Oracle Fusion Cloud Sales Automation

How do I configure contract approval notifications?

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1 How do I configure contract approval notifications?

Overview of Contract Approval Notifications

When a contract is sent for approval, all approvers receive a standardized workflow and email notification. The standard notification has a list of attributes that display in a specific format. You can now configure the notifications to meet your specific business needs and requirements.

You can add other contract-related attributes that you want to display for notifications. You also have the flexibility to change the content, style, and format of the notification that's sent to contract approvers.

Here's a list of some components that you can configure in the default email and workflow contract notification:

- Logo: Change the brand logo in the notification header.
- Body: Add or remove existing attributes or add new tables. This includes standard attributes from any table, descriptive flexfields, and Application Composer attributes.
- Footer Links: Hide the approve or reject links.
- Action buttons: Change the text of the buttons.
- Style: Change the formatting including font size, color, table borders and so on.

All the layout changes are made in the Business Intelligence Publisher (BIP) .RTF-based contract approval notification template or subtemplate. If you're adding new attributes, then you must add them to the data model and reference them in the .RTF template.

> **Note:** This feature is controlled by opt-in. If you've opted in, the new BIP-based contract approval notification is sent during contract approval. If you decide not to opt-in, then you'll continue to see the current notification display. From 24D, the feature will be available by default.

Related Topics
- Best Practices for Content and Layout in Workflow Notifications
- Modify Data Models

Opt In to Configure Contract Approval Notifications

You must opt in to use the Configure Contract Approval Notifications feature. Here are the steps to add this feature to your sales application.

1. Navigate to the Setup and Maintenance work area and select the **Enterprise Contracts** offering.
2. In the **Functional Areas** pane, click **Change Feature Opt In**.
3. From the **Opt In: Enterprise Contacts** page, click the pencil icon under the **Features** column.
4. Enable the **Configure Contract Approval Notifications** functional area by selecting the check box.
5. Click **Done**.

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From now on, you can open the **Configure Contract Approval Notifications** from the Enterprise Contracts offering.

Overview of BI Publisher Process

Notifications created by BI Publisher (BIP) templates are ready to use as delivered. You can easily configure the templates to meet your business requirements. If required, you can change the delivered template layouts and content to add images, change colors and styling, add or remove attributes, or change text.

Both email and in-app notifications use the same BIP template. Any change made to the BIP template for email has an impact on the in-app notification as well. Predefined BIP reports generate workflow notifications by retrieving content from the standard data models. To add new attributes, you must change the data model.

The report layouts use common table and paragraph styling. In addition, reusable notification components use a common subtemplate. These include a custom logo in the notification header, action buttons, and task history.

> **Note:** The history component isn't based on a BIP data model so you currently can't change it.

BI Publisher Process

The BI Publisher process and email notifications are generated by a process of combining various BI catalog objects including data model, subtemplate, and the layout template of the report. This figure shows how these objects work together to generate the output used for notifications.

