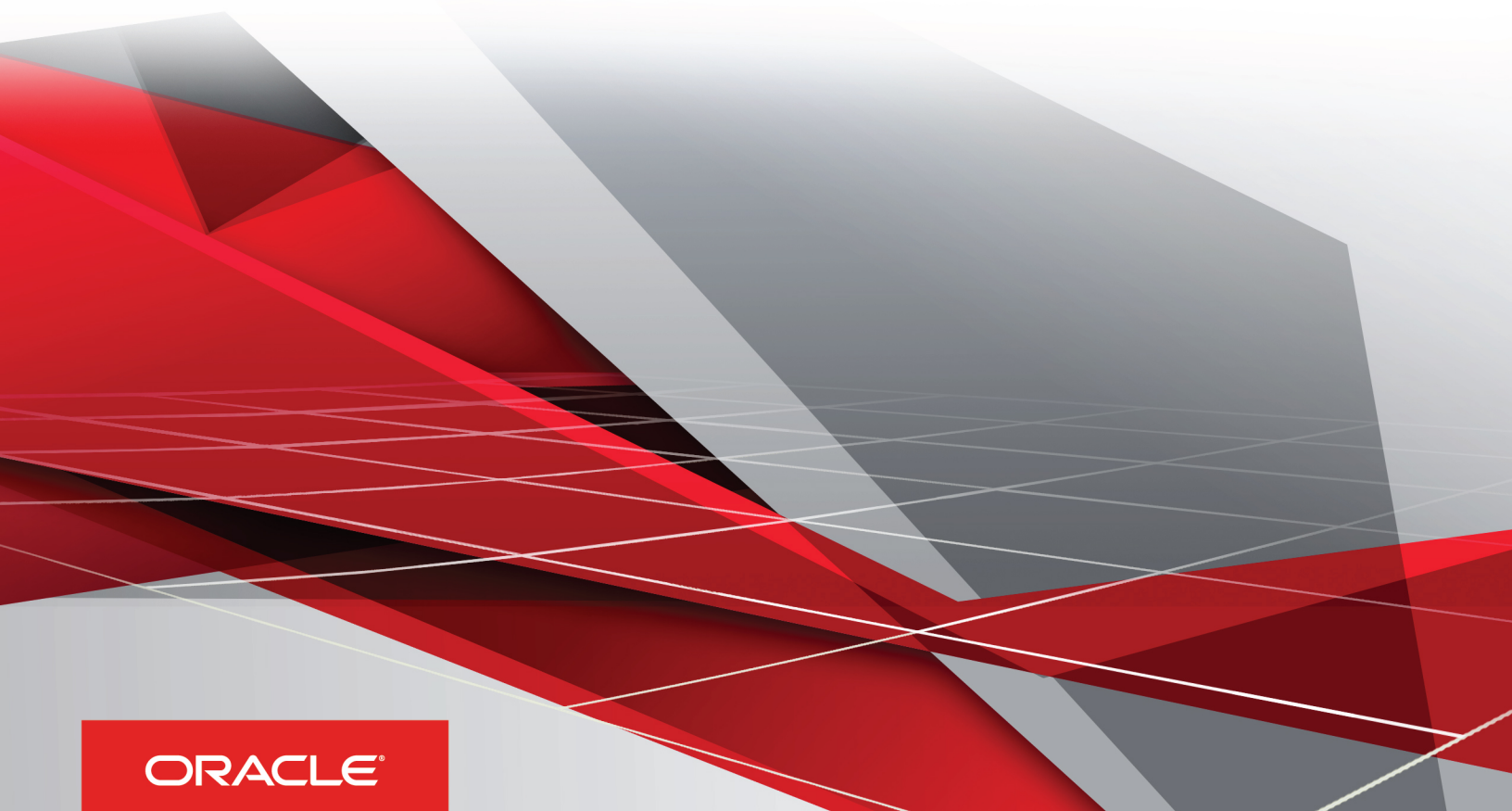
Oracle

Sales Cloud Implementing Enterprise Contracts

Release 9

This guide also applies to on-premise implementations



Oracle® Sales Cloud Implementing Enterprise Contracts

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Preface

This Preface introduces information sources available to help you use Oracle Applications.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application.

> **Note**
> If you don't see any help icons on your page, click the Show Help button in the global area. Not all pages have help icons.

You can also access Oracle Applications Help at https://fusionhelp.oracle.com/.

Oracle Applications Guides

To find other guides for Oracle Applications, go to:

- Oracle Applications Help, and select **Documentation Library** from the **Navigator** menu.
- Oracle Help Center at http://docs.oracle.com/

Other Information Sources

My Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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1 Introduction

About This Guide

Welcome to Oracle Sales Cloud - Implementing Enterprise Contracts.

Purpose and Scope of This Guide

This guide provides conceptual information and procedures needed to implement components and features of Oracle Sales Cloud - Enterprise Contracts.

> **Important**
> This guide assumes your company's sales cloud service is up and running at a basic level, as described in the use case contained in the Oracle Sales Cloud, Getting Started with Your Implementation guide. The getting started guide is intended for administrators setting up the initial sales automation capabilities of Oracle Sales Cloud. The document uses a case study to provide you with the concepts and procedures you'll need to implement sales automation in a test environment.

Additional Guides

In addition to this guide and the getting started guide mentioned above, the following guides also are important references as you implement, administer, maintain, and use Oracle Sales Cloud - Enterprise Contracts:

- Oracle Sales Cloud - Using Sales: This guide contains information to help sales managers, salespeople, and other sales end users when using Oracle Sales Cloud to perform their day-to-day tasks.
- Oracle Sales Cloud - Using Leads: This guide contains information to help sales end users who are charged with creating leads and managing the various aspects of leads.
- Oracle Sales Cloud - Using Campaigns: This guide contains information to help sales end users who are charged with creating campaigns and managing the various aspects of campaigns.
- Oracle Sales Cloud - Implementing Marketing: This guide contains conceptual information and procedures needed to implement the marketing components and features of Oracle Sales Cloud.
- Oracle Sales Cloud - Implementing Incentive Compensation: This guide contains information on implementing sales compensation and payment plans.
- Oracle Sales Cloud - Using Incentive Compensation: This guide contains information on administering and maintaining sales compensation and payment plans
- Oracle Sales Cloud - Implementing Customer Data Management: This guide contains information to help implementers define the setup for managing customer information and the configuration for customer hub deployment.
- Oracle Sales Cloud - Using Customer Data Management: This guide contains information to help end users manage customer information and customer data quality.

- Oracle Sales Cloud - Using Customer Contracts: This guide contains information to help end users who are charged with creating and managing customer contracts.
- Oracle Sales Cloud - Getting Started with Oracle Sales Cloud Customizations: This guide introduces you to user interface elements, user interface types, and simple, common customizations of Oracle Sales Cloud.
- Oracle Sales Cloud - Extending Sales: This guide describes how to create and extend objects and customize the user interfaces and navigation menus.
- Oracle Sales Cloud - Groovy Scripting Reference for Application Composer: This guide explains the basics of how you to use the Groovy scripting language to enhance Oracle Sales Cloud.
- Oracle Sales Cloud - Understanding File-Based Data Import and Export: This guide contains information to help those charged with exporting and importing object data.
- Oracle Sales Cloud - Securing Oracle Sales Cloud: This guide contains information to help setup users and sales administrators configure access to Oracle Sales Cloud functionality and data.
- Oracle Sales Cloud - Using Analytics and Reports: This guide contains information about supplied reports and analytics, as well as how to create your own reports.
- Oracle Applications Cloud - Using Common Features: This guide contains information to help end users of Oracle Applications Cloud as they perform their day-to-day activities.
- Oracle Fusion Functional Setup Manager User's Guide: This guide describes how to use the Setup and Maintenance work area when implementing and configuring Oracle Sales Cloud.

You may need to consult other guides than those shown here to implement, administer, and maintain Oracle Sales Cloud. See the Preface to this guide for additional guides not listed here, and for links to Web sites that can be of assistance to you.

2 Overview

Contracts Offering: Overview

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

Before you begin, use the Getting Started 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 Contracts offering, you can select the following options:

- Procurement Contracts
- Sales Contracts

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

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

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

Define Common Applications Configuration for Contracts

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

You can find other information that supports the common implementation tasks in the Oracle Fusion Applications Concepts Guide.

Define Contracts Common Configuration

Define and manage the setup for common functions within the contracts set of business processes.

Define Procurement Contracts Configuration

Define and manage the setup related to procurement contracts.

Define Sales Contracts Configuration

Define and manage the setup related to sales contracts.

Define Contract Terms and Clause Library Configuration

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

Contracts: Define File-Based Data Import

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

Manage Bulk Data Export

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

Define Transactional Business Intelligence Configuration

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

Note

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

Getting Started with an Implementation: Overview

To start an Oracle Fusion Applications implementation, you must set up one or more initial users using the super user that was created during installation and provisioning of the Oracle Fusion Applications environment, or using the initial administrator user provided by Oracle for Oracle Cloud implementations. Because Oracle Fusion Applications is secure as delivered, the process of enabling the necessary setup access for initial users requires the following steps when getting started with an implementation:

1. If you are not starting an Oracle Cloud implementation, sign into Oracle Identity Manager (OIM) as the OIM Administration users and provision the IT Security Manager job role with roles for user and role management. This enables the super user account, which is provisioned with the IT Security Manager job role, to create implementation users.

2. For starting all implementations, sign in as the user with initial access: either the Oracle Fusion Applications installation super user or the initial Oracle Cloud administrator user.

3. Select an offering to implement, and generate the setup tasks needed to implement the offering.

4. Perform the following security tasks:

    a. Synchronize users and roles in the Lightweight Directory Access Protocol (LDAP) store with HCM user management by using the Run User and Roles Synchronization Process task.

    b. Create an IT security manager user by using the Create Implementation Users task.

    c. Provision the IT security manager with the IT Security Manager role by using the Provision Roles to Implementation Users task.

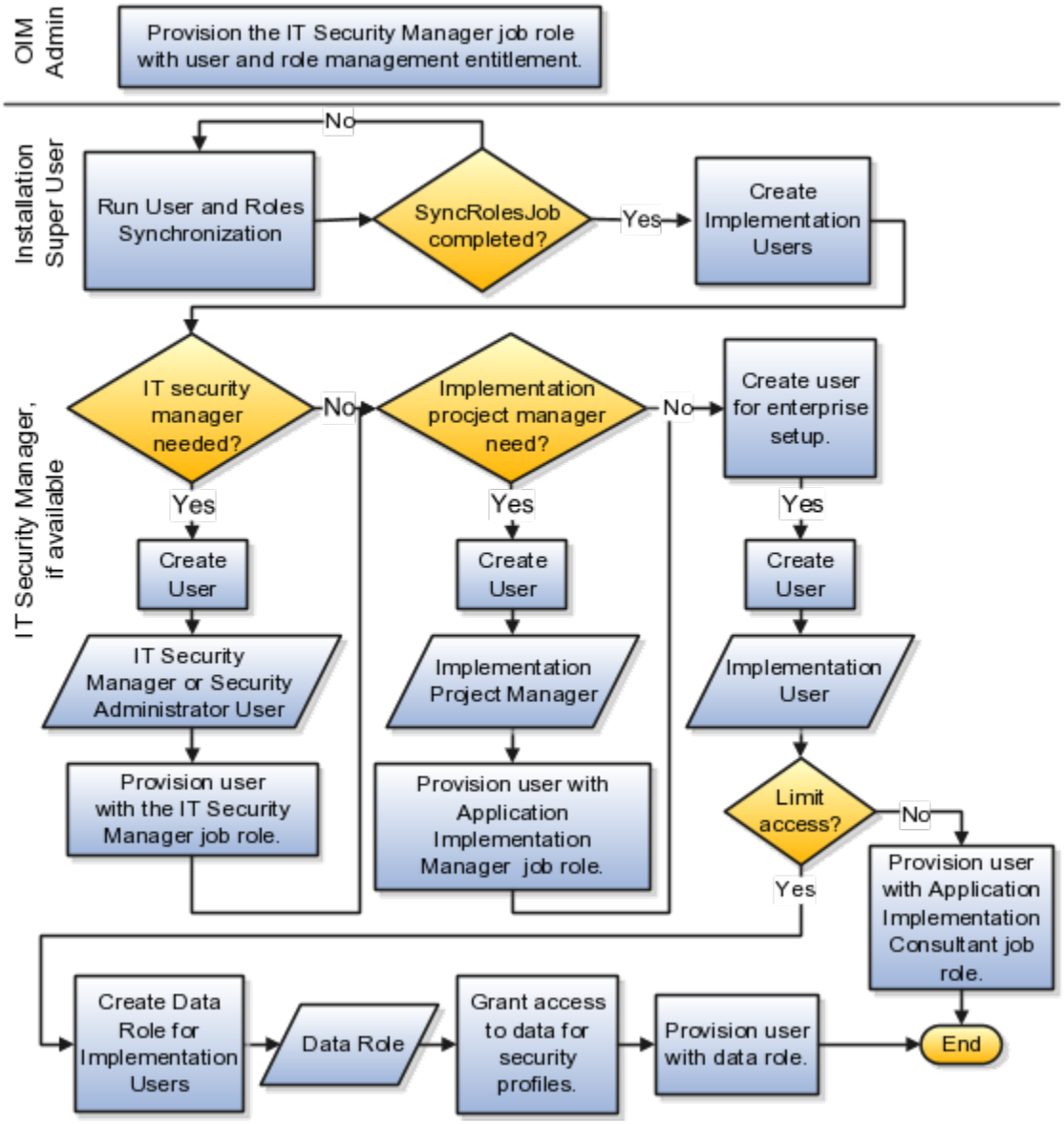
5. As the newly created IT security manager user, sign in to Oracle Fusion Applications and set up at least one implementation user for setting up enterprise structures.

    a. Create an implementation user by using the Create Implementation Users task.

    b. Provision the implementation user with the Application Implementation Manager job role or the Application Implementation Consultant job role by using the Provision Roles to Implementation Users task. The Application Implementation Consultant job role inherits from all product-specific application administrators and entitles the necessary View All access to all secured objects.

    c. Optionally, create a data role for an implementation user who needs only the limited access of a product-specific Application Administrator by using the Create Data Role for Implementation Users. Then assign the resulting data role to the implementation user by using the Provision Roles to Implementation Users task.

The figure shows the task flow from provisioning the IT Security Manager job role with the user and role management entitlement to creating and provisioning implementation users for enterprise setup.



Related Topics

- Initial Security Administration: Critical Choices
- User and Role Synchronization: Explained
- Enterprise Structures: Overview
- Creating Data Roles for Implementation Users: Procedure

Implementation Projects: Explained

An implementation project is the list of setup tasks you need to complete to implement selected offerings and functional areas. You create a project by selecting the offerings and functional areas you want to implement together. You manage the project as a unit throughout the implementation lifecycle. You can assign these tasks to users and track their completion using the included project management tools.

Maintaining Setup Data

You can also create an implementation project to maintain the setup of specific business processes and activities. In this case, you select specific setup task lists and tasks

Exporting and Importing

Implementation projects can also be used as the foundation for setup export and import. You can use them to identify which business objects, and consequently setup data, you will export or import and in which order.

Selecting Offerings

When creating an implementation project you see the list of offerings and functional areas that are configured for implementation. Implementation managers specify which of those offerings and functional areas to include in an implementation project. There are no hard and fast rules for how many offerings you should include in one implementation project. The implementation manager should decide based on how they plan to manage their implementations. For example, if you will implement and deploy different offerings at different times, then having separate implementation projects will make it easier to manage the implementation life cycles. Furthermore, the more offerings you included in an implementation project, the bigger the generated task list will be. This is because the implementation task list includes all setup tasks needed to implement all included offerings. Alternatively, segmenting into multiple implementation projects makes the process easier to manage. It is strongly recommended that you have no more than one offering in an implementation project. This ensures that import and export of the project data will be straightforward and that the export and import sequence will be correct.

Manage Application Implementation

Setup and Maintenance: Overview

Oracle Fusion Functional Setup Manager enables rapid and efficient planning, configuration, implementation, deployment, and ongoing maintenance of Oracle Fusion applications through self-service administration.

All Oracle Fusion Functional Setup Manager functionality is available from the Setup and Maintenance work area, which offers you the following benefits:

- **Self-Service Administration**

  Manage all aspects of functional setup of Fusion applications at the business user level with an integrated, guided process for planning, configuration, implementation, deployment, and maintenance.

- **Configurable and Extensable**

  Configure and Extend prepackaged list of tasks for setting up Fusion applications to better fit your business requirements.

- **Complete Transparency**

Get full visibility of Fusion applications end-to-end setup requirements with auto-generated, sequential task lists that include prerequisites and address dependencies.

- Prepackaged Lists of Implementation Tasks

  Task lists can be easily configured and extended to better fit with business requirements. Auto-generated, sequential task lists include prerequisites and address dependencies to give full visibility to end-to-end setup requirements of Oracle Fusion applications.

- Rapid Start

  Specific implementations can become templates to facilitate reuse and rapid-start for comparable Oracle Fusion applications across many instances.

- Comprehensive Reporting

  A set of built-in reports helps to analyze, validate and audit configurations, implementations, and setup data of Oracle Fusion applications.

