Oracle Fusion Cloud Sales Automation

How do I extract and classify key terms from contract documents using Generative AI? Oracle Fusion Cloud Sales Automation How do I extract and classify key terms from contract documents using Generative AI?

G29757-05

Copyright © 2025, Oracle and/or its affiliates.

Author: Oracle

Contents

Get Help		i

1 How do I extract and classify key terms from contract documents Generative AI?	using 1
About Extracting Key Terms from Contract Documents Using Generative AI	1
Enable the Extract Key Terms from Contract Documents Using Generative AI Feature	1
Security and Privileges to Sep Up and Extract Key Terms from Contract Documents	2
Set Up and Define Key Terms and Prompts	4
Associate Key Terms and Prompts with Contract Types	8
Extract Key Terms from Contract Documents	9
Consolidate Key Term Values from Previous Versions of the Contract	13
Classify Contract Key Terms	14
Frequently Asked Questions (FAQs)	19



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 ⑦ 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 Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at Oracle University.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

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

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

About Extracting Key Terms from Contract Documents Using Generative AI

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

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

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

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

- 1. Navigate to **My Enterprise** > **Offerings**.
- 2. Click the Enterprise Contracts offering.
- 3. Click Opt In.
- 4. Click Features (the pencil icon) and search for the Extract Key Terms from Contract Documents Using Generative AI feature.
- 5. On the Edit Features page, select the checkbox in the **Enable** column.
- Click Done to save the changes and return to the Offerings page.
 For more information, see the New Feature Opt-In Section of the Oracle Applications Cloud Using Functional Setup Manager guide on the Oracle Help Center (docs.oracle.com).

Enable the Use Generative AI Features in Sales Option

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

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



- 6. Click Edit Feature for Intelligence in Sales.
- 7. Select the **Enable** checkbox for the Use Generative AI Features in Sales feature.
- 8. Click Done.

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

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

This topic contains the following sections:

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

Set Up the Enable Security Console External Application Integration Profile Option

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

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

Enable Permission Groups

You must enable permission groups for the following contract roles:

- ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB
- ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB
- ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB
- ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB
- ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB

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

Follow these steps to enable permissions groups:

- 1. From the Navigator, go to **Tools** > **Security Console** > **Roles**.
- 2. Search for each of the contract role names.

- 3. Click Edit Role.
- 4. Click Enable Permission Groups.
- 5. In the Enable Permission Groups dialog, click **Enable Permission Groups**.
- **6.** Click the Summary step and click **Save and Close**.

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

Access Requirements to Set Up Key Terms and Prompts

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

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

			Q	Δ	☆ F	⊐ Ĵ, FF
	2 3 4 - Basic Function Permission Data Security Information Security Policies Groups Policies	60 00 07 08 Role Hierarchy Segregation of Users Summar Dutes				
Edit Role Custom OKC Ro	le: Role Hierarchy		Back	Ne <u>x</u> t		Cancel
					-	
Roles and Privileges Roles and Permission Groups	5					
View - + Add Bala V Dalata III Smarth	e Furel 🐧 Load Inheritad Poler 🛛 📴 🖂 Datach					
View + Add Role A Delete 3= Export to	o Excel 🔨 Load inherited Roles 📑 🔟 Detach					
Role Name	Role Code	Inherited by Role Name	Inherited by Role	Code		
Contract Setup	ORA_DR_OKC_CONTRACT_SETUP_DUTY	Custom OKC Role	CUSTOM_OKC_R	OLE		

Users with these role can:

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

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

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

These privileges are needed to:

• Access the Extract Key Term Values menu item in the Edit Contract UI

- Submit the Extract Key Terms from Contract Documents scheduled process through REST (extractKeyTermValues)
- View Contract (OKC_VIEW_CONTRACT_PRIV) privilege is needed to access the key term values tab in read-only mode.