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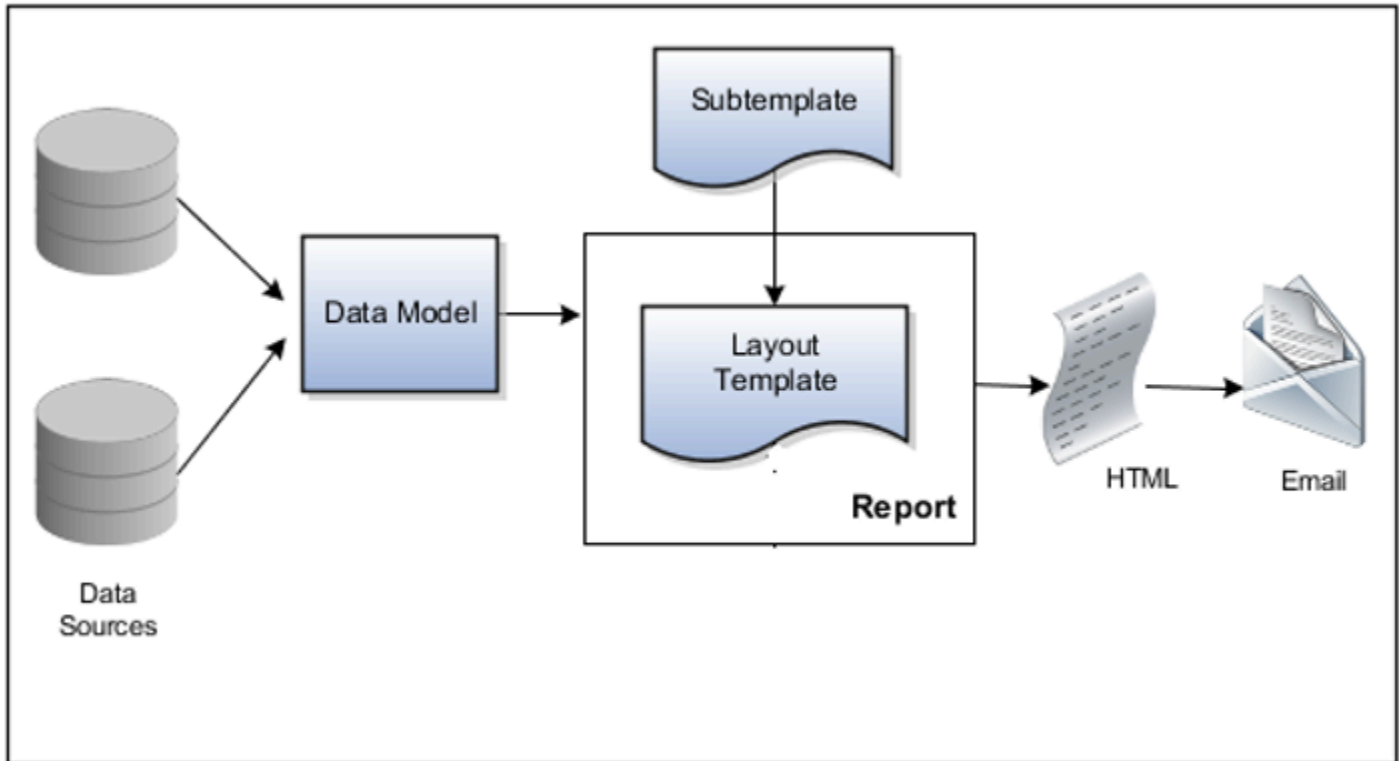
- **Data Sources**: Stores the attributes and attribute values for business objects and transactions in the application, for example transaction tables

- **Data Model**: Identifies which attributes from data sources are available to be included in the email and how that data is retrieved

- **Subtemplate**: Provides common components, for example a branding logo and buttons, that can be reused in multiple reports

- **Report**: Contains a layout template that identifies:
    - Which attributes appear in the email and workflow notification, from the data model used for the report
    - What the notification looks like, leveraging components from the subtemplate

- **HTML**: Generates HTML output from the report

- **Email**: Sends email to users as part of a business flow, with the HTML output embedded in the email body

Related Topics
- Edit the Contract Approval Data Model

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Before you Begin

Before you can start to change the contract approval notifications, make sure you've considered the following:

- Security

  To configure reports and data models for notifications, you must have the Application Developer and the BI Administrator job role.

  Oracle recommends that security administrators don't assign these predefined roles directly to users. Instead, make a copy of a predefined role, remove the privileges that your users don't need, and assign users the role that contains only the privileges they need.

- Data Model and Contract Approval Template Changes

  Don't edit predefined data models or layout templates. Instead, copy them into the Custom folder and edit the copy.

- Create profile options to control the refresh interval

  When you use the Customize option to edit a predefined report, your changes won't be reflected until a refresh that happens every 24 hours. For changes to take effect sooner, use profile options to change the refresh interval. See *Reflect Changes from Edited Reports Sooner* for more information about creating profile options to apply to all workflow tasks (global = BIP_CLIENT_REFRESH), a product family (BIP_CLIENT_REFRESH_TIME_CRM) and product (BIP_CLIENT_REFRESH_TIME_CRM_OKC).

Install Oracle BI Publisher Desktop Add-In for Microsoft Word

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

Only a user with administrator privileges can perform the BI Publisher desktop installation on the workstation. Click the executable and select **Run as Administrator**. Here's how to download Oracle BI Publisher Desktop:

1. Download Oracle BI Publisher Desktop from the following location:*https://www.oracle.com/middleware/ technologies/analytics-publisher/downloads.html*
2. Install the latest version of the software for your sales application.

What to do next

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.

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Edit the Contract Approval Data Model

You can edit the data model to display more information in the contract approval notification such as version number or description from the contract header table. You can also display information from other tables such as contract lines. You must edit the data model before you can add fields in the layout template such as descriptive flexfields and Application Composer attributes.

