest attachments to OSCS

Related Topics
- Enable Search Extension Framework
- Configure Attachment Search
- Contracts Search Options

Amend Contact Without Versioning

You can enable your contract authors to edit contracts without versioning. To determine which contracts are eligible to avoid visioning, you can select the **Allow amendment without versioning** check box at a contract type level.

1. Navigate to the Setup and Maintenance work area.
2. Search and select the **Manage Contract Types** task.
3. In the Contract Type Options section, click the **Advanced Authoring Options** tab.
4. Select the **Allow amendment without versioning** check box.

   Note: If you amend a contract without versioning, you can't revert the contract amendment.

5. Click **Save and Close**.

Once you enable this check box and navigate to the Edit Contract page for the selected type of contract, the application displays the Amend Contract window with these options:

- Version the contract
- Don't version the contract

> **Note:** The **Allow amendment without versioning** check box is disabled when the class is Grant or when the line class is Service or Warranty.

Set Up Common CRM Business Unit Profile Option

In the Manage Common CRM Business Unit Profile Options task, you can select:

- The HZ_ENABLE_MULTIPLE_BU_CRM profile option when you want to use more than one business unit.
- The HZ_DEFAULT_BU_CRM profile option when you only want to use only one business unit.

Here is how you can define your default business unit (BU) profile options:

1. Navigate to **Define Contracts Common Configuration** and open the **Manage Common CRM Business Unit Profile Options** task.
2. Click the default BU profile. Set the profile value to the business unit that should be the default, and click **Save and Close**.
3. Set the default multiple BU profile value to Yes. This means the contracts users are allowed to access multiple business units.
4. **Save your changes**.
5. Click **Done**.

Define Contract Lines Descriptive Flexfields

If you're going to use sales agreement lines with descriptive flexfields, you need to set up descriptive flexfields.

See the related topic for more information.

Related Topics

- Descriptive Flexfields for Contracts

Define Contract Terms Library Components

Here are the steps to define contract terms library components (clauses and terms templates):

1. In the Setup and Maintenance work area, go to your implementation project, navigate to the **Define Contract Terms and Clause Library Configuration** task list, and go to the **Manage Contract Terms Value Sets** task.

   a. Search for value sets created for the Enterprise Contracts module. Value sets are required to define questions and rules in Terms library work area. Click **Create**.
   b. Enter the required information to create a value set. Save and click **Done**.
2. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Manage Contract Clause Types** task.
3. Create a new clause type and save.
4. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Specify Contract Clause Import XML File Location** task.
5. Set the profile value to the required value in your Enterprise Scheduling Service (ESS) server. Specify the ESS server directory where the import clauses from XML File process uploads and imports files into the Contract Terms Library.
6. Navigate to **Define Contract Terms and Clause Library Configuration** and open the **Manage Contract Standard Clauses, Templates, and Expert Rules** task. This is not a setup and maintenance task, but a manual task that is performed from the Terms Library work area.
7. To create terms clauses navigate in the application to **Contract Management**, then the **Terms Library** work area.

   a. Click the **Create Clause** task.
   b. Enter the required information to create a clause and click **Submit**.

      - The Title name should be unique for both buy and sell clauses.
      - The End Date for new clauses can't be a date in the past.
   c. Once you have submitted a new clause for approval, it will need to be approved by the clause approver.
   d. Once approved, you should now search for the clauses to verify that they are in Approved status.
8. To create terms templates navigate in the application to **Contract Management**, then the **Terms Library** work area.

   a. Click the **Create Terms Template** task.
   b. Enter the required template information and click **Save** to enable the Document Types table.
   c. Select a contract type in the document type table and click the **Clauses** tab.
   d. Click the **Add Section** action.
   e. In the Add Section dialog box, enter a section name in the New Section box and click **OK**.
   f. Select your new section and click **+** to add a clause.
   g. In the Add Clauses dialog box, search for your clause, select the row, and click **OK**.
   h. Open your section, and click the clause title. Click the refresh icon in the toolbar to view the section and clause in the terms template preview pane. Click **Submit**.
   i. Check for and resolve any warnings or errors, and then click **Submit**.
   j. **Save and close**.
   k. Repeat the previous steps to add more term templates as needed.
   l. Click **Submit** and then click **Submit** again on the next page to submit it for approval.
   m. Once you have submitted a new template for approval, it will need to be approved by the template approver.
   n. Once approved, you should now search for the templates to verify that they are in Approved status.

Related Topics

- How Contract Terms Templates Work
- How You Import Clauses into the Contract Terms Library

Enable Table of Contents in Contract Preview

Here are the steps to add table of contents in contract preview:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for any area that includes features you want to opt in.
4. On the Edit Features page, select the **Enable** option for **Add Table of Contents to Contract Terms**.
5. Click **Done**.

Configure Import and Export Management for Enterprise Contracts

Here are the steps to configure Import Management for Enterprise Contracts:

1. In your implementation project, go to the **Define Import Management** task list, and open the **Manage File Import Objects** task.
    a. Select the row for `CONTRACT` and click **Edit**.
    b. Enter default values for the attributes of objects `ContractImportJob1` and `Import ContractHeader1`.
    c. Select the Map and Required check boxes as required and click **Save and Close** twice.
2. Navigate to **Define Import Management**, and open the **Manage File Import Mappings** task.
    a. Select **Contract** in the Object drop down list and click **Search** to view the available mappings. Click **Create** to define a new mapping.
    b. Enter the required information and click **Save and Close**.
    c. Click a contract import mapping. Add column mappings as required. Ensure the source column header values match the column names in the data file and click **Save and Close**.
    d. Again click **Save and Close** to return to main folder structure.
3. Navigate to **Define Import Management**, and open the **Manage File Import Activities** task.
    a. Click **Create** to schedule an import job.
    b. Enter the required information and click **Next**.
    c. Enter constant values for the import object attributes or click **Next**.
    d. Select a schedule from the Repeat Unit drop down list and click **Next**.
    e. Click **Activate** to schedule the import job.

Follow these steps to configure Export Management for Enterprise Contracts:

1. In your implementation project, go to the **Manage Bulk Data Export** task list, and open the **Schedule Export Processes** task.
2. Select **Create** from the Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map, in the page.
4. Select **Create** from the Actions menu to view the Manage Export Objects dialog box.
5. Select the objects you want to export and click **Done**.

6. Specify the attributes and filters you want used to export.
7. Click **Next** to view the Create Export Process Definition: Create Schedule page.
8. Select the schedule for your export.
9. Click **Next** to view the Create Export Process Definition: Review page.
10. Review the export process details, and click **Activate**.

Related Topics

- Perform Bulk Export

How You Set Up Approval Groups and Approval Task Configuration Rules

Here's how you set up or define approval groups and approval task configuration rules for contracts:

1. Sign in as a setup user.
2. In Setup and Maintenance go to:
    - Offerings: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Approval Groups
3. On the Manage Approvals page, click the **Approval Groups** tab.
4. In the Groups region, select the plus sign icon to begin creating a new approval group.
    a. Enter a name for the new group.
    b. Click **Save**.
5. Add a member to the group. Click the **Add Member** icon to retrieve the Add to Group dialog window. In the search box, enter the email address of the user created earlier and click OK.
6. Click **Save**.
7. Repeat the previous steps to create an approval group that includes both level-one and level-two approvers.
8. Click the **Task Configuration** tab.
9. In the **Tasks to be configured** region, search for `ContractsApproval`.
10. Click the **ContractsApproval** task to access a set of subtabs where you can set up rules for the approval task. For example, under **Configuration**, you can set the assignment and routing policy attributes to suit your business needs. If you want to let the initiator add ad hoc approvers and configure notifications as the approval progresses, select the **Allow initiator to add participants option**.
    As another configuration example, you can specify a variety of conditions, such as preventing a PDF from being attached to a notification or allowing an initiator to add participants.
11. You can create rules to suit your business needs. Edit the ContractsApproval task.
12. Click **Rules**
13. Expand each rule.
14. Click **Edit** to create rules for the `ContractsApproval` stage rule set.
15. Delete all three rules.
16. Create a new rule.

    Note: Create rule names without spaces between them.

17. Enter the rule name. Click the arrow. Under the IF label, click the list icon next to the first field.

18. As an example, in the Condition Browser, expand `ContractsApprovalPayloadType`, `ContractDetails`, **result**, and select the `estimatedAmount` payload attribute.

    > **Note:** Set up this rule for contracts starting with zero dollars: `ContactDetails.estimatedAmount` is null or `ContractDetails.estimatedAmount.value.doubleValue()` is same or above 0.00.

    Here's another example with contract_type_id, organization_id, amount null, and agreed amount 0 or agreed amount smaller than 2000 dollars:

    ```
    IF ContractDetails.org_id is {org_id} and ContractDetails.contractTypeId in {contract_type_id}
     and (contractdetails.agreedAmount is null or(contractdetails.agreedAmount isn't null and
     contractdetails.agreedAmount.doubleValue()same or less than 2000))
    ```

19. Select **'isn't'** from the operator drop-down list, and select null as the comparison value of the IF condition.
20. Click the down arrow in IF condition and select simple test to add a new IF condition.
21. In the IF condition of ContractApproval, use the following condition to setup contract approval based on Contract Intent:
    - For Buy Intent: `ContractDetails.buyOrSell` is "B"
    - For Sell Intent: `ContractDetails.buyOrSell` is "S"
22. Select the comparison field of the new IF condition from the condition browser.
23. Similarly add another IF condition as follows: select `estimatedAmount` for the comparison field, select **same or less than** as the operator, and select a value such as 30000 as the comparison value.
24. Select Approval Group from the List Builder drop-down list under THEN, and click Create Action to create the List builder action 1 region.
25. Select level 1 approver and enter the required information for the List builder action 1 region.
26. Click **+** next to Estimate_Amount_Rule1 to create a second rule, give it a name such as Estimate_Amount_Rule2, and expand it.
27. Create a second rule to route to higher level approvers for higher contract amounts.
28. Create a third rule such that, if contract estimated amount isn't entered, it's routed to level 1 approver.
29. Click the **Save** button and then the **Commit** task button to commit the rules to the database. Expand all the rules.

    Note that you could also add rules based on:
    - Policy deviations (`ContractsApprovalPayloadType.policyDeviation` = Y or N)
    - Terms amended rule (`ContractsApprovalPayloadType.termsAmended` = Y or N)
    - Nonstandard clauses added (`ContractsApprovalPayloadType.nonStdClause` = Y or N)
    - Missing (deleted) standard clauses (`ContractsApprovalPayloadType.missingStdClause` = Y or N)
    - Standard clause (not on the terms template) added (`ContractsApprovalPayloadType.stdClauseAdded` = Y or N)
    - Clause deviation category codes (`TermsDeviations.deviationCategory` = "<<Code>>")
    - Deviation codes (`TermsDeviations.deviationCode` = "<<Code>>")

    Add steps to define such approval rules, referring to this table:

Clause Deviation Category Code	Clause Deviation Code	Description
OKC_NON_STD_ARTICLES	NA	A nonstandard clause exists on the contract.

Clause Deviation Category Code	Clause Deviation Code	Description
OKC_NON_STD_ARTICLES	ADDED_NON_STD	A new nonstandard clause was added.
OKC_NON_STD_ARTICLES	MODIFIED_STD	A standard clause was modified and made nonstandard.
OKC_MISSING_STD_ARTICLES	NA	A standard clause from the terms template was deleted from the contract.
OKC_MISSING_STD_ARTICLES	MISSING_MANDATORY	A mandatory clause is missing.
OKC_MISSING_STD_ARTICLES	MISSING_EXPERT_ARTICLE	A conditional clause based on an expert rule is missing.
OKC_MISSING_STD_ARTICLES	MISSING_OPTIONAL_ARTICLE	An optional clause is missing.
OKC_INVALID ARTICLES	NA	An invalid clause exists on the contract.
OKC_INVALID ARTICLES	ARTICLE_EXPIRED	The clause is expired.
OKC_INVALID ARTICLES	ARTICLE_ON_HOLD	The clause is on hold.
OKC_INVALID ARTICLES	EXPERT_ARTICLE_NOT_REQUIRED	The rule conditions no longer apply for a clause added by Contract Expert.
OKC_STD_ARTICLES_ADDED	NA	A standard clause was added.
OKC_STD_ARTICLES_ADDED	ADDED_STD_ARTICLE	A standard clause from the library was added.
OKC_STD_ARTICLES_ADDED	REPLACED_ALT	A standard clause was replaced with an alternate clause.

30. Alternatively, to bypass the approval hierarchy and have automatic approval, create only the following rule.

```
Edit IF condition to 1 is 1
Under Then block Choose
List builder : Supervisory Response type: Required Number of levels: 1 Starting
 Participant: HierarchyBuilder.getPrincipal("<User Id>",-1,null,null) Top Participant:
 HierarchyBuilder.getPrincipal("<User Id>",-1,null,null)
Auto action enabled: True Auto Action: "APPROVE"
```

`Save and commit.`

31. Click the **Approval Group** tab to create an approval group for Clause Approval.
32. Click the **Task Configuration** tab to create rules for clause approval human task. Click the human task **ContractClauseApproval** and then click the **Rules** subtab.
33. Click the **Approval Group** tab to create an approval group for Template Approval.
34. Click the **Task Configuration** tab to create rules for Contracts Template Approval human task, click the **TemplateApprovalHumanTask** human task, and then click the **Rules** subtab.
35. Repeat the rule creation steps described for contract approvals.

Note: To create a dynamic list of approvers, you can create a dynamic approval group based on a Java class file. The Java class can refer to approval task payload parameters, for example, contract identifier.

Related Topics

- Approval Rules Configurations
- Configure Workflow Approvals and Notifications
- How Workflow Task Routing Is Mapped Out
- How Authoring Contract Terms Works
- How Reviewing Contract Deviations Works

Scenario-Based Contract Approval Rule Setups

Here are steps you can use to set up specific approval scenarios, including:

- Automatic contract approval
- Contract approval based on the immediate manager's authorization
- Contract approval based on term deviation
- Contract approval by an internal contact:

Note: For any field that can potentially have a null value, ensure you have specified a null condition in the approval rule.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search and select the **Manage Task Configurations for Customer Relationship Management** task. The BPM Worklist page appears.
4. In the Tasks to be configured region, select **ContractsApproval**.
5. Click the **Edit task** icon.
6. Click the **Assignees** tab and click the **Go to rule** icon to create a new rule.
7. Click the **Add Rule** icon to add one of these rules such that:
    - Contracts are approved automatically:
        i. In the If section, select the condition as 1 is 1.
        ii. In the Then section, select:

- List Builder: Supervisory
- Response Type: Required
- Number of levels: 1
- Starting Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
- Top Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
- Auto Action Enabled: True
- Auto Action: "APPROVE"

iii. Ensure that other rules are inactive.

- Contracts are approved after the manager's authorization:

  i. In the If section, select the condition as 1 is 1.

  ii. In the Then section, select:

  - List Builder: Supervisory
  - Response Type: Required
  - Number of levels: 1
  - Starting Participant: `HierarchyBuilder.getManager_1("supervisory",Task.payload.submitter,-1,"","")`
  - Top Participant: `HierarchyBuilder.getPrincipal(Task.payload.submitter,-1,"","")`
  - Auto Action Enabled: False
  - Auto Action: "APPROVE"

  iii. Ensure that other rules are inactive.

- Contracts are approved based on term deviation:

  i. In the If section, select the condition as `TermsDeviations.articleTitle.toUpperCase() is "Key word"`.

  ii. In the Then section, define rules as per your requirements.

- Contracts are approved by an internal contact:

  i. In the If section, select the condition as `InternalContacts.croCode is "CONTRACT_ADMIN"`.

  Note: Replace the "CONTRACT_ADMIN" with the internal contact role.

  ii. In the Then section, select:

  - List Builder: Resource
  - Response Type: Required
  - Users: `InternalContacts.username`
  - Participants: Groups: null
  - Application Role = null

8. Click **Save and Close**.

Configure Scheduled Processes

Configure scheduled processes to change a set of records for a specific business need, or to get a printable output with information about certain records. These processes are predefined but not pre-configured.

This list identifies those scheduled processes that are critical for the smooth operation of your Contracts application:

- Indexing schedules
- Deliverables notifications scheduled processes:
  - Send Contract Terms Deliverable Due Date Notifications
  - Send Contract Terms Deliverable Escalation Notifications
  - Send Contract Terms Deliverable Overdue Notifications
- Expiration notification scheduled process:
  - Send Contract Expiration Notifications
- Fulfillment notification scheduled process:
  - Send Contract Fulfillment Notifications
- Service Contract Billing scheduled process:
  - Send Service Contract Billing Information to Receivables
  - Import Auto-invoice
  - Fetch Service Contract Invoice Information from Receivables
- Process Installed Base Updates

For more information, see the related topics.

Related Topics

- Set Up Contract Text Search
- Overview of Contracts Scheduled Processes

Set Enable Classic Landing Page Profile Option

Depending on your implementation, consider the setting of the Enable Classic Landing Page (OKC_ENABLE_CLASSIC_LANDING_PAGE) profile option. It's important if you're extending the Contracts landing page.

Set the profile option to No if you want to customize the Contracts landing page. A setting of Yes for this profile option means the "classic" UI is enabled for Contracts landing page, instead of the newer "simplified" UI.

Setting this profile option to Yes doesn't impact any other functionality like import or approvals.

Here's how to set the profile option:

1. Navigate to **Setup and Maintenance** and search for the **Manage Administrator Profile Options** task.
2. Search for the profile option code, OKC_ENABLE_CLASSIC_LANDING_PAGE, and set the value at Site level to Yes.

Enable Purge Contracts

Here's how you enable the purge contract feature:

1. Navigate to the Setup and Maintenance work area, select the Enterprise Contracts offering.
2. Click **Change Feature Opt In**.
3. On the Opt In page, click the **Edit** icon for Enterprise Contracts.
4. On the Edit Features page, select the **Enable** option for Purge Contracts.
5. Click **Done**.

4 Set Up Contract Terms and Clause Library Configurations

Overview of Terms Library

This overview provides a brief summary of the key components of the Contract Terms Library and how an administrator can configure them. The Contract Terms Library contains terms templates that you can use to insert boilerplate terms and conditions into contracts during contract authoring.

This library contains individual sections, clauses and variables. Each clause, which is usually a single paragraph, contains text that specifies a set of legal terms. Clauses make up contract sections, which are then assembled to create a terms template or a contract's terms and conditions. Variables are used within a clause to insert information into the contract terms from a sourcing document. Finally, contract expert rules are made up of questions and responses that drive clause selection, terms template selection, and business policies and standards. A user must be assigned with the Business Practice Director (OKC_BUSINESS_PRACTICES_DIRECTOR_JOB) job role to access the Contract Terms Library to set up terms and clauses.

Related Topics

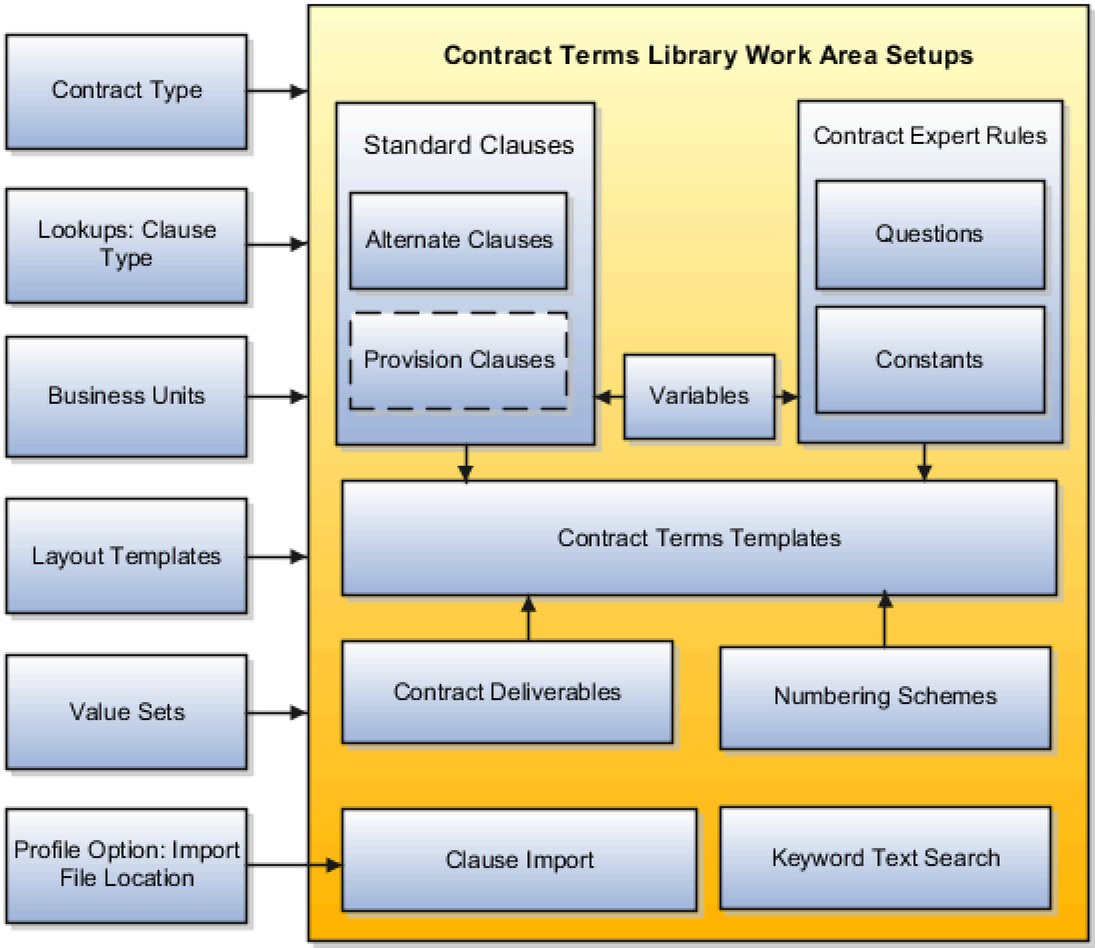
- Contract Terms Library Clauses

Overview of Contract Terms Library Setup

How Contract Terms Library Setups Work Together

This topic provides a brief overview of setups for the Contract Terms Library.

The following figure outlines the main setups for the Contract Terms Library which are described in the sections of this topic. The setups on the left are accomplished using tasks from the Setup and Maintenance work area. To set up most of the Contract Terms Library features, including clauses and contract terms templates, you must navigate to the Terms Library work area. Dashed boxes highlight features that are available only in Oracle Procurement Contracts.



Setups in Oracle Fusion Functional Setup Manager

Different Oracle Fusion Functional Setup Manager tasks enable or affect Contract Terms Library features. These setups include:

- Setting Up Contract Types to Work with the Contract Terms Library

  Contract types specify properties of different contracts including the type of permitted contract lines, party roles, contract validation checks, and the contract acceptance and signature requirements. For the Contract Terms Library, you can use the **Manage Contract Types** task to:

  - Enable contract terms authoring

    You must enable contract terms authoring for a contract type to use any of the library features for contracts of that type.
  - Specify the Oracle Analytics Publisher layout template that will be used to format the printed contract terms for contracts of this type.

- Defining Clause Types

  If you want to categorize the clauses in the library, select the **Manage Contract Clause Types** task to set up clause types.

- Configuring Business Units for Contracts

  The use of most of the Contract Terms Library content is restricted to the business unit where you create it. This includes clauses, contract terms templates, and Contract Expert business rules. Using either the **Specify Customer Contract Management Business Function Properties** or the **Specify Supplier Contract Management Business Function Properties** tasks, you can:

  - Enable content adoption between business units and automatic approvals for content
  - Specify the Contract Terms Library administrator, the employee who will receive approvals and other notifications regarding library content.
  - Enable the Contract Expert feature for the business unit.

- Creating Contract Layout Templates

  Using Oracle Analytics Publisher, you can set up layout templates that determine the formatting of clauses, contract terms template previews, the contract deviations report, and the contract itself.

  Download the sample layout templates provided with your application from the Oracle Analytics Publisher library. You can copy and edit the sample layout templates and upload them.

  > **Note:** For an example on how to use XML to build your own layouts, see the topic Setting Up Enterprise Contracts - Part 2.

- Creating Contract Terms Value Sets

  Select the **Manage Contract Terms Value Sets** task to set up value sets for use in contract terms variables and Contract Expert questions.

- Specifying the Location of the File Used for Clause Import

  You can import legacy clauses into the Contract Terms Library, either from a file or from an interface table using Oracle Fusion Enterprise Scheduler processes.

  If you are importing clauses from a file, then you must specify the location of the file by setting the profile option **Specify Contract Clause Import XML File Location** by selecting the **Manage Clause and Template Management Profiles** task.

Contract Terms Library Work Area Setups

The Contract Terms Library is built using the tasks within the Terms Library work area:

- Creating Clauses

  Create standard clauses for use during contract terms authoring, including alternate clauses, clauses included by reference, and provision clauses. By specifying different clause properties, you can modify clause behavior. For example, you can make clauses mandatory in contracts or protect them from editing by contract authors.

- Creating Variables
  You can use variables in the Contract Terms Library to represent information within individual clauses and for use within Contract Expert rule conditions. Your application comes with predefined variables, called system variables. You can create additional variables, called user variables, with or without programming.
- Creating Numbering Schemes
  You can set up additional clause and section numbering for contract terms. You can select which numbering scheme you want to use with each contract terms template.
- Creating Contract Terms Templates
  Create contract terms templates to insert boilerplate terms and conditions into contracts during contract authoring. Contract authors can apply the templates manually, or the application can apply the templates automatically using default rules you set up.
- Creating Contract Expert Business Rules
  Set up business rules that ensure compliance of contracts with corporate standards.
  Contract Expert helps you to set up business rules that can:
  - Apply the appropriate contract terms template to a contract
    For example, apply the contract terms template Software License and Service Agreement if the contract is authored in the North America Operations business unit and the contract amount exceeds one million dollars.
  - Insert additional clauses into specific predetermined locations in the contract
    For example, add an audit clause if an audit is required.
  - Report contract deviations from corporate policies
    For example, report a contract worth one million dollars or more that includes payment terms greater than 90 days.