With Oracle Fusion Functional Setup Manager you can:

- Learn about and analyze implementation requirements.
- Configure Oracle Fusion applications to match your business needs.
- Achieve complete visibility to setup requirements through guided, sequential task lists downloadable into Excel for project planning.
- Enter setup data through easy-to-use user interfaces available directly from the task lists.
- Export and import data from one instance to another for rapid setup.
- Validate setup by reviewing setup data reports.
- Implement all Oracle Fusion applications through a standard and consistent process.

Offerings: Explained

Offerings are application solution sets representing one or more business processes and activities that you typically provision and implement as a unit. They are, therefore, the primary drivers of functional setup of Oracle Fusion applications. Some of the examples of offerings are Financials, Procurement, Sales, Marketing, Order Orchestration, and Workforce Deployment. An offering may have one or more required or optional functional areas, and one or more or features.

Implementation Task Lists

The configuration of the offerings will determine how the list of setup tasks is generated during the implementation phase. Only the setup tasks needed to implement the selected offerings, functional areas and features will be included in the task list. This gives you the targeted task list necessary to meet your implementation requirements.

Enabling Offerings

Offerings and their functional areas are presented in an expandable and collapsible hierarchy to facilitate progressive decision making when specifying whether or not an enterprise plans to implement them. An offering or its functional areas can either be selected or not be selected for implementation. Implementation managers decide which offerings to enable.

Provisioning Offerings

The Setup and Maintenance work area can display all offerings, or just provisioned offerings. While you are not prevented from configuring offerings that have not been provisioned, ultimately the users are not able to perform the tasks needed to enter setup data for those offerings until appropriate enterprise applications (Java EE applications) are provisioned and their location (end point URLs) is registered.

Options: Explained

Each offering in general includes a set of standard functionality and a set of optional modules, which are called options. For example, in addition to standard Opportunity Management, the Sales offering includes optional functionality such as Sales Catalog, Sales Forecasting, Sales Prediction Engine, and Outlook Integration. These optional functions may not be relevant to all application implementations. Because these are subprocesses within an offering, you do not always implement options that are not core to the standard transactions of the offering.

Feature Choices: Explained

Offerings include optional or alternative business rules or processes called feature choices. You make feature selections according to your business requirements to get the best fit with the offering. If the selected offerings and functional areas have dependent features then those features are applicable when you implement the corresponding offering or functional area. In general, the features are set with a default configuration based on their typical usage in most implementations. However, you should always review the available feature choices for their selected offerings and functional areas and configure them as appropriate for the implementation.

You can configure feature choices in three different ways:

Yes or No

If a feature can either be applicable or not be applicable to an implementation, a single checkbox is presented for selection. Check or uncheck to specify yes or no respectively.

Single Select

If a feature has multiple choices but only one can be applicable to an implementation, multiple choices are presented as radio buttons. You can turn on only one of those choices.

Multi-Select

If the feature has multiple choices but one or more can be applicable to an implementation then all choices are presented with a checkbox. Select all that apply by checking the appropriate choices.

3 Performing Setup Tasks

Overview

Performing Sales Setup Tasks

For most setup activities, you'll 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. You access the Setup and Maintenance area by selecting **Navigator**, then **Setup and Maintenance**, under the Tools menu.

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

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

   > Restriction
   > The sales administrator does not have the same setup permissions as a setup user. He has permissions required to set up and administer sales features and components, but not the higher-level permissions required to implement non-sales ones.

2. Click the navigator icon and then click **Setup and Maintenance**, under the Tools menu.

   The Setup and Maintenance work area appears.

   > Tip
   > The Setup and Maintenance work area is also referred to as the Functional Setup Manager (FSM).

3. Click the All Tasks tab.

4. Enter the name of the task or task list in the search box and click **Search**.

   > Tip
   > You can use the percent sign (%) as a wildcard when searching.

   Alternatively, you can use the quick search in the regional area (on the left) to search for tasks.

5. In the list of tasks that appears, find the task you want.

6. Click the **Go to Task** icon for the task you want.

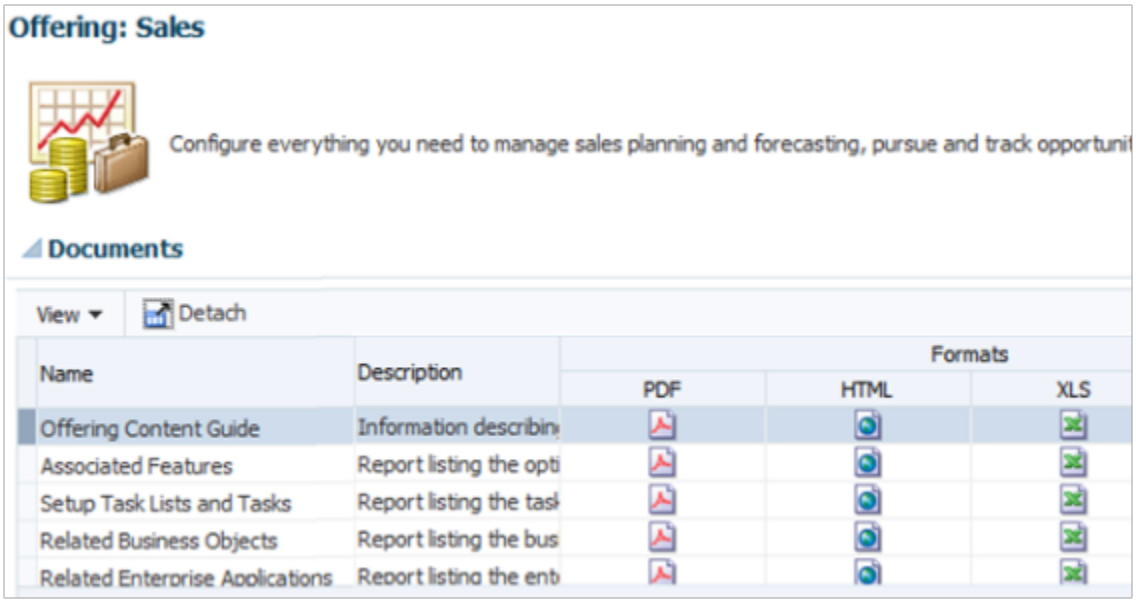
   The setup page for the task appears.

Downloading Task Lists and Setup Reports

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

1. Sign in as a user with access to the setup areas, such as the initial user, another setup user, or the sales administrator.
2. Click the **Getting Started** link in the regional area. Note that you may need to expand the regional panel to see the Getting Started link.
3. In the Getting Started page, click the **Sales** offering icon.

- Use the Sales offering icon to access reports for the Sales 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 are 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 Sales Cloud, see the Oracle Applications Cloud - Using Functional Setup Manager guide.

Sales Offering Task Lists

Following are some of the Sales offering task lists:

- Define Common Applications Configuration -- Manage definitions used across offerings, typically applying to multiple products and product families. These definitions include enterprise structures, workforce profiles, security, and approval rules, among others.
- Define Common CRM and Common Sales Configuration -- Define and manage the setup for common options within the customer relationship management set of business processes, such as trading community model, resources, products and sales catalogs, file-based import, sales prediction configuration, and customer center. Configure CRM for Outlook and Mobile Sales integrations. Additionally, define and manage the setup for common functions within the sales business process, such as notes, tasks, interactions, and calendar.
- Define and Maintain Opportunities and Sales Partners -- Define and manage the lookup choices, options, and additional fields available to sales opportunity and revenue management features. Schedule and monitor the process to automatically evaluate and assign candidate objects, such as resources, to the eligible opportunity revenue. In addition, configure sales partner management.
- Define Territory Management and Sales Quota Configuration -- Define and manage the attributes, attribute values, metrics, policies, and measure information that is related to territory management. In addition, define and manage the setup to support sales quotas.
- Define References and Competitors -- Define and manage the setup for the creation of competitive information to be leveraged by the sales organization in the sales business process. In addition, define and manage the setup for the creation of sales references to be leveraged by the sales organization in the sales business process.
- Define Sales Forecasting Configuration -- Configure forecasting options, such as forecast period parameters, unadjusted forecast criteria, and selected metrics. Additionally, manage processes for generating and refreshing forecasts and define lookups and profile options.

Setup and Maintenance Basics

Implementation Projects: Explained

An implementation project is the list of setup tasks you need to complete to implement selected offerings and functional areas. You create a project by selecting the offerings and functional areas you want to implement together. You manage the project as a unit throughout the implementation lifecycle. You can assign these tasks to users and track their completion using the included project management tools.

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You can also create an implementation project to maintain the setup of specific business processes and activities. In this case, you select specific setup task lists and tasks

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Implementation Project Task Lists: Explained

Once you make offering and functional area selections, Oracle Fusion Functional Setup Manager creates the implementation project and generates a complete list of setup tasks based upon your selections.

Offering Top Task List

A predefined hierarchical task list called the offering top task list is added. It includes a complete list of all tasks, including the prerequisites required to implement the offering. Typically, this task list will have the same name as the name of the offering it represents. If multiple offerings are included in a single implementation project, then each one of the offering top task lists is shown as a top node in the implementation task list hierarchy.

Included Tasks

Tasks needed to set up any of the dependent options and features, which are not selected for implementation are excluded from the task list. The implementation task list is generated according to the offering configurations and top task list definitions present at the time an implementation project is created. Once created, the task list in the implementation project becomes self-contained and will not change based on any changes made to the offering configurations or top task list definitions.

Task Organization

The offering top task list is shown as the top node in the implementation task list hierarchy. If multiple offerings are included in a single implementation project then top task list of each of the offerings becomes a top node of the implementation task list hierarchy. Within each top node, the tasks are organized with prerequisites and dependencies in mind.

- The most common requirements across all offerings are listed first.
- Next, the common tasks across an application area (such as Customer Relationship Management, or Financials), if applicable, are shown.
- Next, tasks that are common across multiple modules and options within an offering display.
- Finally, tasks for specific business areas of the offering, such as Opportunity Management, Lead Management, Territory Management, or Sales Forecasting are displayed.

Offerings: Explained

Offerings are application solution sets representing one or more business processes and activities that you typically provision and implement as a unit. They are, therefore, the primary drivers of functional setup of Oracle Fusion applications. Some of the examples of offerings are Financials, Procurement, Sales, Marketing, Order Orchestration, and Workforce Deployment. An offering may have one or more required or optional functional areas, and one or more or features.

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The configuration of the offerings will determine how the list of setup tasks is generated during the implementation phase. Only the setup tasks needed to implement the selected offerings, functional areas and features will be included in the task list. This gives you the targeted task list necessary to meet your implementation requirements.

Enabling Offerings

Offerings and their functional areas are presented in an expandable and collapsible hierarchy to facilitate progressive decision making when specifying whether or not an enterprise plans to implement them. An offering or its functional areas can either be selected or not be selected for implementation. Implementation managers decide which offerings to enable.

Provisioning Offerings

The Setup and Maintenance work area can display all offerings, or just provisioned offerings. While you are not prevented from configuring offerings that have not been provisioned, ultimately the users are not able to perform the tasks needed to enter setup data for those offerings until appropriate enterprise applications (Java EE applications) are provisioned and their location (end point URLs) is registered.

Related Documents: Explained

Related documents are intended to help you plan a successful implementation of the offerings available on the Getting Started page. Every offering contains a default set of reports as related documents. You cannot modify the default documents. In addition to these reports, you can add custom reports and other related documents to help with planning and implementation or when performing setup tasks. The documents available by default are:

Offering Content Guide

This report shows detailed information on the business processes and activities supported by the offering.

Setup Task Lists and Tasks Report

This report shows the list of task lists and tasks that you should complete to successfully implement the offering.

Associated Features Report

This report shows the list of functional areas and features associated with the offering.

Related Business Objects Report

This report shows all setup data needed to implement the offering. It provides a list of all business objects that are associated with the setup tasks belonging to the offering.

Related Enterprise Applications Report

This report shows the list of enterprise applications used by the functional pages and web services for the offering.

Feature Choices: Explained

Offerings include optional or alternative business rules or processes called feature choices. You make feature selections according to your business requirements to get the best fit with the offering. If the selected offerings and functional areas have dependent features then those features are applicable when you implement the corresponding offering or functional area. In general, the features are set with a default configuration based on their typical usage in most implementations. However, you should always review the available feature choices for their selected offerings and functional areas and configure them as appropriate for the implementation.

You can configure feature choices in three different ways:

Yes or No

If a feature can either be applicable or not be applicable to an implementation, a single checkbox is presented for selection. Check or uncheck to specify yes or no respectively.

Single Select

If a feature has multiple choices but only one can be applicable to an implementation, multiple choices are presented as radio buttons. You can turn on only one of those choices.

Multi-Select

If the feature has multiple choices but one or more can be applicable to an implementation then all choices are presented with a checkbox. Select all that apply by checking the appropriate choices.

Options: Explained

Each offering in general includes a set of standard functionality and a set of optional modules, which are called options. For example, in addition to standard Opportunity Management, the Sales offering includes optional functionality such as Sales Catalog, Sales Forecasting, Sales Prediction Engine, and Outlook Integration. These optional functions may not be relevant to all application implementations. Because these are subprocesses within an offering, you do not always implement options that are not core to the standard transactions of the offering.

What's a functional area?

A functional area is a related set of functionality that you may want to implement as part of an offering. Optional functional areas can be included or excluded from their parent offering. Functional areas may be hierarchical, and therefore may be subordinate to another functional area.

Lookups

Lookups: Explained

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

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

In another example, a lookup type for marital status has lookup codes for users to specify married, single, or available legal partnerships.

Lookup Type	Lookup Code	Meaning	Tag
MAR_STATUS	M	Married	
	S	Single	
	R	Registered Partner	+NL
	DP	Domestic Partner	-FR, AU

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

When managing lookups, you need to understand the following.

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

Using Lookups in Applications

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

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

Customization Level

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

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

The customization levels are user, extensible, and system. The following table shows which lookup management tasks are allowed at each customization level.

Allowed Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No
Updating start date, end date, and enabled fields	Yes	Yes, only if the code is not predefined data	No
Deleting codes	Yes	Yes, only if the code is not predefined data	No
Updating tags	Yes	No	No
Updating module	Yes	No	No

Predefined data means LAST_UPDATED_BY = SEED_DATA_FROM_APPLICATION.

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

Once the customization level is set for a lookup type, it can't be modified. The customization level for lookup types created using the Define Lookups page is by default set at the User level.

Standard, Common, and Set-Enabled Lookups

The available kinds of lookups are as follows.

Lookup	Description
Standard	Lists the available codes and translated meanings
Set enabled	Additionally associates a reference data set with the lookup codes

Lookup	Description
Common	Legacy lookups

Standard lookups are the simplest form of lookup types consisting only of codes and their translated meaning. They differ from common lookups only in being defined in the standard lookup view.

Common lookups exist for reasons of backward compatibility and differ from standard lookups only in being defined in the common lookup view.

Set enabled lookup types store lookup codes that are enabled for reference data sharing. At runtime, a set-enabled lookup code is visible because the value of the determinant identifies a reference data set in which the lookup code is present.

Accessing Lookups

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

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

Enabling Lookups

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

Enable lookups based on the following.

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

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

For more information on the predefined lookups and lookup codes, see assets with the Lookup type in the Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com).

Translating Lookups

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

Restriction
You can add the translation for only as many languages as are permitted by the administrator. The functionality to limit the number of languages displayed on the dialog box is controlled through the Translation Editor Languages profile option. It can be set at the SITE or USER level. If nothing is specified, all active languages are displayed.

Related Topics

- Modules in Application Taxonomy: Explained
- Managing Set-Enabled Lookups: Examples
- What's the difference between a lookup type and a value set?
- Managing a Standard Lookup: Example
- Oracle Enterprise Repository for Oracle Fusion Applications: Explained

How can I edit lookups?

On the Define Lookups page, you can edit the existing lookup codes of a lookup type or add new lookup codes. To access the page, navigate to the Setup and Maintenance work area and search for the Define Lookup task.

You may not be able to edit a lookup if its customization level doesn't support editing.

Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. However, the generic tasks provide access to all lookups types of a kind, such as all common lookups that are associated with the Manage Common Lookups task.

If the lookups in an application are available in the standards, common, or set-enabled lookups view, they are central to an application and can be easily managed. However, lookups defined in a specific application view can only be managed by following instructions provided by that application.

Profile Options

Profile Options: Explained

Profile options manage configuration data centrally and influence the behavior of applications. Profile options serve as permanent user preferences and application configuration parameters. You configure profile options with settings for specific contexts or groups of users. You can change the values of profile options to customize how your user interfaces look and behave.

Profile options store the following kinds of information.

Type of Information	Profile Option Example
User preferences	Settings to provide access to social networking features
Installation information	Setting to identify the location of a portal
Configuration choices	Settings to change user interface skins and behaviors

Type of Information	Profile Option Example
Processing options	Settings to affect how much information to log either for an entire site or a specific user

You can add and configure new profile options in addition to configuring predefined profile options that are implemented as updateable.

Profile Option Definition and Configuration

Application developers add new profile options and configure ones that are not to be updated by other users. Application administrators and implementation consultants configure profile options with profile option values that are implemented as updatable.

Profile option definitions consist of the following.