Here's how to edit the datasets of a contract approval data model.

1. Navigate to the data model folder from Shared folders and open **Enterprise Contracts** > **Workflow Notifications** > **Contract Approval**.
2. Click **Copy Resource** from the menu.
3. Navigate to **Custom** > **Enterprise Contracts** > **Workflow Notifications** > **Contract Approval**.
4. Click **Edit** as shown in this sample screenshot.
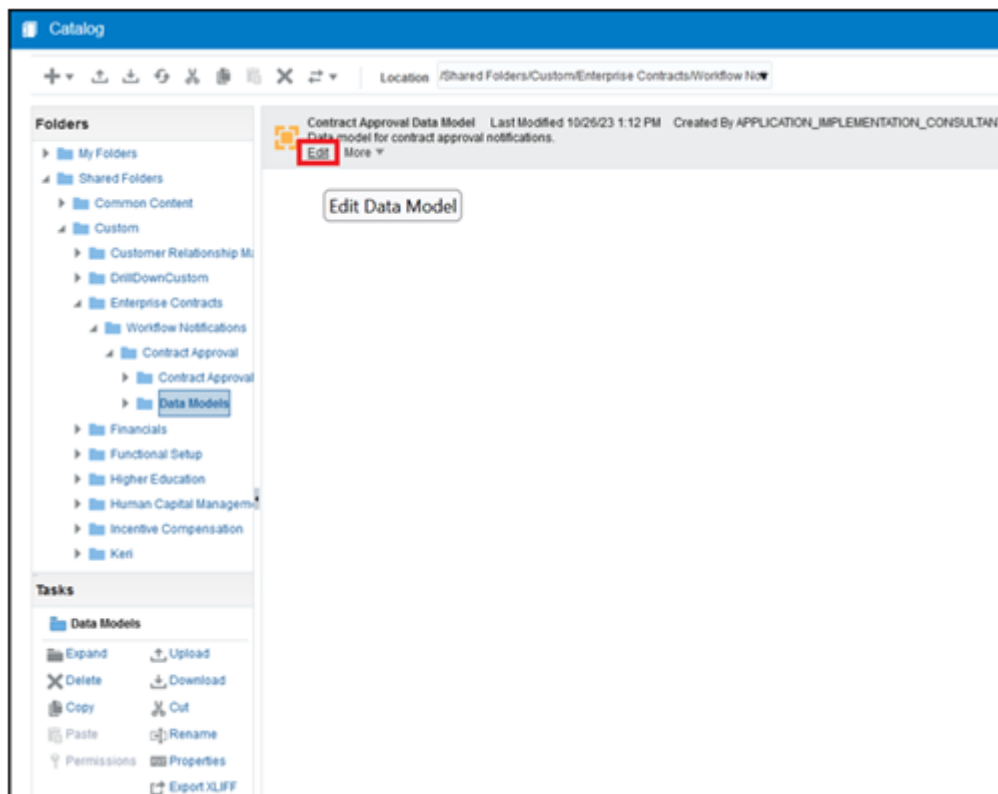
5. Edit the data model in the custom folder as required.