  You can base Contract Expert rule conditions on the values of variables in the contract, the presence of other clauses, or you can set up questions that contract authors must answer during authoring.
  For example, you can ask authors a series of questions about the nature of the materials being shipped to customers and insert additional liability clauses based on their answers.
  If you are setting up business rules with numeric conditions (for instance, insert a special payment terms clause if the contract amount exceeds $1 million) then you must set up constants to hold the numeric values. You cannot enter the numeric values directly.
- Contract Deliverables
  Contract deliverables track both contractual and non-contractual commitments that must be completed as part of negotiations, purchasing, and enterprise contracts between businesses and suppliers or customers based on contract intent. These deliverables can be used in purchasing and sourcing documents that include contract terms and in enterprise contracts.
- Importing Clauses
  You can import clauses from legacy applications by running Oracle Fusion Enterprise Scheduler (ESS) processes from the Terms Library work area by selecting the **Import Clauses** task or from the Setup Manager by selecting the **Manage Processes** task.

- Setting Up and Maintaining the Index for Clause Text Searches Using the Keyword Field

  By selecting the **Manage Processes** task in the Terms Library work area, you can also run the ESS processes required to set up and maintain the text index required for searches of clauses and contract terms templates using the Keyword field.

Related Topics

- How Business Unit Affects Clauses and Other Objects in the Library
- Contract Terms Library Clauses
- How Contract Terms Templates Work
- Variables

How Contract Terms Library Supports Translation

You can set up your contract terms library to handle the translation of clauses, templates, and other content in multiple languages.

This topic discusses the features included in Enterprise Contracts that support translation, making it possible for you to

- Indicate a localized clause is a translation of another
- Manage contract terms template translations

These two features are only a small part of a translation solution, however. The rest of the setup is very much open-ended. For instance, when you have different business units that operate in different languages, you can use the adoption and localization feature of contracts to keep separate libraries in different languages. Alternately, if you're using only one business unit, you can create separate numbering or naming schemes to keep the content in multiple languages separate.

Indicating a Localized Clause is a Translation of Another

If you have set up the multiple business unit structure that supports clause adoption and localization, you can use the localization feature to translate clauses. The global clause you create in the global business unit becomes the clause you're translating from.

To translate the global clause:

1. Localize it using the localize action.
2. Enter the translation on the Localize Clause page. The Localize Clause page displays both the original and translated text.

You can indicate the localized clause is a translation-only clause by selecting a checkbox. This checkbox is for informational purposes only and can be used to generate reports.

Note: Unlike contract terms templates, clauses have no language field that tracks the language of the clause.

Tracking Contract Terms Template Translations

For each contract terms template you can specify the template language and the template it was translated from, if it's a translation.

Note: The language setting on templates is only informational; there's no automatic translation abilities.

The Translations tab in the contract terms template edit page shows all the templates related by translation. All the templates listed display the source template in the Translated From column, except for the source template which leaves this column blank. In this example, you can tell the English template is the source template for the French, Chinese, and Japanese translations because there's no entry in the Translated From column. For instance, if you translate an English template into French, Japanese, and Chinese, then each of the templates lists the translations as shown in the following

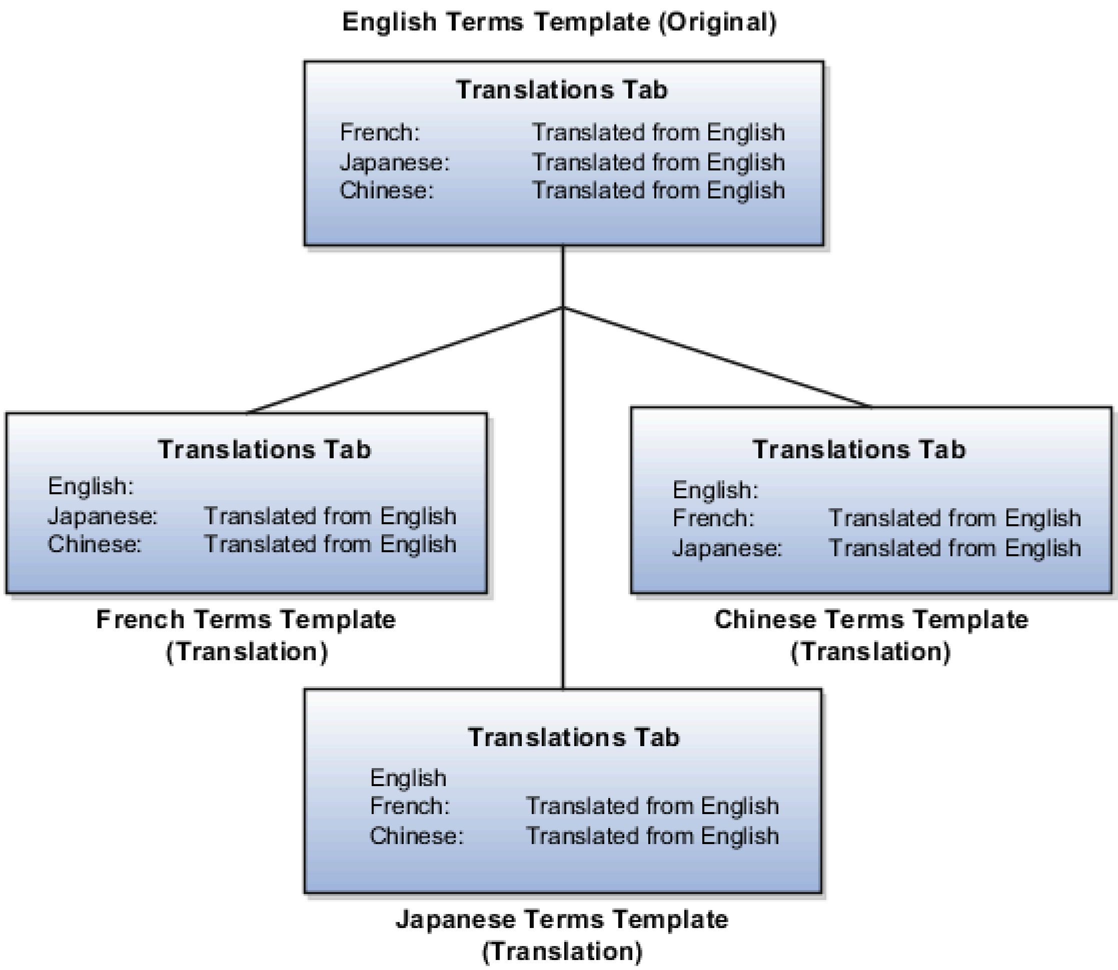


figure.

To manage the translated templates, you can search for all the templates in a particular language and for all templates translated from a specific template.

Related Topics

- How Content is Adopted from Global to Local Terms Libraries

Setup Overview FAQs

How can I set up the content of the Contract Terms Library?

Go to the Terms Library work area to set up the content of the Contract Terms Library.

Related Topics

- How Contract Terms Library Setups Work Together

What drafts display in the Terms Library Overview page?

The Drafts region of the Contract Terms Overview page displays drafts or revisions that you either created or last updated.

Set Up Business Units for the Contract Terms Library

Contract Terms Library Business Unit Setup

You can specify a wide variety of Contract Terms Library settings for customer or supplier contracts within each business unit by using 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

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've 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 must 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. See *Manage Contracts Scheduled Processes* for more information.

Set Up 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 might 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 might 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 Analytics 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

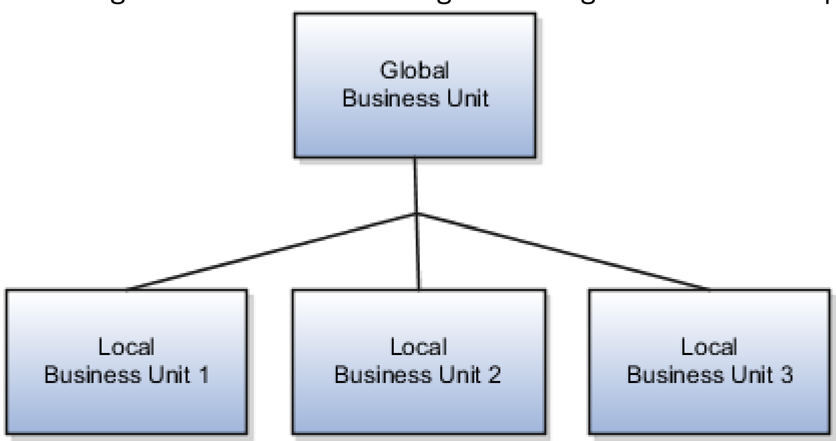
The RTF file you select as the **Deviations Layout Template** determines the appearance of the contract deviations report PDF. This PDF is attached to the approval notification sent to contract approvers.

How Business Unit Affects Clauses and Other Objects in the Library

For some Contract Terms Library objects, the business unit (BU) that's set during contract creation restricts where these objects can be used. Objects affected include clauses, contract terms templates, and Contact Expert rules.

Objects created in a local BU can only be used in that local BU. Objects created in a global BU can be adopted or copied over to other BUs provided they're specified as global. This topic details the impacts of the BU choice on the different library objects.

The following figure shows a hypothetical implementation with four business units: one global business unit and three local business units. You can designate one business unit as global during Business Unit setup. The other business units are local business units.



How Business Units Affect Terms Library Objects

This table details how the selection of a BU affects different objects in the Contract Terms Library.

Terms Library Object	Impact of Business Unit
Clauses	Different restrictions apply depending on BU type: • Local Business Unit Use restricted to the local BU where it's created. • Global Business Unit Clauses created in the global BU, can be made available to other BUs by selecting the Global checkbox. Local BUs can either adopt the clause as is or localize it.
Contract terms templates	Different restrictions apply depending on BU type:

Terms Library Object	Impact of Business Unit
	• Local Business Unit Use restricted to the local BU where it's created. • Global Business Unit Contract terms templates created in the global BU, can be made available to other BUs by selecting the Global checkbox. Local BUs can copy the templates to their BUs.
Contract Expert rules	Use of rules is restricted to the BU where you create them.
Contract Expert questions	Use of questions is restricted to the BU where you create them.
Contract Expert constants	Use of constants is restricted to the BU where you create them.
User variables	No effect. User variables created in any BU and are available across all BUs.
Contract terms sections	No effect. Contract terms sections can be created in any BU and are available across all BUs.
Clause numbering schemes	No effect. Numbering schemes can be created in any BU and are available across all BUs.

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**.

Set Up Multiple Business Units for Terms Templates and Clauses

When you have set up multiple business units, use these steps to restrict the contract visibility based on a selected user and business unit for security reasons.

In addition, you can associate contracts with a business unit, allowing them to be restricted by a business unit.

Here are the overall steps:

1. Create a Contract organization.
2. Associate the Contract organization with a business unit.
3. Associate the Contract organization with a user.

Create a Contract Organization

1. Sign in as a setup user and go to Setup and Maintenance.
2. Search for and select the **Manage Internal Resource Organizations** task.
3. On the Manage Internal Resource Organizations page, click the create icon.
4. Select **Option 2: Create New Organization**, and then click **Next**.
5. Enter the name of the contract organization in the **Name** field. This name is shown in the resource directory. Here are a few things to keep in mind when naming contracts organizations:
    - Each contract organization name must be unique.
    - The names don't have to correspond to any formal organization in your enterprise. The names are only used to create a resource directory.
    - Don't use the name of a manager as the organization name, since you might need to reassign the organization to someone else later.
6. In the Organization Usages region, click the add icon and select **Contracts Organization**.
7. Click **Finish**.

Associate a Contract Organizations with a Business Unit

1. Sign in to the application as an administrator or as a setup user.
2. In the Navigator, select **Resource Directory**.
3. On the Resource Directory page, click the **Tasks** panel tab.
4. In the Resource Organizations region, click **View Organizations**.
5. On the View Organizations page, search for the organization that you created.
6. In the Search Results region, click the link for the organization.
7. Select the **Business Units** tab.
8. Click **Add Row**.
9. Select the business unit from the drop-down list.

    > **Note:** The first business unit with which you associate the contract organization becomes the primary business unit. If you associate the organization with more business units, you can change the primary business unit as required.

10. To add more business units, click **Save**, and then click **Add Row**.
11. After you add the business units, click **Save and Close**.
12. Click **Done**.

> **Note:** If you enable multiple business units, be sure that each user is associated with a contract organization, and the contract organization is associated with one or more business units.

Associate the Organization with a User

Use the Manage Users task in Setup and Maintenance to associate the organization to the user. While creating a new user or editing an existing user, navigate to the Resource Information section, search and select the contract organization in the **Organization** drop-down list.

For information about creating users, see the related topics.

Related Topics

- Ways to Create Sales Users
- What You Must Do Before Creating Sales Users
- How do I create application users?
- Overview of Sales Resources and Multiple BUs

Manage Clauses in the Contract Terms Library

Contract Terms Library Clauses

You can create different types of clauses for different uses and use clause properties to specify if a clause is protected from edits by contract authors, mandatory, and related to or incompatible with other clauses.

A clause you create in the Contract Terms Library is available for use within the business unit where you create it after it is approved.

The types of clauses you can create include:

- Standard clauses
- Clauses included by reference
- Provision clauses for contracts with a buy intent

Using different clause properties you can:

- Make a clause mandatory in a contract.
- Protect it from edits by contract authors.
- Specify that a clause can be selected by contract authors as an alternate of another clause.
- Specify that the clause cannot be in the same document as another clause.
- Make a clause created in a global business unit available for use in other business units.

Creating Standard Clauses

Any clause you create in the library becomes a standard clause that can be used in the business unit where you create it after it is approved. Unless you specify that the clause is protected, contract authors can edit the clause in a specific contract. Any edits they make are highlighted in a clause deviations report when the contract is approved. Similarly, contract authors can delete the clause from a contract, unless you specify the clause is mandatory.

Including Clauses by Reference

For clauses, such as Federal Acquisition Regulation (FAR), you can print the clause reference in the contract instead of the clause text itself. During contract creation, you enter the reference on the Instructions tab of the clause edit page and select the **Include by Reference** option.

Creating Provision Clauses for Contracts with a Buy Intent

For contracts with a buy intent, you can create provision clauses, clauses that are included in contract negotiations but are removed after the contract is signed. Provision clauses are used primarily in Federal Government contracting.

Altering Clause Behavior with Clause Properties

Using different clause properties, you can alter the behavior of a clause. You can:

- Make a clause mandatory.

  A mandatory clause is highlighted by a special icon during contract terms authoring and cannot be deleted by contract authors without a special privilege. You can make a clause mandatory for a particular contract terms template by selecting the *Make Mandatory* action after you have added the clause to the template. A clause is also become mandatory if it is added by a Contract Expert rule and you have selected the *Expert Clauses Mandatory* option in the template.

- Protect it from edits by contract authors.

  A protected clause is highlighted by a special icon during contract terms authoring and cannot be edited by contract authors without a special privilege. You can protect any clause by selecting the protected option during clause creation or editing.

- Specify that a clause can be selected by contract authors as an alternate of another clause.

  You can specify clauses to be alternates of each other on the Relationships tab of the create and edit clause pages. When editing contract terms, contract authors are alerted by an icon that a particular clause includes alternates and can select an alternate to replace the original clause.

- Specify that the clause cannot be in the same document as another clause

  You can use the Relationship tab to specify a clause you are creating is incompatible with another clause in the library. The application highlights incompatible clauses added by contract authors in the contract deviations report and during contract validation.

- Make a clause available for use in other business units.

  Clauses you create in the library are normally available only within the same business unit where you create them. If you create the clause in the business unit that is specified as global during business unit setup, then you can make the clause available for adoption in other business units by selecting the **Global** option during clause creation or edit. This option appears only in the one business unit specified as global.

How Alternate and Incompatible Clause Relationships Work

While creating or editing a clause you can specify its relationship to other clauses in the Contract Terms Library.

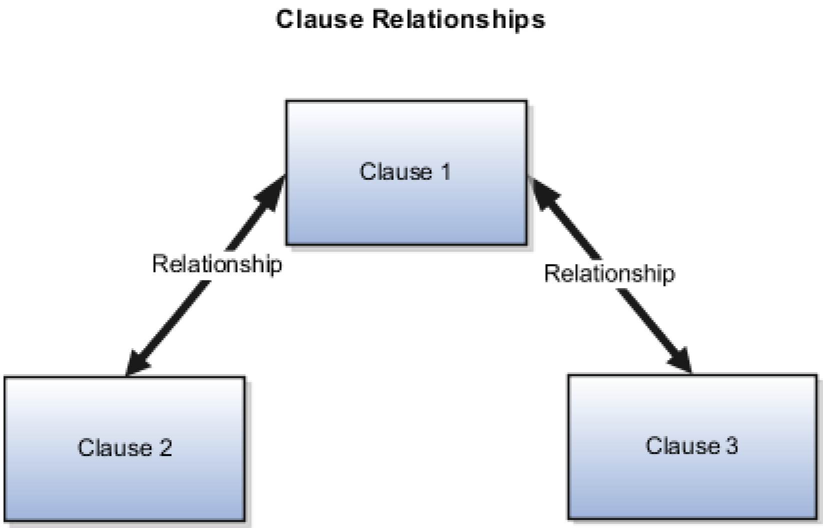
There are two clause relationships to choose from:

- Alternate

  Use the alternate relationship to indicate clauses that authors can substitute for a standard clause in a contract.
- Incompatible

  Use the incompatible relationship to highlight clauses that cannot be present in the contract at the same time.

Both of the relationships you establish are bidirectional but not transitive as shown in the following figure.:



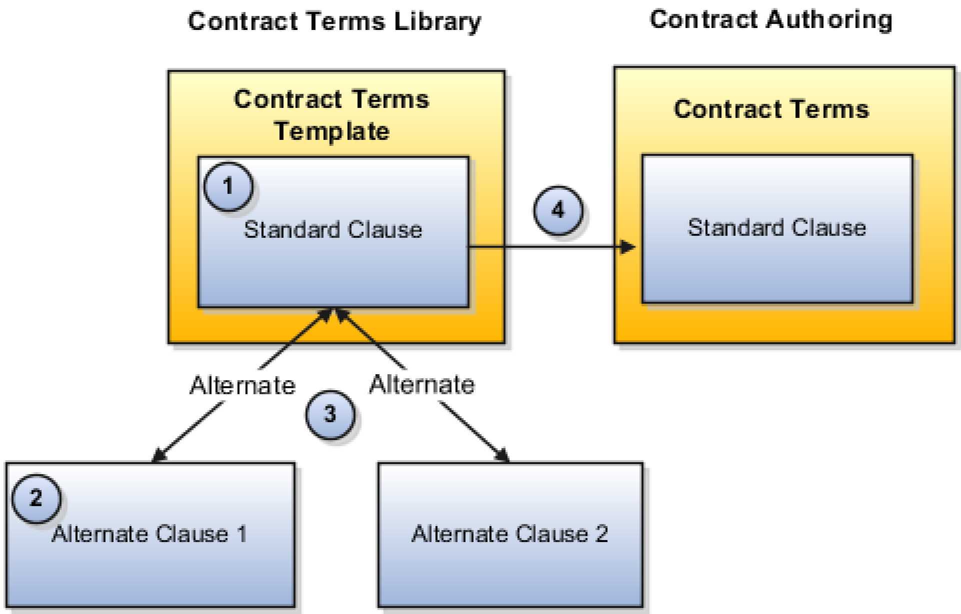
Other relationship properties include:

- Relationships you create are valid for all future clause versions.
- You can only establish relationships between clauses of the same intent and within the same business unit.
- Provision clauses used in procurement applications can only have relationships with other provision clauses.
- For clause adoption, the relationships are copied from the global business unit to the local business unit automatically only if you're adopting clauses as is.

Setting Up the Alternate Relationship

Set up alternate clauses to let contract authors decide when to substitute an alternate clause for a standard clause in a contract.

The following figure illustrates alternate clause setup:Create the standard clause and include it in a contract terms template. Create the alternate clause or clauses. By using variables to represent differences between clauses, you can reduce the number of alternate clauses you must create. Specify the alternate relationships between the standard clause and the alternate clauses. During contract authoring, the contract terms template applies the standard clause in the contract terms, but the contract author can replace it with either one of the alternate clauses. The following figure illustrates the setup of an alternate relationship between clauses in the Contract Terms Library.



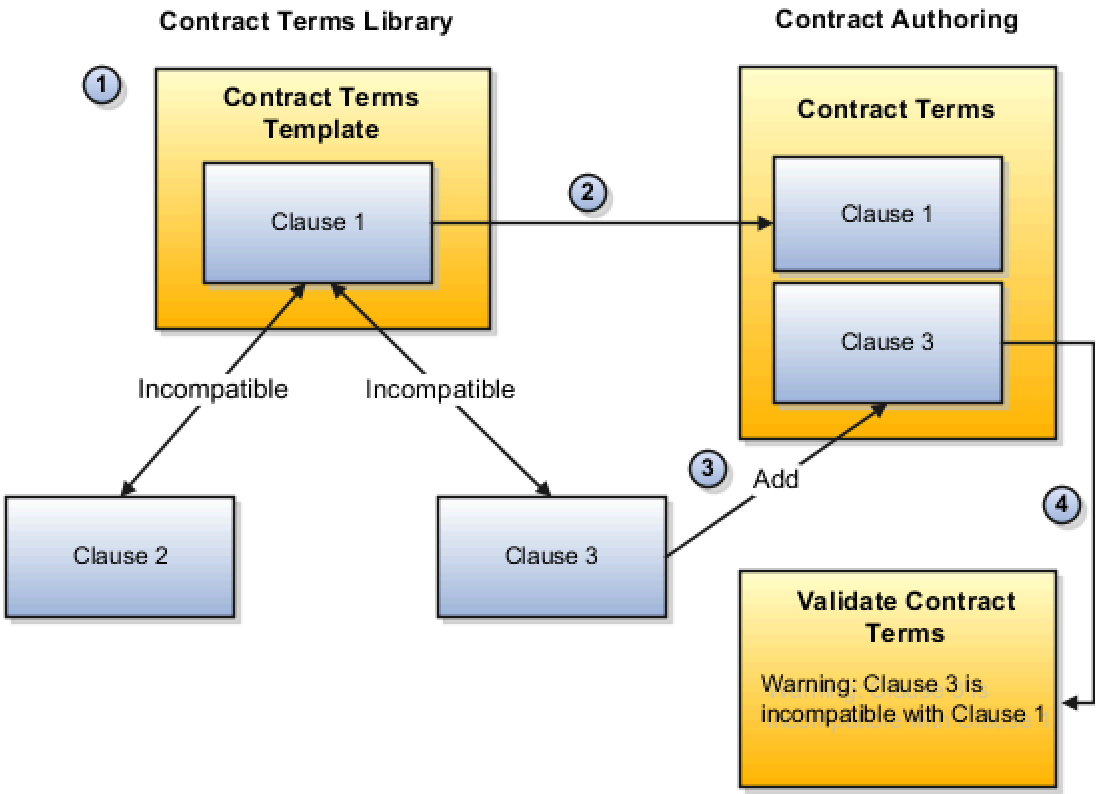
During contract terms authoring, contract authors are alerted to the presence of alternate clauses by a special clause icon. If they choose to substitute one of the alternate clauses for a standard clause, the substitution is recorded as a clause deviation in the contract deviations report.

In addition, by selecting the **Analyze Clause Usage** action, you can determine which contracts are using alternate clauses.

Setting Up the Incompatible Relationship

When you specify a group of clauses to be incompatible, the presence of more than one incompatible clause in a contract results in a warning during contract terms validation.

The following figure uses an example to illustrate the setup of incompatible clauses. During setup, you specify Clause 2 and Clause 3 as incompatible to Clause 1 and associate Clause 1 to a contract terms template.The contract author or a Contract Expert rule applies the contract terms template (including Clause 1) to a contract.The contract author or a Contract Expert rule adds Clause 3 to the contract terms.The application displays a warning during validation.The following figure illustrates an incompatible clause relationship.



Related Topics

- Examples of Setting up Alternate Clauses
- What's the difference between setting up multiple alternate clauses and one with a variable?

Examples of Setting up Alternate Clauses

This topic uses the example of jurisdiction clauses to illustrate two different ways of setting up alternate clauses.

Suppose for example, that the standard jurisdiction for your contracts is the State of Delaware but you want to permit contract authors to select the following jurisdictions:

- San Jose, California
- San Mateo, California,
- Miami-Dade County, Florida

There are two ways of setting up the alternate clauses:

- Create a separate alternate clause for each jurisdiction

  During authoring agents must find and select the clause they want to use.

- Create one alternate clause and use a variable to supply the different alternate jurisdictions

  During authoring, agents select the alternate clause and then supply the jurisdiction by entering the variable value while running Contract Expert.

Creating Separate Alternate Clauses

Use this method to create one clause for each jurisdiction. Here is the setup for this example:

1. Create the standard jurisdiction clause for State of Delaware.
2. Associate the standard clause with a Contract Terms Template that will be used to default it into contracts.
3. Create the three alternate clauses:
    - Alternate Clause 1: San Jose, California
    - Alternate Clause 2: San Mateo, California
    - Alternate Clause 3: Miami-Dade County, Florida

   Because you want each alternate clause to have the same title, Jurisdiction, you must use both the Clause Title and the Display Title fields when you create each alternate. Your entry in the Clause Title must be unique, for example, Jurisdiction_1, Jurisdiction_2, and Jurisdiction_3. But you can enter Jurisdiction in the Display Title field to make the same title appear in the printed contract for all the clauses.
4. Specify the alternate relationship between the different clauses:
    - The standard clause is an alternate of Alternate Clause 1
    - The standard clause is an alternate of Alternate Clause 2
    - The standard clause is an alternate of Alternate Clause 3
    - Alternate Clause 1 is an alternate of Alternate Clause 2
    - Alternate Clause 2 is an alternate of Alternate Clause 3
    - Alternate Clause 1 is an alternate of Alternate Clause 3

During authoring, agents are alerted to the presence of the alternate clauses by an icon and can select any one of the alternate clauses to replace the standard clause.