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

Set Up and Define Key Terms and Prompts

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

Define Key Terms

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

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

						û 🦑 🔤
Key Terms						Create Key Term
Q Add Filter						
Name 0	Output Type 🗘	Group 0	Status ¢	Created By 0	Last Updated Date ~	Actions
Start Date	Date		Active	Quinn MaxOliv	3/10/25	
Party Name	Text		Active	Quinn MaxOliv	3/10/25	
Currency Code	Text	Financial	Active	Quinn MaxOliv	3/10/25	
Limitation of Liability	Text	Legal	Active	Quinn MaxOliv	3/6/25	
Recovery Time Objective	Text		Active	Quinn MaxOliv	3/6/25	
Payment Frequency	Text		Active	Quinn MaxOliv	3/3/25	

This page lists all the key terms that are created. By default, all the active key terms are displayed. Wait for a few seconds for the key terms to load. You can search for existing key terms, create new key terms, and edit existing ones from the



Key Terms UI. Any search text you enter in the **Add Filter** area will be searched against the **Name**, **Output Type**, **Group**, and **Status** fields.

To create a key term, follow these steps:

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

Create Key Term	
Name	Status Active
Output Type	Group
	Cancel Create

2. Enter the following details:

Field	Description
Name	Unique name of the key term.
Status	Status of the key term. Default status is Active . If a key term is made inactive, it won't be extracted from contract documents. An Inactive key term will be read-only and can't be made active again. Set it to Inactive only if you don't want to use this key term anymore.
Output Type	Output type is the data type of the key term returned by the GenAl Large Language Model (LLM). The values are: • Number – For example, renewal percentage, recovery point objective • Date – For example, start date, renewal date • Text – For example, currency, country of jurisdiction
Group	This is based on the lookup Key Term Groups (ORA_OKC_KEY_TERM_GROUP). Groups are used to categorize the key terms. You can set up your own groups.

3. Click Create.

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

RACLE							
covery Tim	e Objective					Cancel	Save
Key term de	etails						
ecovery Time Objecti	ve		Status Active				÷
itput Type		•	Group				
ext			operational				
ext			орегалина				
Prompts			operational				
Prompts			Operational			+ Ad	d Prompt
Prompts Name 0	Description 0	Created	By Ç	Last Updated Date 🗘	Status 0	+ Ad Actions	d Prompt
Prompts Name 0 RTO - DSA	Description ¢ RTD for Data processing service agreement	Created Quinn M	By ≎ axOliv	Last Updated Date 3/4/25	Status 0 Active	+ Ad Actions	d Prompt

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

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

Define Prompts

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

To define a prompt, follow these steps:

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

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

GP-Test 👻 Tools 👻	RTO - CSA			
	Details			
Recovery Time Objective	Name RTO - CSA		Status Active	•
Key term details	Description RTO for cloud s	ervices agreement.		
Name Recovery Time Objective Output Type Text	Prempt What is the reco contract docum	overy time objective mentioned in the rent?	Additional Instruction Answer in the form found in the conte	nat x hours only. If there is no value kt, return NONE
Prompts	Test the prompt	cument POF document here to test.		
	Sales Agreeme Response	nt - SR78938.pdf •••		G Refresh D Run Test
Super Cap Test	12 hours. Prompt test resu	its	B	Data 0 Actives
RTO - DSA RTO for Data processing service agreement	Sales Agreemer	What is the recovery time objective mentioned in the	12 hours.	3/6/25
RTD - CSA RTD for cloud services agreement.	_ 3K10V30.001	contract document?		Cancel Sine

3. Enter the following details:

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

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

4. Click Save.

Associate Key Terms and Prompts with Contract Types

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

A new **Key Terms** tab is available in the Manage Contracts Type UI as shown:

Edit Con	tract Type: Softv	ware License and Service Agr	eement 🕐		Save	Save and Ck	se <u>C</u> anc	•
						_		-
01+++	Feloretics control		Intent	Sell				
Class	Enterprise contract		Buyer Role	Customer				
* Set	Common Set	•	Seller Role	Supplier				
* Name	Software License and Ser	rvice Agreemei	Contract Owner Role	Contract administrator				
Description			Contract Layout Template	×				
		10.	Terms Layout Template	v				
Code				Notify before expiration	5			
Start Date	8/23/00							
End Date	midha	(1)-	Days to Expiration					
End bate	Allow lines	0	Contact role to be notified	~				
			Contract Numbering Method	Manual v				
	Requires signature		Contract Numbering Level	· ·				
	Enable contract modifi	iers						
4 Contra	ct Type Ontions	0	contract sequence category	*				
- 001114	or type options							
Additional Pa	rty Roles Advanced Autr	horing Options E-Signature Key Terms						
Actions 🔻	View 🕶 🕂 🗙	Detach						
* Key Term	n	* Prompt Name	Prompt		* Start Da	te End	Date	
Renewal Ca	ap Percentage	Renewal Cap Percent	what is the renewal cap percentage mentioned in the contract document?		2/1/25	€ @ m/d	yy G	J
Limitation Of	f Liability	Limitation Of Liability	Is there a clause related to limitation of liability mentioned in the document?		2/1/25			
Earthquake		Earthquake	Is there a mention of earthquake in the force majeure clause?		2/1/25			
Payment Ter	rm	Payment Term Prompt	what is the payment term mentioned in the document?		2/1/25			

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

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

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

Extract Key Terms from Contract Documents

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

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

Oracle Fusion Cloud Sales Automation How do I extract and classify key terms from contract documents using Generative AI?

				($\Box \Phi \Box$
Edit Contract: SM/BPA/01, Version	1: Overview ⊘			Actio	ns 🔻 🛛 Save 💌 Su
				1	review
				1	mail
Overview Lines Contract lemis Fulliment Parts	es Deiverables Documents Histo	ry notes related Contracts	Kisks Key lem values	· · · · · · · · · · · · · · · · · · ·	alidate
Number	SMBPA01		User Status		Duplicate
Name	SM/BPA/01	1	Assignee	1	ave as Contract Template
Start Date	3/17/15	J	Туре	PA:Buy Lines	sufocreate Fulfilment Lines
End Date			Intent	Buy A	mend
Description			item Master	Vision Operations	upply Hold
	1			- Share externally	llose
Version Description					stract Key Terms
4 Commitmente	Active				
Agreed Amount	1,000.00 USD		Minimum Release Amount	USD	
Amount Limit	10,000.00 USD		Encumbrance Level		
Payment Terms			Freight Terms		
Carrier			FOB		
Source Document Details					

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

🛕 Warning	×
The Extract Key Terms from Contract Documents process will extract both the prima document and all contract documents for this current version. (OKC-196779). As an would you prefer to manually select the documents you want to include?	ry contract alternative,
	Yes No

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

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

Oracle Fusion Cloud Sales Automation How do I extract and classify key terms from contract documents using Generative AI?

1 2 Select Review Documents Documents							
Extrac	t Key Terms: SM/BPA/	01, Version 2		Back Ne <u>x</u> t	Reset Cancel		
Key terms e	Key terms extraction is supported only for PDF documents.						
	Name	Title	Description				
	Items and sevices01-1.pdf	Items and sevices01-1.pdf					
	Sales Agreement - SR78938.pdf ()	Sales Agreement - SR78938.pdf					
	Primary Contract Document						

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

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

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

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

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

Edit Contract: SM/BPA/01, V	ersion 2: Key Tern	n Values 🕐				
Overview Lines Contract Terms Fulfillm	ent Parties Deliverables	Documents History	Notes Relat	ted Contracts Risks	Key Term Values]
Contract Version 2 v						
Extraction Details						
Status	Submitted 🕤					Documents Used for Extraction 👌
Process ID	130418					Completion Date
Submitted By	Quinn MaxOliv					
✓ Key Terms						
Actions ▼ View ▼ Format ▼ 💯	😭 Detach 🚽 Wrap G	roup All 🗸				
Group Key Term	Updated Value	Measure	Classification	Extracted Value		
No data to display.						