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6. To add other attributes from the contract header, click **ContractHeaderDS** and then click **Edit Data Set** as shown to display the Edit Data Set - ContractHeaderDS page.
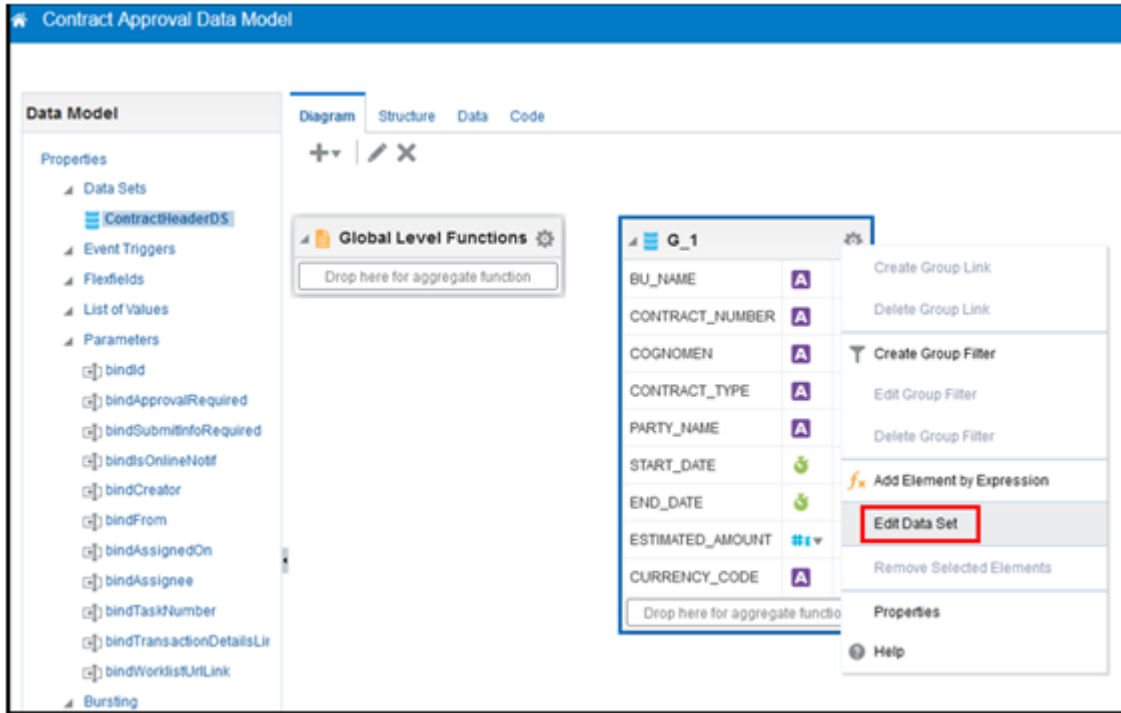
For example, you can add the major version attribute by adding HEADER_MAJOR_VERSION in the last line of the SQL Query and add a comma after CURRENCY_CODE. The **Major Version** attribute is added to the Data Model as shown in this screenshot.

7. Click **OK**, then click **Save**.

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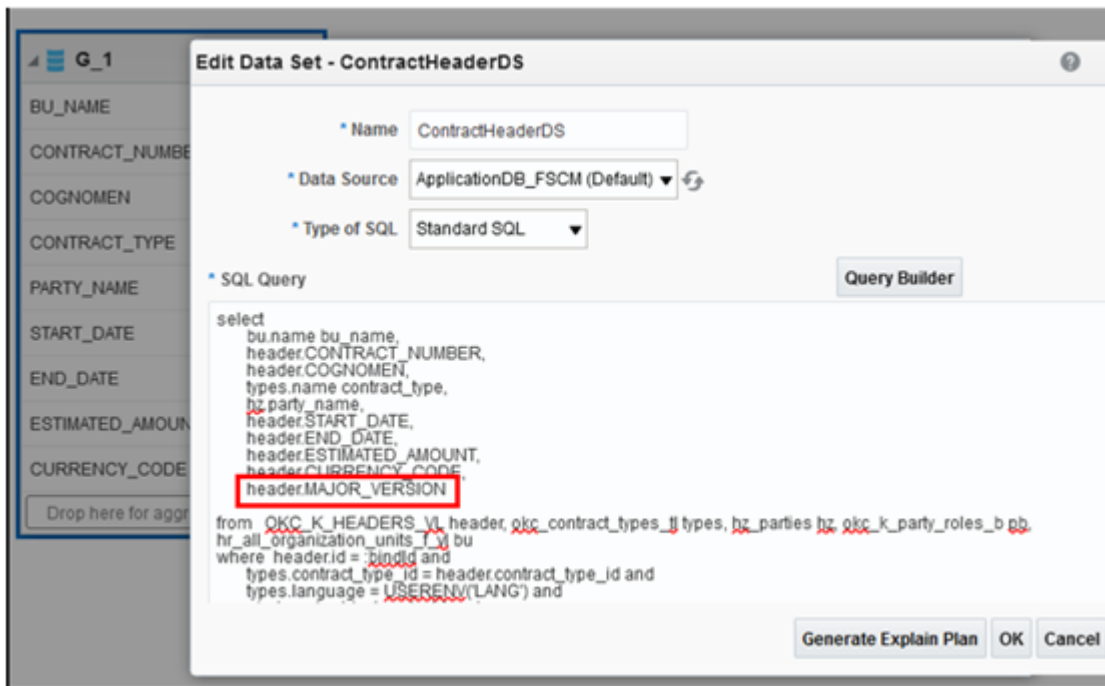
8. Next, select the **Data** tab, and enter the ID from the okc_k_headers_all table for a specific contract as shown.
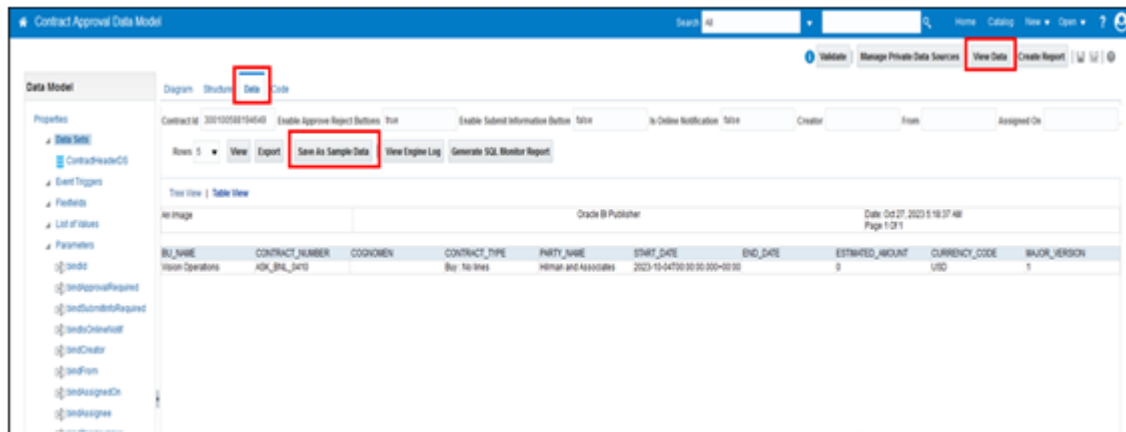
9. Click **View Data** if the validation is successful.
10. Click **Save As Sample Data**.