- Profile option name
- Application and module in the application taxonomy
- Profile option values
- Profile options categories
- Profile option levels
- Profile option level hierarchy

Profile options can appear on any user interface page without indication that a profile option is what is being set.

Profile Option Values

Some profile options have predefined profile option values.

The Manage Profile Option Values task flow allows an administrator to set updatable profile option values at the available levels, including the user level. You can access the Manage Profile Option Values task starting in the Setup and Maintenance Overview page and searching for profile option tasks.

You can set profile option values at different levels: site, product, and user. The following table provides examples.

Profile Option Level	Value of the Profile Option Level	Profile Option Value	Effect
User	Manager1	UK pound sterling	Access to site and all products shows UK pounds sterling in effect
User	Manager2	US dollar	Access to site and all products shows US dollars in effect
Product	Financials for EMEA	Euro	Unless superseded by a user level value, Euros in effect for Financials for EMEA applications

Profile Option Level	Value of the Profile Option Level	Profile Option Value	Effect
Site	Site	UK pound sterling	UK pounds sterling in effect for all other users and products

Context such as user session or accessed product determines which profile option value is associated with the profile option name. In the example, if manager1 doesn't set a profile option value for this profile option, access to Financials for EMEA shows currency in Euros; and access to other products shows currency in UK pounds sterling.

Profile Option Categories

Categories group profile options based on their functional area. Profile option categories facilitate searching and defining data security.

For example, in Oracle Fusion Receivables, the Transactions profile option category groups profile options related to setting how Receivables transactions are to be processed, such as Require Adjustment Reason.

A profile option can be in more than one category.

Profile Option Hierarchies and Levels

Application developers specify at which hierarchy level a profile option is enabled. The predefined profile option hierarchy levels are site, product, and user.

The hierarchy levels specified in the profile option definition determine the context in which a profile option value may be set. If the profile option value at a particular level is updatable, an administrator can update the profile option value for that context.

> **Note**
> Profile options should only be enabled for context levels that are appropriate for that profile option. For example, a profile option indicating a global configuration setting must not be enabled at the user level, if users cannot choose a different value for that setting.

For security, one level in the hierarchy is designated as a user level. A profile option may be enabled at any or all hierarchy levels. When enabled at all levels, the predefined ordering of profile option hierarchy levels gives precedence to the values that are set at the user level over values set at the product and site levels, and precedence to values set at the product level to values set at the site level. If there is no value for the current user, then the product value applies. If there is no value for the user or product, then the site value applies.

The table shows the predefined profile option hierarchy and ordering.

Hierarchy Level	Priority When Multiple Levels Set	Effect on Applications	Example
Site	Lowest	Affect all applications for a given implementation	Currency for the site is set to Euros.
Product	Supersedes Site	Affect all applications of a product family such as Financials	Currency for the Financials products set to UK pound sterling.

Hierarchy Level	Priority When Multiple Levels Set	Effect on Applications	Example
User	Highest, supersedes Product	Affect only the experience of the current user	Currency for the user of Financials applications set to US dollars.

You can configure updatable values for profile options at one or more levels depending on which levels are enabled in the profile option definition. When a profile is set at more than one level, higher levels of specificity override lower levels of specificity.

In the example, if the currency setting for the site is UK pounds sterling, but the Financials division works in the Netherlands using the Euro, a manager in the US can override that product level setting at the user level to use US dollars when accessing Financials applications.

In another example, if a profile option called Printer is set only at the site and product levels. When a user logs on, the Printer profile option assumes the value set at the product level, since it is the highest level setting for the profile.

> Tip
> Set site-level profile option values before specifying values at any other level. The profile option values specified at the site-level work as defaults until profile option values are specified at the other levels.

For more information on the predefined profile options, see assets with the Profile Option type in the Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com).

Related Topics

- Managing Profile Options: Points to Consider
- Viewing and Editing Profile Option Values: Points to Consider
- Modules in Application Taxonomy: Explained
- Planning Profile Options: Points to Consider
- Oracle Enterprise Repository for Oracle Fusion Applications: Explained

Profile Options and Related General Preferences: How They Work Together

Some Oracle Fusion Middleware Extensions for Oracle Application profile options are related to general preferences in the global area.

Preferences

The related general preferences are Default Application Language, Territory, Date Format, Time Format, Currency, and Time Zone. When the user changes any of these preferences, the stored values in LDAP are updated accordingly.

Profile Options

The corresponding profile options are Default Language, Default Territory, Default Date Format, Default Time Format, Default Currency, and Default User Time Zone. No matter what you set for these profile options at any level, the preferences settings,

or LDAP values, take precedence. The profile option value is used only if the LDAP value isn't available. Updating the profile option value doesn't automatically update the value in LDAP or preferences.

Related Topics

- Viewing and Editing Profile Option Values: Points to Consider

4 Defining Users

Defining Implementation Users: Overview

This topic describes tasks in the Define Implementation Users task list.

Create Implementation Users

The implementation user is a user with the necessary access to perform the initial implementation of Oracle Sales Cloud. The implementation user performs the tasks in Oracle Sales Cloud implementation projects, sets up enterprise structures, and administers users and security.

Oracle creates an initial implementation user for you when your Oracle Sales Cloud environment is provisioned. This initial implementation user account is created in Oracle Identity Management only and is not part of the sales organization.

> Note
> The initial implementation user can create other setup users to help with application setup. For information about creating setup users, see the Oracle Sales Cloud - Getting Started with Your Implementation guide.

Create Data Role for Implementation Users

This task does not apply to Oracle Sales Cloud. Data roles are not used to provide access to Oracle Sales Cloud data.

Provision Roles to Implementation Users

Oracle provisions the initial implementation user you are assigned with the following job roles:

- Application Implementation Consultant
- IT Security Manager
- Application Diagnostic Administrator

The initial implementation user can provision similar implementation job roles to other users who can then help with application setup. For information about creating setup users and provisioning roles to them, see the Oracle Sales Cloud - Getting Started with Your Implementation guide.

5 Defining Security

Defining Security: Overview

Oracle Sales Cloud is secure as delivered, that is, access is limited to one initial implementation user. To enable application users to access Oracle Sales Cloud functions and data, you perform the tasks in the Define Security for Customer Relationship Management task list as appropriate. You can perform most of these tasks both during implementation and later as requirements emerge. This topic introduces the tasks in this task list.

For more information on setting up security for Oracle Sales Cloud and for task procedures, see the Oracle Sales Cloud - Securing Oracle Sales Cloud guide.

Manage Job Roles

The Oracle Sales Cloud security reference implementation provides many predefined job roles. You can perform the Manage Job Roles task to:

- Review the role hierarchy of a job or abstract role.
- Create custom job and abstract roles.
- View the roles assigned to a user and list the users who have a specific role.

A user with the IT Security Manager or Application Implementation Consultant job role performs the Manage Job Roles tasks.

Manage Duties

You can perform the Manage Duties task to:

- Review the duties of a job or abstract role.
- Manage the duties of a custom job or abstract role.
- Create custom duty roles.

A user with the IT Security Manager job role performs the Manage Duties tasks.

Define Data Security

Use the Manage Data Security Policies task to manage the data security policies that determine grants of entitlement to a user or role on an object or attribute group.

A user with the IT Security Manager job role performs the Manage Data Security Policies task.

Other tasks on the Define Data Security for Customer Relationship Management task list do not apply to Oracle Sales Cloud.

Define Users

Using the tasks on the Define Users for Customer Relationship Management task list, you can:

- Create application users using the Manage Users task.

- Create role mappings to control the provisioning of roles to application users using the Manage HCM Role Provisioning Rules task.

  For example, you can create a role mapping to provision the Channel Sales Manager role automatically to specified sales managers.

- Import partner contact data using the Import Partner Users task.

Note

You can also create users in Oracle Sales Cloud by importing legacy users from a file using the Manage File Import Activity task available from the Setup and Maintenance work area. For information on importing users, see the Oracle Sales Cloud - Getting Started with Your Implementation guide. You cannot perform bulk imports of data into Oracle Sales Cloud using the Import Worker Users task.

A user with the IT Security Manager job role performs the Define Users tasks.

6 Defining Sales Resources

Understanding Sales Resources

Sales resources are users who participate in Oracle Sales Cloud business processes. You must create or import resources before you can associate them with resource organizations, resource teams, or work objects.

You can enter your resource information using the Setup and Maintenance work area, Manage Resources task. Alternatively, you can import data to create or update employee resources.

Related Concepts

You must understand the following concepts to understand resources in Sales Cloud.

- Resource team: A resource team is a temporary group of resources formed to complete a business task. A resource team cannot be hierarchically structured and is not intended to implement an organization.
- Resource Role: You use the resource roles to define provisioning rules. For example, a provisioning rule can assign the Sales Manager job role to a user with the Sales Manager resource role.
- Resource Directory: The Resource Directory offers detailed information about all the resources within the deploying organization. The Resource Directory also enables you to find and communicate with other resources, and to network and collaborate with them.
- Resource Organization: You create sales resources and provision permissions the resources need to do their jobs. In the process, you also build the organization chart of your sales organization.

Setting Up Resources

You create sales resources and provision permissions the resources need to do their jobs. In the process, you also build the organization chart of your sales organization.

To set up resources, you must:

- Identify an existing employee, contingent worker, or partner member as a resource.
- Specify the end date for a resource's engagement with the deploying company.
- Assign resource roles to the resources. You can define resource roles using the Manage Resource Roles task from the Setup and Maintenance work area.
- Assign resources to organizations. Before assigning resources to organizations, you must ensure that the organization hierarchy for your sales organization is built. You can define organizations using the Manage Internal Resource Organizations task from the Setup and Maintenance work area.
- Assign resources to teams. You can include resources from different resource organizations or an entire organization to work as members of a resource team. You can assign identified resources to teams and assign them roles within the team.

For more details, see the Define Resource Information chapter of the Oracle Sales Cloud - Implementing Customer Data Management guide.

7 Setting Up Currencies

Overview

Setting Up Currencies: Overview

Oracle Sales Cloud supports multiple currencies, multiple daily rates, and currency rate conversion.

If you are going to use multiple currencies, at a minimum you need to:

- Specify corporate currency: You may have already done this if you were following the currency setup in the Oracle Sales Cloud - Getting Started With Your Implementation guide. If you've already specified your corporate currency, there's no need to do so again.
- Specify the default currency: You may already have done this if you were following the currency setup in the getting started guide. If so, there's no need to do it again.
- Import or enter daily currency conversion rates.
- For opportunities integration, set the multi-currency profile option.
- Enable the currencies you are going to use, if you previously disabled them.

For more information, see the topic, Setting Up Multiple Currencies.

Oracle Sales Cloud also supports different currency conversion rate types, allowing your business to maintain different conversion rates between currencies for the same period. Examples of conversion rate types are supplied: Spot, Corporate, User, and Fixed. For more information, see the guide, Oracle Financials Cloud - Implementing Enterprise Structures and General Ledger, and the online help.

Implementation Tasks

Setting Up Multiple Currencies

You must complete several steps to enable multiple currencies in Oracle Sales Cloud:

Following are the high-level steps:

- Download the Desktop Integration Installer.
- Set two profile options that specify default corporate currency and rate type.
- Define daily currency conversion rates.
- For opportunities integration, set the multi-currency profile option.
- Re-enable currencies if you previously disabled them.

These steps are detailed in this topic.

Download Desktop Integration Installer

Use the following steps to download the desktop integration installer:

1. Sign in as a setup user and, in the Navigator, click the **Download Desktop Integration** link in the Tools category.

   > Note
   > If that link doesn't work, then in the URL, replace after /homePage/ with /desktop_installer/OracleFADesktop.exe.
   >
   > Here is an example: https://domainname:port/homePage/faces/AtkHomePageWelcome .
   >
   > The URL looks like this: https://domainname:port/homePage/desktop_installer/OracleFADesktop.exe.

2. Save the executable (.exe) file to your computer.

   If Microsoft Project is not installed on your computer, an error may occur if you select Complete Install. To avoid this, click OK and then choose custom install, and then uncheck Microsoft Project Integration.

Set Default Currency Profile Options

Use the following steps to set the profile options, Corporate Currency Default and Exchange Rate Type Default.

> Note
> If you have already set these profile options in a previous procedure, then you can skip this step.

1. Sign in as a setup user and, in the Navigator, click the **Setup and Maintenance** link in the Tools category.
2. In Setup and Maintenance, search for the task, Manage Currency Profile Options.
3. Click the **Go to Task** icon for the task. The Manage Currency Profile Options page appears.
4. Click the link for ZCA_COMMON_CORPORATE_CURRENCY and set it to your default corporate currency.
   - The display name for this profile option is Corporate Currency Default. It stores configured corporate currency.
5. Save your changes.
6. Click the link for ZCA_COMMON_RATE_TYPE and set it to the default currency rate type.
   - The display name for this profile option is Exchange Rate Type Default. It stores the default currency exchange rate type.

For more information on currency exchange rates types, see the guide, Oracle Financials Cloud - Implementing Enterprise Structures and General Ledger, and the online help.

Define Daily Currency Conversion Rates

Use the following steps to define daily currency conversion rates.

1. Sign in as a setup user and, in the Navigator, click the **Setup and Maintenance** link in the Tools category.
2. In Setup and Maintenance, search for the task, Manage Daily Rates.

3. Click the **Go to Task** icon for the task. The Currency Rates Manager page appears.
4. Click the Daily Rates tab.
5. Click **Create in Spreadsheet** and open the CreateDailyRates spreadsheet. In this spreadsheet, you'll define the start and end dates of your exchange rate (month, year).
6. Add some rows to the spreadsheet and enter your data. Use the following example data as guidance:

   Enter a maximum of 10 rows at one time for a successful import.

From Currency	To Currency	Conversio Rate Type	From Conversio Date	To Conversio Date	Conversio Rate	Inverse Rate	Action
USD	EUR	Corporate	12/31/2012	12/30/2013	0.800300	1.249400	Insert
USD	EUR	Corporate	12/31/2013	12/31/2014	0.800300	1.249400	Insert

7. When you are done adding the data, click Submit in the spreadsheet.
   - On the back-end, the currency process Import and Calculate Daily Rates runs automatically.

     Important
     The Import and Calculate Daily Rates process automatically calculates and enters inverse rates for you, so there is no need to enter these manually as separate rows. In other words, in the above sample data, there is no need to enter two additional rows with From Currency as EUR, To Currency as USD, and opposite conversion and inverse rates.

     If successful, a confirmation message displays, saying that all rows were inserted successfully.
8. Optionally, to validate that the process ran okay, go to Navigator, Tools, Scheduled Processes and search for the process Import and Calculate Daily Rates. It should have a status of succeeded.

For more information on currency exchange rates types, see the guide, Oracle Financials Cloud - Implementing Enterprise Structures and General Ledger, and the online help.

Set Opportunity Currency Profile Option

Use the following steps to set the profile option, Multiple Currencies for Opportunity Lines Enabled. This profile option specifies whether multiple-currencies are supported in opportunity header and revenue (product) lines.

Note
If you have already set this profile option in a previous procedure, then you can skip this step.

1. Sign in as a setup user and, in the Navigator, click the **Setup and Maintenance** link in the Tools category.
2. In Setup and Maintenance, search for the task, Manage Opportunity Profile Options.
3. Click the **Go to Task** icon for the task. The Manage Opportunity Profile Options page appears.

4. Search for the profile option, (MOO_REVN_ENABLE_MULTICURRENCY) and select it.
5. Set to Yes to allow different currencies at line and header level in opportunities. Set to No to disallow the functionality.
6. Save your changes.

For more information on currency exchange rates types, see the guide, Oracle Financials Cloud - Implementing Enterprise Structures and General Ledger, and the online help.

Ensure Currencies are Enabled

By default, all currencies are enabled. If you previously disabled any currencies, then you'll need to re-enable them. Use the following steps:

1. As a setup user, navigate to **Setup and Maintenance** and search for the task, Manage Currencies.
2. Click the **Go to Task** icon. The Manage Currencies page appears.
3. In the Manage Currencies page, click **Search** to search for all currencies, without entering any search criteria.
4. Select the **Enabled** option for each currency you plan to use.
5. Save your work.

Defining Currencies: Points to Consider

When creating or editing currencies, consider these points relevant to entering the currency code, date range, or symbol for the currency.

Currency Codes

You can't change a currency code after you enable the currency, even if you later disable that currency.

Date Ranges

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

Symbols

Even if you enter a symbol for a currency, the symbol is not always displayed when an amount is displayed in this currency. Some applications use currency symbols when displaying amounts. Others, like Oracle Fusion General Ledger, do not.

Related Topics

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

Currency Revaluation Setup and Process: Points to Consider

The Currency Revaluation process manages the effects of revaluation of currency exchange rates on opportunity revenue.

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

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

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

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

Note
Only revenue items in Open status are targeted by the batch process.

Running the Process

Run the Currency Revaluation batch process from the job input screen available from the **Scheduled Processes** option on the Navigator menu. Select the job name OptyRevnCurrencyReEvaluation.

Note
The Currency Revaluation batch process can also be triggered when corporate currency, configured rate type, or exchange rate (or any combination of these) is modified, either directly through administrator intervention or when these currency parameters change in the general ledger.