Here are the extraction details:

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

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

Overview Contract	Terms Parties Deliverables Documents F n Details Status Extracted Date 12/12/24 Documents ♣ ▼ 第 Classify 篇 Detach ♣ Wrap	listory Notes Ne	gotiation and Renewal Related Cor	Irracts Key Term Values Process ID User	223243 Quinn MaxOliv	
Group	Key Term Classification	Updated Value	Extracted Value		Version	Citations
Financial	Payment Term	Net 30 days from	Net 30 days from invoice date.		1	Ę.
Financial	Currency	USD	USD		1	1
Operations	Renewal Cap Term	NONE	NONE		ì	四
Operations	Recovery Point Objective	The RPO is 1 ho	The RPO is 1 hour.		1	5
Renewal	Business Continuity	Yes	Yes		1	
Financial	Price Hold	Yes	Yes		1	
Audit	Anti Bribary	None	None		1	17
Operations	Renewal Cap Percentage	5.	5.		1	

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



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

Consolidate Key Term Values from Previous Versions of the Contract

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

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

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

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

Consolidation Logic:

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

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



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

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

Classify Contract Key Terms

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

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

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

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

Enable the Classify Contract Key Terms Feature

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

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



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

E ORACLE				
View - Potach R The D		1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 - 1920 -		
Feature	Always Enabled From Help	Opt In Task	Enable	View History
Disable Warning Message When Making Clause Nonstandard				68
Search Contracts with Oracle Search Extension Framework				67
Share Enterprise Contracts in Supplier Portal				69
Print Standard and Custom Attributes in Deviation Reports				69
Show Variable Values in Supplier and Customer Cont Deviation Reports				69
Display Header and Footer on Downloaded Word Document				63
Manage Signed Contract Documents				60
Manage Contract Requests				60
Extract Key Terms from Contract Documents Using Generative AI				67
Classify Contract Key Terms				60

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

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

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

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

Security and Privileges to Classify Key Terms

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

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

Classification Code Lookups

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



Key Term Classification Rules

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

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

You can find more information about sandboxes here *Overview of Sandboxes* Sample rules might be as follows:

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

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

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

Key Terms Classification					
Application Composer					
Application ERP and SCM Cloud ~	Server Scripts Cont	ract Key Term Extraction P	rocess		
Object name	Validation Rules Triggers	Object Functions			
Object Innovation Sales Quality	Object Triggers				
✓ Objects	tation - Manuel -	Tringer Name			
🔯 Custom Objects 🕂	Action View View Et	Z Z O Search Ingger value	<u> </u>	4	
🔺 🎲 Standard Objects	Trigger	Trigger Name Description			
Admission Application	To add a trigger, click Create				
Asset Group					
G Change Order					
Goncept					
Gontact List					
Gontract	Field Triggers				
Contract Key Term Extraction Proces	noid mggoro	1			
Server Scripts	Action 🔻 View 👻 🖳	🖉 🗙 🕤 Search Trigger Name	×	9	
Gentract Key Term Pages	Field Display Name	Field Name	Trigger	Trigger Name	Description
Server Scripts	Classification Date	ClassificationDate	AfterFieldChanged	ClassifyKeyTerms	
Gi Contract Request					
Gin ContractorLicenses					



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

Key Terms Classification 👻 Tools 👻				Sandbo	x Mode: Edi	t v
		۵	$\hat{\Box}$	☆ F	ם ל <mark>י</mark>	
Application Composer						
Application ERP and SCM Cloud Object name Object in innovation Sales Quality : Objects Custom Objects Custom Objects M Standard Objects M Admission Application	Edit Field Trigger Field and Name Trigger AfterFieldChanged Description Field Name Classification Date * Trigger Name ClassifyKeyTerms Ferror Message			<u>S</u> ave a	nd Close	Ca
Maset Group Gakalog Item Gakalog Gakalog Item Gakalog Item Gakalog Item Gakalog	<pre>* Trigger Definition @ Edit Script Edit Script</pre>	== != 88		More 🔻	₫ 등 .	ſş
 Server Scripts Gontract Key Term Pages 	13 def vcil = vcr.ensureCriteriaItem('Id') 14 moil_estCompton(!=!)					