Download the Sample Data XML

You can access the standard application attributes and extensible attributes by downloading the data model attributes in an XML format. Once you've made all your changes to the data model and you know the attributes you want to update, you can include the required attributes in the contract approval layout template.

Here's how to download the sample data model file.

1. In the Data Model pane, click Properties.

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2. In the **Attachment** section of the page that appears, from the **Sample Data** field click the file name, `sample.xml`. The file downloads automatically.
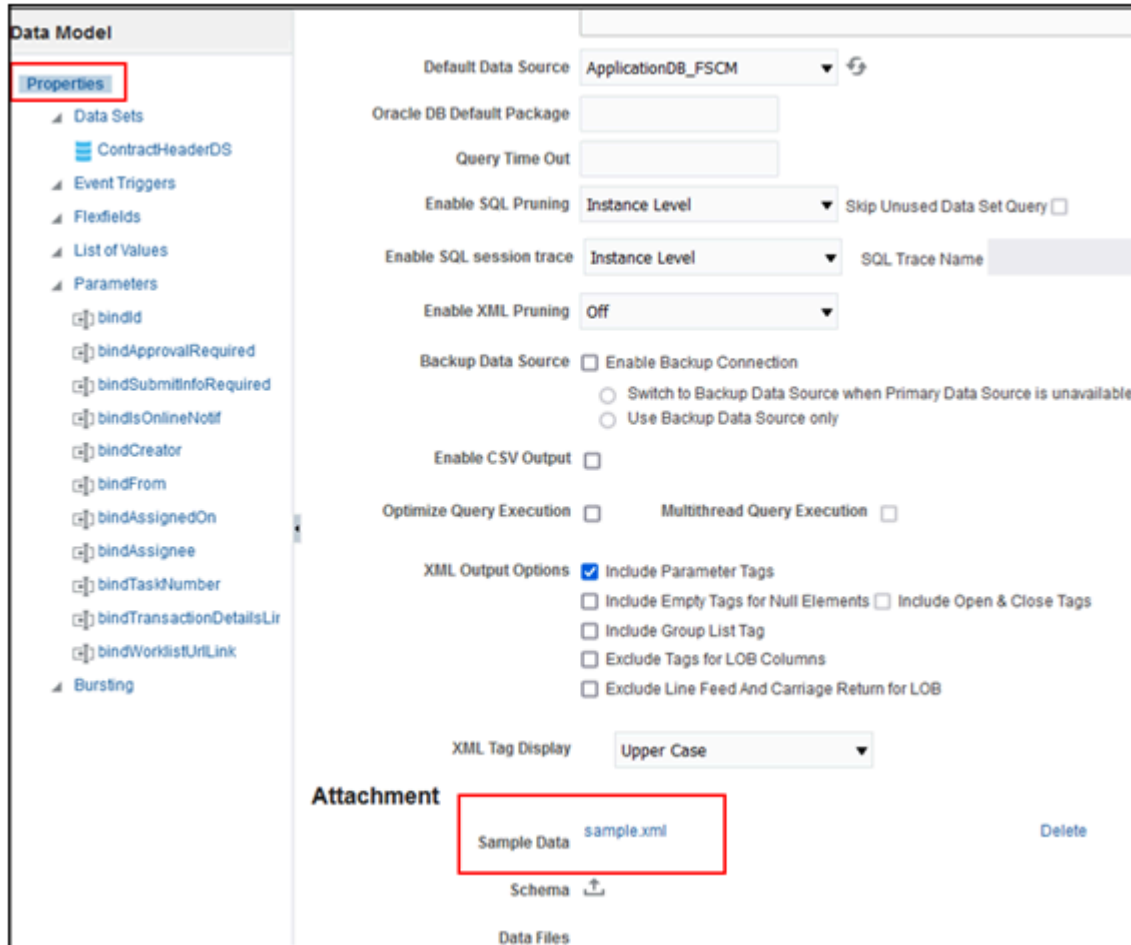
Configure the Contract Approval Layout Template