Creating One Alternate Clause with Variables

If you want to minimize the number of alternate clauses you must create to just one, use this alternate setup:

1. Create the standard jurisdiction clause for Delaware.
2. Associate the standard clause with a Contract Terms Template that will be used to default it into contracts.
3. Create one alternate clause with two variables: one for the county and one for the state:

   ```
   This agreement is governed by the substantive and procedural laws of [@State of Jurisdiction@] and you and the supplier agree to submit to the exclusive jurisdiction of, and venue in, the courts in [@County of Jurisdiction@] County, [@State of Jurisdiction@], in any dispute arising out of or relating to this agreement.
   ```
4. Specify the alternate relationship between the standard clause and the alternate clause.

During authoring, agents are alerted to the presence of the alternate clause by an icon. Agents who select the alternate clause must run Contract Expert and enter the state and county variable values.

Related Topics

- What's the difference between setting up multiple alternate clauses and one with a variable?
- How Alternate and Incompatible Clause Relationships Work

Clause Versioning

To make changes in an approved clause, you must create a new version. Versioning permits you to make changes to outdated clause text in contracts.

You create a new version of a clause by selecting from the Actions menu in the clause search page. Keep the following points in mind:

- Clause versioning is restricted by status.
- A new clause version is not effective until it is approved.
- Not all attributes are versioned.
- Creating a new version doesn't affect the setup of contract terms templates or rules.
- You can view all clause versions and compare version text, but you can't restore an old version.

Clause Versioning Is Restricted by Status

You can create versions for clauses in the approved or expired statuses only. You don't create new versions to edit clauses that were rejected in the approvals process. You must edit and resubmit them for approval.

A New Version Is Not Effective Until It's Approved

When you create a new version of an approved clause, your edits don't take effect until the new version is approved. In the meantime, contract authors can continue to use the last approved version if there is one.

Not All Attributes Are Versioned

Not all clause attributes are versioned, so editing them immediately affects all versions, even those currently in use in contracts. These attributes are:

- Clause relationships
- Folders
- Templates
- Translations

Viewing Versions and Comparing Text

You can view and compare clause versions, but you can't restore a previous version:

- If you want to view the different clause versions that are available in the library, select the **Include All Versions** check box in the clause search page.
- If you want to compare the text of the old versions of a clause with the current version, open the clause in the edit page and click the History tab.

Related Topics

- What are the clause statuses and what do they mean?

Example of Changing the Title of an Approved Clause

While you cannot change the entry you make in the Clause Title field after a clause is approved, you can change the title that is printed in contracts in subsequent versions by making an entry in the Display Title field.

The display title overrides the original title in contracts.

Scenario

Suppose you want to change the title of the clause Liability to Limited Liability, but the clause is already approved and in use.

In this case, you can do the following:

1. Create a new clause version.
2. Enter Limited Liability in the Display Title field.
3. Submit the new version for approval.

Contract authors can start using the new version of the clause after it is approved.

Related Topics

- Clause Versioning

Considerations for Removing a Clause from Use

You can remove a clause from use by deleting it, putting it on hold, or entering an end date. Each of these actions is available and appropriate in different circumstances.

Deleting a Clause

You can delete a clause only when it is in the **Draft** or **Rejected** status. If the clause already exists in an approved version, then that original version can continue to be used in contract terms templates, Contract Expert rules, and in contracts.

Putting a Clause On Hold

You can place an approved clause temporarily on hold by selecting the **Apply Hold** action and remove the hold by selecting **Remove Hold**.

You can still add a clause that is on hold to contract terms templates and Contract Expert rules, but you receive a warning when you try to activate them. Similarly, contract authors receive a warning when they validate a contract with a clause that was on hold and record the hold in the contract deviations report.

Entering an End Date

Enter a past date as the end date while editing a clause in the Contract Terms Library. This removes an approved clause permanently from use and sets the clause to the **Expired** status. You can search and view the most recently expired version of a clause in the Contract Terms Library and copy it to create a new clause.

Related Topics

- Clause Versioning

Example of Including a Clause by Reference

This example illustrates how to create a clause that is printed in contracts as a reference.

Scenario

Suppose you want to include a Federal Acquisition Regulations clause 52.202-1 by reference. In this case, you would fill in the following information, as seen in the following table:

Tip: Selecting the Include by Reference option prints the clause reference instead of the clause text.

Field	Entry
Number	52.202-1
Title	52.202-1
Display Title	Definitions
Description	Clauses About Definitions
Instructions	As prescribed in 2.201, insert the following clause:
Text	Definitions (July 2004) (a) When a solicitation provision or contract clause uses a word or term that is defined in the Federal Acquisition Regulation (FAR).
Reference	http://www.acqnet.gov/far/
Reference Description	This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this address: http://www.acqnet.gov/far/
Include by reference	Select this option.

How You Set Up Numbering for Clauses

For each business unit, you can specify either automatic or manual numbering for clauses stored in the Contract Terms Library.

You specify the clause numbering method individually for each business unit during business unit setup by selecting either the **Specify Customer Contract Management Business Function Properties** or the **Specify Supplier Contract Management Business Function Properties** tasks. These tasks in the Setup and Maintenance work area are part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

If you specify manual numbering, requiring users to enter a unique number manually each time they create a clause in the library, then no further setup is required.

If you want the clauses to be numbered automatically, then you must:

- Select a clause numbering level. The default clause numbering level for a contract that is not project-based is business unit.
- Select the appropriate clause sequence category for the specified numbering level. This requires the setting up of a document sequence category and a document sequence as described in related topics before setting up the numbering method in the business unit. Use the following values for your setup.

Values to Use for Document Sequence Categories

When creating document sequence categories for numbering clauses in the Contract Terms Library, use the following values:

- Application: Enterprise Contracts
- Module: Enterprise Contracts
- Table: OKC_ARTICLES_ALL

Values to Use for Document Sequences

When creating document sequences, use the following values:

- Application: Enterprise Contracts
- Type: Automatic
- Module: Enterprise Contracts
- Determinant Type: Global, Business unit, Ledger (if a primary ledger has been assigned to the business unit)

Related Topics

- Document Sequence Categories
- Document Sequences

Considerations for Importing Clause Text from Microsoft Word

You can enter the text of a clause in the Contract Terms Library.

Use any one of the following options to enter the text of a clause:

- Enter the text using the built-in text editor
- Import the text from a file created with Microsoft Word 2007 or later

Entering Clause Text Using the Built-In Rich Text Editor

Use the built-in rich text editor to enter and edit clause text whenever possible. This supports all of the application features.

Importing Clause Text from Microsoft Word 2007 or Later Version

Import clause text from a document created in Word instead of entering the text directly into the application. This helps preserve complex formatting not supported by the application's editor or if using Word is more convenient.

Points to consider:

- The file you are importing must be saved in the XML file format.
- The built-in text editor is disabled after you import the text for the first time. To modify the clause, you must download it to a file, edit the clause in Word 2007 or later, and upload again.
- Contract authors must also use Word 2007 or later if they want to edit the clause during contract authoring.
- Importing clause text prevents contract authors from using some features of this application. For example, contract authors cannot compare the text between two clause versions or control clause formatting with a layout template.
- To import large numbers of clause records rather than the text of individual clauses, use the Import Clauses from XML File concurrent program.

> **Note:** Sometimes Microsoft Word inadvertently adds formatting tags around the variables in the XML file format document. Additional formatting tags can cause the clause import process to fail. To evade additional Microsoft Word tags, copy the variables information in any basic text-editing program, for example, Notepad or TextEdit. Then replace the variable information from basic text-editing program into your XML file.

Set up Cross-References in Terms and Conditions

You can use variables to set up cross-refernces to refer to related material between clauses in a contract document.

You can use cross-reference between clauses when the legal language in a clause refers to terms described in another clause within the same document. You can use this feature with both nonstandard clauses and standard clauses defined in the Terms Library.

Setup Cross-Reference for Clauses

Cross-references in contract terms and conditions can help readers to find supporting information between clauses in the contract. To add cross-references to clause text:

1. Navigate to the Terms Library and select the **Create Variable** task.
2. On the Create Variable page, perform these tasks:
   a. Enter a variable name.
   b. In the **Intent** field, select **Buy** or **Sell**.

c. In the **Source** field, select **Java string**.
d. In the **Method Type** field, select **System**.
e. In the **Method Name** field, select **Get clause cross-reference**.
f. Click **Save and Close**.

> **Tip:** You can add a prefix when naming your cross-reference variables so that you can identify variables that are used to support cross-references from other types of variables

3. Navigate to one of these tabs to select a variable for the clause as a cross-reference in the **Cross-reference Variable** field:
   - **Edit Terms Template** > **Create Clause tab**
   - **Edit Terms Template** > **Edit Clause tab**
   - **Edit Contract** > **Edit Clause tab**
   - **Edit Contract** > **Create Nonstandard Clause tab**

   Use this step to set up the source clause of a cross-reference variable.
4. Navigate to either the create or edit clause tab of the clause where you want to refer to the destination clause, click **Insert Variables** to insert the cross-reference variable into the clause text.

   Use this step to set up the source clause of a cross-reference variable.

Points to Consider for Cross-References

When setting up cross-references, consider these points relevant to various terms library components.

- **Variable**

  You can use the Create Variable page to create a new variable that can later be used as an anchor to refer one clause to another clause.
- **Clause**

  You can select an anchor variable in the **Cross-reference Variable** field on either the create or edit clause page. The selected variable acts as the bookmark for this clause. The **Cross-reference Variable** field only displays the active variables that are not added to any clause. You can only add one cross-reference variable to a clause.

  When you create a new version of a clause, a cross-reference variable is copied to the latest version. If this clause is used in terms and conditions, the cross-reference also resolves for the new version. You can only add a cross-reference variable for a new version of a clause. You can't select a value in the **Cross-reference Variable** field for the history version of a clause.

  Once you have added a cross-reference variable to a clause, you can insert variables into the required clause to set up the source clause. You can edit a clause text and click Insert Variables to add the cross-reference variable. You can also manually insert the reference variable in the clause text using the [@Cross-Reference_Variable_Name@] code. Just replace the "Cross-Reference_Variable_Name" in the code with the variable name you want to add. You can also use the import clause option to import clause text that contains a cross-reference variable.

  Updating the contract document, for example, moving a clause or inserting a new clause, automatically updates the cross-reference used in the clause text.

- **Terms Template**
  A cross-reference variable only resolves when you add it to a clause associated with a structured terms template. You can embed a cross-reference variable within a simplified terms template, but the variable remains unresolved. You can set up and manage cross-references while editing the simplified terms template in Microsoft Word.
  For a structured terms template, you add library clauses that already have references between them. You can then edit these clauses and click **Insert Variables** to add the required cross-reference variables. These new draft clauses are submitted for approval along with the terms template. When you move clauses from one location to another and then preview, any clause references are automatically updated based on the new location of the referenced clause.
  You must apply a numbering scheme to terms template for this feature to work when previewing or printing the contract document.

How You Import Clauses into the Contract Terms Library

You can import clauses, values sets, and manual user variables from external sources into the Contract Terms Library by importing the data from an XML file.

What You Can Import

You can import:

- Clauses
- Clause relationships
- Manual user variables
- Value sets that are used for the variables
- Value set values

Before You Begin

Here's what you must do before importing:

- Download this file that contains a Contracts clause import sample XML file and an XML template: *OKCXMLIMPDFN.zip*.
- Prepare the XML file as specified in the schema file, OKCXMLIMPDFN.xsd, and the sample file OKCXMLIMPDFN.xml (these are in the zip file). Oracle recommends that you keep any Contracts clause XML files under 2 MB in size.
- Be sure that you assign the Business Practices Director (OKC_BUSINESS_PRACTICES_DIRECTOR_JOB) job role to users who want to use the Terms Library to import clauses and see the import account.

Import Clauses

Here are the steps to import clauses:

1. Use the Specify Contract Clause Import XML File Location profile option to specify the Enterprise Scheduler Service server directory where the Import Clauses from XML File process uploads and imports files into the Contract Terms Library. You can set this profile in using the Specify Contract Clause Import XML File Location

task. This task in the Setup and Maintenance work area is part of the Enterprise Contracts offering in the Terms and Clauses Library functional area. For example, enter: `/usr/tmp/`.

2. Select the **Import Clauses** task link in the Terms Library work area, and enter the following parameters for running the Import Clauses from XML File process:

Parameter	Description
XML File Name	The name of the file you are importing. The file must be uploaded to the crm/clause/import UCM account.
Default Business Unit	The business unit where clauses are assigned when no specific business unit is included in a clause record you are importing. If the import file includes business units for all clause records, then you can leave this field blank.
Create as Global Clause	You can specify clauses imported into the global business unit as global clauses. This means they will be available for adoption by other business units.
Default Clause Status	The status you enter here is used to specify the status of clause records where no status is specified.
Mode	Use the Validate option to test the quality of your data. Use the Import option to import the clauses.

3. Use the **Manage Process** task available in the Terms Library work area to monitor the progress of your import. Review the log for any error messages. Records with errors remain in the interface tables until you purge them or correct them.
4. To improve performance, periodically purge the interface tables used in the import by running the Purge Contract Clause Import Tables process.

Clause Statuses

Clause statuses determine when a clause becomes available for use in contract terms authoring. The statuses are:

- Draft: The clause can be edited and submitted for approval.
- Pending Approval: The clause is automatically routed to approvers.
- Approved: The clause is available for use immediately after import.

Interface Tables

Here are the database tables used for clause import:

Table	Description
OKC_ART_INTERFACE_ALL	The main interface table for loading clause data from external systems
OKC_ART_RELS_INTERFACE	Table that stores information about clause relationships

Table	Description
OKC_VARIABLES_INTERFACE	Table used to import variables used in clauses
OKC_VALUESETS_INTERFACE	Table used to import value sets that are used by variables
OKC_VS_VALUES_INTERFACE	Table that stores value set values
OKC_ART_INT_ERRORS	Table that stores errors that are reported during import validation or import
OKC_ART_INT_BATPROCS_ALL	The internal system table that stores the batch run details. This includes the processing status as well as all the parameters that are used for each import

Purge Interface Tables

To optimize import performance, periodically run the Purge Contract Clause Import Tables process from the Scheduled Processes UI. This process purges records in all of the interface tables. If you don't enter any parameters, the process purges all records.

Here are the parameters you can use to restrict the extent of the purge:

Parameter	Mandatory	Description
Start Date and End Date	No	Use the start and end dates to identify the date range for the interface records you want to purge.
Process Status	No	Enter a status if you want to purge interface records with that status. The possible values are Error, Success, and Warning.
Batch Name	No	You can restrict the purge to a specific batch by entering its name.

Related Topics

- How Alternate and Incompatible Clause Relationships Work
- Variables

Examples of Using the Oracle Contracts Terms Library

Standard clauses, terms templates, and business rules are set up in the contract terms library. With policies and terms templates in place, the legal language on a contract can be quickly created from approved templates, expediting contract creation and approval.

Use these examples to better understand using the common features of the terms library.

Creating a Clause in the Contract Terms Library

The clause is the basic building block of both the terms library and contracts in general. Using the **Create Clause** task in the Terms Library work area the following steps summarize the creation of a clause. See the related links section for a detailed demonstration.

1. In the Create Clause window, select the business unit for the clause.
2. Enter a clause number, title, and display title per your organization's standards.
3. Select the intent for the use of this clause.
4. Select a clause type.
5. Use the editor to enter your clause text.
6. Add variables to your clause by positioning the cursor in the text and clicking **Insert Variables** .
7. You can enter optional instructions for contract authors in the Instructions tab.
8. You can provide contract authors with alternate clauses that they can select instead of this one in the Related Clauses tab.
9. When your clause is complete, submit the clause for approval by the library administrator by clicking **Submit**.

Creating a Contract Terms Template

The terms template is the customary starting point for all contract authors. Using the **Create Terms Template** task in the Terms Library work area the following steps summarize the creation of the template. See the related links section for a detailed demonstration.

1. Select the business unit for the template.
2. Enter a unique name into the Name field per your organization's standards.
3. Select the intent for the use of this template.
4. Select the layout template which best enables contract authors to preview the contract terms when they are selecting templates.
5. It's recommended that you use Contract Expert rules to add additional clauses if the contract requires it, so you must enable Contract Expert for this template.
6. Enter name of the default section where Contract Expert will insert any additional clauses into the Default Section field.
7. Click **Save**.
8. Click **Add** in the Document Types toolbar of the Document Types region to specify what contract types will use this template.
9. Select the Document Type and optionally click the **Default** option to automatically apply this template to every new contract of this type.
10. You need a section to add clauses to so start by clicking **Add Section** from the Actions menu in the Clauses tab.
11. Add an existing section from the library or create a new section.
12. To add clauses to this section, click **Add Clause**.
13. Search for the desired clause, select the clause, and then click the **OK** button.
14. Click **Expand** for the section and then click **Refresh** to see your edits.
15. After you have added all the desired terms and conditions to the template, click **Submit** to begin the approval process.
16. If your template passes validation without errors, click **Submit** again.

Creating a Clause in a Contract Terms Template

Once you have created a contract terms template you can modify it by creating a clause while editing the template in the Contract Terms Library. With your template open in the Clauses tab the following steps summarize the creation of a clause. See the related links section for a detailed demonstration.

1. Click **Add Clause** and search the library for similar clauses before creating a new one. In this example the library does not contain the clause you need and you will create one.
2. Click the **Create Clause** button.
3. Enter an alphanumeric ID in the **Number** field that is unique within the business unit.
4. Enter a unique clause title in the **Title** field.
5. Classify the clause for the Contract Terms Library by selecting a **Type**.
6. Enter the clause text and optionally insert variables into the Text field to complete your new clause.
7. Once you are satisfied with your new text, click the **OK** button.
8. Expand the template folders and click **Refresh** to see the latest edits.
9. After you have added all the new terms and conditions to the template, you are ready to submit it for approval by clicking **Submit**.
10. Review all the draft clauses you created or added to the template and click **Next**.
11. If the template passes validation without errors, you then click **Submit** again.
12. The template and draft clauses are now pending approval and are available for use in contracts after they are approved.

Manage Clauses FAQs

What are the clause statuses and what do they mean?

Clause statuses in the Contract Terms Library reflect the state of the current version you are editing and restrict what actions you can take.

The table that follows describes the clause statuses and explains their implications:

Status	Description	Effect
Draft	A clause is automatically set to the Draft status after you create a clause initially or when you create a new version.	• Available for authoring and adoption? Not available. • Effect contract approval? No effect. Contracts do not include draft clauses. • Editing? No restriction. • Inclusion in contract terms templates and Contract Expert rules? You can include a draft clause version, but the templates or rules cannot be activated until the clause version is approved. • Deletion?

Status	Description	Effect
		Yes. You can delete versions in the Draft and Rejected statuses
Pending Approval	The status of a clause after it's submitted for approval.	• Available for authoring and adoption? Not available. • Effect on contract approval? None. Contracts do not include clause versions in this status. • Editing? Limited to description and the end date. • Inclusion in contract terms templates and Contract Expert rules? You can include clauses with their latest versions pending approval, but the templates and rules cannot be activated until the clause version is approved. • Deletion? Not directly but indirectly by first withdrawing it from approval and thus reverting the clause to its original Draft status. • Stop Approval? Yes. You can withdraw the clause from approval using the Stop Approval action. Withdrawing the clause from approval reverts the clause to Draft status.
Rejected	The approvers rejected the clause version. You can edit clauses in this status and resubmit them for approval.	• Available of version for authoring and adoption? Not available. • Effect contract approval? Contracts do not include clause versions in this status. • Editing? Unrestricted. • Inclusion in contract terms templates and Contract Expert rules? You cannot add a clause with its latest version rejected. • Deletion? Yes.

Status	Description	Effect
Approved	The clause was approved.	• Available for authoring and adoption? Yes. • Effect contract approval? None. • Editing? Edits restricted to end date and description. • Inclusion in contract terms templates and Contract Expert rules? Yes. • Deletion? No.
Expired	The clause is past its end-date. The application automatically enters a clause end date in the old version when a new version is approved. You can also manually enter an end date in an approved clause.	• Available for authoring and adoption? No. • Effect contract approval? Creates an error during contract approval validation. The clause must be removed before submitting the contract for approval. • Editing? No edits permitted. • Inclusion in contract terms templates and Contract Expert rules? You cannot add an expired clause. If the latest version of a clause becomes expired when it's already in a template or rule, then the application displays an error during template or rule activation. • Deletion? No.
On Hold	Another Contract Terms Library administrator placed a hold on the clause version.	• Available for authoring and adoption? No. • Effect contract approval? Creates an error during contract approval. The clause must be removed before submitting the contract for approval. • Editing? No.

Status	Description	Effect
		• Inclusion in contract terms templates and Contract Expert rules? Cannot add clauses with the latest version on hold. Existing templates and rules use the previously approved version, if one exists. • Deletion? No deletion possible.

Related Topics

- Clause Versioning
- When do I create a clause as part of a contract terms template?
- How can I withdraw a clause or a terms template from approval?

How can I find clauses that I drafted or that require my action?

You can see the clauses that you drafted and clauses that require your action on the Terms Library Overview page.

How do I use the Clause Title and Display Title fields?

In the Clause Title field, give a unique and meaningful name for each clause. Title must be unique within a business unit. Because, once approved, you can't change the clause title. On the contrary, Display Title field, requires no uniqueness of name.

You can use this field to change the title that appears in contracts or to use same title name for multiple alternate clauses.

Related Topics

- Examples of Setting up Alternate Clauses
- Example of Changing the Title of an Approved Clause
- How can I set up the clause title to include the clause number?

How can I create clauses with the same title?

Use the Display Title field to use same title for more than one clause. Display Title doesn't require uniqueness but, Clause Title must be unique within a business unit. The Display Title overrides the Clause Title in printed contracts.

This way, you can create multiple clauses with the same printed title.

How can I search for a clause in the library by its text?

You can search for clause text using the Keyword field. This field also looks up clause number, clause title, display title, text, instructions and description.

Related Topics

- Why can't I find a clause when I search by clause text?

How can I view the HTML source of a clause text?

You can view the HTML source for clauses in the Terms Library that aren't in an editable state, using the View Source action from the Edit Clause page.

The application displays the **View Source** action in the statues: Approved, Pending approval, Expired, On hold, and Draft where the clause text is imported from a Microsoft Word XML document.

You can download the source as an HTML file for offline analysis. You can use the **View Source** action in the application editor on draft clauses, but you can't open the editor for clauses in non-editable states, such as approved clauses. When clauses don't print as expected, this feature lets you view the HTML source to see if there's a problem without first creating a new version of the clause to make it editable in the application. For example, where clauses are adopted or localized, this feature can help you isolate the source of the problem, without amending a clause.

How can I set up the clause title to include the clause number?

You can have the clause number automatically added to the front of the clause title as a prefix in printed contracts by selecting the Include Clause Number in Display option during business unit setup.

You should only do this if the clause number is meaningful in some way, for example when it refers to a number of a government regulation. The clause number is a number of the clause in the Contract Terms Library and it is usually generated by the application automatically. It is not the number of the clause in the contract generated by the numbering scheme.

How does Contract Expert identify where to insert clauses into contracts?

If you are using a Contract Expert rule to insert clauses into a contract, then Contract Expert inserts the clause in the location that is predefined for the clause in the terms template.

If the clause location is not defined in the terms template, then Contract Expert inserts the clause into the section that is specified in the Default Section field in the General Information region on the create and edit clause pages. If you do not specify a default section for the clause, then Contract Expert uses the default section specified in the Contract Expert region on the General tab in the create and edit contract terms template pages. If the section doesn't already exist in the contract where the clause is being inserted, Contract Expert adds the section along with the clause.

Related Topics

- How can I predefine locations of Contract Expert clauses in the contract?

How does creating a new version of a Contract Expert rule affect contracts?

Activating a new version of a rule makes that new version effective whenever the contract author runs Contract Expert.

Authors who validate or submit for approval contracts that used a previous version of the rule receive an error asking them to run Contract Expert again. Approved contracts are not affected.

What can I use clause analysis for?

Use clause analysis to find out how the Contract Terms Library clauses, contract terms templates, and Contract Expert rules are used in contracts.

Use clause analysis to:

- Identify which contracts make use of a legal concept.
- Identify contracts that use a given set of clauses.
- Research the effectiveness of standard policies and standards defined in the Contract Terms Library.

  For example, you can find out if you need to revise a standard clause by searching for the nonstandard versions of the standard clause.

What do I enter as the clause text if I plan to include the clause reference instead?

The content you enter in the Clause Text field is used for searching the clauses by text. So, even if you print the Clause Reference instead of Clause Text, it's good you enter content in it.

How can I embed a question response in a clause?

You can embed a question response in a clause by inserting the associated variable of the question in the clause text.

To associate a question response to a variable, the value sets of the question response and the variable must be identical.

What information is copied over when I duplicate a clause?

Duplicating a clause copies all information about the clause except for its historical information (the templates where it is used and adoption history). You can edit all of the information about the new clause except for its business unit.

> **Note:** To copy a clause to another business unit, you must recreate the clause in that business unit.

Why can't I find a clause when I search by clause text?

You may not be able to find a clause by searching for its text if the clause text has not been indexed.

The application administrator must periodically index clause text by running two processes: Build Keyword Search Index for Contract Clauses and Optimize Keyword Search Index for Contract Clauses.

How can I find clauses that are adopted by other business units?

If you're in the global business unit, use the Business Unit and Adoption Type options in Search Clauses page. This way, you can look up localized or adopted clauses. In a local business unit, you can use the analyze clause usage action instead.

What's the difference between the clause Instructions and the clause Description fields?

You use the clause Instructions field for contract authors on how to use a clause, but use the Description field to enter information describing the clause.

Further details:

- Both text fields are visible to contract authors during contract terms authoring.