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

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

	Status Extrac Date 12/12/ Documents 📩	ted 👈 24			Process ID User	223243 Quinn MaxOliv		
View v Form	at T Classify Classify Classify	Detach 🚽 Wrap Classification	Group All Updated Value	Extracted Value			Version	Citations
Financial	Payment Term		Net 30 days from	Net 30 days from invoice date.			1	10
inancial	Currency		USD	USD			1	17
Operations	Renewal Cap Term	Non-stan	NONE	NONE			1	17
Operations	Recovery Point Objective		The RPO is 1 ho	The RPO is 1 hour.			1	12
Renewal	Business Continuity		Yes	Yes			1	12
inancial	Price Hold	Present	Yes	Yes			1	5
Audit	Anti Bribary		None	None			÷	12
Operations	Renewal Cap Percentage	Non-standard	5.	5.			1	5
Operations	Renewal Cap Period		12 months	12 months			1	5
Operations	Recovery Time Objective		NONE	NONE			1	R

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



Sample Groovy Script for Key Term Classification Rules

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

```
def typeName;
def count = 0;
def renewal;
def renewalCapVal;
def renewalCapPrcnt;
trv{
//Below snippet will get Contract Type Name Using Id and MajorVersion of the
Contract def vo = newView('ContractVO')
def vc = newViewCriteria(vo)
def vcr = vc.createRow()
def vci1 = vcr.ensureCriteriaItem('Id')
vci1.setOperator('=')
vci1.setValue(DnzChrId)
def vci2 = vcr.ensureCriteriaItem('MajorVersion')
vci2.setOperator('=')
vci2.setValue(MajorVersion)
vc.insertRow(vcr)
vo.appendViewCriteria(vc)
vo.executeQuery()
def row = vo.first();
if(row != null)
{
typeName = row.getAttribute('ContractTypeName')
}
//Iterate through KeyTerms to classify key terms such as Renewal Cap Percentage,
//Based on the rules, user must populate ClassificationCode with appropriate Lookup Code
def contKeyTerms = contractKeyTerms
while(contKeyTerms.hasNext()){
def keyTermrow = contKeyTerms.next();
// Implementing Rule #1
 if(keyTermrow.getAttribute('KeyTermName') == 'Renewal Cap Percentage'){
renewalCapPrcnt = keyTermrow.getAttribute('UpdatedValue')
 if(renewalCapPrcnt > '2')
keyTermrow.setAttribute("ClassificationCode","OKC_CLASSIFY_NON_STD")
else
keyTermrow.setAttribute("ClassificationCode","OKC CLASSIFY STD")
 }
// Implementing Rule #2
if(keyTermrow.getAttribute('KeyTermName') == 'Price Hold'){
if(keyTermrow.getAttribute('UpdatedValue') == 'Yes')
keyTermrow.setAttribute("ClassificationCode","OKC CLASSIFY PRESENT")
else
keyTermrow.setAttribute("ClassificationCode","OKC CLASSIFY ABSENT")
 }
}
// Implementing Rule #3
//Re-Iterate through KeyTerms to Classify the Renewal Period
def contKeyTermsUpd = contractKeyTerms
```



Oracle Fusion Cloud Sales Automation How do I extract and classify key terms from contract documents using Generative AI?

```
while(contKeyTermsUpd.hasNext()){
 def keyTermUpdrow = contKeyTermsUpd.next();
 if(keyTermUpdrow.getAttribute('KeyTermName') == 'Renewal Period'){
if(typeName == "Sell : No lines"){
if(keyTermrow.getAttribute('UpdatedValue') < 3 != 'NONE'){</pre>
keyTermUpdrow.setAttribute("ClassificationCode","OKC CLASSIFY NON STD")
 ł
 if(keyTermrow.getAttribute('UpdatedValue') >= 3){
 keyTermUpdrow.setAttribute("ClassificationCode","OKC CLASSIFY STD")
 ł
 }
 }
}
}
catch(Exception e) {
def message = "There is an error in the implementation. Please contact Administrator";
adf.error.warn(message)
ł
```

Frequently Asked Questions (FAQs)

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

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

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

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

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

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

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



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

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

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

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

You must also have the following privileges:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Why is the Classify button disabled?

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

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

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