The following table shows the logical parameters expected by the batch process:

Parameter	Default	Description
CRM Common Currency	Stored in the profile option, Corporate Currency Default (ZCA_ COMMON_ CORPORATE_ CURRENCY)	• Configured corporate currency. • Passed if corporate currency changes. • Program does not check against profile for match.
CRM Common Currency Rate Type	Stored in the profile option, Exchange Rate Type Default (ZCA_ COMMON_ RATE_TYPE)	• Configured rate type. • Passed if there is a need to re-evaluate the conversion rate against a different rate type. • If no value is passed, program uses the profile option value.

Parameter	Default	Description
Business Unit Organization ID		Leave blank, and all business units will be targeted. Otherwise provide the specific business unit ID.
Number of Opportunities per Database Update	500	Oracle recommends that you leave this parameter at the default value or blank (and program uses default value).
Last Batch Job Run Time Stamp		This parameter can be used for batch program re-runs. When a few opportunities have failed, the log will reflect all the failed opportunities, as well as provide a timestamp for "Start Batch Job Timestamp". Enter this timestamp on the second run of the batch program to limit the scope of the batch job to only the failed opportunities.
Effective Date	System date	Date passed to general ledger (via an API) to calculate the conversion rate. The program does not validate that the date must be in the future, so, in effect, any date can be passed.

Note
Forecasting activity is paused when this process executes. Also, when updating revenue lines, the process does not consider whether the revenue is already included in a forecast.

Currency Revaluation Impact on Revenue Objects

The Currency Revaluation batch process impacts several revenue attributes, as shown in the following table.

Revenue Model Attribute	Attribute Description/Function	Batch Process Update
• CRM_CURRENCY_CODE • CRM_CONVERSION_RATE_TYP • CRM_CONVERSION_RATE	These attributes store the exchange rate between revenue line currency and the corporate currency, and are used to construct the materialized views for Closed, Pipeline and Unforecasted revenue metrics along the territory hierarchy. For lines in status category of Open, these attributes are updated whenever	CRM_ CURRENCY_CODE and CRM_ CONVERSION_ RATE_TYPE are updated based on a parameter to the batch program. If these two parameters are passed in, the program uses them to update the revenue tables. If these values are not passed in, the application retrieves the profile option values

Revenue Model Attribute	Attribute Description/Function	Batch Process Update
	a revenue line is created/updated or whenever an opportunity with revenue is updated or saved. • The default for CRM_CURRENCY_CODE is taken from the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_ • The default for CRM_CONVERSION_RATE_TYP is taken from the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE). • CRM_CONVERSION_RATE is calculated using a GL API.	and updates the revenue tables with them.
REVN_ AMT_ CURCY_CODE	Currency of the revenue (summary or line)	Entered currency. Not updated.
• CONVERSION_RATE_TYPE • CONVERSION_RATE	These attributes store the exchange rate between revenue line currency and the summary revenue (opportunity level) currency and are used to convert the revenue line amounts to opportunity level currency. For lines in a status category of Open, these attributes are updated whenever the revenue is created/ updated or whenever an opportunity with revenues is updated or saved.	• CONVERSION_RATE_TYPE is updated based on a parameter to the batch program. • CONVERSION_RATE is updated. Changes if corporate rate types change. Rate is obtained using (conversion_rate_type, line_currency_code, summary_currency_code, and system date).
• REVN_AMT • DOWNSIDE_AMT • UPSIDE_AMT	For summary revenue amounts, these amounts are calculated as the sum of line revenue amounts. These amounts are converted to the opportunity-level currency before calculating the sum. The exchange rate stored in the CONVERSION_ RATE attribute is used to perform the conversion.	• Line revenue is not updated. • Summary revenue is recalculated.
LAST_ UPDATE_DATE	WHO column	Updated.

Revenue Model Attribute	Attribute Description/Function	Batch Process Update
USER_ LAST_ UPDATE_DATE	Functional WHO column	Not updated.

Related Topics

- Managing Job Definitions: Highlights
- Setting Up Opportunity Revenue: Points to Consider

Entering Daily Rates Manually: Worked Example

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

In order to load rates using the Daily Rates Spreadsheet, you need to install Oracle ADF Desktop Integration client software. Oracle ADF Desktop Integration is an Excel add-in that enables desktop integration with Microsoft Excel workbooks. Users can download the installation files from **Navigator > Tools > Download Desktop Integrator Installer.**

Entering Daily Rates

1. **Navigator** > **Period Close**.

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

2. Click the **Manage Currency Rates** link.

   Use the **Currency Rates Manager** page to create, edit, and review currency rate types, daily rates, and historical rates.

3. Click the **Daily Rates** tab.

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

4. Click the **Create in Spreadsheet** button.

   Use the **Create Daily Rates** spreadsheet to enter daily rates in a template that you can save and reuse.

5. Click in the **From Currency** field. Select the GBP - Pound Sterling list item.
6. Click in the **To Currency** field. Select the USD - US Dollar list item.
7. Click in the **Conversion Rate** field. Select the Spot list item
8. Click in the **From Conversion** field. Enter a valid value: 10/1/2014.
9. Click in the **To Conversion Date** field. Enter a valid value: 10/5/2014.
10. Click in the **Conversion Rate** field. Enter a valid value: 1.6.
11. Click the **Submit** > **OK** twice.

12. Review the **Record Status** column to verify that all rows were loaded successfully.
13. Save template to use to enter daily rates frequently. You can save the spreadsheet to either a local drive or a shared network drive.
14. Optionally, edit the rates from the Daily Rates user interface or resubmit the spreadsheet.

Related Topics

- Using Rate Types: Examples
- Working in Desktop Integrated Excel Workbooks: Points to Consider

Updating Currency Rates: Worked Example

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

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

Updating Currency Rates

1. Navigate to the Period Close work area.

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

2. Click the Manage Currency Rates link.

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

3. Click the Daily Rates tab.

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

4. Click the From Currency list. Select the GBP - Pound Sterling list item.
5. Click the To Currency list. Select the USD - US Dollar list item.
6. Enter the dates for the daily rates that you are changing. Enter today's date.
7. Click the Rate Type list. Select the Spot list item.
8. Click the Search button.
9. Click in the Rate field. Enter the new rate of 1.7 in the Rate field.
10. Click in the Inverse Rate field. Enter the new inverse rate of 0.58822 in the Inverse Rate field.
11. Click the Save button.

Related Topics

- Working in Desktop Integrated Excel Workbooks: Points to Consider

8 Setting Up Common Components

Application Toolkit

Define Application Toolkit Configuration: Overview

Oracle Fusion Application Toolkit (ATK) provides many features that are available to users of all product families, including Applications Help, the Reports and Analytics pane, and the Watchlist in the global area. In the Setup and Maintenance work area, use the Define Application Toolkit Configuration task list to set up some of these components, and the Define Help Configuration task list to set up Applications Help.

> **Note**
> The Define Application Toolkit Configuration task list is available in implementation projects only if the Application Toolkit Component Maintenance feature choice is selected.

Related Topics

- Defining What's Available in the Reports and Analytics Pane: Procedure
- Setting Up Help: Overview

Attachments

Attachments: Explained

You can use attachments to provide supplementary information to specific business objects. Attachments can be URLs, desktop files, text, or repository folders. For a business object you may view, create, delete, or edit attachments, depending on your role and granted privileges. For more information on attachments, see the Oracle Fusion Applications Developer's Guide.

Repository

Attachments are stored in a content management repository provided by Oracle WebCenter Content Server. Users managing attachments can't interact with the repository unless the repository mode is enabled. When enabled, users can share attachments among objects, update attachments, and perform other tasks. Access to the attachment files is controlled by a digital signing mechanism.

Security

Data security applicable to a specific business object extends to its attachments For example, if a user has no access to a specific expense report, then that user cannot access its attachments. You can also use attachment categories to control access and actions on attachments, based on roles associated with that category. For more information on securing attachments, see the Oracle Fusion Applications Developer's Guide.

Related Topics

- Attachment Entities: Explained

- What's an attachment category?

What is the size limit for attachment files in Oracle Sales Cloud?

As delivered, the file size limit for an individual file associated with an attachment in Oracle Sales Cloud is 100 MB. You can decrease this limit, but you can't increase it. The method for decreasing the limit varies by object.

Sales Cloud objects with a 100 MB limit for each attachment file are:

- Account
- Activity
- Campaign
- Contact
- Forecasting
- Household
- Lead
- Note
- Opportunity
- Partner

Attachments Troubleshooting: Explained

Attachments UIs are very user-friendly and easy to work with. You may encounter issues in certain cases such as you customize 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 do not 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. Make sure that users have a role with the privileges shown in the following table, 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 do not have the Update Application Attachment privilege for any attachment categories tied to the expense report attachment entity, then they cannot create any attachments for the expense reports.

For more information on attachment category data security, see the Oracle Fusion Applications Developer's Guide.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

Issue: Missing Attachment Category

You can view existing attachments but the attachments no longer have an attachment category associated with them.

Resolution

When the attachment was added, at least one category existed for the corresponding attachment entity. Since then, the entity was edited so that it no longer has any assigned categories, so the user cannot 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: Explained
- Attachment Entities and Attachment Categories: How They Work Together
- What's an attachment category?

Calendar

Creating the Calendar for Oracle Sales Cloud

The accounting calendar defines time periods including the exact dates for each period. These defined periods, often called enterprise periods, are used for many purposes in Oracle Sales Cloud. Examples include:

- Reports that provide amounts by enterprise period, such as a sales pipeline analysis
- Metrics calculations by period for territory analysis
- The ability to adjust forecast amounts by time period
- Distribution of quota amounts by time period

The period frequency set in your fiscal calendar is the shortest period you can use. Therefore, if you set the period frequency to yearly, then your reports and activities can be for each year, but can't be broken down by month. If you set the period frequency to monthly, then you can break down activities and reports by month and summarize by quarter and year. However, if you set the period frequency to weekly, then you can perform activities and reports by week, quarter, and year, but not by month because the number of weeks per month varies.

Setting up your accounting calendar requires two steps:

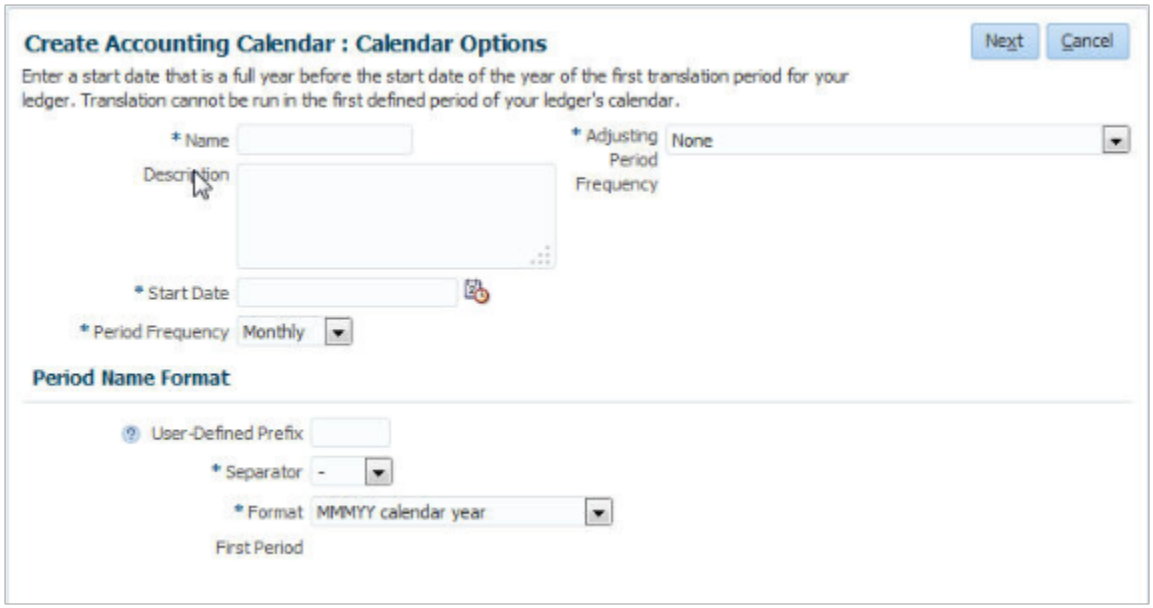
1. Create the calendar. For Oracle Sales Cloud you create only one calendar.
2. Designate the calendar you just created as the calendar you will use by setting the Accounting Calendar Default profile option.

Creating the Accounting Calendar

The accounting calendar sets the exact start and end dates for each period, for each year.

1. Sign in as a setup user.
2. In Setup and Maintenance, search for the Manage Accounting Calendars task.
3. Click **Go To Task**.

4. On the Create Accounting Calendars page, click **Create**.



5. Name your calendar, for example, Sales Calendar.

6. Leave the **Adjusting Period Frequency** set to None.

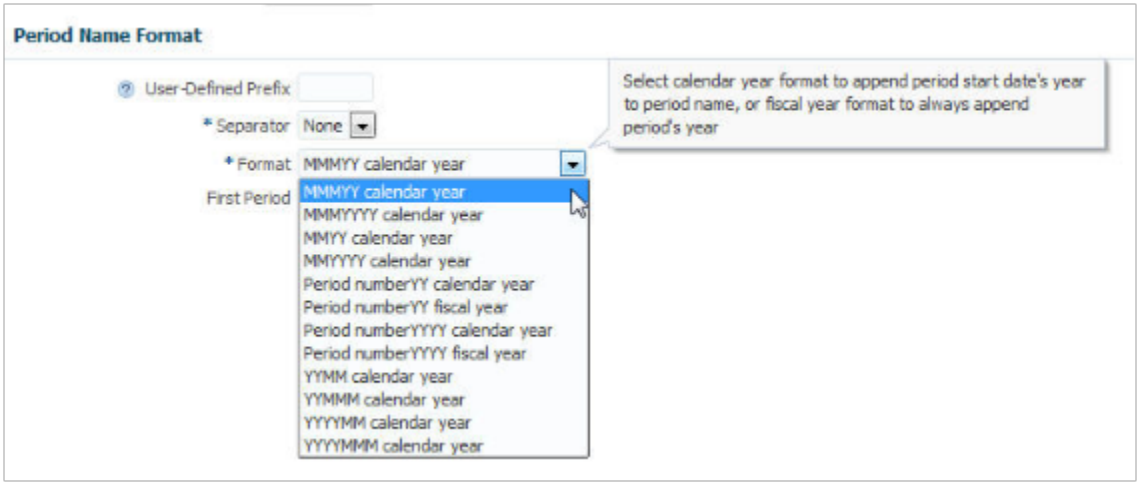
7. For **Start Date**, Vision is using 1/1/10.

   You cannot change the settings after you start using the application, so consider setting the date to the first date that your company was created. Then you can upload historical data later, if necessary.

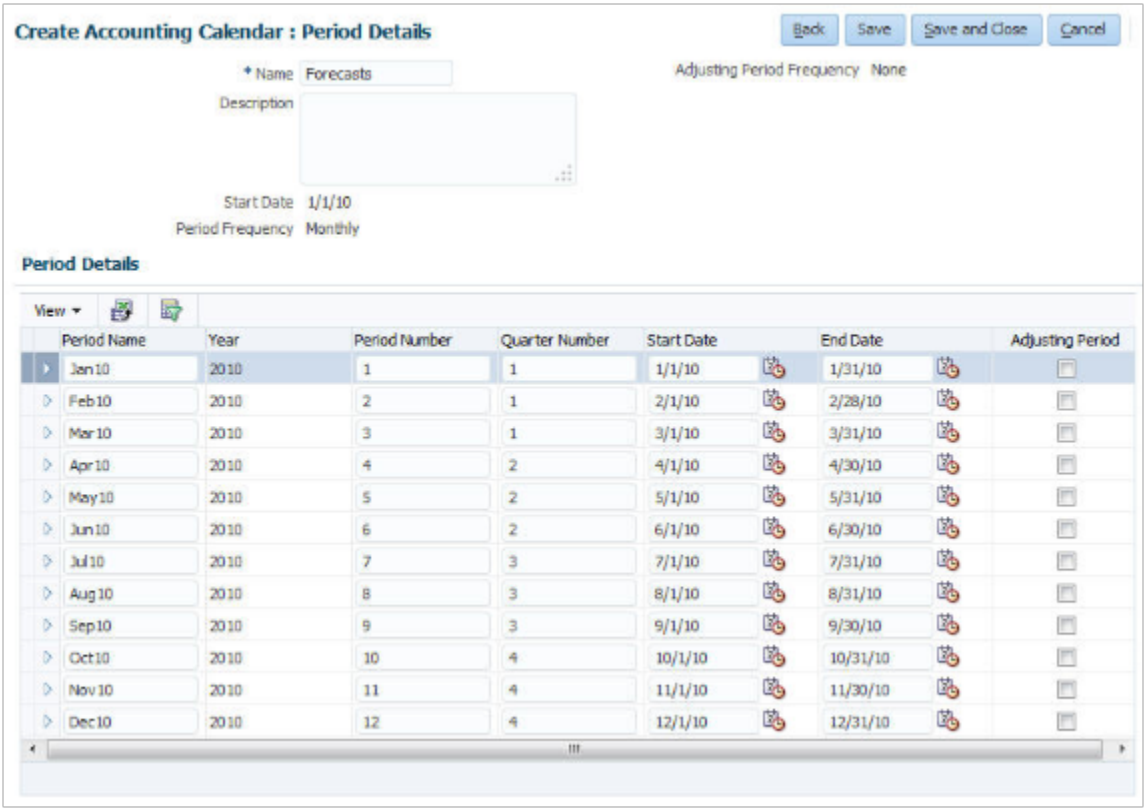
8. For **Period Frequency**, select the shortest time period you want to use for reports and activities. For Vision Corporation, we choose **Monthly**. The period starts on the first of the month and ends on the last day of the month, regardless of the number of days or weeks in each month.