- The text of both fields can be searched using the **Keyword** field.
- Neither field is printed in contracts.

What's a clause intent?

The clause intent specifies if the clause is going to be used for sales or procurement contracts. You can only create a clause for one intent.

What's the difference between saving a clause and submitting a clause?

Saving a clause saves it as a draft.

Submitting a clause triggers validation checks and submits the clause for approval. While a clause is in the approval process, you cannot make any edits. The clause must be either approved or rejected for you to edit it again.

What's the difference between setting up multiple alternate clauses and one with a variable?

This topic also includes the advantage and disadvantages of setup methods.

There are two ways of setting up alternate clauses:

- You create multiple separate alternate clauses
- You create just one alternate clause and include variables to supply the different variants

This table highlights the differences between the two setup methods:

Setup Method	Advantages	Disadvantages
Multiple Alternate Clauses	• You can use clause analysis to track usage of the clause and its alternates • One-step selection: Contract authors select the clause from a list. • Language of the alternate clauses you create can vary.	• Must create and maintain a large number of clauses. • Authors are restricted to the alternates you create. • Authors may have to search for the clause they want if there are many.
Single Alternate Clause with Variables	• Permits you to create and maintain just one alternate clause. • Supports unlimited number of alternates.	• Two-step selection: Authors select the alternate and then run Contract Expert to fill in the variable values. • Language of the alternate clause cannot change. The only difference is the information supplied by the variables.

Related Topics

- How Alternate and Incompatible Clause Relationships Work
- Examples of Setting up Alternate Clauses
- What can I use clause analysis for?

Who can edit protected and mandatory clauses?

Only users with the Override Contract Terms and Conditions Controls privilege can edit mandatory and protected clauses. Contact your application administrator with questions about the privileges granted to you.

Why can't I edit the clause information?

You can't edit clause information if you don't have permissions or if the clause isn't in the draft status. Clauses once sent for approval have to be approved or rejected by the approvers.

If you want to modify approved or rejected clauses, you must create a new version of the clause before editing.

Related Topics

- Why can't I edit the clause title?

Why can't I edit the clause text?

You can't change a clause text if you don't have edit permissions on it or if the clause text was imported as a Word document. With necessary permissions, you can change the imported clause text.

To do so, download the imported Word document into your computer. Open and edit the document using MS Word version 2007 or above. Upload the latest document.

> **Note:** Request your administrator for 'Override Terms and Conditions' permissions to edit the clause text of protected and mandatory clauses.

Related Topics

Why can't I edit the clause title?

You cannot edit the clause title after you first save the clause. However, you can change the clause title in printed contracts by entering a new title in the Display Title field. The display title replaces the clause title in printed contracts.

Manage Contract Terms Templates

How Contract Terms Templates Work

You can create contract terms templates in the Contract Terms Library to insert appropriate terms and conditions into contracts during contract authoring. You can apply the templates manually while authoring contracts or the application can apply the templates automatically using defaulting rules you set up.

Contract terms templates:

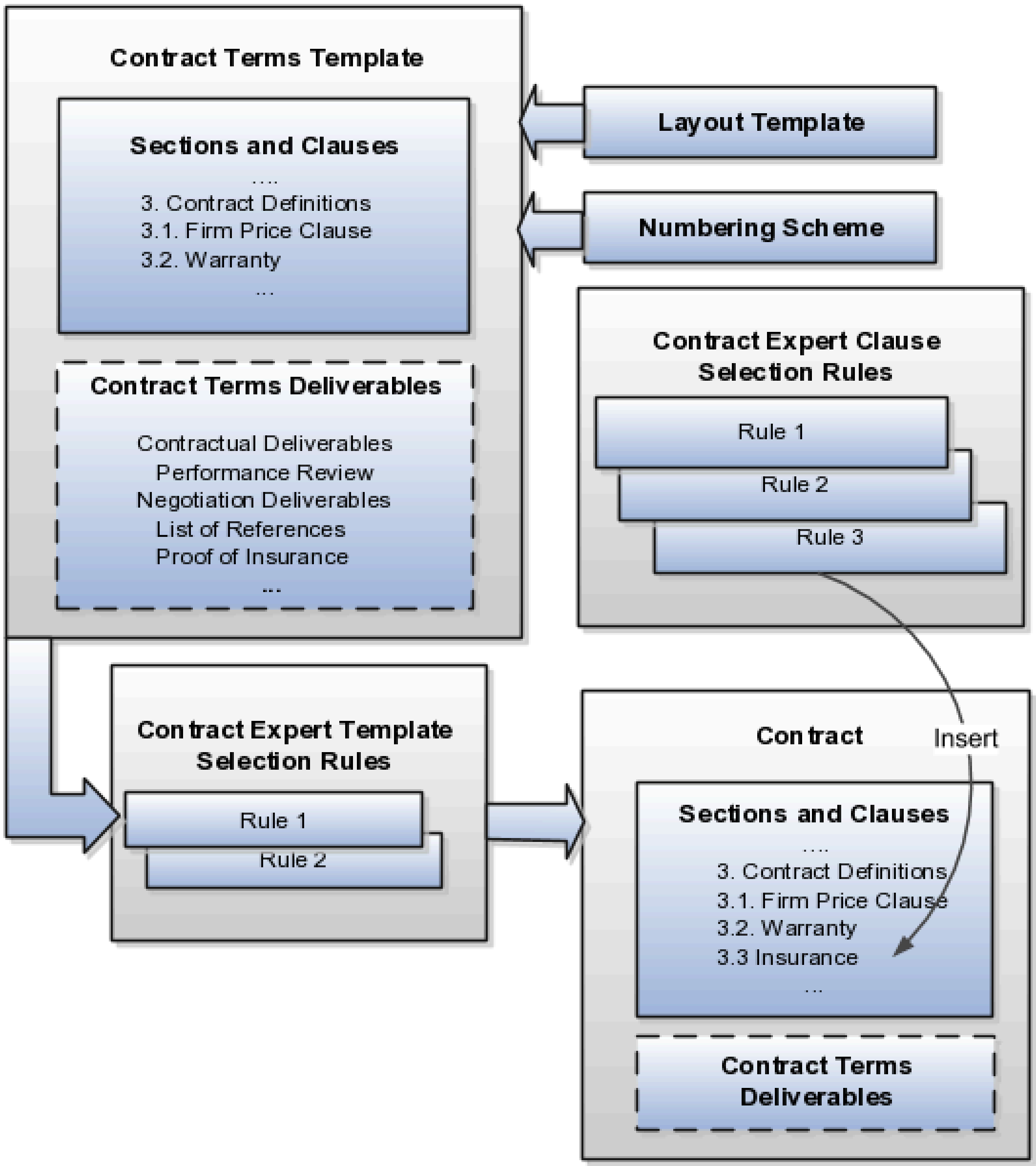
- Contain sections and clauses from the Contract Terms Library.
- Are created in the Contract Terms Library separately. You cannot create them directly from an existing contract.
- Are specific to one business unit.

- Apply to enterprise contracts of the contract types you specify in the template.
- Are specific to either sell-intent or buy-intent contracts.
- Can default contract terms directly on purchase orders and sourcing documents, and on enterprise contracts. For these documents, contact terms templates can also include contract deliverables which can be used to track the completion of contractual tasks in the contract.

In addition, for a contract terms template you can:

- Set up Contract Expert rules to recommend additional clauses for contracts that use the template and insert these clauses in specified locations in the contract if marked as conditional.
- Associate a layout template for previewing the template.
- Specify a contract terms numbering scheme for the template.
- Set up template selection rules to default the template into a contract automatically.

The following figure illustrates the different aspects of contract terms templates, such as section and clauses, contract terms deliverables, layout template, numbering scheme and so on.



Adding Sections

You can add sections that you have created in the library or create sections that are specific to the template itself.

Adding Clauses

You can add clauses in one of two ways:

- Add a clause from the Contract Terms Library directly into a section in the template.

  You can create the clause in the library from the template if the library does not have what you need.
- Create Contract Expert rules to add clauses to the contract terms in a contract depending on the specifics of the contract.

For example, you may want to add a boilerplate jurisdiction clause directly into the template, but use a Contract Expert rule to insert the appropriate liability clause. This way a contract that calls for the shipment of hazardous materials will get a liability clause that's different from a contract that does not include any, for example.

The properties that you set up in the clause apply automatically. If you set up a clause as mandatory, you will not be able to delete the clause after it is inserted by the template unless you have the special Override Contract Terms and Conditions Controls privilege. If you set up a clause with alternates, then you can substitute any of the alternate clauses in the contract.

> **Note:** You are not required to add any sections or clauses to a template directly. You can use Contract Expert rules exclusively, if appropriate.

Enabling Contract Expert on the Template

To use Contract Expert in a contract where the template is applied, select the **Enable** option in the Contract Expert region of the Create Terms Template or Edit Terms Template pages. When Contract Expert rules enabled for the template suggest additional clauses, these additional clauses are presented for your review before they are inserted in the default section specified in each clause. Depending on privileges, you can choose which clauses to insert and which to omit. If you make Contract Expert suggestions mandatory for the template, then you can reject the recommendations only if you have the special Override Contract Terms and Conditions Controls privilege.

You can also place recommended clauses for insertion n their predetermined locations, if the clauses are marked as conditional clauses and their locations are defined in the terms template associated with the contract.

Adding Contract Deliverables to Purchase Orders, Sourcing Documents, and Enterprise Contracts

For Oracle Purchasing purchase orders, Oracle Sourcing documents, and enterprise contracts, you can track compliance of tasks that the contract parties have agreed to execute as part of the agreement by adding contract deliverables.

You can use deliverables to record the status of the tasks, keep everyone notified of past and future deadlines, and as a repository of the deliverable documents themselves. For example, vendors agreeing to supply a monthly report can log in to their sourcing portal and attach the report or ask for an extension. If they fail to respond by the specified deadline, the deliverable can trigger an automatic notification that the deliverable is overdue.

Assigning a Layout Template for Previewing the Contract Terms Template

You must assign a layout template for the contract terms template so you can preview the template content, when you need to make a template selection, for example. The layout template, which you select on the General tab while editing the contract terms template, specifies what is displayed in the preview, including the fields displayed, graphics such as a company logo, page numbering, headers and footers, and boilerplate text. This layout template is not used for printing the contract.

If you marked Contract Expert recommended clauses as conditional on the terms template, then these are displayed in gray font in the print preview to distinguish them from regular clauses.

The layout template is an RTF file stored in the Enterprise Contracts folder in the Business Intelligence Presentation Catalog. A sample layout template is provided with your application. You can copy the sample template and edit it to create your own as described in a related topic.

Specifying a Numbering Scheme

You can associate a numbering scheme to the template that will automatically number sections and clauses in the contract. Several predefined numbering schemes are available with your application, and you can create additional numbering schemes of your own.

Making the Template the Contract Default

You can have a contract terms template apply automatically in all contracts based on:

- Contract type
- Contract Expert rules that select the template based on the specific information in the contract itself

If you enabled the feature Enable Contract Terms in Oracle Fusion Procurement for Procurement Contracts during implementation, then you can also apply templates to procurement documents based on document type.

The following document types become available:

- Auction
- Bid
- Blanket Purchase Agreement
- Contract Purchase Agreement
- Standard Purchase Order
- RFI
- RFI Response
- RFQ
- Sourcing Quote

While editing the contract terms template, you specify a template to be the default for a contract type or document type in the Document Types region. You can set up only one template as the default for each contract type or document type. You set up the Contract Expert template selection rules separately as described in a related topic. You can have multiple rules recommend the same template.

Here is how the default values you enter in the Document Types region and the Contract Expert template selection rules interact to select and apply a template during contract authoring:

- Contract Expert template selection rules always take priority. If the rules specify a single template for a contract, then it is applied regardless of the default you entered in the Document Type region.
- If the Contract Expert rules recommend different templates, then the application uses the default from the Document Type region as a tiebreaker.
- If no Contract Expert selection rule applies and you specified a default, then the application uses the default.
- If you did not set up any rule or default for a contact type or document type, then you must select the template from a list while authoring.

Related Topics

- How You Activate and Revise Contract Terms Templates
- How Contract Expert Works
- Contract Printing and Layout Templates

How You Activate and Revise Contract Terms Templates

For a contract terms template to be available for use by contract authors, it must pass an automatic validation check and be approved by the contract terms administrator.

If you need to make changes after the template is approved and in use, you can create a new version by editing the approved template and submitting it for approval. After the revision is approved, it replaces the original automatically.

This topic discusses:

- The validation checks for common errors that you must correct
- The approvals process
- Contract terms statuses, what they mean, and how they affect what actions you can take
- The creation of new template versions or revisions

Validation Checks

The application performs the following validation checks for all contract terms templates. You must fix all errors before templates can be sent for approval. Fixing warnings is optional.

The following table lists the validations for terms templates including validations for terms template that contain deliverables.

Validation Check	Type	Action
The template contains incompatible clauses.	Warning	Remove one of the incompatible clauses.
A clause you added to the template is in the draft status.	Error	While you can add draft clauses when creating a contract terms template, these clauses must be approved before the template can be sent for approval. If you create the draft clauses as part of the contract terms template, then these clauses are submitted for approval along with the template.
A clause in the template is in inactive, on hold, or rejected status. If a previous approved version of the clause is available, then this message does not appear. The template continues to use the previously approved version.	Error	You must obtain approval for the clause and resubmit the template for approval.
The template contains more than one alternate clause.	Error	You must remove one of the alternates.
Contract Expert suggested clauses specific to the activated rules associated with the terms template are not marked as conditional clauses on the terms template.	Warning	You must mark these clauses as conditional clauses on the terms template.

Validation Check	Type	Action
Contract Expert suggested clauses specific to the activated rules associated with the terms template are flagged as unconditional clauses on the terms template.	Warning	You must mark these clauses as conditional clauses on the terms template.
The template contains conditional clauses that are not Contract Expert suggested clauses specific to the activated rules associated with the terms template.	Warning	You must either remove these clauses or mark them as unconditional clauses on the terms template.
If the template is a translation of another template, then the template it was translated from must be valid on the date you validate the translation.	Error	Obtain approval of the template you are translating before resubmitting.
Template contains no clauses.	Warning	Clauses are not required in a template.
The requester or the internal and escalation contacts in the deliverable are invalid.	Error	You must enter different requester or contacts. The internal contact and requester must be employees with e-mail addresses to receive notifications.
Supplier / customer contact is invalid.	Error	The supplier or customer must be entered as a contact with an e-mail address.
Deliverable dates are missing.	Error	Enter the missing dates.

Template Approval

After you submit a template for approval and it passes validation, the application sends a notification to the approvers specified in the Oracle BPEL Process Manager notification service process. If you have created clauses as part of the contract terms template, then the clauses are automatically submitted for approval and approved along with the template.

For clauses that you added to the terms template from the Terms Library, terms template approval has no effect on them. You can, however, stop the approval of each of these clauses from the Edit Clause page or from the worklist approval notification.

Stopping Template Approval

If for some reason, after you submit a terms template for approval, you want to withdraw it from approval, you can use the Stop Approval action on the Edit Terms Template page to do so. Stopping terms template approval, automatically stops the approval of clauses that you created or added and submitted for approval with the terms template. The Stop Approval action is not available for such clauses individually on the Edit Clause page.

Stopping the approval of a terms template reverts it to its previous Draft or Revision status and reverts the status of the clauses that you submitted for approval with the terms template to their previous Draft status. For clauses in Pending Approval status that you added to the terms template from the Terms Library, stopping the approval of the terms template has no effect on these clauses. These clauses remain in their Terms Library statuses.

Template Statuses

Contract terms template statuses are set automatically during the template lifecycle.

The following diagram shows the available statuses and the permitted transitions and actions in each stage of the template lifecycle:

- When you create a contract terms template it is automatically set to the Draft status.
  You can edit and delete templates in this status.
- When you submit a draft template for approval and it is successfully validated, it is set to the Pending Approval status. You cannot edit, delete, or enter an end date for templates in this status. The approvers must either approve or reject the template or you can withdraw the terms template from approval.
- An approved template is automatically available for use in the business unit where it is created.
- You can edit an approved template to create a new version. The edited version is set to the Revision status until it is validated and approved.
- If the approvers reject the template revision, you can edit it and resubmit it for approval.
- You can place an active template on hold, temporarily removing it from use until the hold is removed. You cannot edit templates in this status.
- You can remove an approved template from use permanently by entering an end date. You cannot edit a template that is past its end date. The only available action is to copy it to create a new one. Entering an end date does not change the status of the template even past the end date.

Creating Contract Terms Template Revisions

You can create a revision of a terms template by editing an active template. After the revision is approved, it automatically replaces the current version in the Contract Terms Library. The application does not save previous versions of templates.

If the template is a global template that was adopted by other business units, those business units must copy over the revision. The new template revision appears in the Available for Adoption region of the Terms Library Overview page.

Related Topics

- How Contract Terms Templates Work

Contract Terms Templates FAQs

How can I add a clause to a contract terms template?

You can add sections and clauses to a contract terms template on the Clauses tab while editing the template. Alternately, you can set up Contract Expert rules to suggest clauses based on the circumstances of each contract.

Use the outline region to add sections and clauses that will be present in all contracts created with the template. You must add at least one section using the Actions menu before you can add clauses. If you don't find the clause you need while adding clauses, you can create one from the Add Clauses window. In this case, refresh the preview of your template by clicking the **Refresh** icon.

Also, you can create rules to add clauses that vary from contract to contract. Contract Expert can add clauses based on variable values and answers to questions contract authors supply when they author the contract.

Related Topics

- How Contract Terms Templates Work

What's a default contract terms template?

A contract terms template that's specified as the default template for a document type. A document type can be a buy or sell document that's considered a contract, such as a purchase order or a blanket sales agreement.

What's the difference between document types and contract types?

While both document types and contract types are contracts, document types encompass all purchasing and sales documents that are deemed contracts. Contract types include only enterprise contracts.

For Sales, the list of document types is restricted to contract types, those contracts created in Enterprise Contracts. If you enabled the Enable Contract Terms in Oracle Fusion Procurement feature for the option Procurement Contracts during implementation, then the following procurement document types are available:

- Auction
- Bid
- Blanket Purchase Agreement
- Contract Purchase Agreement
- Standard Purchase Order
- RFI
- RFI Response
- RFQ
- Sourcing Quote

Contract type is an administrator-created classification for enterprise contracts which determines contract functionality, including the presence of lines and contract terms. You create contract types during contract setup by selecting the **Create Contract Types** task.

Related Topics

- Contract Types

What validation checks are performed for contract terms templates?

The application performs validation checks for all contract terms templates. You must fix all errors before templates can be sent for approval. Fixing warnings is optional.

Here are the validations for terms templates, including validations for terms template that contain deliverables.

Validation Check	Type	Action
The template contains incompatible clauses.	Warning	Remove one of the incompatible clauses.
A clause you added to the template is in the draft status.	Error	While you can add draft clauses when creating a contract terms template, these clauses must be approved before the template can be sent for approval.

Validation Check	Type	Action
		If you create the draft clauses as part of the contract terms template, then these clauses are submitted for approval along with the template.
A clause in the template is in inactive, on hold, or rejected status. If a previous approved version of the clause is available, then this message does not appear. The template continues to use the previously approved version.	Error	You must obtain approval for the clause and resubmit the template for approval.
The template contains more than one alternate clause.	Error	You must remove one of the alternates.
Contract Expert suggested clauses specific to the activated rules associated with the terms template are not marked as conditional clauses on the terms template.	Warning	You must mark these clauses as conditional clauses on the terms template.
Contract Expert suggested clauses specific to the activated rules associated with the terms template are flagged as unconditional clauses on the terms template.	Warning	You must mark these clauses as conditional clauses on the terms template.
The template contains conditional clauses that are not Contract Expert suggested clauses specific to the activated rules associated with the terms template.	Warning	You must either remove these clauses or mark them as unconditional clauses on the terms template.
If the template is a translation of another template, then the template it was translated from must be valid on the date you validate the translation.	Error	Obtain approval of the template you are translating before resubmitting.
Template contains no clauses.	Warning	Clauses are not required in a template.
The requester or the internal and escalation contacts in the deliverable are invalid.	Error	You must enter different requester or contacts. The internal contact and requester must be employees with e-mail addresses to receive notifications.
Supplier / customer contact is invalid.	Error	The supplier or customer must be entered as a contact with an e-mail address.
Deliverable dates are missing.	Error	Enter the missing dates.

What's a global contract terms template?

A contract terms template that's created in a business unit designated during setup as the global business unit. A global template is automatically listed in the Term Library Overview page in the local business units, and can be adopted by duplicating it.

Related Topics

- How Content is Adopted from Global to Local Terms Libraries

What's a layout template?

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

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

When do I create a clause as part of a contract terms template?

While creating a contract terms template, if don't find a clause you want to add in the Contract Terms Library, use the Create Clause button to create one.

The clause you create this way automatically associates to the terms template and you can send this for approval along with the terms template. While this shortcut to create a clause doesn't allow you to add some details such as clause instructions, references, and relationships to other clauses, you can always add any missing information later by editing the clause.

Similarly, when you withdraw the terms template from approval, all the draft clauses submitted along with the terms template are withdrawn too. This includes draft clauses that you added from the Terms Library. On stopping approval these draft clauses revert from their Pending Approval status to Draft status. Clauses in Pending Approval status you added to the terms template from the Terms Library stay in their Terms Library statuses when you withdraw the terms template from approval.

When do I make a contract terms template as the default for a document type?

Set a contract terms template as the default for a document type when you want that template to be automatically applied to a contract of that type.

You can also apply contract terms templates to contracts using Contract Expert rules. If a Contract Expert rule has a default contract terms template, the application ignores the document type default you set here. However, if the Contract Expert rules you had set picks multiple templates, then the application uses the document type default you set here as a tiebreaker.

Related Topics

- How Contract Expert Rules Work
- What's a default contract terms template?
- What validation checks are performed for contract terms templates?

Why am I reviewing draft clauses when submitting a contract terms template for approval?

A contract terms template can be approved for authoring only when all of its clauses are approved as well.

If any of the clause versions you added to the template are drafts, then the application lets you review a list of those drafts and submit them for approval along with the contract terms template. The draft clauses can include any draft clause versions, as well as clauses drafted specifically as part of the contract terms template using the Create Clause button.

If any of the clauses are already available in an approved version, then you can use the approved version in the template instead of submitting the drafts for approval. You can make the substitution on the review page by deselecting the draft.

Why can't I edit the contract terms template?

You can't edit a contract terms template if you have insufficient privileges or if the contract terms template is in a status that doesn't let you make modifications.

Related Topics

- How You Activate and Revise Contract Terms Templates

Why can't I add clauses to the contract terms template?

You must add at least one section to a contract terms template before you add clauses. Also, the template must be in a status that permits editing.

Related Topics

- How Contract Terms Templates Work
- How can I add a clause to a contract terms template?
- Why am I reviewing draft clauses when submitting a contract terms template for approval?

Why do I want to enable Contract Expert in a contract terms template?

Enable Contract Expert in a contract terms template if you want to use its rules. Contract Expert rules can default the template onto a new contract, recommend additional clauses, and show any policy deviations in contracts that use the template.

> **Note:** If you don't enable Contract Expert on a template, contract authors can't run Contract Expert in contracts that use the template. Contract Expert rules don't apply; not even those you specify as valid for all templates.

Related Topics

- How Contract Expert Rules Work
- When do I make a contract terms template as the default for a document type?

Set Up Contract Expert

How Contract Expert Works

Use Contract Expert to enforce corporate policies and standards for all types of contracts, including enterprise contracts, purchase orders, and sourcing contracts.

Contract Expert helps you set up business rules that can:

- Apply the appropriate contract terms template to a contract.

  For example, apply the contract terms template Software License and Service Agreement if the contract is authored in the North America Operations business unit and the contract amount exceeds one million dollars.
- Insert additional clauses into specific predetermined locations in the contract.

  For example, add an audit clause if an audit is required.
- Report contract deviations from corporate policies.

  For example, report a contract worth one million dollars or more that includes payment terms greater than 90 days.

Contract Expert consists of two components: Rule setup and rule execution.