The contract approval layout template decides the formatting of the approval notification. Don't make any changes to the standard template. Make a copy of the standard template, save it to the Custom folder, and edit the sample template.

Here are the steps to change the contract approval template.

1. Sign in to Analytics Publisher with administrator privileges and navigate to the Catalog.
2. In the Shared Folders directory, open **Enterprise Contracts** > **Work Flow Notifications** > **Contract Approval** > **Contract Approval Report**.
3. Click **More**.
4. Click **Customize**.

   The Customize option automatically creates a copy of a predefined report and stores it in the **Shared Folders** > **Custom** folder within the Catalog.

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5. In the Custom folder, open **Enterprise Contracts** > **Work Flow Notifications** > **Contract Approval** > **Contract Approval Report**.
6. Select the report and click the **Edit** link of the layout to download the RTF file:
   `ContractApprovalNotificationReport.rtf`
7. Open the downloaded RTF template file in Microsoft Word.
8. Load the sample data that you generated by clicking on **Sample XML** in the BI Publisher ribbon.
9. Insert the fields in the file according to your business requirements. After the upload is complete, all the Oracle Analytics Publisher options are enabled to configure the template. When you click the **Field** icon, you see the contract-related fields from the data model. You drag or move the required fields to change the template.
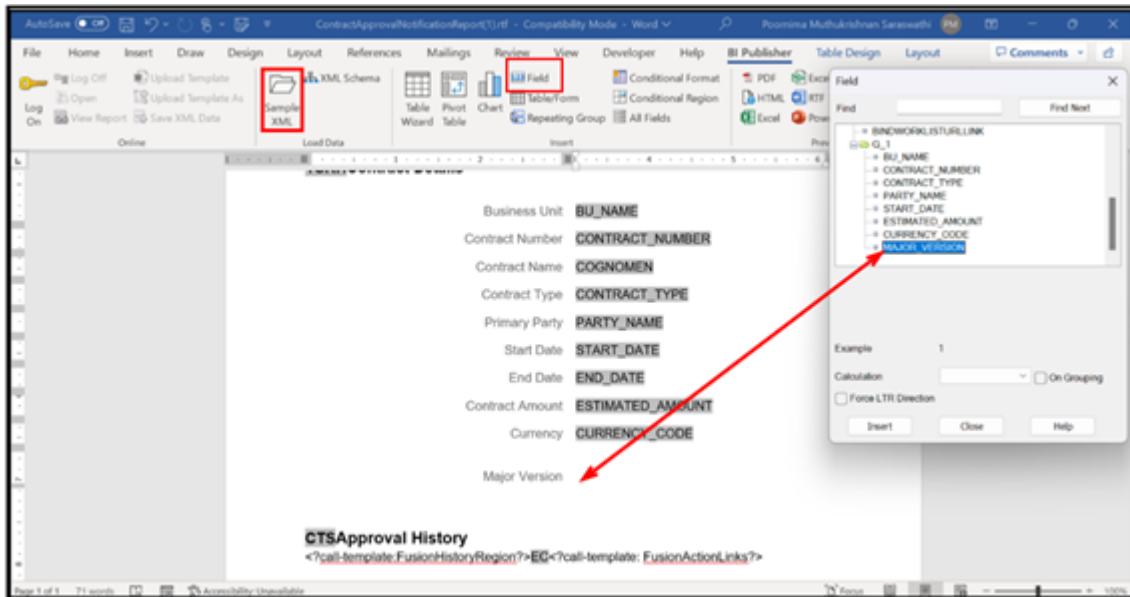
10. Save the file as Rich Text Format (RTF).