9. For Vision Corporation, choose **None** for the **Separator**.

10. Select the format to use for period names.



11. Click **Next**. The application generates the periods, with start and end dates, for the first year (2010 for Vision Corporation).



12. If needed, you can manually change the details for each period. Click **Save and Close**.
13. Now you need to generate the periods for each additional year, including the current, or coming year. Open the calendar.
14. Click **Add Year**.
15. Click **Save and Close**.
16. Repeat the last three steps for each year you want to add.
17. Click **Done**.

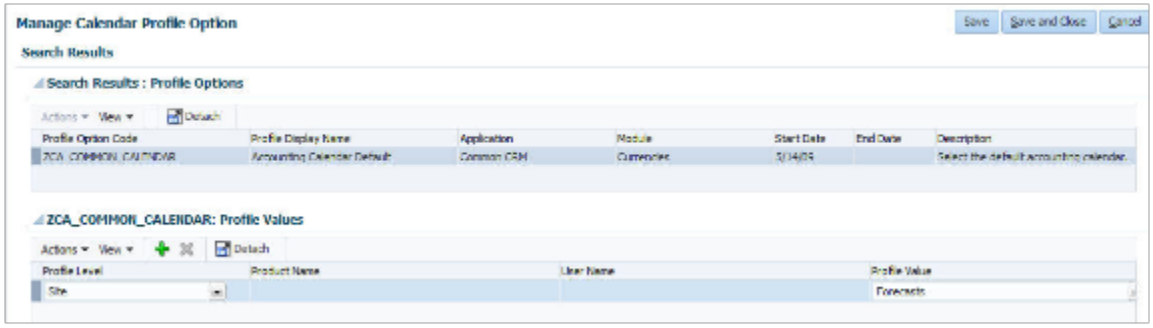
> **Restriction**
> You cannot change your calendar options after you start using the calendar, such as by generating forecasts.

Selecting the Common Calendar

Select the calendar you just created to be the common calendar. Many features of Oracle Sales Cloud use the common calendar, so changing the selected calendar can result in the loss of data.

1. Sign in as a setup user or sales administrator.
2. Search for the Manage Calendar Profile Option task.
3. Click the **Go To Task** icon.
4. On the Manage Calendar Profile Option page, select the Accounting Calendar Default profile option.
5. In the Profile Values table, click **New**.

6. For **Profile Value**, select **Site**.
7. Click the **Profile Value** list, and select the name of the calendar you created.



8. Click **Save and Close**.

Messages

Messages: Highlights

A message dictionary contains all messages that inform users about missing or incorrect data, warn users about the consequences of certain actions, and provide information in log files. Messages are defined for specific applications and modules but a few are common messages that can be used in any application. All applications also use messages stored outside of the message dictionary.

The message dictionary is described in the Oracle Fusion Applications Developer's Guide.

Managing Messages

- Use the Manage Messages page to create and edit custom messages in the message dictionary, as well as edit predefined messages. Do not delete predefined messages unless you are sure that they are not used anywhere. Refer to the Oracle Fusion Applications Developer's Guide.

  See: Introduction to Message Dictionary Messages

- Messages outside of the message dictionary, such as confirmations and field validations, are managed either in the Oracle Application Development Framework or through message resource bundles used for translation.

Related Topics

- Modules in Application Taxonomy: Explained

Creating and Editing Messages: Highlights

Each message in the message dictionary has many attributes and components such as message properties, text, and tokens. You set these attributes when creating or editing the message.

To create or edit a message, navigate to the Manage Messages task in the Setup and Maintenance work area and open the Manage Messages page.

Details about these messages are described in the Oracle Fusion Applications Developer's Guide.

Message Properties

- The message type identifies the type of information in that message.

  See: Understanding Message Types

- The message name and number are identifiers for the message. There are specific message number ranges for predefined messages in each application, and you should not edit numbers assigned to predefined messages. When creating custom messages, use only message numbers within the 10,000,000 to 10,999,999 range.

  See: About Message Names

  See: About Message Numbers

- The translation notes for predefined messages might contain internal content that you can disregard.

  See: About Translation Notes

- The message category, severity, and logging enabled option are related to the incident and logging process.

  See: About Grouping Messages by Category and Severity

  See: Understanding Incidents and Diagnostic Logs with Message Dictionary

Message Text and Tokens

- The message text comprises various components, some of which are displayed only to select users. To determine which component of the message text is displayed to a particular user, set the Message Mode profile option (FND_MESSAGE_MODE) at the user level for that user. The message component short text is visible to all users and therefore, it is understood that the profile option does not apply to this component. Also, the profile option applies only to messages in the message dictionary.

  See: About Message Components

- Tokens are variables that represent values to be displayed in the message text.

  See: About Tokens

Related Topics

- Modules in Application Taxonomy: Explained

Common Messages: Points to Consider

Message names that begin with FND_CMN and message numbers between 0 and 999 are common messages. Each common message can appear in multiple places in any product family across Oracle Fusion Applications. For example, the FND_CMN_NEW_SRCH message can be used for any search to indicate that no results were found. Common messages of type error or warning are part of the message dictionary.

Creating and Editing Common Messages

You can create custom common messages for use in multiple places. You can choose any suitable naming convention but the message number should be within the range that is designated for the product.

> **Note**
> Do not begin the message name with FND_CMN as this is already used in the existing common messages.

Common messages can be used in any application. Therefore, consider the ramifications if you edit any aspect of the message, including incident and logging settings. Changes would be reflected in all instances where the message is used. For example, if you change the message text, make sure that the text is generic and applies to all users across Oracle Fusion Applications.

Creating and Editing Messages: Highlights

Each message in the message dictionary has many attributes and components such as message properties, text, and tokens. You set these attributes when creating or editing the message.

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  See: Understanding Message Types
- The message name and number are identifiers for the message. There are specific message number ranges for predefined messages in each application, and you should not edit numbers assigned to predefined messages. When creating custom messages, use only message numbers within the 10,000,000 to 10,999,999 range.

  See: About Message Names

  See: About Message Numbers
- The translation notes for predefined messages might contain internal content that you can disregard.

  See: About Translation Notes
- The message category, severity, and logging enabled option are related to the incident and logging process.

  See: About Grouping Messages by Category and Severity

  See: Understanding Incidents and Diagnostic Logs with Message Dictionary

Message Text and Tokens

- The message text comprises various components, some of which are displayed only to select users. To determine which component of the message text is displayed to a particular user, set the Message Mode profile option (FND_MESSAGE_MODE) at the user level for that user. The message component short text is visible to all users and therefore, it is understood that the profile option does not apply to this component. Also, the profile option applies only to messages in the message dictionary.

  See: About Message Components
- Tokens are variables that represent values to be displayed in the message text.

  See: About Tokens

Related Topics

- Modules in Application Taxonomy: Explained

Miscellaneous Features

Setting Up the Mapping Service for Contextual Addresses: Points to Consider

A contextual address is marked with an orange square that users can click to display the address on a map. The Mapping Service for Contextual Addresses profile option determines the mapping service to use to display the map. Use the Manage Administrator Profile Values task in the Setup and Maintenance work area to set the profile option value.

Profile Option Default

By default, the Mapping Service for Contextual Addresses profile option has no value.

> Warning
> Until you enter a valid value for this profile option, users get an error when they try to open a map for any contextual address.

Profile Option Value

After you find and select the Mapping Service for Contextual Addresses profile option, enter a mapping service URL in the Profile Value column, for example:

- http://maps.google.com/maps?output=embed&q=
- http://maps.yahoo.com/maps_result.php?q1=
- http://maps.live.com/default.aspx?where1=
- http://bing.com/maps/?v=2&encType=1&where1=

> Tip
> You can include parameters in the URL. For example, to avoid a locator box in Google Maps, add &iwloc=& to the URL. So you enter http://maps.google.com/maps?iwloc=&&output=embed&q= as the profile value.

Related Topics

- Viewing and Editing Profile Option Values: Points to Consider

How can I enable the privacy statement?

In the Setup and Maintenance work area, open the Manage Applications Core Administrator Profile Values task and search for the **Privacy Statement URL** profile option. Update the profile value with the full URL of the web page containing the privacy content. Subsequently, the Privacy Statement menu item appears in the global area under your user name, and is linked to the given URL.

Related Topics

- Viewing and Editing Profile Option Values: Points to Consider

Public Unique Identifier: Explained

Oracle Sales Cloud generates a unique 18-digit identifier (UID) for each row. Users cannot easily read or use UIDs because of its length and complexity. The Public Unique ID (PUID) is a more user-friendly, alphanumeric ID that is generated by the document sequencing feature.

The default setup shows the automatically generated numeric private UIDs and PUIDs for data records. To use an alphanumeric PUID instead of the default numeric PUID, navigate to the **Manage Public Unique Identifier Profile Options** task from Setup and Maintenance to enable the encoding process.

You can configure the following profile options for PUID:

- **CRM Public Unique ID String Encoding** profile option controls the characters used in the encoding of the PUID based on a radix, or base number.
- **CRM Public Unique ID Prefix** profile option defines the optional prefix value for the PUID.

Document sequencing typically begins with the one. However, you can start the PUIDs sequences at any value.

CRM Public Unique ID String Encoding Profile Option

This profile option determines the set of numbers and letters used in encoding the PUID generated by the document sequencing feature. The PUID is delivered with the encoding set to none. To enable the encoding of the PUID, select a radix or base conversion algorithm. The available values are stored in the lookup type **ZCA_PUID_ENCODING**. The encoding methods convert the PUID into user readable IDs using alphanumeric characters instead of numeric digits. For example, if BASE_26 is chosen, only the upper case letters of the alphabet will be used. The base values are not extensible

The following base values are available:

RADIX	Values
BASE_16	Numbers 0-9, letters A-F
BASE_26	Letters A-Z, Upper Case
BASE_29	Numbers 2-9, letters BCDFGHJKLMNPQRSTVWXYZ
BASE_31	Numbers 0-9, letters ABCDEFGHJKLMNPQRTUWXY
BASE_36	Numbers 0-9, letters A-Z upper case
BASE_62	Numbers 0-9, letters A-Z, letters a-z
NONE (default)	No Encoding

CRM Public Unique ID Prefix Profile Option

You can define a prefix as a site-level profile option. This profile option is delivered without a defined prefix. When defined, the inserted text is added before the PUID base encoded document sequence value. For example, if the PUID is CLE123 and the Prefix is ORA, the PUID will be ORACLE123.

You must define the delimiters or separation characters in the prefix. The concatenated PUID and prefix should not exceed the defined field length, which is usually 30 characters. For example, you may want the records for the pharmaceutical divisions of your company to be denoted with PUIDs and the prefix Pharma- or Pharma1, Pharma2, and so on.

Related Topics

- Document Sequences: Explained
- Document Sequences: Points to Consider

Notes

Defining Notes: Points to Consider

A note is a record attached to a business object. Notes capture nonstandard information received as you do business. When setting up notes for your application, you should consider the following points:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.

Note Types

Note types are assigned to notes when they're created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type.

When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.

Note Type Mappings

If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.
- If no other note types appear, then note type mapping doesn't exist for that object and the default note types are used. Select **Default Note Types** to see which default note types exist in the system.
- 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.

Note
Extensibility features are available on the Note object. For more information refer to the article Extending Oracle Sales Cloud Applications: How it Works.

Related Topics

- Extending Oracle Sales Cloud: How It Works

Search

Synchronizing and Optimizing Database Search Indexes for CRM Objects: Explained

You can synchronize and optimize database search indexes for your Oracle Sales Cloud objects to make your users' searches faster and more efficient. To do this, you can schedule two Enterprise Scheduler Service (ESS) jobs to perform the synchronization and optimization operations.

Synchronizing Database Search Indexes

The Synchronize Database Search Indexes for CRM Objects job is a common ESS job that refreshes text indexes for customer, contact, party name, lead name, and opportunity name columns. It calls the CTX_SYNC_INDEX API to synchronize the text index to process inserts, updates, and deletes to the base table, and ensures that any changes made to these columns are reflected in the database index for the columns.

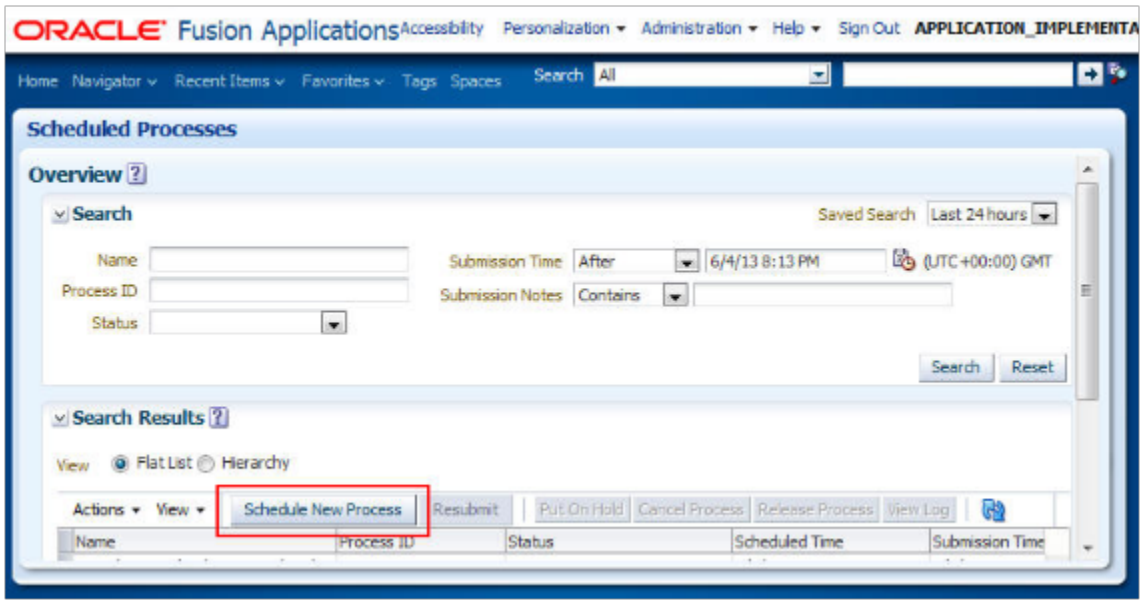
The recommended minimum interval for scheduling the database synchronization job is five minutes; you should allow a longer interval if possible.

You must have the CRM Application Administrator Duty role to see the Synchronize Database Search Indexes for CRM Objects job in the job list, and the Run Search Index Scheduler privilege to run the job.

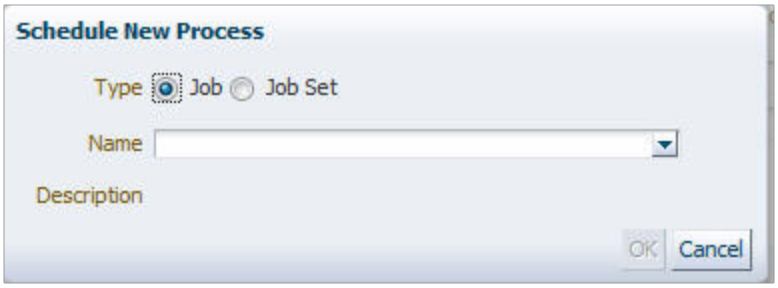
To schedule the database synchronization job:

1. Navigate to the Scheduled Processes page by selecting Scheduled Processes under the Tools menu in the Navigator.

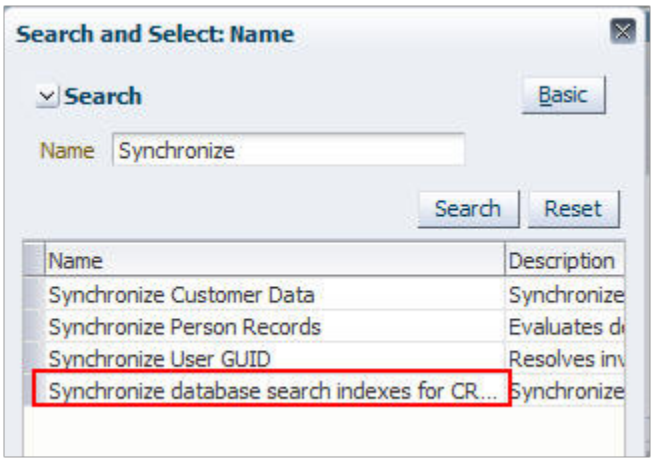
2. Click the **Schedule New Process** button.



3. Specify Job in the **Type** field on the Schedule New Process dialog box if it is not already specified.



4. Search for and select the job type of Synchronize database search indexes for CRM objects.



5. Click **OK**.

Optimizing Database Search Indexes

The Optimize CRM Search Indexes for CRM Objects job is a common ESS job that optimizes the search indexes. It calls the CTX_OPTIMIZE_INDEX API to perform the optimization. Optimization removes old data and minimizes index fragmentation, which can improve query response time.