Rule Setup

Administrators create the rules that are stored in the Contract Terms Library. A rule can be based on these conditions:

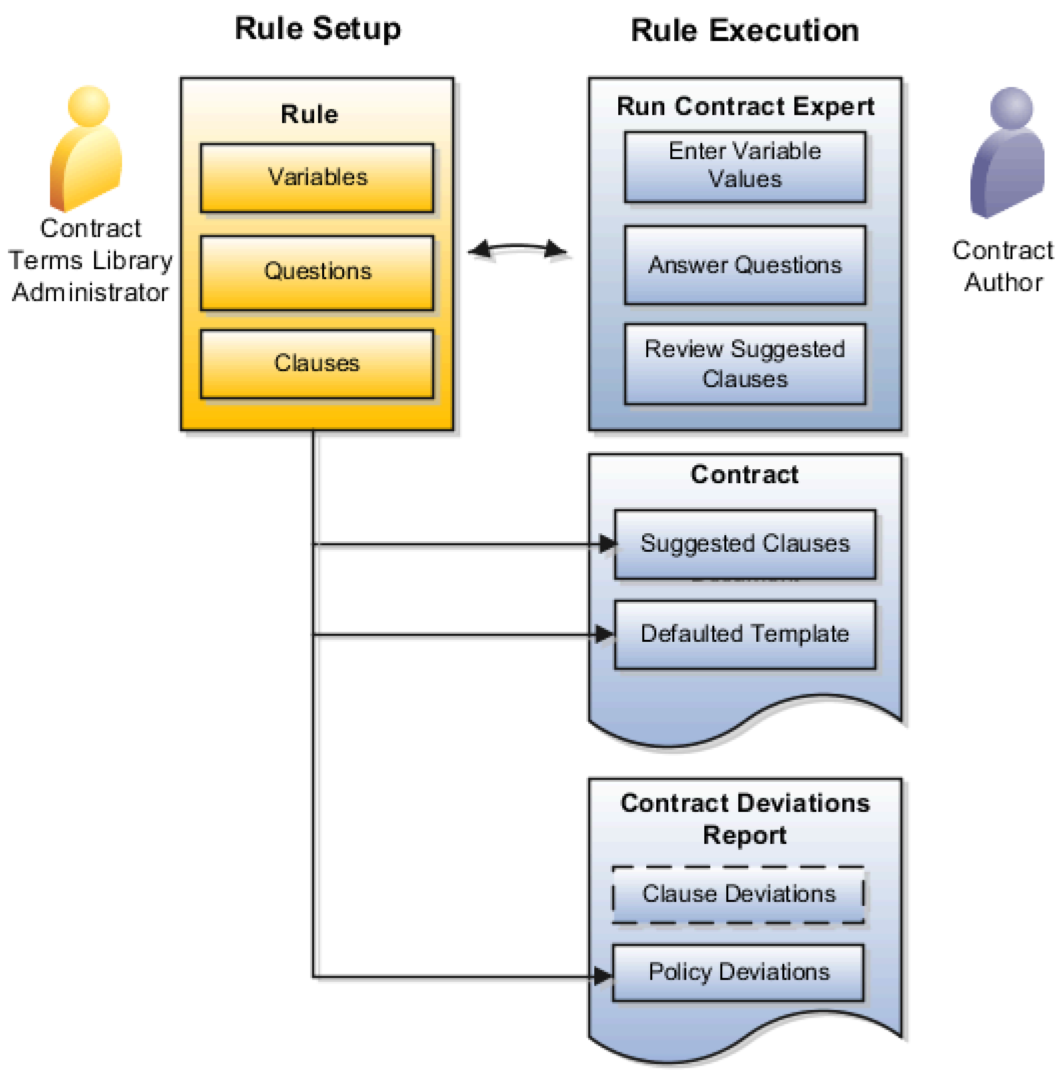
- The values of variables in the contract: For example, recommend an additional clause if the shipment date on an order is greater than 90 days.
- Answers that you as contract authors provide to questions: For example, recommend an additional liability clause depending on a response to a question about hazardous materials.
- The presence of clauses in the contract: For example, if the contract includes a hazardous materials clause, then insert additional insurance clauses.

The first two condition types require your input during authoring.

Rule Execution

During contract authoring, Contract Expert evaluates the rules. For rules with conditions that require your input, Contract Expert asks you to provide missing variable values and to answer questions when you select the Run Contract Expert action. You can then evaluate any recommended clauses for insertion in the contract. Such clauses can also be inserted in predetermined locations, if you defined these locations in the terms template associated with the contract. You can review any policy and clause deviations by selecting the Review Contract Deviations action. Clause deviations are shown in a dashed box because they don't require Contract Expert rules.

This figure illustrates the setup and contract authoring components of contract expert:



Contract Expert Rule Setup

Depending on the type of rule that you are creating, you can base rule conditions on:

- Variables

  This condition is based on the value of a variable in the contract. The application either derives the value automatically from the contract, or you enter the value when you run Contract Expert.
- Questions

  This condition is based on answers to questions that you supply when you run Contract Expert.
- Clauses

  This condition is based on the presence of a specific clause in the contract.

Contract Expert rules apply only to contract terms templates where Contract Expert is enabled. You can specify if you want a rule to apply to all or selected terms templates.

Contract Expert Rule Execution During Contract Authoring

Depending on their type, all active rules for the contract terms template used in a contract are evaluated automatically. The evaluation happens during contract terms authoring or when you run Contract Expert in the Contract Terms tab.

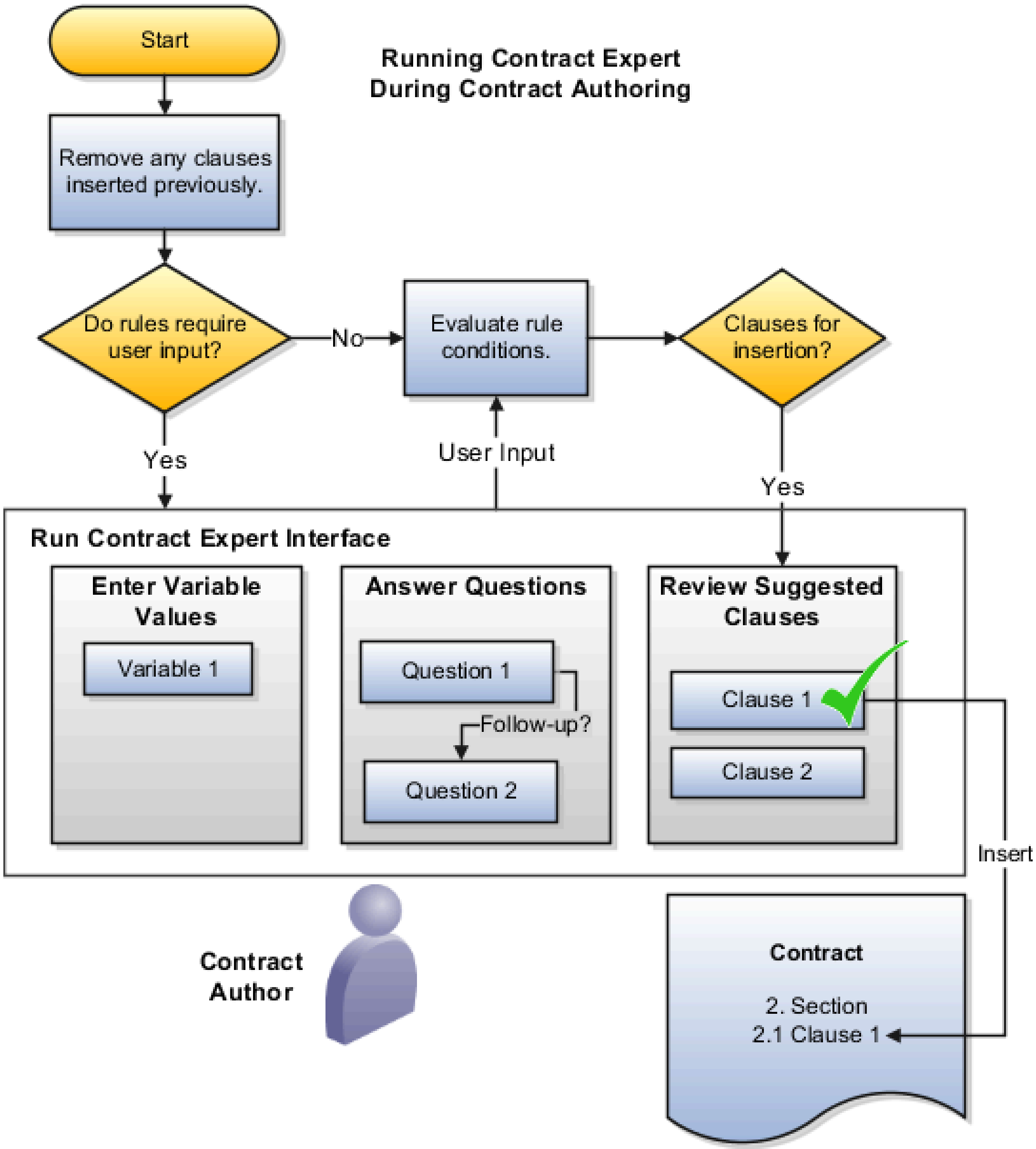
If rule conditions require user input, Contract Expert prompts you to enter variable values and answer questions. Answers to questions can trigger follow-up questions. In this figure, the answer to Question 1 triggered the follow-up Question 2.

Contract Expert displays any recommended clauses for your review. You can choose which of the recommended clauses to insert into the contract as long as you have sufficient privileges.

Contract Expert inserts the clauses in the contract terms section specified during clause setup in the Contract Terms Library. If no section is specified in the clause, the application uses the default section specified in the contract terms template. Contract Expert automatically inserts the default section if it doesn't already exist in the contract. The clauses recommended for insertion might also be placed in their predetermined locations, if you defined these locations in the terms template associated with the contract.

On subsequent runs, Contract Expert first removes any clauses that it inserted into the contract in earlier runs, including clauses that have been moved or have been made nonstandard.

This figure illustrates the behavior of Contract Expert during contract authoring:



If you don't make all the required entries or forget to run Contract Expert altogether, expect to receive warnings when you validate the contract terms or when you review the contract deviations report.

Related Topics

- Examples of Contract Expert Clause Selection Rules and Follow-up Questions
- How Contract Expert Rules Work

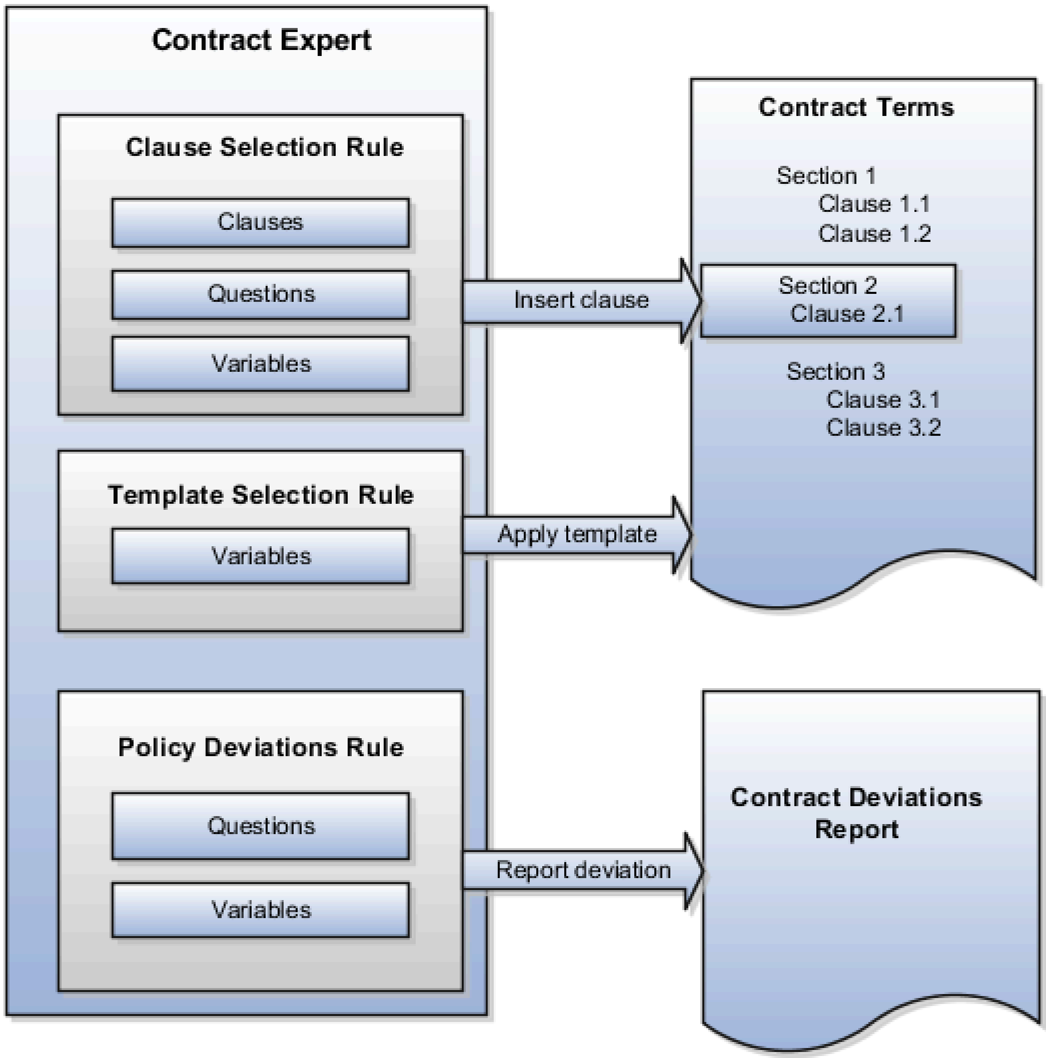
How Contract Expert Rules Work

You can set up Contract Expert rules to apply contract terms templates automatically to contracts, to suggest additional clauses for insertion during contract terms authoring, and to identify any contract deviations from company policy.

Each rule include conditions that must be met and the rule results. You can base rule conditions on:

- The presence of another clause already in the contract
- The value of a system variable or a user variable
- Questions that the contract author must answer

Different Contract Expert rule types support different condition types, as illustrated in the following figure. Clause selection rules, which can default individual clauses and sections into a contract, can be based on clauses, questions, and variables. Template selection rules, which identify the default contract terms template for the contract, can be based on variables only. Policy deviation rules, which identify contract deviations from company policies, use questions and variables only. The following figure illustrates the Clause Selection, Template Selection, and Policy Deviation Contract



Expert rules.

Key rule properties include:

- All rules can use multiple conditions linked together with either the AND or OR logical operators.
- All rules: clause selection, policy deviation, or template selection can't start with a numeric prefix.
- The values of non-numeric conditions are supplied by value sets.
- The values for numeric conditions are supplied by constants.

- Rule types that allow the inclusion of questions can trigger follow-up questions, letting you chain rules together.
- Rules are restricted to the specific business unit and the contract intent where you create them.
- Rules don't get copied when you copy a global contract terms template to another business unit.
- Conditions support both logical and numeric operators:
  - IS
  - IS NOT
  - IN (allows the selection of multiple values)
  - NOT IN (allows the selection of multiple values)
  - >=: (greater than or equal to)
  - <=: (less than or equal to)
  - =: (equal to)
  - > (greater than)
  - < (less than)

Clause Selection Rules

Clause selection rules permit you to insert one or more clauses and sections into a contract.

The following table describes the rule properties.

Rule Property	Details
Rule outcomes	The rule can: • Recommend one or more clauses for insertion into the contract Contract authors can review the Contract Expert recommendations before the clauses get inserted into the contract. By setting the **Expert Clauses Mandatory** option when creating a contract terms template, you can specify if you want the clause insertion to be mandatory or if the authors can ignore the recommendations. If you make the insertion mandatory, then only contract authors with the Override Contract Terms and Conditions Controls privilege, a special privilege that allows deleting mandatory clauses from the contract, can reject the recommendations. Similarly, if the recommended clauses are standard clauses, then the authors must have the Author Additional Standard Contract Terms and Conditions privilege to reject the recommendations. This privilege allows the deletion of standard clauses from the contract. If you marked recommended clauses as conditional and specified the location of these clauses in the terms template, then Contract Expert inserts the clause in the contract in the location that you specified. If the location of an Expert suggested clause isn't specified in the terms template, Contract Expert inserts each clause in the section specified as the default for the clause in the Contract Terms Library. If no default section is specified in the clause, then Contract Expert inserts the clause into the default section specified in the contract terms template. Contract Expert automatically inserts the default section if it doesn't already exist in the contract. • Ask follow-up questions You can ask follow-up questions by adding them in the Additional Questions region of the Results tab. Any additional question that you add must be part of another rule. Adding the follow-up question chains the rules together.

Rule Property	Details
When the rule is evaluated	The rule is evaluated every time that a user runs Contract Expert. Users receive a warning message during contract validation if they fail to run Contract Expert.
Conditions	Conditions can be based on: • clauses • questions • variables You can use both predefined system variables and user variables. Both types of user variables are supported: those that require entry by contract authors and those where the values are supplied by a Java procedure.
Where it applies	The rule applies only within the business unit and for the intent that you specify. You can have the rule apply to one of the following: • Specific contract terms templates • All contract terms templates for the business unit

Contract Terms Template Selection Rules

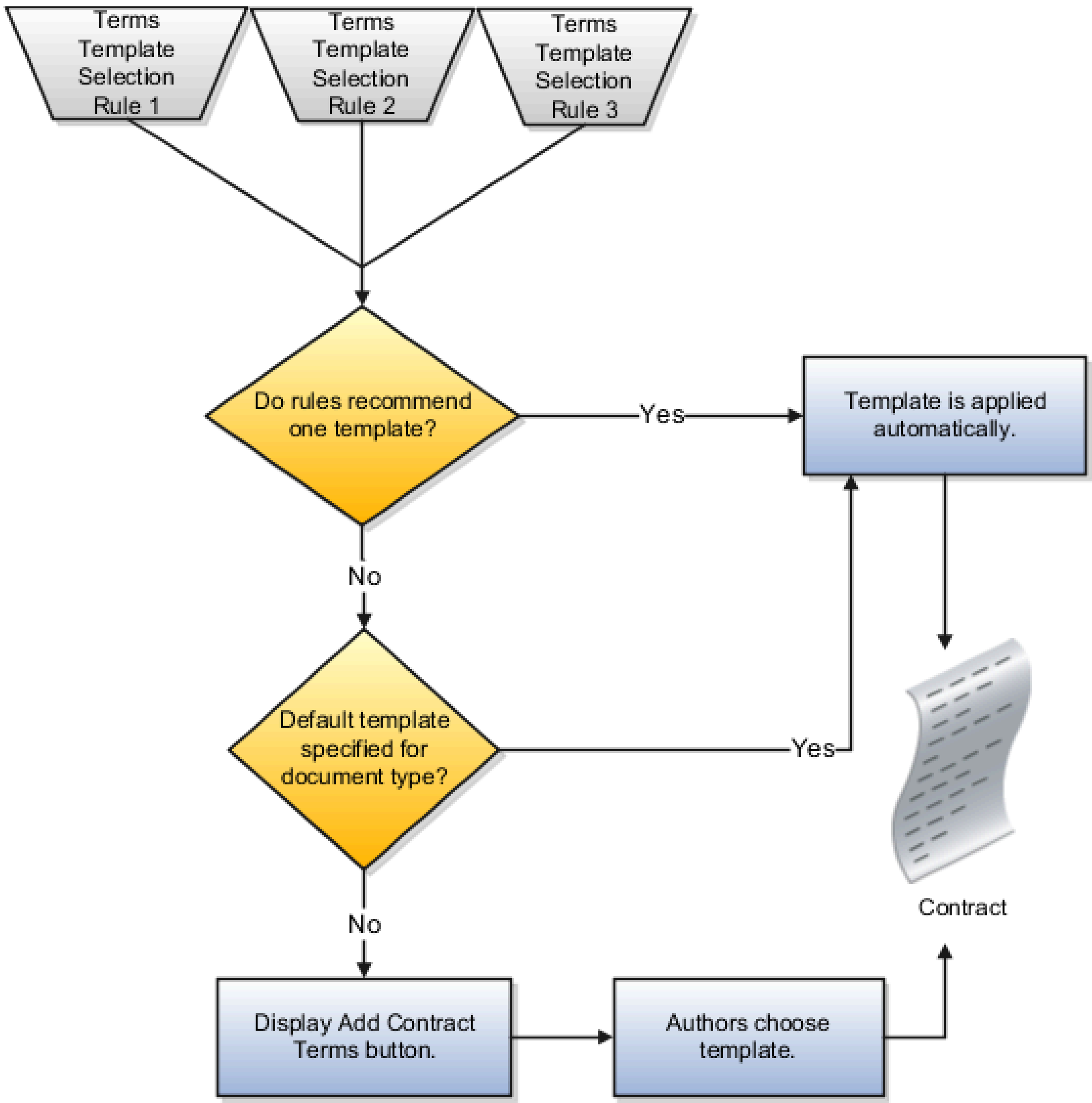
Contract terms template selection rules let you to automatically apply a contract terms template to a contract.

The following table describes the rule properties.

Rule Property	Details
Rule outcomes	The application automatically applies a contract terms template to a contract. Or, if the author removed the contract terms using the Actions menu, the template displays the template name as the default when applying a new template.
When the rule is evaluated	The application evaluates the rule whenever the author navigates to the Contract Terms tab as long as no contract terms template is applied. If a contract terms template is applied to the contract, the template selection rules aren't executed again, even if changes to the contract would result in a different rule outcome. The rule is also evaluated to determine if the contract contains the recommended template whenever the contract author: • Runs the clause deviations report • Validates the contract terms or the contract In both cases, the rule generates a warning if the author applied a different template from that recommended by the rule.
Conditions	Variables only You can use predefined system variables and those user-defined variables where the values are supplied by a Java procedure.
Where it applies	The rule applies only within the business unit and for the intent specified in the rule.

Rule Property	Details

Contract Expert doesn't apply a contract terms template if the contract terms template default rules you set up recommend multiple terms templates for a single contract. Instead, Contract Expert applies the contract terms template specified as the default for the business document type during contract terms template setup. If no document type default is specified, then the application displays the Add Contract Terms button and permits authors to select a template of their own choice. The choices are restricted to the templates specified for the contract type.The following figure describes choosing a contract terms template for application to a contract.



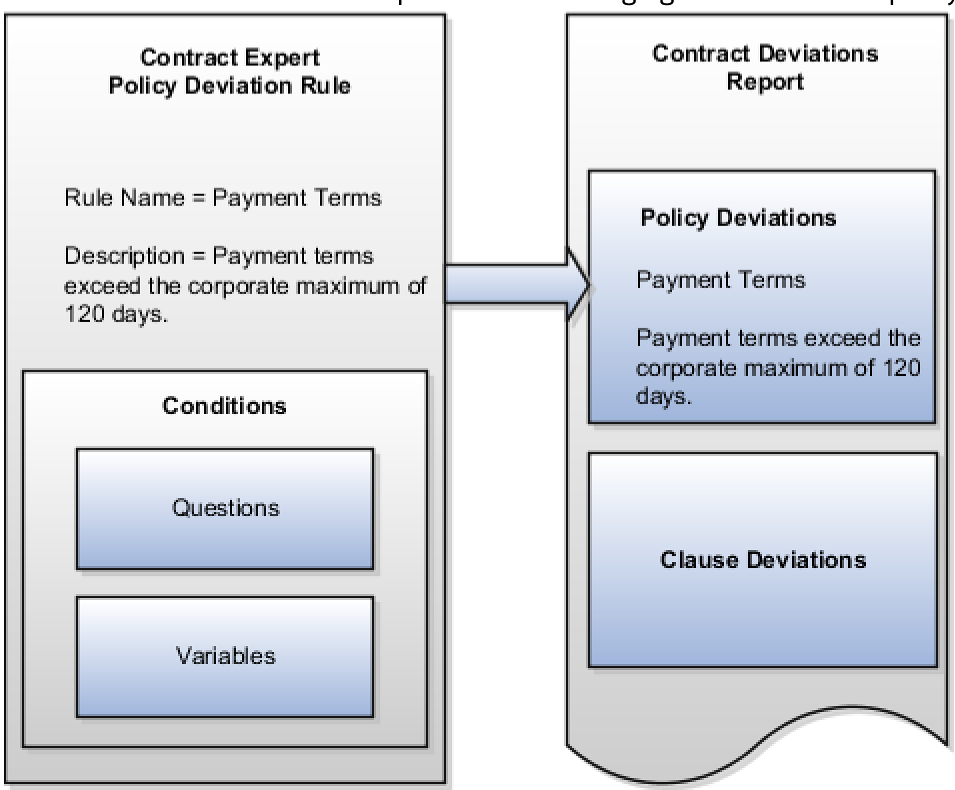
Policy Deviation Rules

Policy deviation rules identify deviations from company policies on the contract deviations report. This report is run by the contract author before submitting a contract for approval.

The following table lists the rule properties.

Rule Property	Details
Rule results	The rule displays a deviation in the contract deviations report. The rule name becomes the deviation.
When the rule is evaluated	The rule is evaluated whenever the user: • Runs the contract deviations report • Validates the contract terms or the contract
Conditions	Conditions can be based on: • Questions • Variables Both predefined system variables and those user-defined variables where the values are supplied by a Java procedure.
Where it applies	The rule applies only for the contract terms templates within the business unit and for the intent that you specify.

You can build rule conditions out of both questions and variables. In the contract deviation report, your entry in the Rule Name field becomes the deviation name and your entry in the rule Description field becomes the deviation description. The following figure illustrates the policy deviation rule setup.



Policy deviation rules list policy deviations in the contract deviations report, along with any clause deviations that are identified automatically by the application. Contract authors can run the report before submitting the contract for approval and enter comments to explain the deviation to the approver. The report is rerun automatically when the author submits the contract for approval and a copy of the report is attached to the approval notification.

Activating and Validating Rules

After you set up a rule, you must activate it using the Activate Rule action. Rules don't require approval before activation, but the contract terms templates that they apply to do.

> **Note:** To activate a rule, you must assign it to at least one contract terms template. The template doesn't have to be approved at the time that you make the assignment, but it must be approved before the rule can be used.

Activating a rule triggers an automatic validation process. You must correct all errors before the rule gets activated.

Related Topics

- Examples of Contract Expert Clause Selection Rules and Follow-up Questions
- Contract Expert Rule Statuses and Available Actions
- How Contract Expert Works
- How does Contract Expert identify where to insert clauses into contracts?
- How can I predefine locations of Contract Expert clauses in the contract?

Contract Expert Rule Statuses and Available Actions

Statuses track the life cycle of a Contract Expert rule from creation through activation and revisions as well as restrict available actions.

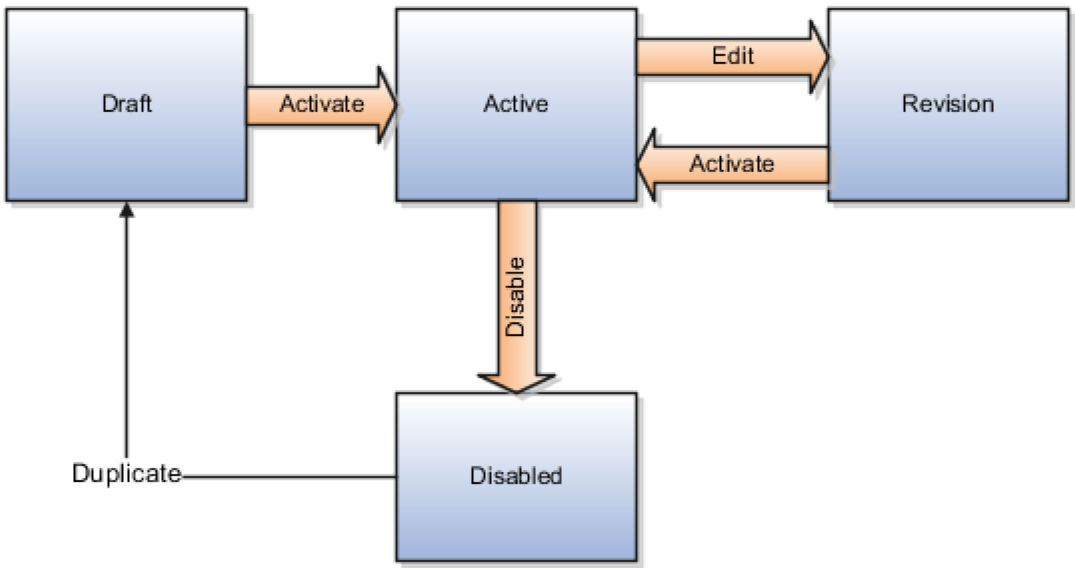
Contract Expert Statuses and Available Actions

This table describes available rule statuses and lists the permitted actions for each.

