Oracle Fusion Cloud Sales Automation

How do I get started with 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.

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Share Your Feedback

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

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 Introduction

Overview of Enterprise Contract Features

Oracle Enterprise Contracts provides the most complete solution for managing sales, procurement, and other contracts. It's a comprehensive offering for standardizing corporate contract policies, improving internal controls, and complying with all contractual obligations and regulatory requirements.

Summary of Features

The key features of Enterprise Contracts include the following:

- Standardize the contract process
- Speed up contract renewal cycles
- Improve visibility and drive contract compliance

Standardize the Contract Process

With Enterprise Contracts, companies can implement contract best practices with standard templates, clauses, and contract policy rules that can be enforced enterprise-wide. Global organizations can establish company-wide standards that can be adopted and tailored by regional administrators to comply with local or country-specific regulations.

Contract administrators and legal personnel might author and negotiate many complex contracts each year. Enterprise Contracts simplifies the process by allowing contract administrators to maintain a central library of standard clauses, contract templates, and policy rules across the enterprise. Contract templates enable rapid assembly and creation of contracts by providing standard contract boilerplate language for each type of sale or procurement. Policy rules specify which clauses are required for a contract or protected against updates during negotiation.

Speed up Contract and Renewal Cycles

The Contract Expert feature guides users through a questionnaire. Based on the user's responses and other negotiated business terms, such as products, prices, and contract amount, Contract Expert adds any required clauses. Standards-based contracts can be generated, reviewed, and approved with little or no legal supervision. Users can print the contract as a PDF document for signature. The application also enforces contract policy controls to prevent unauthorized modifications. Contract collaboration and negotiation is streamlined using the two-way integration with Microsoft Word. The change tracking in Microsoft Word enables the contract administrator, legal department, or the external party to make changes offline. The document is synchronized with the structured contract terms stored in the application.

Improve Visibility and Drive Contract Compliance

A single view of all enterprise contracts is essential for effective management of contract activities and for reporting and analysis of outstanding supplier, customer, and partner commitments. Contracts enables contract professionals to search and view all contracts from a single location. The text-based search engine can combine keyword searches with structured information like contract dates or amounts, providing unprecedented access to contracts for all key stakeholders. The Contracts Dashboard provides a snapshot of all contract-related activities, including deliverables progress, approvals, and contracts that need attention.

For More Information

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

- *How do I configure Enterprise Contracts?*

  Learn how to configure Enterprise Contracts.
- *How do I use Enterprise Contracts?*

  Find out how to create and manage Oracle 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.

2 Implementation Overview

Common Implementation Overview

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

Application Extensions

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

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

Other Functional Areas

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

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

Create Implementation Users

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

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

Enable Features to Access Common Setup Tasks

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

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

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

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

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

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

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

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

Oracle Fusion Cloud Applications System Requirements

Before using Fusion Applications in browsers and on your mobile devices, check the operating systems, supported browsers, and other computer requirements. See *Oracle Fusion Cloud Applications System Requirements* for more details.

3 Contracts Setup Overview

Initial Setup Tasks Overview

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

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

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

Related Topics

- Plan Your Implementation

Levels of Editing Privileges for Contract Authoring

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

Privilege Levels and What They Permit

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

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

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

Contracts Business Units and User Access

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

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

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

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

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

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

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

This table illustrates the user access scenario:

Contract Privilege	Administrative User	Non-Administrative User
Create contracts	Can create contracts in all the BUs that the user is authorized in, based on their resource/ resource organization mapping.	Can create contracts in all the BUs that the user is authorized in, based on their resource/ resource organization mapping.
Edit contracts	Can edit all the contracts of the BUs that the user is authorized to.	Can edit all the contracts in which the user is a team member. **Note:** • Even if a user is authorized in a BU, the user might not be authorized for all contracts in that BU. • Users can access contracts even if they're not authorized in its BU, provided they're on the contract team.

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

Overview of the Contracts Offering

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

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

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

- Procurement Contracts
- Sales Contracts

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

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

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

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

Define Common Applications Configuration for Contracts

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

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

Define Contracts Common Configuration

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

Define Service Contracts Configuration

Define and manage the setup related to service contracts.

Define Procurement Contracts Configuration

Define and manage the setup related to procurement contracts.

Define Sales Contracts Configuration

Define and manage the setup related to sales contracts.

Define Contract Terms and Clause Library Configuration

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

Contracts: Define Import Management

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

Manage Bulk Data Export

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

Define Transactional Business Intelligence Configuration

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

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

Define Extensions for Contracts

Define and manage the setup related to extensions for contracts.

Perform Contracts Setup Tasks

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

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

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

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

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

   The setup page for the task appears.

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

Downloading Task Lists and Setup Reports

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

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

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

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