Upload the Modified Contract Approval Layout Template

After previewing the changes you made to your contract approval layout template, you can now upload your changes to the BI catalog.

Here are the steps.

1. Sign in to Analytics Publisher with administrator privileges and navigate to the BI catalog.
2. In the Shared Folders directory, open **Enterprise Contracts** > **Work Flow Notifications** > **Contract Approval** > **Contract Approval Report**.
3. Navigate to the **Shared Folders** > **Custom** folder within the Catalog.
4. Click the **View a list** link to open the **Layout** page.

   Note: The Layout page displays the copy of the report layout template automatically created from **Configure the Contract Approval Layout Template** task. Leave this report layout template as is. If the modified workflow notifications don't work, you can revert back to using this report layout template. The report template is a copy of the predefined report layout template.

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5. Click the **Create** icon. A page opens that contains a **Create Layout** section and an **Upload or Generate Layout** section as shown.
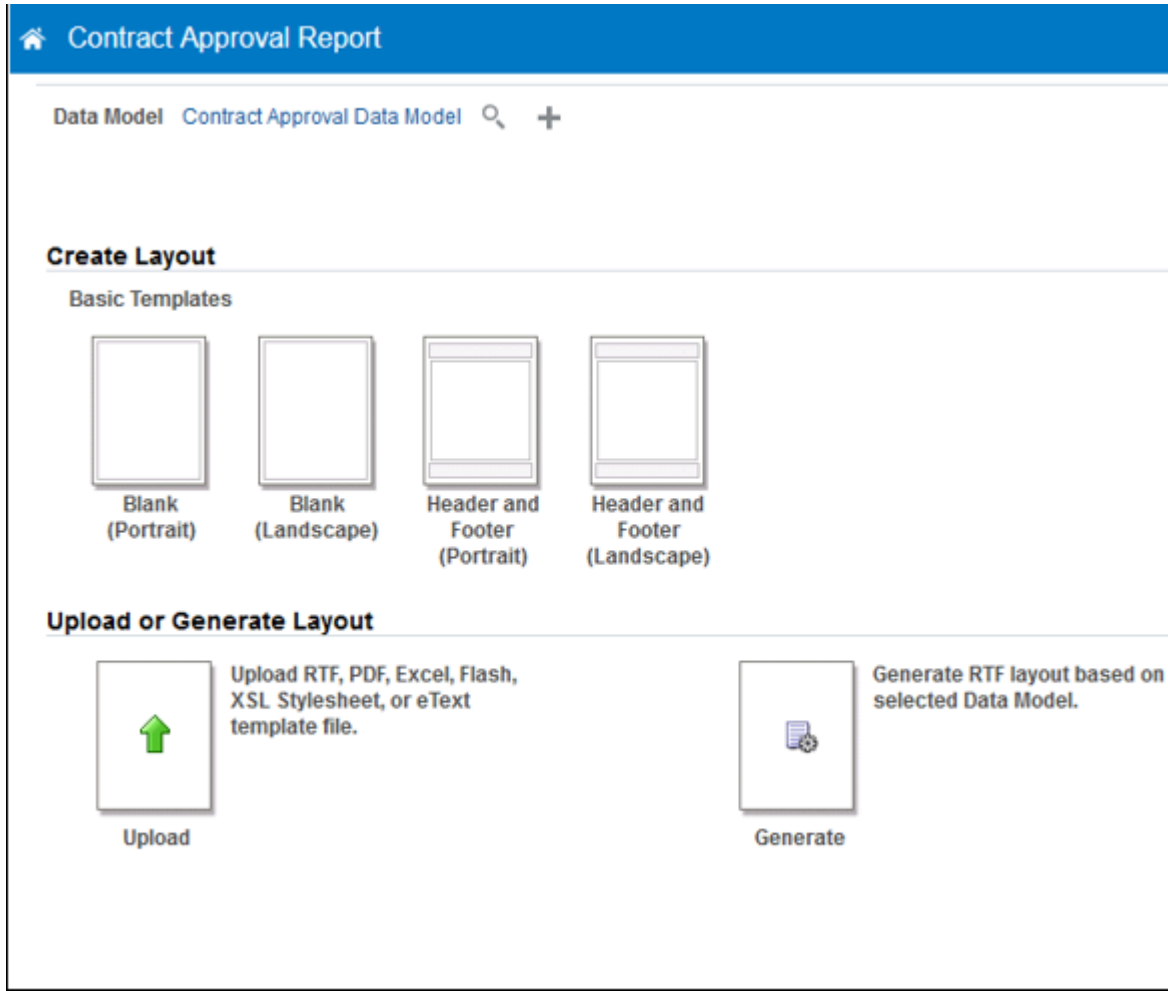
6. Click the **Upload** icon to open the **Upload Template File** dialog box.
7. Complete the following:

Field	Steps
Layout Name	Enter a name for your modified report layout template. For example, enter Modified Contract Approval Template.
Template File	Click **Browse**. Find and select the modified report layout template that's on your local drive. Click **Open** to return to the Upload Template File dialog box.
Type	Select **RTF Template**.
Locale	Select **English**.

8. Click **Upload**. The Contract Approval Report page returns to the thumbnail view of the report layout templates.
9. Make sure you select the correct data model from the custom folder.
10. Click the **View a list** link to return to the Layout page with the list of the report layout templates.

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11. Select the row that contains the report layout template that you just uploaded and click **View Report** to review the modified report layout template.

12. Enter values from an existing notification into the fields and click **Apply** to view the report with sample data.

13. Repeat steps 3 through 8 to navigate back to the list of report layout templates. In the row for the report layout template that you just uploaded, click the **Default Layout** option. This step enables the modified report layout template for future contract approval workflow notifications.

14. Click **Save**.

Best Practices for Content and Layout in Workflow Notifications

Here are some recommendations, tips, and reminders to keep in mind when you're working with content and format for your configurable workflow notifications and contract approval layout templates.

Follow the General Structure

In general, the workflow notifications contain a set of components that are displayed in a certain order. When you change notifications, try to keep to this general structure and don't remove essential elements such as the action buttons.

The callouts in this figure identify the email notification components listed in the following table.

The callouts in this figure identify the in-app notification components listed in the following table. In addition to describing each component, the table also indicates if the component appears in the email notification, in-app notification, or both.

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Callout	Component	Notification Type
1	Notification component heading.	Both
2	Summary section listing key attributes of the workflow task and the associated transaction.	Both
3	Buttons for the primary actions to take on the task, such as **Approve** and **Reject**. These buttons aren't part of the configurable, report-based notification content.	In-app

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Callout	Component	Notification Type
4	Notification body that usually includes transaction and line level details, displayed in tables or sets of attributes with corresponding values. The data model for the report restricts the total number of rows displayed in some tables. If the limit is exceeded, the table footer provides a link to the transaction details page, where users can view all the rows. To change this limit, you can edit a copy of the data model.	Both
5	Approval history, including any attachments that users in the history uploaded for the task. You can't edit the approval history component, which usually appears in the body of only email notifications. For in-app notifications, you can usually view the history by clicking the **Actions** button and selecting **History**.	Email (or both, in rare cases)
6	Buttons for the primary actions again.	Email
7	A link to the corresponding transaction page, and another link to the in-app notification.	Email

Keep Mobile in Mind

Because users can view the workflow notifications on mobile devices, always consider mobile first and keep the notifications as simple as possible. For example:

- Don't put too much content horizontally, such as too many columns in tables.

- Keep all text, including attributes and column headings, as short as possible.

- Center align lists of attributes and their values, if they appear outside tables.

Note: For workflow tasks with configurable notifications, make sure that the **Hide End User Web URL in notifications** check box is selected in BPM Worklist. If not, a default first line will appear in the emails, in addition to what comes from the report layout template. It's best to hide this extra content because it might cause emails to not render well, especially when viewed from mobile devices.

Make sure to test your email notifications on mobile devices.

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