Status	Description	Available Actions
Draft	When you first create a rule, it remains in the Draft status until you activate it and it passes all the validation checks without error.	• Activate • Edit • Delete • Duplicate
Active	The rule was activated and passed validation.	• Edit You can edit an Active rule, to create a new version. This version remains in the Revision status until you activate it and it passes all the validation checks. Until it does, the old version remains active. Once the new version is in the Active status, it automatically replaces the old version. • Disable • Duplicate

Status	Description	Available Actions
Revision	The status of an active rule that was edited. The new version of the rule remains in this status until it passes validation and become active.	• Activate • Edit • Delete • Duplicate • Disable
Disabled	The rule was disabled using the Disable action.	Duplicate

You can activate a draft rule. When a rule is active, then you can either edit it or disable it. When you edit a rule, the application creates a revision of the active rule. When you disable a rule, then it's status is changed to disabled. This diagram illustrates the rule statuses and main actions.



About Contract Expert Question Setup

You can set up Contract Expert questions in the Contract Terms Library to solicit contract author entries during contract authoring. Contract Expert presents the questions to authors when they are part of a Contract Expert rule.

The questions you create are restricted to one intent and their names must be unique within that intent. Questions can be reused across all business units.

Question Response Types

Question responses can be one of the following:

- *Yes or no*
  These questions appear to contract authors with a choice list with two values: Yes and No. This question type supplies the choice list automatically without additional setup.
- *Numeric*

Contract authors enter responses to numeric questions directly using the keyboard.

- *Selection from a list of values*

  For questions that require users to make a selection from a list of values, you must set up a value set with the **Char** format type and one of the following validation types: **Independent**, **Translatable Independent**, or **Table**.

> **Note:** Contract Expert does not permit you to provide default responses to user questions. However, the application sets numeric questions without a user response to 0.

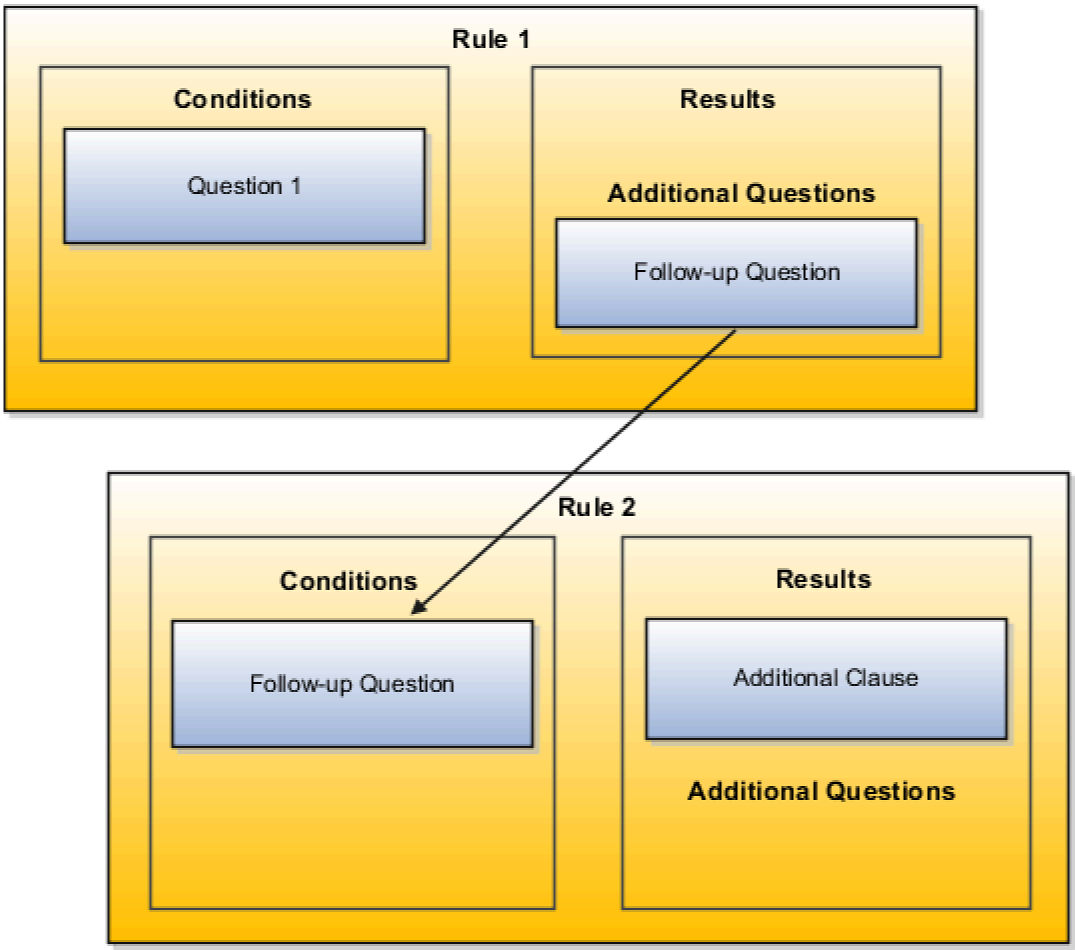
Related Topics

- How Contract Expert Rules Work
- Examples of Contract Expert Clause Selection Rules and Follow-up Questions

How Additional Clauses are Inserted Based on Follow-up Questions

You can ask follow-up questions and insert additional clauses into the contract terms based on the answers that the contract author gives.

For example, you can create a couple of rules. The result of the first rule can trigger a follow-up question in the second rule. The following figure illustrates how you can ask a follow-up question using the follow-up question to link two rules.



Ask Follow-Up Questions

To ask follow-up questions:

1. Include the follow-up question as an additional question on the Results tab of a rule.

   In this example, contract authors get the follow-up question if they provide an answer that satisfies the condition with Question 1 (the only condition in Rule 1).
2. Create a second rule with the follow-up question in a condition.

   In this example, the application inserts the additional clause if the contract author satisfies the condition based on the Follow-up Question (the only condition in Rule 2).

Related Topics

- Examples of Contract Expert Clause Selection Rules and Follow-up Questions
- How Contract Expert Rules Work

Examples of Contract Expert Constants

Contract Expert constants supply numeric values to numeric conditions in Contract Expert rules. The same constant can supply the value in multiple rules. Constants are specific to one intent, but can be used in all business units.

Scenario

For example, to default a payment terms clause when the contract amount is greater than $1 million, you create a Contract Expert rule with the condition: Contract Amount > 1,000,000.

Instead of entering the number directly into the condition, you create the constant Contract Amount Threshold and set its value to 1,000,000. The condition in your rule becomes: Contract Amount > Contract Amount Threshold.

You can use this same constant in multiple conditions. This way, if the threshold is later increased later to $2 million, you need only to update the constant instead of every rule that uses the condition.

Examples of Contract Expert Clause Selection Rules and Follow-up Questions

Two examples illustrate how you can set up a Contract Expert clause selection rule to insert additional clauses and sections into a contract and how you can set up rules to ask follow-up questions.

Scenario

Suppose, that you want to add two additional insurance clauses under the section Additional Insurance when a shipment of hazardous materials is to be delivered within 30 days. You can handle this scenario by setting up one clause selection rule with two conditions:

- Condition 1: Delivery < 30

  This condition will be evaluated when contract authors enter the delivery period by updating a user variable when they run Contract Expert.
- Condition 2: Hazardous Materials = Yes

  This condition will be evaluated when contract authors answer the question "Is hazardous material involved?" by selecting Yes or No.

Here is how you set up the rule:

1. Ensure that both of the clauses that you want to add are created in the Contract Terms Library with the default section Additional Insurance. This guarantees that both appear in the contract under that section. If the section is not already in the contract, Contract Expert inserts it automatically.

   > **Note:** If you do not set up the clauses with a default section, Contract Expert inserts the clauses in the default section specified in the contract terms template.

2. For condition 1, you must create a constant called Shipping and set its value to 30.

   This is because numeric values for conditions must be entered using constants rather than directly.
3. Set up a question that requires a yes or no answer for the prompt "Is hazardous material involved?" for Condition 2.
4. Create the clauses that you want to add to the contract in the Contract Terms Library.

   > **Note:** The clauses must be approved before the rule can be used.

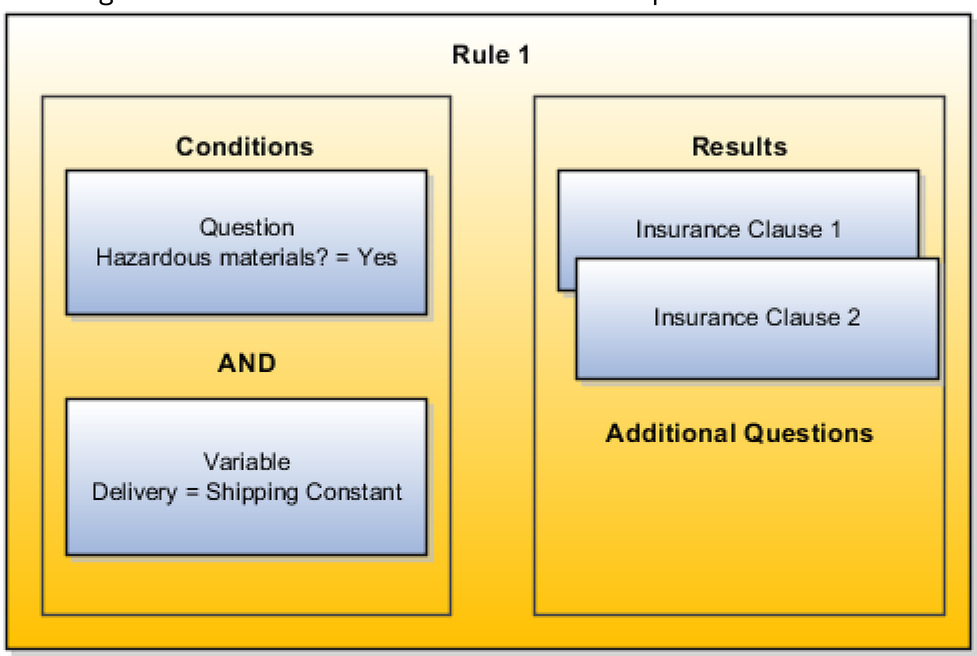
5. Create the Contract Expert rule with the two conditions.

   Selecting the Match All option means both conditions must be evaluated before the rule is true.
6. Associate the rule with the contract terms templates where you want the rule to apply.

   You can assign the rule to individual templates or all templates with the same intent and within the same business unit.
7. Activate the rule by clicking the **Activate** button while editing the rule.

The rule is evaluated for only those contracts that use templates that have been assigned to the rule. When both conditions in the rule are true, Contract Expert will default the two insurance clauses.

This diagram illustrates the clause selection rule example.

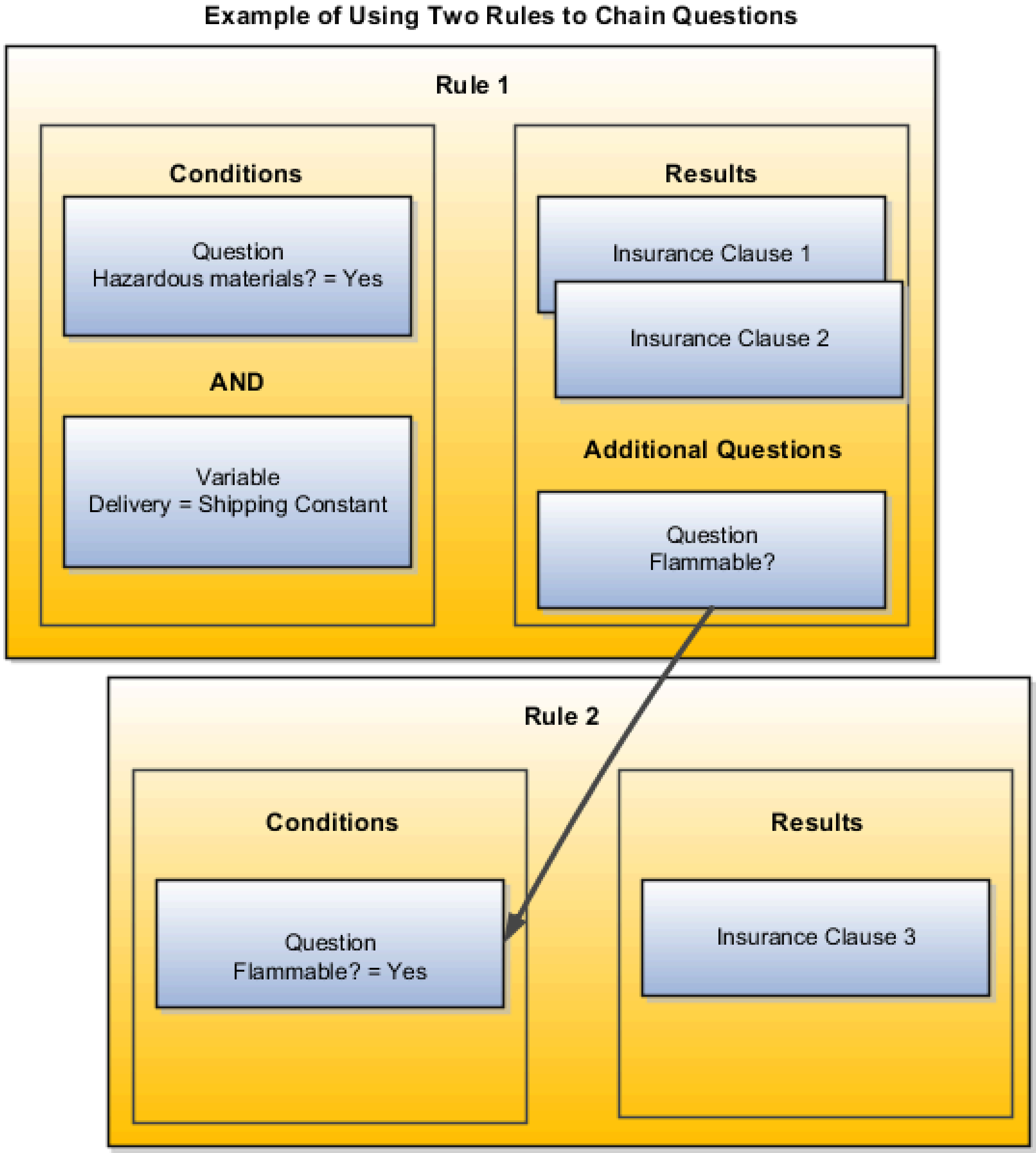


Scenario

Now suppose you want to add an additional clause to the previous example if the hazardous material in the shipment is flammable. To do this, you create:

- The follow-up question:
- A rule where the follow-up question is a condition.
- You link the rules together by entering the follow-up question the Additional Questions region on the Results tab of the first rule.

The following diagram illustrates the setup:



Here are the steps in detail:

1. Set up the follow-up question "Is the material flammable?" with yes and no answers.
2. Create the additional insurance clause that you want to add to the contract in the Contract Terms Library.
3. Create a new Contract Expert rule, Rule 2, with the follow-up question as the condition. The rule will be true if the author answers yes.
4. Associate Rule 2 with the same contract terms templates where Rule 1 applies.
5. Edit Rule 1 to add the newly created question in the Additional Questions region on the Results tab.
6. Activate both rules using the Actions menu.

Contract authors see the question from Rule 2 in Contract Expert only if Rule 1 is true. Rule 2 inserts the additional clause in the contract if authors answer yes.

Related Topics

- How Contract Expert Rules Work

Contract Expert Setup FAQs

What are Contract Expert questions?

Questions contract authors answer when running Contract Expert while authoring the contract. The answers can trigger Contract Expert to suggest additional clauses or ask follow-up questions, depending on how you set up the Contract Expert rules.

Related Topics

- How Contract Expert Rules Work

What does it mean to make clauses suggested by Contract Expert mandatory in a contract terms template?

When contract authors run Contract Expert on a contract, Contract Expert displays a list of any clauses that it recommends for insertion.

Contract authors can review the Contract Expert recommendations before the clauses get inserted into the contract. By setting the **Expert Clauses Mandatory** option when creating a contract terms template, you can specify if you want the clause insertion to be mandatory or if the authors can ignore the recommendations.

If you make the insertion mandatory, then only contract authors with the Override Contract Terms and Conditions Controls privilege, a special privilege that allows deleting mandatory clauses from the contract, can reject the recommendations. Similarly, if the recommended clauses are standard clauses, then the authors must have the Author Additional Standard Contract Terms and Conditions privilege to reject the recommendations. This privilege allows the deletion of standard clauses from the contract.

Related Topics

- How Contract Expert Works
- How Contract Expert Rules Work

What happens if the clause to be inserted by the Contract Expert rule is versioned or removed from use?

If the current clause version isn't approved or removed from use, Contract Expert automatically uses the previous approved version. If there's no approved version, the author of the contract gets an error when validating the contract.

What happens to existing contracts if I disable a Contract Expert rule?

As a contract author, whenever you run the Contract Expert, the change applies to all new and existing contracts. But, approved contracts remain intact. If you disable a clause selection rule, Contract Expert removes the suggested clause the next time you run it.

If you disable a contract terms template selection rule, it doesn't make changes to the templates that are already applied to contracts, but indicates the change during contract validation and on the contract deviations report.

What validations are performed when I activate a Contract Expert rule?

The application automatically validates a Contract Expert rule when you attempt to activate it. You must correct any errors before the rule can become active.

The application performs the following checks:

- Circular references between questions used in the rule
- The presence of clauses that are in the Draft, Expired, or On Hold status
- Invalid or absent Java procedures associated with a variable used in the rule
- Disabled questions
- Invalid SQL in the value set associated to a question or variable used in the rule
- Invalid value in a value set associated to a question or variable used in the rule
- Other invalid rules associated to the contract terms template
- Question or variable using a deleted value set
- Expired or on-hold templates that are a part of template selection rules

Related Topics

- How Contract Expert Rules Work

What's a system variable?

A predefined variable that gets its value from an attribute of the contract or other document.

For buy-intent contracts, system variables include payment terms, the purchase order number, and the purchase order amount. For sales-intent contracts, they include the customer name, the ship-to address, and the payment terms. System variables are supplied with your application and cannot be modified or deleted.

When does a Contract Expert rule become effective?

A Contract Expert rule takes effect after you activate it and associate it to a contract terms template.

Why are some conditions unavailable for creating my Contract Expert rule?

Rule conditions are restricted by rule type. For example, rules for selecting default contract terms templates must be based on variables. However, clause selection rules can be based on variables, questions, or clauses.

Related Topics

- How Contract Expert Rules Work

Why can't I assign a Contract Expert rule to a contract terms template?

For you to assign a Contract Expert rule to a contract terms template, the template must be in a Draft or Approved status; it must be enabled for Contract Expert; and it must belong to the same intent as the rule.

Why doesn't a Contract Expert question display during authoring?

A question does not display during contract terms authoring if the rule is not activated or if the rule is not assigned to an active contract terms template.

If you chain contract terms rules to ask follow-up questions, then the display also depends on the answer the contract author gives to the previous question.

Related Topics

- About Contract Expert Question Setup

Are Contract Expert rules affected by the relationships between clauses?

The alternate and incompatible relationships you specify for clauses do not affect the execution or setup of Contract Expert rules. However, the presence of more than one incompatible and alternate clause show up as warnings when the contract author validates the contract.

How are Contract Expert questions presented during contract authoring?

Contract authors see all of the activated Contract Expert questions that apply to a specific contract terms template on a single page when they run Contract Expert during authoring.

Use the Reorder button on the View Question Sequence page to specify the order in which the questions are displayed. If you chained rules to ask additional follow-up questions, then each follow-up question appears underneath the previous question after the contract author answers it.

Related Topics

- About Contract Expert Question Setup
- Examples of Contract Expert Clause Selection Rules and Follow-up Questions

How can I find all the Contract Expert rules that use a question?

Use the Search Rule page to find all the Contract Expert rules that contain a particular question.

How can I find out which questions contract authors see when they run Contract Expert?

The Rules tab on the contract terms template edit page displays all of the possible questions contract authors may be required to answer when they run Contract Expert and in the order they are asked.

A contract author may see only a subset of the questions, depending on what variable values they enter and how they answer the Contract Expert questions. You can view and change the order of questions from the Terms Template search page by selecting the Manage Question Sequence action.

Set Up Variables

Variables

You can use variables in the Contract Terms Library to represent information within individual clauses and for use within Contract Expert rule conditions.

Your application comes with predefined variables, called system variables. You can create additional variables, called user variables, with or without programming.

> **Note:** While creating variables, you must use only single space between the variables. Also, don't use any characters or symbols that are part of HTML syntax (such as double quotes, less than (<), greater than (>), ellipsis) in the Variable values.

Predefined System Variables

Your application comes with predefined system variables that you cannot modify. These include:

- System variables

  These variables make it possible for you to use information that is entered in integrated procurement, sales, and projects applications. For example, you can use the purchase order amount from procurement contracts or the payment terms from sales in Contract Expert rules that insert additional clauses to a contract as necessary.
- Deliverable variables

  These variables permit you to list the titles of contract terms deliverables within a clause in the contract terms. For instance, if a supplier must deliver a monthly quality report as part of the contract terms, you can create a deliverable to ensure compliance. But creating the deliverable does not automatically print that deliverable in the contract terms. To ensure that the deliverable name is printed, you must include a clause with the appropriate deliverable variable inserted.
- Table variables

  Table variables make it possible for you to print in a contract all of the values in a list such as a price list. Table variables are available only in sales-intent contracts.

To obtain a list of the predefined variables and the information that they represent, navigate to the Search Variables page and filter your search on the Variable type. Select the Document Association tab to view the application and document where the variable information originates. Alternately, you can search for variables by document type.

User Variables

You can create the following types of user variables:

- Manual
- Java string
- Java table

- Descriptive flexfield
- Object
- Child object

Related Topics

- How User Variables and Contract Expert Rules Uses Value Sets
- User Variables
- Examples of Creating Java Methods for User Variables

Predefined System Variables

This section provides more information about how you can define and use the predefined system variables.

Define employee data based variables

The application enables you to add the employee-based system variables and view the value for these variables in your contract. These variables are derived from the Human Capital Management cloud services. These employee-based system variables apply only to contracts that use Employee as the seller role. The application retrieves the value for these variables when it identifies employee as the primary party on the contract.

> **Note:** The following users can see the document attached to a contract and the resolved variable values associated with the contract:
> - User with the view contract privilege
> - Contract approvers when a contract document is shared along with the approval notification. Approvers are securely set up as part of the approval hierarchy. It's not mandatory to set approvers as the users of Enterprise Contracts. Only required users with the approval to see potentially sensitive contractual information should be added in the approval hierarchy.

If required, you can separately secure access to contract documents using data security policies to protect personally identifiable information (PII) associated with the employee-based variables. The data or information that's used to uniquely identify a contact, or locate a person is called PII, such as addresses, drivers Licenses, phone numbers, and so on. This information is considered confidential and sensitive, and must be protected to prevent unauthorized use of personal information.

For more information about managing PII data, or about configuring access to PII data, see the guide Implementing Customer Data Management.

Only users assigned the appropriate privileges in the HCM cloud services can access data for the employee and retrieve the value for the employee variables. Assign the Human Capital Management Integration Specialist and Human Resource Specialist-View All roles to the user who needs to see this data.

User Variables

The following sections explain how to create and user different types of user variables used in contract clauses.

Creating Java Variables

If you are creating user variables in a non-Cloud environment, then you can use Java variables. Java string and Java table variables require you to create Java methods to capture attribute values. Sample code is provided in the topic Creating Java Methods for User Variables: Examples. While Java string and table variables require programming knowledge, you can create manual user variables without programming. To do so, you:

1. Create a value set starting from the Setup and Maintenance work area to validate the value entry for the variable.

   A value set can either specify the list of values that users must choose from or merely specify the variable format and length. Value sets are common application components described in the Oracle Fusion Applications Functional Setup Manager Developer's Guide.
2. Navigate to the Create Variable page.
3. Enter a name for the variable. It can be any text that describes the purpose of the variable but it should not have the prefix `OKC$` that is used for system variables.
4. Select the variable intent.

   Variables can be created for either buy (procurement) or sell contracts.
5. Select the value set, and enter the name and the description that will help users identify the variable when they are inserting into a clause or entering its value in Contract Expert.
6. If you are creating a variable for buy intent, then you can make the variable updatable by vendors in the Oracle Fusion Sourcing application by selecting the Updatable by External Parties option.

Creating Descriptive Flexfield Variables

You can use the variable source Descriptive flexfield to capture the values you enter in the Contract Headers flexfield and embed those values into the clauses that make up the terms and conditions of the contract.

Use the Manage Contract Descriptive Flexfields task to define the global segments that you need to reference in your contract variable. This task in the Setup and Maintenance work area is part of the Enterprise Contracts offering in the Enterprise Contracts Base functional area.