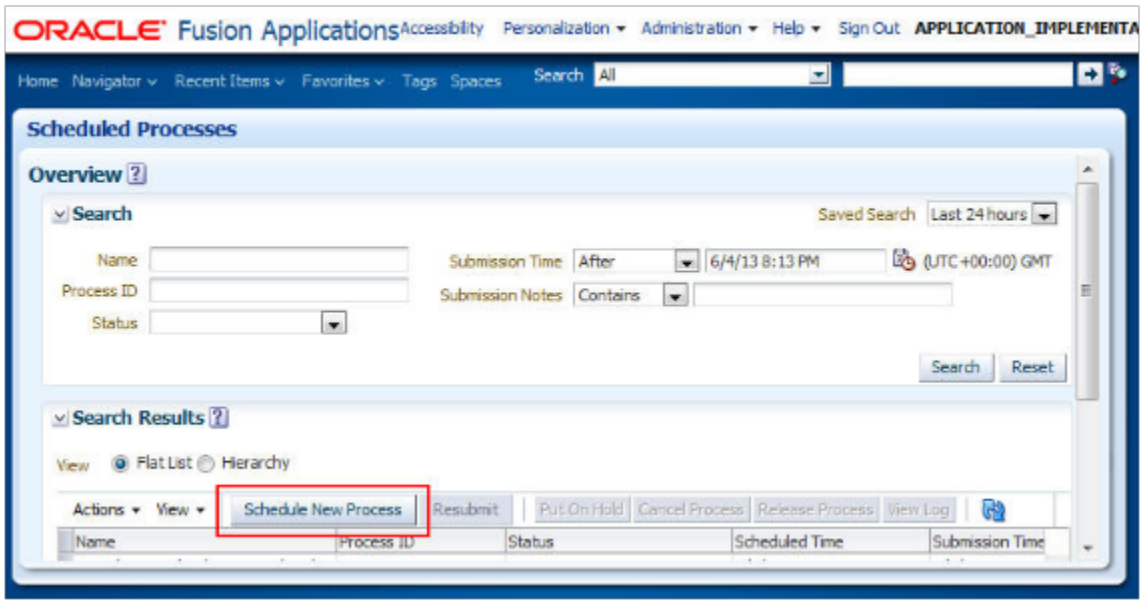
You can run this job on a weekly, monthly, or as-needed basis if search performance becomes poor. The recommended minimum interval for scheduling the database optimization job is five minutes; you should allow a longer interval if possible.

You must have the CRM Application Administrator Duty role to see the Optimize CRM Search Indexes for CRM Objects job in the job list, and the Run Search Index Scheduler privilege to run the job.

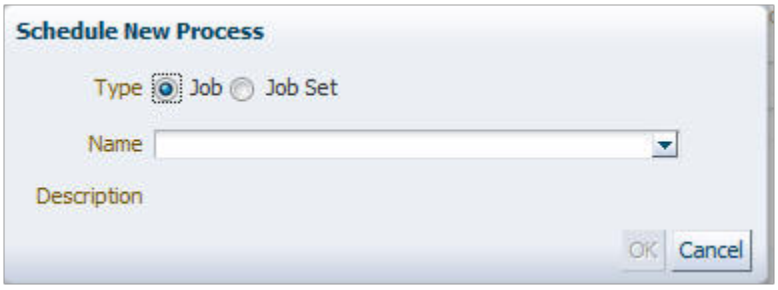
To schedule the database optimization job:

1. Navigate to the Scheduled Processes page by selecting Scheduled Processes under the Tools menu in the Navigator.

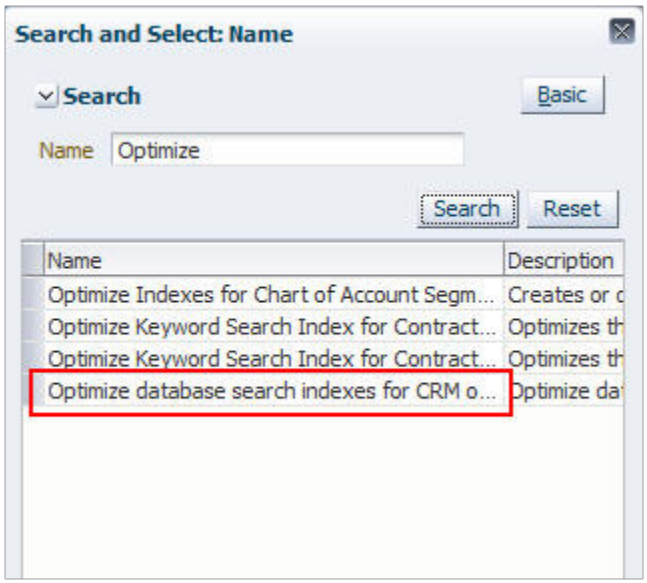
2. Click the **Schedule New Processes** button.



3. Specify Job in the **Type** field on the Schedule New Process dialog box if it is not already specified.



4. Search for and select the job type of Optimize database search indexes for CRM objects.



5. Click **OK**.

Task Templates

How can I create a task template that is available to associate with assessment templates?

Create the task template with a subtype of Assessment.

What are the statuses a task can be in?

Tasks can have the following statuses by default. You can change or delete these statuses, or add more to fit your needs.

Status	Meaning
Canceled	The task was canceled.

Status	Meaning
Complete	The task was completed. You can change this status to another one as needed.
In progress	The task is currently active and being worked on.
Not started	The task has not yet been started.
On hold	The task is not actively being worked on, but has not yet been completed.

If a task is set to Complete, the Percentage Complete field for the task is set to 100% and the end date is set to the current date.

> **Note**
> If you change the status of a Complete task to something else, the Percentage Complete field value does not change automatically.

Defining Tasks: Points to Consider

A task is a unit of work to be completed by one or more people by a specific completion date. When using tasks in your application, you should consider the following points:

- Tasks
- Task Templates

Tasks

You define a task with a description, due date, and category. Each task has an owner, who oversees or is responsible for the task, and one or more assignees who perform the work.

The task can be related to a business object, such as an Opportunity, a customer, or one or more external contacts. Tasks can also have notes for general information and attachments for tracking e-mail or project documents.

Task Templates

Often, a process includes a set of tasks that are performed repeatedly. To make this easier, administrators can define task templates, which represent a group of tasks. You can use a task template when working on a particular business object. You select the appropriate task template for your process and the system creates the tasks and associates them with the business object being worked on.

> **Note**
> Extensibility features are available on the Task object. For more details refer to the article Extending Oracle Sales Cloud Applications: How It Works

Related Topics

- Extending Oracle Sales Cloud: How It Works

Turning a Business Process into a Task Template: Example

This example illustrates how to create a task template that represents a business process.

Scenario

A sales manager wants to create a task template for her department's client product demonstration process.

Client Product Demonstration Activities

The client product demonstration process occurs regularly. The sales manager does not want to manually create tasks for this process every time it occurs, so she decides to create a task template that includes the business process activities. Each time she repeats the business process, she can use the task template to automatically generate the appropriate tasks that need to be performed.

Analysis

The business process consists of the following activities:

- Book a conference room.
- Create an agenda.
- Confirm the date and time with the client.
- Make arrangements with presenters.
- Deliver product demonstration.
- Follow up with client.

Resulting Task Template

Based on the analysis of the business process, the following task template is created:

Task Template Name: Client Product Demonstration

Task	Category	Lead Days	Duration Days
Book conference room	Preparation	1	1
Create agenda	Preparation	1	1
Confirm date and time with client	Call	5	1

Task	Category	Lead Days	Duration Days
Schedule presenters	Preparation	5	2
Deliver demonstration	Demonstration	7	1
Follow up with client	Call	10	1

Related Topics

- Assessment Templates and Task Templates: How They Fit Together

Watchlist

Disabling and Enabling Watchlist Categories and Items: Points to Consider

You can disable or enable predefined Watchlist categories and items for all users. Use the Set Watchlist Options task in the Setup and Maintenance work area.

Ultimately, what users see in their own Watchlist would be the categories and predefined items that you enable in the Set Watchlist Options page:

- Plus any saved searches that the user is using as Watchlist items
- Minus any categories or items that the user chooses to hide using Watchlist preferences
- Minus any items with no results found, if the user chooses to hide such items using Watchlist preferences

Any Category or Item

When you disable any category or item, you also disable the processes that calculate the Watchlist item counts. These processes include creating data caches, performing security checks, invoking services across domains, running queries, and so on.

Predefined Watchlist Items

An item with the Predefined type represents the actual predefined Watchlist item that appears in the Watchlist.

If you disable this type of Watchlist item, then:

- The item isn't available for users to display in their Watchlist.
- The item is removed from any Watchlist where it's currently displayed.

If you disable a Watchlist category, then the category is not available for users to include in their Watchlist, and all Watchlist items within the category are also disabled.

User-Created Saved Search Watchlist Items

A Watchlist item with the User-Created Saved Search type doesn't appear in the Watchlist. It controls the display of the **Manage Watchlist** button on pages with saved searches in the local area.

If you disable this type of Watchlist item, then:

- The **Manage Watchlist** option isn't available on the corresponding page, so users can't use their own saved searches as Watchlist items.
- Any user-defined saved searches (from that page) already used as Watchlist items are removed from the users' Watchlist. The saved searches are still available for searching, but not for the Watchlist.

Watchlist Category

If you disable a Watchlist category, then:

- The category isn't available for users to include in their Watchlist.
- All Watchlist items within the category are also disabled.

Related Topics

- Creating Watchlist Items: Procedure
- Displaying and Hiding Watchlist Items: Procedure

Click-To-Dial

Oracle Sales Cloud CTI: Highlights

Oracle Sales Cloud Computer Telephony Integration (CTI) integrates with your telephony environment and must be manually enabled in your deployment. This topic highlights what is required to set up the CTI feature and to implement logging of the calls made using the CTI feature.

CTI is a feature of the customer contact process. You initiate phone communication to customers and employees with a click of your mouse, leveraging your customer contact information and the application context. The CTI feature uses Oracle WebLogic Communication Services, OWLCS, to enable communications. Applications that provide the CTI functionality do so primarily through contextual actions.

Additionally, CTI utilizes Oracle Sales Cloud tasks as an optional transaction logging feature that will track information about the call such as the customer, call participants, a timestamp noting the start time of the call, the direction of the communication, in or outbound, and the resolution code.

Terms used in setting up these communications:

- PSTN: Public switched telephone network is the network of the world's public circuit-switched telephone networks.

- SIP: Session initiation protocol, an open signaling protocol standard that is used to set up phone calls
- TPCC: Third Party Call Control enables an application to control the telephony network to set up calls automatically.
- OWLCS: Oracle WebLogic Communication Services. Offers the TPCC service to Oracle applications and sets up the calls via SIP integration with the telephony network.

The setup task list Define WebLogic Communication Services Configuration includes four tasks required for the correct configuration and implementation of CTI. One optional task, separate from the setup task list, is required for implementing task logging.

You can find information about implementing CTI in the Oracle Sales Cloud Administrator's Guide. Detailed information about configuring and maintaining WebLogic Communication Services is found in the Oracle WebLogic Communication Services Administrator's Guide

Configure and Deploy WebLogic Server

- Deploy WebLogic Communication Services: After the Oracle WebLogic communication server is deployed, this manual task activates the server.

  See: Oracle WebLogic Communication Services Administrator's Guide

Integrate Communications Services

- Integrate WebLogic Communication Services with Telephony Network: This manual task integrates communications within the telephony environment. OWLCS must be configured to interface with the specific characteristics of the telephony network.

  See: Managing Oracle WebLogic Communication Services for CTI Functionality

Specify the Domain and Address

- Register a URL for the telephony gateway or soft switch for SIP domain: This task defines the Server protocol, defaulted to http, the external server host address, and external server port address. The Associated Modules section is not required for setup. You can also perform this as a manual task using Topology Manager to configure the address of the SIP Public Switched Telephone Network (PSTN) gateway or SIP soft switch serving the users within that domain. This address is needed by CTI to correctly form the SIP addresses required by WebLogic Communication Services. See the link to Configuring PSTN Gateway Address Using Topology Manager: Worked Example.

Enable Click-to-Dial

- After configuring the server and defining the SIP domain, perform the Enable Click-to-Dial task. This task sets the value of the profile option Enable Click-to-Dial to 'Yes.'

Call Logging via Tasks

- To initiate the task based logging for CTI, set the profile option Call Interaction Logging Enabled to 'YES.'

Configuring PSTN Gateway Address Using Topology Manager: Worked Example

This example demonstrates how, during the implementation of the **Register URL for the telephony gateway or soft switch for SIP domain** task, you must manually configure the PSTN gateway address by registering HzCTDPstnGatewayApp to a given environment using Oracle Fusion Topology Registration

These steps configure the address of the SIP Public Switched Telephone Network (PSTN) gateway or SIP soft switch serving the users within that domain. This address is needed by Click-to-Dial to correctly form the SIP addresses required by WebLogic Communication Services.

For example: SIP:+1650-555-1212@pstn_gateway.oracle.com;user=phone where pstn_gateway.oracle.com is the SIP domain. The SIP domain can also be expressed in the format 10.1.1.1 (IP address).

Configuring PSTN using the Topology Manager

1. Sign in to Oracle Sales Cloud as a user that has **application implementation consultant** and **WebLogic Services administration** roles.
2. In Setup and Maintenance, click Register Enterprise Applications from the regional area under **Topology Registration.**
3. On the Register Enterprise Applications page, click the plus icon to add an enterprise application. An Add Enterprise Application dialog box appears.
4. Enter the new application information: Click **Search** in the Enterprise Application list field. Enter **HzCTDPstnGatewayApp** in the name field and click **Search**.
5. Click **OK**.
6. Enter the other fields in the Add Enterprise Application dialog box.

Field	Value
Name	HzCTDPstnGatewayApp
Server Protocol	SIP This field is ignored by Click-to-Dial. Oracle WebLogic Communication Service (OWLCS) always uses the SIP protocol.
External Server Host	10.143.167.91 (Used as an example) A host name can be used instead of an IP address.
External Server Port	0 (Used as an example) This field is ignored by Click-to-Dial.

7. Click **Save and Close**.

9 Customizing Reports and Analytics

Customizing Sales Cloud Analytics and Reports: Overview

Oracle Sales Cloud comes predefined with a wealth of business intelligence (BI) analytics and reports that help your sales team monitor and interpret your sales pipeline, team performance, forecasts, activities, customers, and more. If the supplied analytics and reports don't meet your unique business requirements, you can build your own.

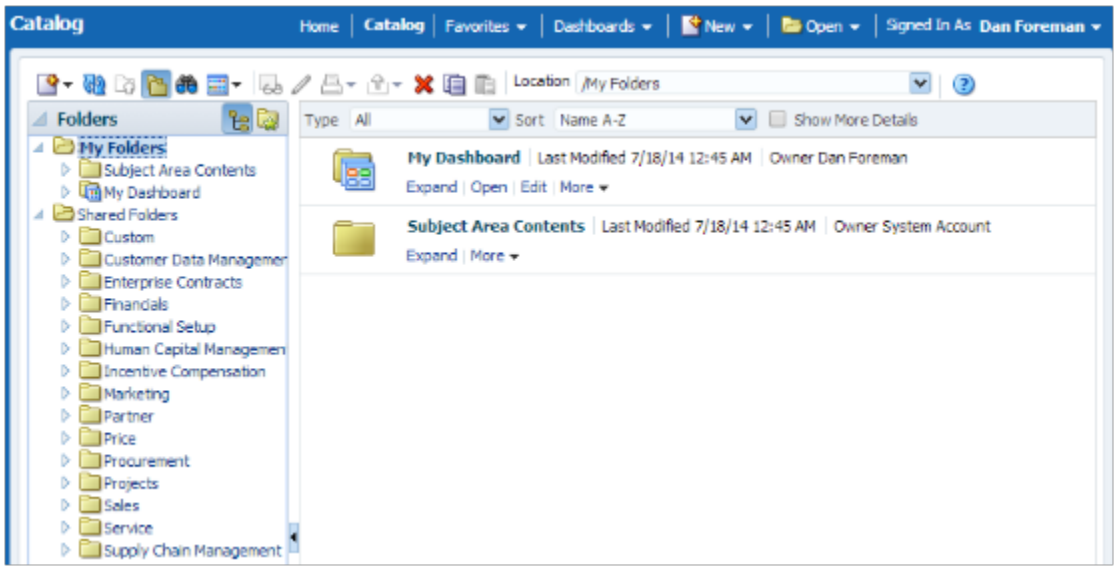
> **Note**
> This topic provides an overview of customizing analytics and reports. For detailed information, see the Oracle Sales Cloud - Creating and Editing Analytics and Reports guide and the online help.