Use the following steps to create Descriptive flexfield variables:

1. Navigate to the Terms Library and select the Create Variable task.
2. Enter the name, intent, and description for the new variable.
3. Select the Descriptive flexfield source and select the global segment on which the variable is based.
4. Assign the following job roles to users who want to use the terms library to create variables and author contracts:
   - Customer Contract Manager - OKC_CUSTOMER_CONTRACT_MANAGER_JOB
   - Business Practices Director - OKC_BUSINESS_PRACTICES_DIRECTOR_JOB

Descriptive flexfield variables have the following limitations:

- You can use only global segments in contract variables.

- In Contract Expert rules, you cannot use segments that use a value set with a Number or Character data type and use the Independent validation type.
- The following data and display types are not supported:
  - Drop-down List, Hidden, Date/time are not supported for any data types.
  - No display types are supported for the Date Time data type.

Creating Object Variables

You can use the variable source, Object or Child object, to create variables that reference fields associated to the Sales Account and Opportunity objects in Application Composer. You can reference either standard child objects, or user-specific child objects that you define for the Sales Account or Opportunity objects.

To define Object or Child object variables, you should ensure the following:

- Using Application Composer, define the fields you want to use in your variables on the Sales Account or Opportunity objects. You can use standard fields or set up user-specific fields.
- Expose the new fields you created on the Sales Account or Opportunity pages.
- If these changes are defined in a sandbox, they must be published before values can be used in Contract Expert rules or for printing a contract.

Creating Object Variables and Child Object Variables

You start by adding the following duty roles to the user depending on their requirements:

- A user that needs to view or edit contracts that use opportunity variables must be assigned to this duty: Opportunity Administration.
- A user that needs to view or edit contracts that use sales account variables must be assigned to this duty: Sales Party Review.
- A user that needs to use the Terms Library, for example, to create variables or author contracts, must be assigned the following job roles: Customer Contract Manager - OKC_CUSTOMER_CONTRACT_MANAGER_JOB, Business Practices Director - OKC_BUSINESS_PRACTICES_DIRECTOR_JOB.

Use the following steps to create object variables:

1. Navigate to the Terms Library and select the Create Variable task.
2. Enter the name, intent, and description for the new variable.
3. Select the source as Object and select the object name as either Sales Account or Opportunity.
4. Enter the field name. This is the API name assigned to the field in Application Composer.
5. Select the Character, Date, or Number data type.
6. For Character data type, enter the lookup types as follows:
   - For variables of type Fixed Choice List, enter the lookup type assigned to the field in Application Composer.
   - For fields of the check box type, enter a lookup type that has codes defined as True (Yes) and False (No).

Use the following steps to create child object variables:

1. Navigate to the Terms Library.
2. Select the **Create Variable** task.
3. Enter the name, intent, and description for your variable.
4. Select source **Child object**.

5. Select the parent object name, either Sales Account or Opportunity.
6. Obtain the child object name from the Sales Account or Opportunity XSD file. This is the API Name assigned to the child object in Application Composer. The path to the XSD file is of the format `http://server_name:port_number` followed by the following strings:
   - `/crmCommonSalesParties/SalesPartyService?XSD=/oracle/apps/crmCommon/salesParties/salesPartiesService/SalesParty.xsd`
   - `/opptyMgmtOpportunities/OpportunityService?XSD=/oracle/apps/sales/opptyMgmt/opportunities/opportunityService/Opportunity.xsd`
7. Enter the child object name obtained from the XSD file on the Create Variable page.
8. Enter the print layout template name. As for any other table variable that could contain multiple records, you will need to specify which values captured in the child object are to be printed on the contract, and how they should be formatted. This layout will need to be obtained from the RTF file. (See the related "Printing Contract Child Object Variables: Procedure" topic.)

Note: To view or print any user-specific child object values, the user must be assigned a privilege that allows them to view the user-specific child object. For more information refer to the "Managing Security for Custom Objects" topic in the extending sales guide for your cloud service.

Object variables have the following limitations:

- Object variables based on fields of type Dynamic Choice List are not supported.

Initiating Contract Creation from An Opportunity Object

You can add an action to initiate the creation of a contract using the application composer.

You can create the contract from the opportunity object as a draft contract using the following APIs: All subsequent steps of the contract, like approving and signing, will happen through Enterprise Contracts.

- Public static AttributeList createContract(AttributeList contractList) throws JboException
- Public static void deleteContract(String externalSourceKey, String externalReferenceKey, boolean deleteAllVersions) throws JboException

Use the following steps to add an action to the opportunity object to create a contract:

1. Create an object function within the server script for the opportunity object to initiate the createContract API. The sample code and helper methods are given at the end of this section.
2. Ensure that the AttributeList input parameter to call the createContract Java API includes the ExternalSourceKey as OPPORTUNITY and ExternalReferenceKey as Opportunity ID.
3. Create a new action under the Action and Links section of the opportunity object to initiate the object function created in Step 1.
4. Add the action on the opportunity page, for example, Create Contract.
5. If defined in a sandbox, publish these changes once testing is complete.

Note: Instead of invoking the API directly in the first step, you can choose to create a global function and reference from the opportunity object.

You should grant the following privileges to users who use the opportunity object:

- Privilege: OKC_EDIT_CONTRACT_VIA_WEB_SERVICE_PRIV
- Duty: OKC_ALL_BUSINESS_UNITS_CONTRACT_MANAGEMENT_DUTY

Contract creation from opportunity objects has the following limitations:

- The contract created from the opportunity cannot use template selection rules to apply the terms template. The terms template must be the default assigned to the contract type of the contract.
- Application Composer does not support disabling the Create action if a contract is already created for the opportunity object.

Sample code - Object function to create contract:

> **Note:** The values for Business Unit and Contract Type should be replaced with those appropriate to your own instance. Vision Operations and Service Agreement are only examples for illustration purposes.

```
def startDate = new Date();
 def endDate = null;
 def externalSourceKey = 'OPPORTUNITY';
 def businessUnitName = 'Vision Operations';
 def contractTypeName = 'Service Agreement';
 def deleteSuccess = 'Y';
 // Get ContractType Id using ContractType Name
 def contractTypeId =
oracle.apps.partnerMgmt.partnerProgram.util.service.con
tractsCoreTransactionSe
rvice.ContractsCoreTransactionServiceWrapper.getContrac
tTypeIdentifier(adf.sou
rce, contractTypeName );
 // Get businessUnitId Id using Business Unit Name
 def businessUnitId =
oracle.apps.partnerMgmt.partnerProgram.util.service.con
tractsCoreTransactionSe
rvice.ContractsCoreTransactionServiceWrapper.getBusines
sUnitIdentifier(adf.sou
rce, businessUnitName );
// Delete all versions of the Contract using Chr Id and
MajorVersion
 try {

oracle.apps.partnerMgmt.partnerProgram.util.service.con
tractsCoreTransactionSe
rvice.ContractsCoreTransactionServiceWrapper.deleteCont
ract(externalSourceKey,
 OptyId.toString(), true);
 }
 catch (java.lang.Exception e) {
 deleteSuccess = 'N';
 }

 if (deleteSuccess == 'Y') {
 // Create Contract
 oracle.jbo.AttributeList contractHeader = new
oracle.jbo.NameValuePairs();
 // Set Contract Header Attributes
 contractHeader.setAttribute("OrgId",
businessUnitId);
 contractHeader.setAttribute("StartDate", startDate);
 contractHeader.setAttribute("EndDate", endDate);
 contractHeader.setAttribute("ContractTypeId",
contractTypeId);
 contractHeader.setAttribute("CurrencyCode",
CurrencyCode);
 contractHeader.setAttribute("ContractNumber", Name);
 contractHeader.setAttribute("PartyId",
TargetPartyId);
```

```
 contractHeader.setAttribute("ContractOwnerId",
OwnerResourcePartyId);
 contractHeader.setAttribute("WebServiceFlag", "N");

 contractHeader.setAttribute("ExternalSourceKey",
"OPPORTUNITY");
 contractHeader.setAttribute("ExternalReferenceKey",
OptyId);
 // Invoke createContract API to create a contract

oracle.apps.partnerMgmt.partnerProgram.util.service.con
tractsCoreTransactionSe
rvice.ContractsCoreTransactionServiceWrapper.createCont
ract(contractHeader);
 }
 }
.
.
.
Corrected code that should be used:
.
def OrgIdStr="OrgId";
def ContractTypeIdStr='ContractTypeId';
def WebServiceFlagStr='WebServiceFlag';
def ExternalSourceKeyStr='ExternalSourceKey';
def ExternalReferenceKeyStr='ExternalReferenceKey';
def ContractNumberStr='ContractNumber';
def ContractOwnerIdStr='ContractOwnerId';
def startDate = new Date();
def endDate = null;
def externalSourceKey = 'OPPORTUNITY';
def businessUnitName = 'Vision Operations';
def contractTypeName = 'Service Agreement';
def deleteSuccess = 'Y';
// Get ContractType Id using ContractType Name
def contractTypeId =
oracle.apps.partnerMgmt.partnerProgram.util.service.con
tractsCoreTransactionSe
rvice.ContractsCoreTransactionServiceWrapper.getContrac
tTypeIdentifier(adf.sou
rce, contractTypeName );
// Get businessUnitId Id using Business Unit Name
def businessUnitId =
oracle.apps.partnerMgmt.partnerProgram.util.service.con
tractsCoreTransactionSe
rvice.ContractsCoreTransactionServiceWrapper.getBusines
sUnitIdentifier(adf.sou
rce, businessUnitName );
// Delete all versions of the Contract using Chr Id and
MajorVersion
try {
oracle.apps.partnerMgmt.partnerProgram.util.service.con
tractsCoreTransactionSe
rvice.ContractsCoreTransactionServiceWrapper.deleteCont
ract(externalSourceKey,
 OptyId.toString(), true);
}
catch (java.lang.Exception e) {
deleteSuccess = 'N';
}
.
.
if (deleteSuccess == 'Y') {
// Create Contract
oracle.jbo.AttributeList contractHeader = new
oracle.jbo.NameValuePairs();
```

```
// Set Contract Header Attributes
contractHeader.setAttribute(OrgIdStr, businessUnitId);
contractHeader.setAttribute("StartDate", startDate);
contractHeader.setAttribute("EndDate", endDate);
contractHeader.setAttribute(ContractTypeIdStr,
contractTypeId);
contractHeader.setAttribute("CurrencyCode",
CurrencyCode);
contractHeader.setAttribute(ContractNumberStr, Name);
contractHeader.setAttribute("PartyId", TargetPartyId);
contractHeader.setAttribute(ContractOwnerIdStr,
OwnerResourcePartyId);
contractHeader.setAttribute(WebServiceFlagStr, "N");
contractHeader.setAttribute(ExternalSourceKeyStr,
"OPPORTUNITY");
contractHeader.setAttribute(ExternalReferenceKeyStr,
OptyId);
// Invoke createContract API to create a contract
oracle.apps.partnerMgmt.partnerProgram.util.service.con
tractsCoreTransactionSe
rvice.ContractsCoreTransactionServiceWrapper.createCont
ract(contractHeader);
}
```

Use the following helper methods to collect the required information for your implementation:

Method Signature	Description
public static Long getBusinessUnitIdentifier(Object context*, String businessUnitName)	Get business unit ID for a given business unit name.
public static Long getContractTypeIdentifier(Object context*, String contractTypeName) **Note:** Object context is either EntityImpl or ViewRowImpl object.	Get contract type ID for a given contract type name.
public static Long getPersonIdentifier(Object context*, Long resourceId)	Get person ID for a given resource ID.
public static AttributeList createContract(AttributeList contractHeaderList)	Create contract with only header, party and party contact entities.
public static void deleteContract(String externalSourceKey, String externalReferenceKey, boolean deleteAllVersions)	Delete a contract using the external keys.
public static AttributeList findContract(String externalSourceKey, String externalreferenceKey)	Find a contract using the external keys.

Method Signature	Description
public static void deleteContract(Long contractId, Long majorVersion) (Existing PRM API)	Delete a contract using the contract ID and version.

Viewing a Contract from an Opportunity

You can add a link to view the contract from an opportunity using Application Composer. From the opportunity, you can access the contract through URL navigation.

Use the following steps to add an action to the opportunity object to create and view a contract:

1. Create a link in Application Composer on the opportunity object, for example, Preview Contract.
2. Return the URL for navigating to the Contracts AuthoringMainFlow in the groovy script editor for the link.
3. Add the link to the Opportunity page.
4. If defined in a sandbox, publish these changes once testing is complete.

You should grant the following privileges to Opportunity users:

- The entitlement View Opportunity must be assigned the getOpportunity resource.
- Users viewing contracts from an opportunity must be granted permission for viewing the AuthoringMainFlow taskflow:
  - Privilege: OKC_VIEW_CONTRACT_PRIV
  - Duty: OKC_ALL_BUSINESS_UNITS_CONTRACT_INQUIRY_DUTY or OKC_CONTRACT_INQUIRY_DUTY

Creating and viewing a contract from an opportunity has the following limitations and known issues:

- Performing a save or roll back is not recommended in the Application Composer groovy script. The user must click Save on the Opportunity page to persist the user-specific fields, ContractId and MajorVersion, on the Opportunity object.
- Application Composer does not support identity switch when invoking a web service for GPA policy.
- The standard for building the URL for navigating to a taskflow is to call the getURL() API on the oracle.apps.fnd.applcore.patterns.uishell.context.UIShellContext. Application Composer does not support the UIShellContext class on the groovy script.
- fileDownloadActionListener is not supported in Application Composer, so the Preview Contract PDF file cannot be downloaded by clicking a button on the Opportunity page. The alternative approach is to drill down to the Contracts Application using URL navigation.

How User Variables Are Used in a Contract

The user variables that you create can be:

- Inserted in the Contract Terms Library clauses
- Inserted into individual nonstandard clauses created by contract authors during contract authoring.
- Used in Contract Expert rule conditions

When contract authors run Contract Expert during authoring, they are prompted to enter the variable value. The value is automatically substituted in the contract terms and any rules where the variable is used are evaluated.

Descriptive flexfield variables and Application Composer objects have a similar behavior when they are inserted into a clause text and the variable value is embedded. A contract that uses a terms template containing a clause that uses the variable takes the value entered in that field and embed it into the variable value. When previewing or printing the contract, the variables are resolved and the values printed in the document. For variables based on descriptive flexfields, the value is sourced based on the segment name and the attribute number. The ContractSample.xml file exposes the contract header descriptive flexfield so that the values are formatted and used correctly when printed with your own layout templates. For variables based on Application Composer objects, variable resolution uses the opportunity unique ID and the primary party ID to source the opportunity and sales account variable values.

This approach has the following limitation: if you create a contract from the contracts work area, and if the terms template associated with the contract contains variables sourced from the Opportunity object, no variables in the terms template are resolved because the contract was not created from an opportunity and the reference information cannot be retrieved.

Related Topics

- Variables
- Print Contract Child Object Variables
- Examples of Creating Java Methods for User Variables

How User Variables and Contract Expert Rules Uses Value Sets

You can use value sets to determine what entries contract authors can make in user variables and in Contract Expert feature questions.

You can use them either to specify the format an entry must take, or to create a list of values contract authors must choose from.

Value sets are a common application component which you can set up by navigating to the **Setup and Maintenance** work area and searching for the **Manage Contract Terms Value Sets** task. This topic highlights value sets nonprogrammers can set up for Oracle Fusion Enterprise Contracts.

This topic covers:

- Using value sets for creating user variables
- Restrictions for values sets used in Contract Expert feature rules

Using Value Sets for User Variables

You use value sets in the setup of user variables for one of the two following purposes:

- To set up the list of values the contract author must choose from to enter the value
- To specify only the length and format of the information the author must enter manually

Suppose, for example, that you need to create a user variable contract authors can use to enter the name of one of your warehouses into a clause during contract authoring. Without any knowledge of programming, you can:

- Create the list of values the contract author will use to select one of the warehouses.

  You create the values first and then enter them into an independent value set.
- Create a format only value set that restricts the entry to a specified number of characters.

Other value set features are also available for use by nonprogrammers. If you want to restrict the entry of the available warehouses by country, then you can make the above value set dependent on a second value set of countries, for instance.

Restrictions for Using Value Sets in Contract Expert Rules

If you are using the value set for a variable that will be used in Contract Expert rules or to specify the values used in responses to a question used in such a rule, then you only use a subset of the value set features as described in the following table.

Value Set Format Type	Value Set Validation Type	Supported?
Char	Independent	Yes Valid operators are: Is, Is Not, In, and Not In
Char	Table	No
Char	Translatable Independent	Yes Valid operators are: Is, Is Not, In, and Not In
Char	None	No
Char	Pair	No
Char	Special	No
Char	Dependent	No
Number	None	Yes Numeric operators.
Standard Date / Standard Date Time	Not Applicable	No
Date / Date Time	Not Applicable	No

Related Topics

- Variables
- Overview of Value Sets

Variables FAQs

How can I obtain a list of system variables for use in Contract Expert rules?

Use the Search Variables page to create a list of system variables you can use in Contract Expert rules.

You can use the Document Type field to narrow down your search by contract document type, such as a purchase order or Request for Quote.

How do I enable, disable, and delete variables?

The moment you create a variable, it's immediately available for use in clauses and contract expert rules. While there is no activation process or validation for a variable, variable setup is validated when you use variables in rules.

You can delete a variable that's not in use in a clause or a Contract Expert rule. If you don't want to use an already active variable anymore, disable it from the Edit Variable page. This way, you can prevent its future use, without affecting clauses or Contract Expert rules that are already using it.

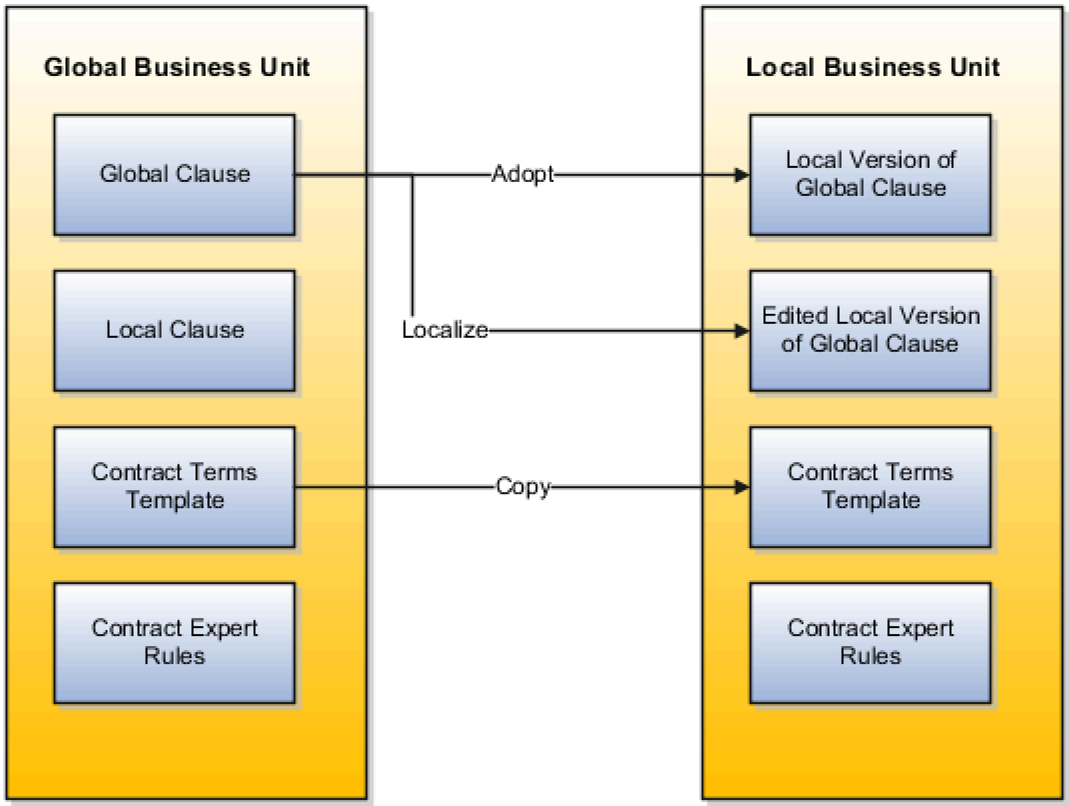
Set Up Adoption of Content Between Libraries

How Content is Adopted from Global to Local Terms Libraries

Much of the content in the Contract Terms Library is available only in the business unit where you create it.

When you designate one of the business units as global during business unit setup, however, the content you create within that business unit can be copied over by other business units, a process known as adoption.

Different kinds of content in the global library can be adopted for use in a local library in different ways, as outlined in the following figure. Clauses designated as global can be adopted by selecting either the Adopt or the Localize action in local business units. Adopt adopts the clause as is. Localize permits the local business unit to edit the clause text. Local clauses are visible only in the business unit where they're created. Contract terms templates designated as global are visible to the local business units and can be copied over using the duplicate command. Contract Expert rules are visible only in the business unit where they're created. Sections, folders, and numbering schemes don't need to be adopted or copied. They're automatically available across all business units.



Adopting Clause Localization

Here's how you adopt and localize clauses:

1. In the global business unit, you create a clause with the **Global** option selected.

   After the global clause is approved, it's automatically listed as available for adoption on the Terms Library Overview pages in the local business units.

2. Contract Terms Library administrators in local business units select **Adopt** or **Localize** from the Actions menu to adopt the clauses.

   Both adopted and localized clauses now exist as independent clauses in the local library and must be approved before they can be used in contracts.

   > **Note:**
   > - During the local business unit setup, you can make clause approvals automatic.
   > - To adopt all approved global clauses for use in a new local business unit, run the process Adopt Global Clauses for a New Business Unit. See the Enterprise Scheduler Processes topic for more information.
   > - When a new version of one of the adopted or localized global clauses is approved in the global business unit, the terms library administrators in the local business units automatically receive a notification.
   > - You specify the administrator to receive the notification during the local business unit setup.
   > - Administrators in the global business unit can create a clause analysis report that details the adoption and localization of the global clauses in the local business units.

Using Copy for Contract Terms Template Adoption

You adopt contract terms templates by copying them:

1. In the global business unit, you create a contract terms template with the **Global** option selected.

   After the global template is approved, it's automatically available for copying in the local business units.
2. Contract Terms Library administrators can search for the global templates available for adoption by selecting the **Global** option in the Search Templates page.
3. Select the **Duplicate** action to copy Global templates.

   > **Tip:** Clauses in the copied templates must be first adopted or localized in the local business unit.

4. The copied contract terms template must be approved in the local business unit before it can be used.

Related Topics
- Clause Versioning

Content Adoption FAQs

How can I find clauses that are available for adoption?

The Clauses for Adoption region in the Terms Library Overview page shows the list of clauses ready for adoption. You can also search for them using the Search Clauses page.

Use the option, Available for Adoption from the Adoption Type drop-down list to make the search.

What happens if the global library publishes a new version of the clause I localized?

The new version of the clause appears as available for adoption in the Terms Library Overview page and in clause searches. The Contract Terms Library administrator gets a notification about it.

Related Topics

- How Content is Adopted from Global to Local Terms Libraries

What's the difference between an adopted clause and a localized clause?

Adopt a global clause to reuse it without change in a local business unit.

Localize a global clause to use it with edits in a local business unit.

All clauses you adopt and localize must be approved within your local business unit before they can be used for contract authoring. You can set up approvals to be automatic for adopted clauses, but not for localized clauses.

Create Folders to Organize Clauses

Folders in Contract Terms Library

You can use folders to organize clauses in the Contract Terms Library.

Folder Properties

Folders have the following properties

- A single folder can contain clauses with both buy and sell intent.
- Folders can be used only in the business unit where you create them.
- Folders cannot be copied to other business units.
- Folder names must be unique within the business unit where you create them.

Set Up Contract Preview and Printing

Print Contract Child Object Variables

You must specify which values captured in the child object are to be printed on the contract, and how they should be formatted. This formatting is specified using the print layout template RTF file.

Specify the Print Layout Template Name and Copy the Template

As for any other table variable that could contain multiple records, you must specify which values captured in the child object are to be printed on the contract, and how they should be formatted. You need BI Administrator privileges to update the layout template to print the child object values.

1. On the Create Variable window enter the Print Layout Name for a child object variable.
2. In the BI catalog, find the existing `ECMTableVarSub.rtf` file in the Enterprise Contracts Transformation Templates folder.
3. Select the English sub template and save the file.

Having made a copy of the sub template, you can edit to add the child object values you would like to print. You can copy an existing child object table to use as a template and paste it into your file. Every table template must have a unique name in the RTF file. The template name entered in the `ECMTableVarSub.rtf` file must exactly match the Print Layout Name you enter when creating the child object variable.

Update the Table Template Properties

You must also update the table template properties to ensure that the template matches the name you provided for the table template. Using Microsoft Word with the Analytics Publisher add-in installed, perform the following steps on the RTF template:

1. Right-click the template name.
2. Navigate to the Analytics Publisher properties.
3. Ensure the template match property is consistent with the table template name.
4. Update the child object column names and attributes in the table template as required.
5. Update the child object attributes in the table template.
6. Update the local name for each child object attribute.

   The name must be the same as the API name of the child object attribute in Application Composer.
7. Once your edits are complete, save your changes.
8. Delete the existing `ECMTableVarSub.rtf` file from the catalog, and choose the create sub template action to upload your updated version.

When the child object variable is used in a clause, the updated sub template is applied to retrieve the attribute values and format them in the print preview.

Related Topics

- Contract Printing and Layout Templates

Set Up Contract Terms Deliverables

Contract Deliverables

Contract deliverables establish and track both contractual and noncontractual commitments that must be honored as part of negotiations and contractual agreements between businesses and suppliers or customers based on contract intent. These deliverables can be used in enterprise contracts, purchasing documents, and in negotiations.

This topic provides an overview of the following:

- How you can use contract deliverables
- Creating and managing contract deliverables
- One-time and repeating deliverables
- Where you can create and use contract deliverables
- The different deliverable types
- Fixed and relative due dates
- Deliverable notifications

Using Contract Deliverables

You can use contract deliverables:

- To communicate with the external party on the contract about commitments.