Build Custom Analytics and Reports

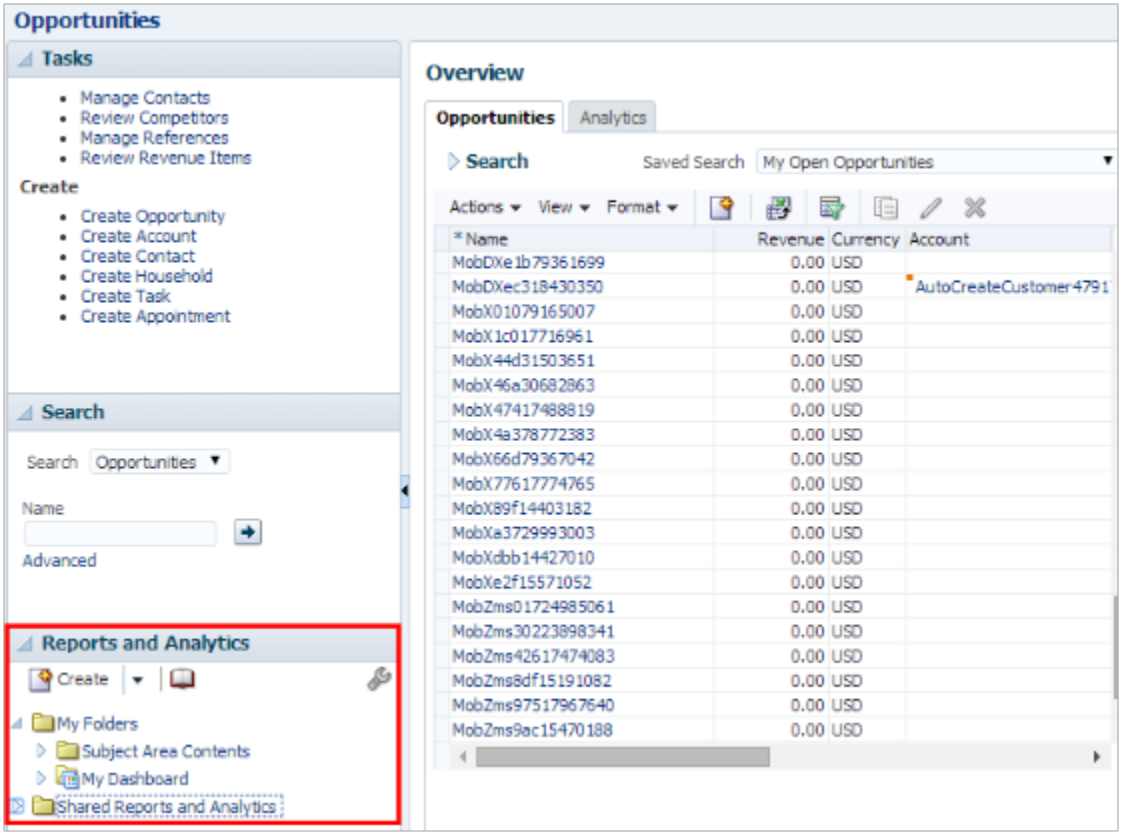
You use the BI presentation catalog to build and view custom analytics and reports. You can browse the subject areas, which are organized by functional area, such as opportunities, leads, and the like. Within each subject area are columns and attributes that you use to create the reports. Each report can have its own layout and format, such as table format or graph format. You can also filter attributes by various criteria.

You access the BI presentation catalog either from the Reports and Analytics area in the regional area of transactional pages, or by using the Navigator menu, under the Tools menu.

The following figure shows an example of the BI presentation catalog where you can view reports, create reports, and browse subject areas.



The following figure shows an example of the Reports and Analytics area available in several desktop UI transactional areas.



Customizing Infolets

The Sales dashboard in the simplified UI comes predefined with several infolets, which are configurable portals that provide report summaries based on transactional sales data. Administrators can create custom infolets and display them in the Sales area of the simplified UI.

Custom Analytics and Reports

Creating and Editing Reports: Explained

Many predefined reports exist that you can use to generate and print documents for internal operations, external business transactions, or legal requirements. To meet specific requirements, you might need to create or edit reports to capture different data or present it in another way by customizing their components.

Report Components

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

Report Component	Description	Tool for Customizing
Data model	Defines the data source, data structure, and parameters for the report. Multiple reports can use the	Data model editor in the application

Report Component	Description	Tool for Customizing
	same data model. Each report has one data model.	
Layout	Defines the presentation, formatting, and visualizations of the data. A report can have multiple layouts. There are different types of layout templates, for example Excel and RTF.	Depending on the template file type: • **XPT:** Layout editor in the application • **RTF:** Microsoft Word • **PDF:** Adobe Acrobat Professional • **Excel:** Microsoft Excel • **eText:** Microsoft Word
Properties	Specifies formatting and other settings for the report.	Report editor in the application

What You Can Create or Edit

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

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

Accessing Report Components to Customize: Points to Consider

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

Accessing the BI Catalog

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

- In the Reports and Analytics pane, click **Browse Catalog** to open the BI catalog, and find your report or data model in the Folders pane.
- In the Reports and Analytics pane, find your report and select **More** to go to the report directly in the catalog. The data model associated with the report should be in the Data Models subfolder within the same folder as the report.
- Sign in to the application directly (for example: http://host:port/analytics/saw.dll) to open the catalog.
- Sign in to the BI server directly (for example: http://hostname.com:7001/xmlpserver) to open the catalog.
    - Alternatively, once you are in the catalog using another method, for example through the Reports and Analytics pane, change the final node of the URL (http://host:port/analytics/saw.dll) to xmlpserver. So the URL you use would be: http://host:port/xmlpserver.

Predefined Reports

A special Customize option is available only:

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

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

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

Predefined Data Models

Don't edit predefined data models. Instead, copy the data model into the Custom folder and edit the copy.

Related Topics

- Saving Analytics and Reports: Points to Consider

Data Structure for Analytics: Explained

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

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

Columns

This table describes the three types of columns.

Column Type	Description	Example	Icon for Column Type
Fact	Provides a measure of something, meaning that the values are numbers.	Total	Yellow ruler
Attribute	Represents a piece of information about a business object, with values that are dates, IDs, or text. **Note** Attribute columns can be flexfield segments imported into the BI repository.	Start Date	Gray paper
Hierarchy	Holds data values that are organized in a hierarchical manner.	Time, with sublevels: • Year • Quarter • Month	**Column:** Hierarchy of blue squares **Sublevel:** Blue or white square

Subject Areas

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

Folders

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

- **Fact folders:**
  - Contain fact columns.
  - Are usually at the bottom of the list of folders and are usually named after the subject area.
- **Dimension folders:**
  - Contain attribute and hierarchical columns.

- Are joined to the fact folder within a subject area.

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

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

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

Related Topics

- Creating and Editing Analytics: Highlights

Creating Custom Reports: Procedure

Create a custom report when the predefined reports don't provide the data you need. Or, if you want to use a predefined data model, and also want to change other aspects of the report other than layout. Save your custom report to **Shared Folders** - **Custom** in the business intelligence catalog.

Creating a Report

1. Open the Reports and Analytics pane in any work area.
2. Click **Create** and select **Report**.
3. Select the data model to use as the data source for your report.
4. Continue with the wizard to create the report layout, or choose to use the layout editor and close the wizard.
5. Define the layout for the report.
6. Click the **Properties** button in the report editor to set specific formatting, caching, and processing options for your report.

Setting Up Access

You or your administrator can:

- Create a job definition so that users can run your custom report as a scheduled process.

- Set up the report for scheduling in the Reports and Analytics pane.
- Secure general access to your report and its job definition, if any.

Creating and Editing Analyses Using a Wizard: Procedure

You can use a wizard that guides you through creating and editing analyses. Even though the wizard doesn't give you all available features, you can still use it to make typical changes, for example adding views or filters.

> **Restriction**
> The function of the wizard is only for creating and editing analyses. Use Oracle Business Intelligence Answers to create dashboards and to delete analyses.

Creating an Analysis

1. Open the Reports and Analytics pane in any work area.
2. Click **Create** and select **Analysis**.
3. Select the subject area that has the columns you want for your analysis.
4. Optionally, add more subject areas or remove any that you no longer need.
5. Select the columns to include, set options for each column, and click **Next**.
6. Optionally, enter a title to appear at the top of the analysis, above the analysis name that you enter in the last step.
7. Select the type of table or graph to include, specify the layout of the views, and click **Next**.

   > **Tip**
   > At any point after this step, you can click **Finish** to go to the last step, to save your analysis.

8. Optionally, set more options for the table or graph, and click **Next**.
9. Optionally, add sorts or filters based on any of the columns you included, and click **Next**.
10. If you have a table, optionally define conditional formatting for select columns, for example to display amounts over a certain threshold in red. Click **Next**.
11. Enter the name of your analysis and select a folder to save it in.
12. Click **Submit**.

Editing an Analysis

1. Open the Reports and Analytics pane in any work area where the analysis is available.
2. Select your analysis in the pane and click **Edit**.
3. Perform steps 4 through 10 from the preceding Creating an Analysis task, as needed.

4. To update an existing analytic, select the same name in the same folder.

> Tip
> Tip: To copy the analysis, name it either with a new name or in a new folder.

5. Click **Submit**.

Related Topics

- Reports and Analytics Pane: Explained
- Saving Analytics and Reports: Points to Consider

Creating and Editing Analyses with Advanced Features: Procedure

Even though you can use a wizard to create or edit analyses, you might have to use advanced features for complicated analyses or specific requirements. For example, you can create view selectors so that users can toggle between views within an analysis, or define criteria for filters using SQL statements.

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

Creating or Editing an Analysis

1. Open the Reports and Analytics pane in any work area.
2. Click the **Browse Catalog** button.
3. Click the **New** button, select **Analysis** under **Analysis and Interactive Reporting**, and select a subject area.

   Or, select your analysis in the Folders pane and click **Edit**.
4. Use the tabs as described in this table.

Tab	Task
Criteria	Select and define the columns to include. Add filters.
Results	Add views and set options for results.
Prompts	Define prompts to filter all views in the analysis.

Tab	Task
Advanced	View or update the XML code and logical SQL statement that the analysis generates. Set options related to query performance.

5. Save your analysis.

Performing Other Actions on an Analysis

1. Open the Reports and Analytics pane in any work area where the analysis is available.
2. Select your analysis in the pane and click **More**.
3. Click **More** for your analysis and select the desired action, for example **Delete** or **Copy**.

Related Topics

- Reports and Analytics Pane: Explained
- Saving Analytics and Reports: Points to Consider

Using the Customize Option for Predefined Reports: Points to Consider

The Customize option automatically creates a custom copy of a predefined report and stores it in the **Shared Folders** - **Custom** within the business intelligence (BI) catalog. The custom copy includes the report definition, folder structure, and original report permissions.

This custom copy is linked internally to the original report. You can edit the custom copy of the report, leaving the original report intact. When users open or schedule the original report, they are actually using the custom version.

Benefits of the Customize Option

Aside from conveniently copying a predefined report to the Custom folder, the Customize option:

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

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

Accessing the Customize Option

To access the Customize option:

1. Sign in to the BI server (for example, http://hostname.com:7001/xmlpserver).
2. In the Folders pane, select the predefined report.
3. Select **Customize** from the **More** menu for the report.
4. The copied report in the Custom folder opens, so proceed to edit this report.

To edit the custom report again later, you don't need to be in the BI server. Just go to the BI catalog and either:

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

Related Topics

- Saving Analytics and Reports: Points to Consider

Links Between Original and Custom Reports: Points to Consider

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

Maintaining the Link Between Reports

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

- If you manually create a report with the same name as a predefined report, and give it the same folder path under the Custom folder, then the new report becomes a custom version of the original. It would be as if you had used the Customize option to create the custom report.
- The link to the original report is broken if you rename the custom or original report.

  You can edit the custom report so that it uses a different data model. But if the original data model is updated later, then your custom report doesn't benefit from the change.

Tasks Performed on Original Reports

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

Task Performed on the Original Report	Result When There's a Custom Report
Open	Opens the custom report.

Task Performed on the Original Report	Result When There's a Custom Report
Schedule	Creates a report submission for the custom report.
Edit	Edits the custom report.
Delete	Deletes the original report only. If you delete the custom report, the original report is not deleted.
Copy	Copies the original report.
Cut and Paste	Cuts and pastes the original report.
Rename	Renames the original report. The custom report name is not changed. Warning This breaks the link between the original and custom reports.
Download	Downloads the custom report.
Customize	Edits the custom report.
History	Opens the job history of the custom report.

Related Topics

- Saving Analytics and Reports: Points to Consider

Cross-Subject Area Analyses: Explained

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

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

Common Dimensions

A common dimension is a dimension that exists in all subject areas that are being joined in the report. For example, both the Workforce Management - Worker Assignment Real Time and the Workforce Management - Worker Assignment Event Real Time subject areas have Worker, Job, and Department available for use in the respective subject areas. These are considered common dimensions between these two subject areas and they can be used to build a cross-subject area report.

Common and Local Dimensions

The Worker Assignment Details dimension in the Workforce Management - Worker Assignment Real Time subject area is not available in the Workforce Management - Worker Assignment Event Real Time subject area; therefore it is a local dimension for the purposes of a cross-subject area query between these two subject areas.

Related Topics

- Creating a Cross-Subject Area Analysis for HCM: Worked Example

Creating an Absence by Department Report: Worked Example

This example demonstrates how to create an Oracle Business Intelligence Publisher report. In this example, you use a data model that you created using an Oracle Transactional Business Intelligence analysis for reporting on absence data by department.

The following table summarizes key decisions for this scenario.

Decision to Consider	In This Example
Which data model to use?	Use the Absence by Department data model that you previously created.
Which layout options to use?	Select Landscape and select Chart and Pivot table.
Add any additional charts to the report?	Yes. Add a chart with the same configuration as the graph. Add this chart above the graph. When you click on the different bars in the chart, it will filter the graph by that criteria.
Are filters needed for the report?	Yes. Add filters to the chart, graph, and table to exclude records where the Reason for Absence is blank.
Is conditional highlighting needed?	Yes. Add conditional highlighting to the pivot table so that departments with 20 or more absences are highlighted in red.

Creating a Report

1. Click **Browse Catalog** to open the BI Catalog.

2. On the OBI EE home page, under Published Reporting, click **Report** in the Create region.
3. In the Create Report window, verify that Use **Data Model** is selected.
4. Click **Search** in the **Data Model** field.
5. In the Select Data Model window, select the absence by department data model that you created.
6. Click **OK**.
7. On the Create Report page, verify that the **Guide Me** option is selected, and click **Next**.
8. On the Create Report, Select Layout page, select **Landscape** for the layout.
9. Select the **Page Header** and **Page Footer** options.
10. Select the **Chart and Pivot Table** option.
11. Click **Next**.
12. On the Create Report, Create Chart page, drag Number of Absences and drop it onto the **Drop Value Here** box.
13. Drag Reason for Absence and drop it onto the **Drop Series Here** box.
14. Drag Department and drop it onto the **Drop Label Here** box.
15. Click **Next**.
16. On the Create Report, Create Table page, review the location of each element in the table to make sure it's formatted correctly.
17. Click **Next**.
18. Select **View Report**, and then click **Finish**.
19. In the Save As window, save your report in My Folders, and name it Absence by Department Report.
20. Click **OK**.
21. The report appears.

Adding Additional Details to the Report

1. In the upper right corner of the Absence by Department Report tab, click **Actions** to view the options you have for exporting, editing, and so on.
2. Click **Edit Report**.
3. Click **Edit.**
4. On the Insert tab, select **Chart**.
5. Drag the Chart component down to the report area, and drop it directly below the report title.

   When you drag the chart component down to the report area, a blue bar appears that you can use as a guide to decide where to drop the chart. Drop the chart when the blue bar is directly below the report title.
6. In the Data Source region, click on Number of Absences, and drag it and drop it onto the **Drop Value Here** box.
7. Click on Reason for Absence and drag and drop it onto the **Drop Label Here** box.
8. Click on the new graph. A yellow border appears.
9. Click in the bottom right corner of the yellow border, and drag the corner out to the right so that the graph occupies the entire page.
10. In the Filter options on the Chart tab, click **Filter**.

11. In the Filter window, select Reason for Absence from the **Data Field** menu.
12. In the **Operator** field, select is greater than or equal to from the drop down list.
13. In the **Value** field, enter 0.
14. Click **OK**.
15. Toggle 3D Effect on and off and choose one of the settings, based on your preference.
16. Repeat steps 9 through 14 for the second graph.
17. Click on the pivot table to refocus the page on the pivot table. The yellow border appears.
18. In the Filter options on the Table tab, click **Filter**.
19. In the Filter window, select Reason for Absence from the **Data Field** drop down list.
20. In the **Operator** field, select is greater than or equal to from the drop down list.
21. In the **Value** field, enter 0.
22. Click **OK**.
23. Click on the cells in the Number of Absences column.
24. In the Conditional Formatting region of the Pivot Table Data tab, click **Highlight**.
25. In the **Operator** field, select is greater than or equal to from the drop down list.
26. In the **Value** field, enter 20.
27. Click in the **Background Color** field.
28. In the **Color Picker** window, select Red (ff0000)
29. Click **OK**.
30. In the Highlight window, click **OK**.
31. Click **Save** to save the changes to your report.
32. Click **Return.**
33. Click **View Report**.
34. In the upper graph, click on the different bars to see how the lower graph filters the results.