  To do this, the responsible party on the contract deliverable must update the contract deliverable such that this change is reflected in the Contracts application.
- To submit any required documents

  For an enterprise contract, the external contact that's the responsible party on the deliverable can sign in to the Contracts application to submit a report and change the deliverable status to Complete.
- As a repository of documents submitted in the negotiations

  All documents submitted as attachments are stored in the deliverable history and can be accessed from the deliverable itself.
- To track a contract deliverable from the initial stages of a negotiation to the signed contract

  The application can automatically copy the appropriate deliverables from the negotiation document to the final contract.
- To automatically calculate deliverable due dates

  You can set deliverable due dates relative to contract events, for example, a week before the contract is signed or comes into effect. The application automatically calculates the actual date the deliverable is due. You can also create multiple instances of a deliverable to track repeating deliverables, such as monthly reports.

- To automatically notify interested parties when the deliverable is due or overdue

  You can set up the deliverable to automatically notify parties of an upcoming deadline or when the deliverable is overdue.

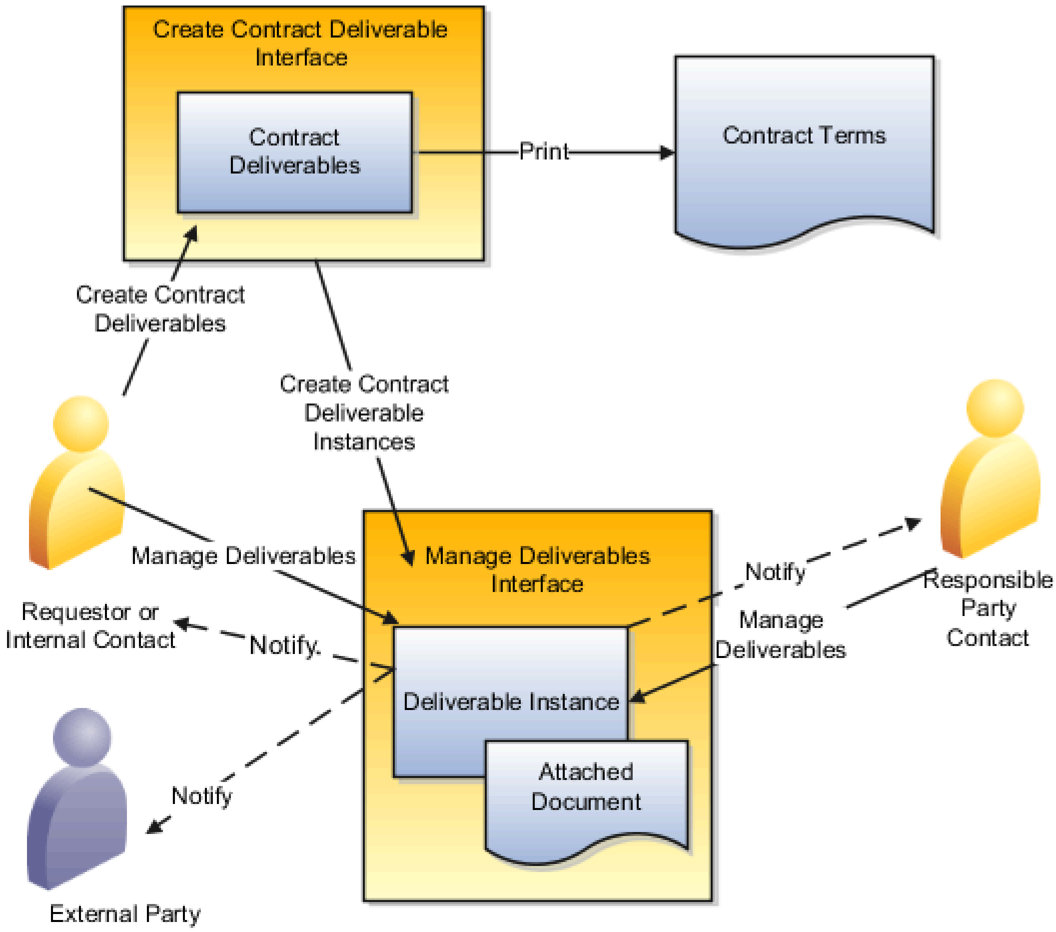
Creating and Managing Contract Deliverables

You create and manage contract deliverables in two separate interfaces. You create the contract deliverables while the contract is in negotiations. You manage the deliverables while the contract is active and in the process of being executed except for internal deliverables with fixed due date that you can manually activate before the contract is active.

Here is how the two interfaces work:

1. You create the deliverable either in a contract terms template that can then be applied to the contract or directly in the contract. For the deliverable, you must enter the responsible party contact, the deliverable deadlines, and the notifications required.
2. If deliverables are present in a contract terms template you apply to a contract, then the deliverables get copied to the contract automatically. The type of deliverables that are applied automatically can vary based on the document type.
3. The application creates deliverable instances with the calculated deadlines based on your setups at the time the contract becomes active. For instance, if you created a deliverable that calls for the submission of a report every week after the contract is signed, then the application creates a separate instance of the deliverable for each week based on the date the contract was signed.
4. You and the responsible party contact use the Manage Deliverables page to access and update each deliverable instance. In the example, each week the deliverable instance that's due that week is updated and any collateral attached.
5. Based on your setups, the parties are automatically notified when the deliverable is due or overdue, or when one of the parties changes its status (dashed lines).
6. The contractual deliverables you set up are listed in the printed contract terms when you add the deliverable variable to a clause.

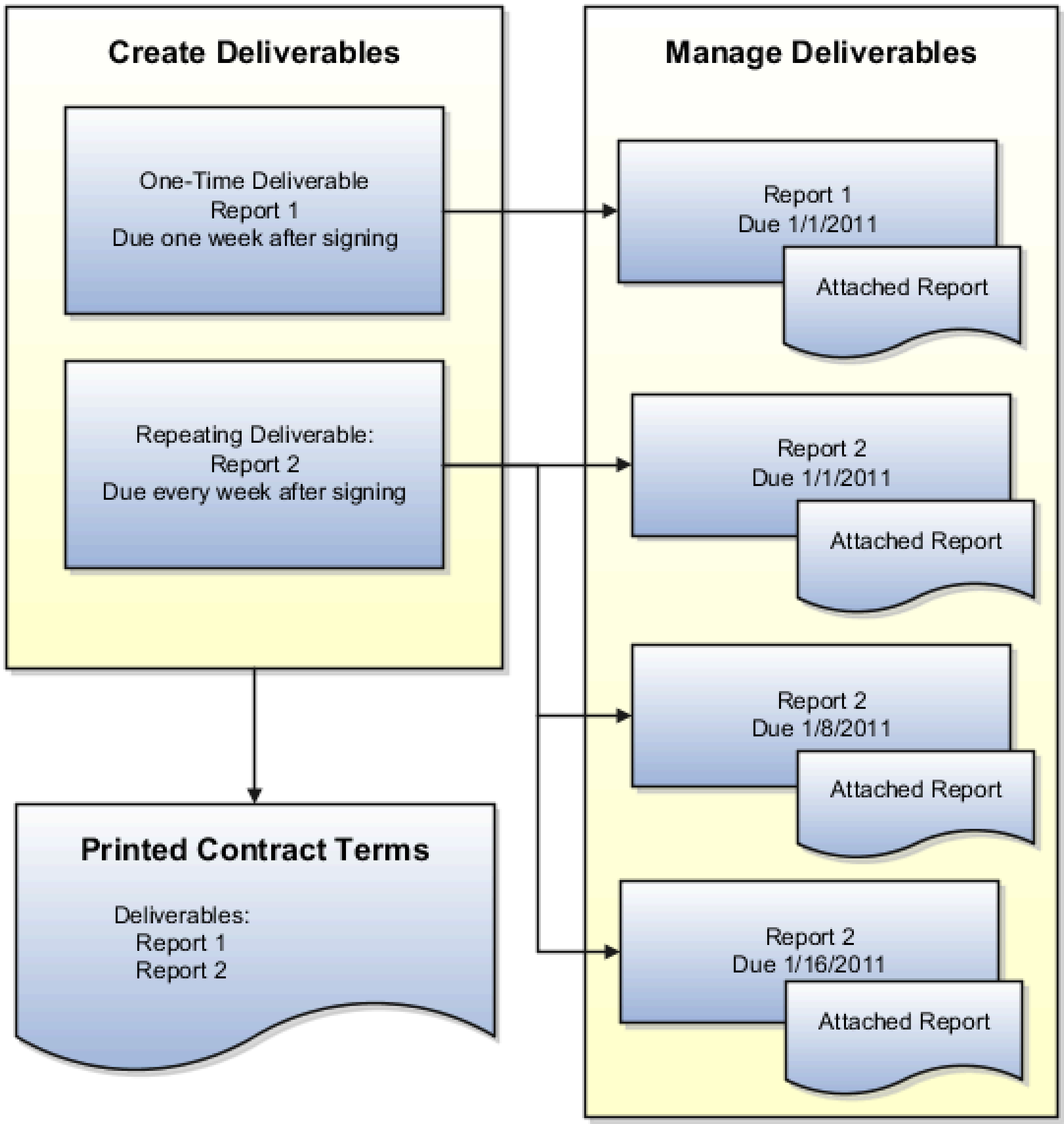
The following figure shows two different interfaces you use to create and manage contract deliverables.



One-Time and Repeating Deliverables

You can create both one-time and repeating deliverables. A one-time deliverable tracks the performance and deadlines for an individual required action that must be performed by one of the parties in the contract. A repeating deliverable tracks a deliverable that must be performed periodically, for instance a progress report that must be submitted every week after the agreement is signed.

The following diagram uses an example to illustrate the two variable types:A one-time deliverable (Report 1) that the responsible party contact must provide that's due one week after the agreement is signed. A repeating deliverable (Report 2) that the responsible party contact must provide weekly after the contract is signed. After the contract is signed and active, the application automatically creates instances of the two deliverables which can be viewed and updated by the responsible party contact using the Manage Deliverables page and the Deliverables bin. The due dates for each deliverable in this example are based on the date the contract was signed. Note that the name of each deliverable instance for a repeating deliverable is the same. The only difference is the due date. The internal contact, requester, or responsible external party contact attaches the report file to the appropriate instance of the deliverable and changes its status to Complete.The following figure illustrates the example of one-time and repeating deliverables.



Where You Can Create and Use Contract Deliverables

You can create contract terms deliverables both in buy-intent and sell-intent contract terms templates, in the Deliverables tab of an enterprise contract, and in Oracle Fusion Purchasing and Oracle Fusion Sourcing documents.

For purchasing, you can create and use deliverables on documents which include:

- Blanket Purchase Agreement
- Contract Purchase Agreement
- Standard Purchase Order

For sourcing, deliverables are copied over from the negotiation document. Sourcing documents include:

- Auction
- Bid

- RFI
- RFI Response
- RFQ
- Sourcing Quote

Contract Deliverable Types

Deliverable types restrict where a deliverable is available and where it can be printed. There are three deliverable types, as mentioned in the following table:

Deliverable Type	Where Available	Description	Where It Prints
Contractual Deliverables	Purchasing and sourcing (except RFI documents) documents and enterprise contracts	Deliverables that must be completed as part of the contract.	Prints in all documents: • As part of the Contract Terms Template preview • Enterprise contracts • Purchasing documents • Sourcing documents
Negotiation Deliverables	Sourcing only	Deliverables that are a part of a negotiation document but are not part of the final contract.	Prints as part of: • As part of the Contract Terms Template preview • Sourcing documents
Internal Deliverables	Purchasing documents and enterprise contracts	Deliverables that are used to track internal schedules and commitments.	Not printed as part of the contract terms.

Note: If you create a deliverable as part of a contract terms template and that deliverable is of a type that isn't compatible with the contract where the template is applied, then the deliverable doesn't get created in that contract. For instance, a negotiation deliverable in a template is dropped when that template is applied to a purchase order but added when that same template is used for an RFQ.

Fixed and Relative Due Dates

You can specify a deliverable to be due on a specific date, such as the first of the month, or relative to a contract event, such as one week after the contract is signed.

The available events include:

- The contract start and end dates
- The dates the negotiations are opened and closed
- The date the contract is signed
- On negotiation documents, the date you receive a response from the responsible external party contact

The available contract events differ depending on where you create the deliverable and the deliverable type. For instance, for contractual deliverables you create in a contract terms templates, you can base the due dates on: Contract

Canceled, Contract Closed, Contract Signed, Contract Start Date, and Contract End Date. Negotiation deliverables can be based on: Negotiation Closed, Negotiation Opened, and Response Received.

Deliverable Notifications

You can notify interested parties using Oracle BPEL Process Manager by email, voice message, instant messaging (IM), or short message service (SMS).

Notifications can only be sent for the activated deliverable. Therefore, you must first activate a deliverable to send a notification associated with it. You can activate a deliverable:

- Manually by selecting a deliverable and clicking on Activate.
- Automatically when a contract is activated.

Even for a contractual deliverable, you can send a notification message when you activate a contract.

> **Note:**
> - You can send only one notification for a deliverable.
> - You can't send a notification when the contract is in the pending approval state.

You can send automatic notifications:

- Prior to the due date
- When one of the parties changes the status of the deliverable
- When a deliverable is overdue
- When a deliverable must be escalated after the due date

> **Note:** For these notifications to appear, the following processes must be running:
> - Send Contract Terms Deliverable Due Date Notifications
> - Send Contract Terms Deliverable Escalation Notifications
> - Send Contract Terms Deliverable Overdue Notifications

Who receives the notification depends on a combination of the notification type and the party who's responsible for the deliverable as listed in the following table. The requester is an internal party. The external contact is a supplier or customer contact.

Notification Type	Responsible Party	Recipients
Prior to due date	Internal	Internal Contact
Prior to due date	External	External Contact
Overdue	Internal	Requester, Internal Contact

Notification Type	Responsible Party	Recipients
Overdue	External	Requester, Internal Contact, External Contact
Status Change	Internal	Requester, Internal Contact
Status Change	External	Requester, Internal Contact, External Contact
Escalation	Internal and External	Requester, Internal Contact, Escalation Contact

Related Topics

- How do I create contract deliverables for an enterprise contract?
- What's the difference between internal and contractual deliverables?

Contract Deliverables FAQs

How do I create contract deliverables for an enterprise contract?

You can create deliverables for a terms template and apply this terms template to a contract. The deliverables from the applied terms template are then visible in the Deliverables tab of the contract.

Alternatively, you can navigate to the Deliverables tab using the contract header Deliverables menu item and create deliverables directly in the contract.

Related Topics

- Contract Deliverables

What does it mean to change the printing sequence for contract deliverables?

Contract deliverables can be listed by title in a clause in your terms and conditions. You can change the sequence in which the titles appear on this list by modifying the print sequence.

What's the difference between contract deliverables and contract fulfillment?

Contract deliverables establish and track both contractual and noncontractual commitments that must be honored as part of negotiations and contractual agreements between businesses and suppliers or customers based on contract intent. These deliverables can be used in enterprise contracts, purchasing documents, and in negotiations.

Contract fulfillment in procurement contracts denotes commitments in terms of goods or services that must be delivered. Use contract fulfillment to create and track a purchasing activity in integrated procurement applications. For example, use contract fulfillment to create a purchase order in Oracle Fusion Purchasing. And next, track the activity on that purchase order as it's being executed.

Related Topics

- Contract Deliverables
- How do I create contract deliverables for an enterprise contract?
- How Contract Fulfillment Works

Index Clauses for Keyword Searches

How You Build and Maintain the Text Index for Keyword Searches

In the Contract Terms Library, you can use the Keyword field to search the text of clauses and contract terms templates. You can automatically build and maintain the text index by running the processes listed in this topic.

Setting Up and Maintaining the Text Index

You can set up the processes listed in this table to automatically build and optimize the text index at desired intervals. How frequently depends on how often your clauses and contract terms templates are updated. New clause and template versions become available for searching after they are indexed.

Process	Description
Build Keyword Search Index for Contract Clauses	Builds the index for clauses. The process indexes the text in the following fields: Clause Text, Clause Title, Display Title, Description, and Instructions.
Optimize Keyword Search Index for Contract Clauses	Optimizes the clause search.
Build Keyword Search Index for Contract Terms Templates	Builds the index for clauses in contract terms templates. The process indexes the text in the following fields: Template Name, Description, and Instructions.
Optimize Keyword Search Index for Contract Terms Templates	Optimizes the clause search in contract terms templates.

To run the processes:

1. Select the **Manage Processes** task link in the Terms Library work area.
2. In the Managed Scheduled Processes page, click **Schedule New Process**.

Manage Clause and Section Numbering Schemes

Manage Numbering Schemes

Use a numbering scheme to number sections and clauses in a contract terms template or contract. In addition to the numbering schemes that come with the application, you can create more numbering schemes in the Terms Library work area.

Numbering Scheme Properties

Numbering schemes have the following properties:

- Numbering schemes are available in all business units.
- You can create numbering schemes up to five levels.
- Numbering clauses is optional.
- You can add the numbering of the previous level as the suffix of the current level by selecting the Concatenate with Child option.
- You can skip the numbering of specific sections and clauses for printing and display of contract terms by selecting the Skip Numbering printing option. This automatically moves up the numbering of subsections and clauses in the section and following sections and clauses in the contract.
- Edits you make to an existing numbering scheme in the Contract Terms Library do not automatically apply to all contracts using that numbering scheme. You must reapply the scheme to each contract.
- You cannot delete any of the numbering schemes that come with your application.
- You cannot delete a numbering scheme if it is used in an existing contract.

Related Topics

- How can I change the numbering scheme for sections and clauses?

How can I change the numbering scheme for sections and clauses?

You can apply a numbering scheme for contract sections and clauses when authoring a contract or creating a contracts terms template. To do so, use the Change Numbering Scheme action on the Contract Terms tab.

You can change the numbering sequence using the **Skip Numbering** printing option for a section or clause.

To hide or display subsequent subsections, clauses within sections, and clauses in a contract, use the **Suppress Title** option. To hide a specific clause, you need to manually suppress it. The application doesn't support automatically suppressing clauses based on the clause type.

To create additional numbering schemes, use the action on the Terms Library Overview page.

Related Topics

- How can I configure contract terms before I print them?

Contract Terms and Clause Approval

How to Set up Approval for Terms and Clauses

The following topic outlines the main setups approval for the Terms and Clauses. The setups are accomplished using tasks from the Setup and Maintenance work area.

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 `ContractClassApproval` and `TemplateApprovalHumanTask`for the set up of clause and template respectively.
9. Click the **ContractClauseApproval** or **TemplateApprovalHumanTask** respectively 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 ContractClauseApproval or TemplateApprovalHumanTask respectively.
11. Click **Rules**
12. Expand each rule.
13. Click **Edit** to create rules for the `ContractsApproval` or `TemplateApprovalHumanTask`stage rule set respectively.
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 `ContractClauseApproval` or `TemplateApprovalHumanTask`, `ContractDetails`, **result**, and create the following rule:

```
Edit IF condition to 1 is 1
```

```
Under Then block Choose
```

18. Select Approval Group from the List Builder drop-down list under THEN, and click Create Action to create the List builder action 1 region.
19. Select level 1 approver and enter the required information for the List builder action 1 region.
20. 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(Task.creator,-1,"","") Top Participant
 HierarchyBuilder.getPrincipal(Task.creator,-1,"","")
Auto action enabled: True Auto Action: "APPROVE"
Save and commit.
```

21. Click the **Approval Group** tab to create an approval group for Clause and Template Approval respectively.
22. Click the **Task Configuration** tab to create rules for clause approval human task and template approval human task respectively. Click the human task TemplateApprovalHumanTask or ContractClauseApproval and then click the rules subtab.
23. Click the **Approval Group** tab to create an approval group for Template Approval or Clause Approval.

Scenario-Based Clause and Template Approval Rule Setups

The following topic outlines the main setups approval for scenario-based clause and template. The setups are accomplished using the tasks from the Setup and Maintenance work area. You need to select and edit the task to create a new rule.

Here are steps you can use to set up specific approval scenarios:

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search and select the **Manage Task Configurations for Customer Relationship Management** task. The BPM Worklist page appears.
4. In the Tasks to be configured region, select **ContractClauseApproval** or **TemplateApprovalHumanTask** respectively.
5. Click the **Edit task** icon.
6. Click the **Assignees** tab and click the **Go to rule** icon to create a new rule.
7. Click the **Add Rule** icon to add one of these rules such that:

    - Clauses and Template are approved automatically:

        i. In the If section, select the condition as 1 is 1.
        ii. In the Then section, select:

            - List Builder: Supervisory
            - Response Type: Required
            - Number of levels: 1
            - Starting Participant: `HierarchyBuilder.getPrincipal(Task.creator,-1,"","")`
            - Top Participant: `HierarchyBuilder.getPrincipal(Task.creator,-1,"","")`

- Auto Action Enabled: True
- Auto Action: "APPROVE"

iii. Ensure that other rules are inactive.

- Clauses and Template are approved based on organization ID:

  i. In the If section, select the condition as `Task.payload.getContractsClauseApprovalRuleAttributesResponse.result.orgId.lon gValue()` is Organization ID.

  ii. In the Then section, you can select a user or a group of a user as per your business requirements, this example, is a build for a user:

  - List Builder: Resource
  - Response Type: Required
  - Users: search for username
  - Groups: NULL
  - Application Role: NULL

  iii. Ensure that other rules are inactive.

8. Click **Save and Close**.

5 Applications Common Components

Attachments

Attachments

You can use attachments to provide supplementary information to specific business objects. Attachments can be URLs, desktop files, text, or repository folders.

For a business object you can view, create, delete, or edit attachments, depending on your role and granted privileges.

Repository

Attachments are stored in a content management repository provided by Oracle WebCenter Content Server. Users managing attachments can't interact with the repository unless the repository mode is enabled. When enabled, users can share attachments among objects, update attachments, and perform other tasks. Access to the attachment files is controlled by a digital signing mechanism.

All attachments are scanned for viruses before they're stored on the content management repository. If a virus is detected at the time of upload, the attachment request fails and the user is notified about it.

Security

Data security applicable to a specific business object also applies to its attachments For example, if a user has no access to a specific expense report, then that user can't access its attachments. You can also use attachment categories to control access and actions on attachments, based on roles associated with that category.

Related Topics

- Attachment Entities
- What's an attachment category?

What's the size limit for attachment files in the sales application?

Users can attach files, such as PDFs and Word docs, to both standard and custom objects. By default, the file size limit for an individual, attached file is 2 GB. You can decrease this limit, but you can't increase it.

There are no limits placed on the number of files. The size of the files is controlled centrally by the File Upload Maximum Size (FND_FILE_UPLOAD_MAX_SIZE) profile option.

Also note:

- The only limit on the total file size that can be uploaded is the amount of available space that you've purchased for the content server.
- There are no restrictions on the types of files you can attach.

Attachments Troubleshooting

Attachments UIs are very user-friendly and easy to work with. You may encounter issues in certain cases such as you modify the attachments, for example create additional attachment categories, or implement data security on them.

Issue: Can't View, Add, Update, or Delete Attachments

You may encounter the following issues when trying to view attachments or perform actions such as adding attachments.

- You can no longer see specific attachments that were earlier visible.
- You can no longer update or delete attachments.
- You get an error stating that you don't have permission to add attachments.

Resolution

Use the Manage Attachment Entities page to ensure that attachment categories are associated to the relevant attachment entity. You might need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or what categories to assign.

If data security is implemented on the categories for the attachment entity, verify that the Enable Security check box is selected in the Manage Attachment Entities page for that entity. Also, make sure that users have a role that has the necessary privileges. The following table lists the privileges required to view, add, update, or delete attachments with a specific attachment category.

Action	Privilege
View	Read Application Attachment (FND_READ_APPLICATION_ATTACHMENT_DATA)
Add or Update	Update Application Attachment (FND_UPDATE_APPLICATION_ATTACHMENT_DATA)
Delete	Delete Application Attachment (FND_DELETE_APPLICATION_ATTACHMENT_DATA)

For example, if users have the Read Application Attachment privilege for all categories associated with the expense report attachment entity, except the Receipts attachment category, then they can view all expense report attachments except those created with the Receipts category. Likewise, if users don't have the Update Application Attachment privilege for any attachment categories tied to the expense report attachment entity, then they can't create any attachments for the expense reports.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

Issue: Missing Attachment Category

You can view existing attachments but the attachments no longer have an attachment category associated with them.

Resolution

When the attachment was added, at least one category existed for the corresponding attachment entity. Since then, the entity was edited so that it no longer has any assigned categories, so the user can't see the category associated with that attachment.

Use the Manage Attachment Entities page to reassign attachment categories to the relevant attachment entity. For example, if users can no longer see the Receipts attachment category for an attachment to an expense report, then search for the expense report attachment entity and assign to it the Receipts category. You may need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or any additional categories to assign.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

Related Topics

- Attachment Entities
- How Attachment Entities and Attachment Categories Work Together
- What's an attachment category?

Notes

Define Notes

A note is a record attached to a business object, such as an opportunity or lead. Notes capture nonstandard information received as you do business. Consider the following points when you set up notes for your application:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.

Note Types

Note types are assigned to notes when they're created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type. When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.

Note Type Mappings

If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.
- If no other note types appear, then note type mapping doesn't exist for that object and the default note types are used. Select **Default Note Types** to see which default note types exist in the application.

- If you modify a default note type, it affects all the business objects that don't have a note type mapping.

Suppose you decide to add a new note type of Analysis for your product area of Sales-Opportunity Management. You use note type mapping to map Analysis to the Opportunity business object. Now, every time you create or edit a note for an opportunity, you see Analysis as an available note type option.

When deciding which note types to map to business objects, you should keep the same considerations in mind that you did when you decided which note types to include.

Notes Character Limit

If you're using the source code editing mode, the limit for notes is 100,000 characters. If you're using the Rich Text editing mode, HTML tags can cause the actual maximum character count to vary, as the HTML tags are also counted in the character total.

Related Topics

- About Application Composer