Related Topics

- Creating an Absences by Department Analysis: Worked Example

Layouts

Creating and Editing Report Layouts: Overview

The layout determines what and how data is displayed on report output. All predefined reports have at least one predefined layout template file. This topic describes the following aspects of report templates:

- Layout templates

- Layout template types
- Overall process of managing layouts
- Deleting layout templates

Layout Templates

To customize a layout, you edit the layout template, which:

- Defines the presentation components, such as tables and labeled fields.
- Maps columns from the data model to these components so that the data is displayed in the right place.
- Defines font sizes, styles, borders, shading, and other formatting, including images such as a company logo.

Layout Template Types

There are a few types of template files to support different report layout requirements.

- **RTF:** Most of the predefined templates are rich text format (RTF) templates created using Microsoft Word.
- **XPT:** Created using the application's layout editor, these templates are for interactive and more visually appealing layouts.
- eText: These templates are specifically for Electronic Data Interchange (EDI) and electronic funds transfer (EFT) information.

You can also create and edit other types of templates using Adobe PDF, Microsoft Excel, Adobe Flash, and XSL-FO.

Overall Process to Create or Edit Layouts

Editing or creating report layout, for example using Microsoft Word or the layout editor, involves making the actual changes to the template file. But that task is just one part of the entire process for customizing layouts.

1. Copy the original report and save the custom version in **Shared Folders** - **Custom** in the business intelligence (BI) catalog. You create or edit templates for the custom copy of the report.

   > Tip
   > You can use the Customize option if the original is a predefined report.

2. Review report settings for online viewing.
3. Generate sample data for the report.
4. Edit or create the layout template file.
5. Upload the template file to the report definition.

   > Note
   > You can skip this step if you're using the layout editor.

6. Configure the layout settings.

Deleting Layout Templates

To remove a layout template for a report:

1. Select your report in the BI catalog and click **Edit**.
2. In the report editor, click **View a list**.
3. Select the layout template and click **Delete**.

Making Reports Available for Online Viewing: Procedure

Some reports are set up so that you can only view them through another application or submit them as scheduled processes. To view your report online while you're editing it, you need to define a few settings. When you're done editing your report, make sure that you reset these settings as needed.

Updating Report Properties

1. Select your report in the business intelligence catalog and click **Edit**.
2. In the report editor, click **Properties** at the top of the page.
3. In the Report Properties dialog box, select **Run Report Online** and deselect **Report is Controlled by External Application**.

Updating Layout Settings

1. Back in the report editor, click **View a list**.
2. Make sure that the **View Online** check box is selected.

Generating Sample Report Data: Procedure

Depending on the type of report layout changes you're making, sample data can be required or optional. You generate sample data, and then load it for use with your layout so that you can map data fields to layout components. For example, for the Start Date table column in your layout, you can set it so that the data displayed in that column comes from the Start Date field in the sample data.

You can generate sample data from the:

- Report data model
- Report viewer
- Scheduler

Generating Data from the Data Model

To generate sample data from the data model:

1. Select your data model in the business intelligence (BI) catalog and click **Edit**.

   > **Tip**
   > If you're not sure which data model is the source for your report, find the report in the catalog and click **Edit**. The data model is displayed in the upper left corner of the report editor.

2. In the data model editor, click **View Data**.
3. Enter values for any required parameters, select the number of rows to return, and click **View**.
4. To save the sample data to the data model, click **Save As Sample Data**.

   If you're designing an RTF template, click **Export** to save the file locally.
5. Save the data model.

Saving Data from the Report Viewer

To save sample data from the report viewer:

> **Note**
> This procedure requires that the report is enabled for online viewing.

1. Select the report in the BI catalog.
2. Click **Open** to run the report in the report viewer with the default parameters.
3. On the Actions menu, click **Export**, then click **Data**.
4. Save the data file.

Saving Data from the Scheduler

To save sample data from the scheduler:

> **Note**
> This procedure requires that the report is enabled for scheduling (not as a scheduled process).

1. Select the report in the BI catalog.
2. Click **Schedule**.
3. On the General tab, enter values for any report parameters.
4. On the Output tab, ensure that **Save Data for Republishing** is selected.

5. Click **Submit**.
6. Open the Report Job History page.
7. On the global header, click **Open**, then click **Report Job History**.
8. Select your report job name in the Job Histories table.
9. On the details page, under Output and Delivery, click the **XML Data Download** icon button.

Configuring Layout Settings for Reports: Procedure

As part of creating or editing layout, you can set report properties related to layout. These settings determine, for example, which layouts users can choose from when viewing or scheduling the report. The settings apply only to your report.

Setting Layout Properties

1. Select your report in the business intelligence catalog and click **Edit**.
2. In the report editor, click **View a list**.
3. Set layout properties, some of which are described in this table.

Setting	Usage
Output Formats	Depending on the requirements for a report, you may want to limit the output file formats (for example PDF or HTML) that users can choose from. The available output formats vary depending on the template file type.
Default Format	When multiple output formats are available for the report, the default output format is generated by default when users open the report in the report viewer.
Default Layout	When multiple layouts are available for the report, you must select a default layout to present it first in the report viewer.
Active	Active layouts are available for users to choose from when they view or schedule the report. Tip To hide a predefined layout from users, inactivate it.

Setting	Usage
View Online	Select this check box so that layouts are available to users when they view the report. Otherwise, the layout is available only for scheduling the report.

4. Click **Save Report**.

Layout Templates

Creating and Editing Report Layout Templates Using the Layout Editor: Procedure

The layout editor in the application provides an intuitive, drag-and-drop interface for creating pixel-perfect reports with PDF, RTF, Excel, PowerPoint, and HTML output. The layout template files you create with this tool have an .xpt extension.

The layout editor tool is the only editing tool that provides dynamic HTML output. Users can interact with this output in a browser, for example by sorting, applying filters, and so on.

Prerequisite

Make sure that sample data is generated from the data model that your report is using.

Using the Layout Editor

To customize XPT templates:

1. Select the report in the business intelligence (BI) catalog and click **Edit**.
2. In the report editor, click **Edit** to update a template.

   Or, click **Add New Layout** and select a template type under the Create Layout section.
3. Create or edit the layout.
4. Click **Save** to save the layout to the report definition.

Setting Up for RTF and Excel Report Layout Templates: Procedure

You can use Microsoft Word or Microsoft Excel to create or edit RTF and Excel layout templates, in addition to the layout editor in the application. If you use Word or Excel directly, you must download and install the appropriate add-in so that the Microsoft application has the features you need to design report layouts.

> **Note**
> If you're designing a new layout for your report, consider using the layout editor instead unless you are an experienced layout designer.

Installing the Add-In

1. Open the Reports and Analytics pane in any work area.
2. Click the **Browse Catalog** button.
3. Click **Home**.
4. Under the Get Started pane, click **Download BI Desktop Tools**.
5. Select the add-in for the type of template you're working with.
    - **Template Builder for Word:** RTF templates
    - **Analyzer for Excel:** Excel templates
6. Save and then run the installer.

Related Topics

- eText Report Layout Templates: Explained

Creating and Editing RTF Report Layout Templates: Procedure

Most predefined report layout templates are RTF templates. An RTF template is a rich text format file that contains the layout instructions to use when generating the report output. Use Microsoft Word with the Template Builder for Word add-in to design RTF templates.

Prerequisites

Install the Template Builder for Word add-in, and generate sample data.

Using Template Builder for Word

To customize an RTF template:

1. If you are editing a predefined layout:
    a. Select your report in the business intelligence catalog and click **Edit**.
    b. In the report editor, click the **Edit** link of the layout to download the RTF file.

    If you are creating a new layout, skip this step.
2. Open the downloaded RTF template file in Microsoft Word. Or, if you're creating a new template, just open Microsoft Word.
3. Load the sample data that you generated.

4. Edit or create the layout template.
5. Save the file as Rich Text Format (RTF).

Uploading the Layout Template File to the Report Definition: Procedure

If you're creating or editing a report layout using the layout editor, the layout is automatically saved to the report definition, so you can skip this step. For all other layout types, for example RTF, upload the template file to the report definition after you're done making layout changes.

Uploading the Template File

1. Select your report in the business intelligence catalog and click **Edit**.
2. In the report editor, click **View a list**.
3. In the table that lists the layouts, click **Create**.
4. Under **Upload or Generate Layout**, click **Upload**.
5. In the Upload Template File dialog box:
    a. Enter a layout name.
    b. Browse for and select the layout template file that you created or edited.
    c. Select the template file type.
    d. Select the locale, which you can't change once the template file is saved to the report definition.
    e. Click **Upload**.
6. Save the report definition.

Related Topics

- eText Report Layout Templates: Explained

Custom Dashboards

Creating and Editing Dashboards: Procedure

You can create and edit dashboards to determine their content and layout. Aside from objects in the business intelligence (BI) catalog, such as analyses, reports, and prompts, you can also add text, sections, and more to a dashboard.

Creating a Dashboard

1. Open the Reports and Analytics pane in any work area.
2. Click **Browse Catalog**.
3. Click **New** and select **Dashboard** under **Analysis and Interactive Reporting**.
4. Enter the dashboard's name and description, and select a folder to save in.
5. With the **Add content now** option selected, click **OK**.
6. Optionally, add more pages, or tabs, within the dashboard.
7. Drag and drop items from the Dashboard Objects or Catalog pane to add content to the desired page.
8. Click **Save**.

Note
The first dashboard page is saved with the **page 1** name by default. To rename this page:

1. Click the **Catalog** link.
2. In the Folders pane, select your dashboard.
3. For **page 1**, click **More** and select **Rename**.
4. Enter the new name and click **OK**.

Editing a Dashboard

1. Open the Reports and Analytics pane in any work area where the dashboard is available.
2. Select your dashboard in the pane and click **More**.
3. Click **Edit**.
4. Perform steps 5 and 6 from the preceding Creating Dashboards task, and make other changes as needed, for example:
   - Remove content from the dashboard.
   - Drag and drop within a page to move content around.
   - Change the layout of a page.

Related Topics

- Saving Analytics and Reports: Points to Consider
- Reports and Analytics Pane: Explained

Data Structure

Data Models

Customizing Data Models: Procedure

A data model defines where data for a report comes from and how that data is retrieved. If a data model can't give you all the data that you need in your report, then you can either copy and edit an existing data model or create a new one.

Creating a Data Model

1. In the business intelligence (BI) catalog, click the **New** button and select **Data Model** under **Published Reporting**.
2. Optionally click the **Data Model** node in the Data Model pane to set properties for the data model.
3. Click the **Data Set** node in the Data Model pane to create or edit data sets, which determine where and how to retrieve data.
4. Click the **New Data Set** button and select a data set type.

   Tip
   It's best practice to use the BI repository as a data source, so you should select either:

   - **Oracle BI Analysis:** To use columns from a selected analysis.
   - **SQL Query:** To use a Query Builder tool to define what to use from the repository. Select **Oracle BI EE** as the data source.

5. Optionally, to limit the data included in the report output, click the **Parameters** node in the Data Model pane to define variables that users can set when they use the report.

   Important
   The order of parameters is important if there are job definitions defined for reports that use your data model. If you change the order in the data model, you must also update the job definitions.

6. Optionally, define other components of the data model.
7. Save your data model.

Editing a Data Model

1. To edit a predefined data model:
    a. Find the data model in the BI catalog and click **Copy**.
    b. Paste within **Shared Folders** - **Custom** in a subfolder that has a folder path similar to the folder that stores the original data model.
    c. For the data model you pasted, click **More**, and select **Edit**.
2. Optionally click the **Data Model** node in the Data Model pane to set properties for the data model.
3. Click the **Data Set** node in the Data Model pane to create or edit data sets.

    Most predefined data models are of type SQL Query, and are set up to get application data from the following tables:

    - **ApplicationDB_FSCM:** Financials, Supply Chain Management, Project Management, Procurement, and Incentive Compensation
    - **ApplicationDB_CRM:** Sales
    - **ApplicationDB_HCM:** Human Capital Management
4. Perform steps 5 through 7 from the preceding Creating a Data Model task, as needed.

Creating a New Data Model for an HCM Report: Worked Example

This example shows how to create a data model for an Oracle Business Intelligence Publisher report. In this example, you create a data model using an absence by department analysis that you created previously.

Creating a Data Model

1. Navigate to the Reports and Analytics work area and click **Browse Catalog** to open the Oracle Business Intelligence Catalog.
2. On the OBI EE home page under Create, Published Reporting, click **More** and select **Data Model**.
3. On the Diagram tab, click **New Data Set** and select **Oracle BI Analysis**.
4. In the New Data Set - Oracle BI Analysis window enter a name for your data model.
5. In the Oracle BI Analysis field, click **Search**.

6. In the Oracle BI Catalog window, click **Users**.
7. Click the name of the person who created the analysis.
8. Locate and select the absence by department analysis that you have previously created.
9. In the **Time Out** field, enter 120.
10. Click **OK**.
11. Click the **Structure** tab.
12. In the **XML Tag Name** field for the Department Name, replace the default value with DEPT_NAME, and replace the default value in the Display Name with Department.
13. In the **XML Tag Name** field for the Absence Reason, replace the default value with ABSENCE_REASON, and replace the default value in the Display Name with Reason for Absence.
14. In the **XML Tag Name** field for the Assignment Absences, replace the default value with NUMBER_ABSENCES, and replace the default value in the Display Name with Number of Absences.
15. Click the **Data** tab.
16. On the Data tab, click **View**.
17. View the report structure and click **Save As Sample Data**.
18. Click **OK**.
19. In the upper-right corner, click **Save**.
20. In the Save As window, select **My Folders**, and enter Absence by Department Data Model.

Advanced Procedures

Setting Reports Up to Run as Scheduled Processes: Points to Consider

You can create a job definition for predefined or custom reports so that users can run them as scheduled processes. Otherwise, users can open reports (which are set up to be run online) through the Reports and Analytics pane, or open and schedule them from the business intelligence catalog.

Use the Define Custom Enterprise Scheduler Jobs task in the Setup and Maintenance work area to create job definitions.

General Job Definition Information

This table describes the general information to enter for your job definition.

Field	What You Enter
Job Type	BIPJobType

Field	What You Enter
Report ID	The path to the report in the catalog, starting with the folder beneath Shared Folders, for example: Custom/ <Family Name>/ <Product Name>/<Report File Name>.xdo. Tip Make sure to include the .xdo extension for the report definition.
Default Output	A default output format.

Parameters

You can define parameters to be available to users when they submit scheduled processes based on your job definition. When users run the scheduled process, the values they enter for the parameters:

- Are passed to the data model that the report is using.
- Determine the data to be included in the report.

The parameters that you define must be in the same order as parameters in the data model.

For example, the data model has parameters in this order:

- P_START_DATE
- P_END_DATE
- P_CURRENCY

You create parameters as follows:

- Start Date
- End Date
- Currency

Note
Because you define parameters using the list of values sources from the Define Custom Enterprise Scheduler Jobs task, you should not define lists of values in the data model.

User Property

The only user property you need to define is EXT_PortletContainerWebModule. Only lists of values associated with the application that you select are made available for parameters in this job definition.

Setting Up Reports for Scheduling in the Reports and Analytics Pane: Procedure

You can set up reports as scheduled processes, which means users can submit them from the Scheduled Processes and other work areas. If you want users to also submit these scheduled processes from the Reports and Analytics pane, then you must configure properties for the corresponding reports.

Enabling a Report for Scheduling

To enable scheduling in the Reports and Analytics pane:

1. Select the report in the business intelligence catalog and click **Edit**.
2. Click **Properties**.
3. On the General tab in the Properties dialog box, enter the following fields:

Field	Value
Enterprise Scheduler Job Package Name	The path for the job definition, for example: / oracle/ apps/ ess/<product family>/ <product>/ <business area>/ Jobs
Enterprise Scheduler Job Definition Name	The job definition name (not display name), for example: ABCDEFG

Related Topics

- Defining What's Available in the Reports and Analytics Pane: Procedure

Enabling Descriptive Flexfields for Oracle Business Intelligence: Procedure

You can use descriptive flexfields in Oracle Transactional Business Intelligence. If you haven't already created flexfield segments, you first create them, then deploy them, and then import them into Oracle Transactional Business Intelligence. After you import your descriptive flexfields into Transactional Business Intelligence, you can create analyses that include the flexfield segments.

To use descriptive flexfields with Transactional Business Intelligence:

- Define flexfield segments.
- Run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process.
- Create an analysis in Transactional Business Intelligence.

Defining Flexfield Segments

To define flexfield segments:

1. Navigate to the Setup and Maintenance work area.
2. Open the Mange Descriptive Flexfields task.
3. Search for and select the flexfield code that you want to use, and edit it.
4. Select the **BI Enabled** option.
5. Save the flexfield and deploy it.

Running the Import Oracle Fusion Data Extensions for Transactional Business Intelligence Process

To run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process:

1. Navigate to the Scheduled Processes page.
2. In the Search Results region of the Overview page, click **Schedule New Process**.
3. In the Schedule New Process window, click the **Search: Name** arrow in the Name field, and click the **Search** link at the bottom of the list.
4. In the Search and Select: Name window, enter Import Oracle Fusion Data Extensions for Transactional Business Intelligence in the **Name** field.
5. Select the row for Import Oracle Fusion Data Extensions for Transactional Business Intelligence, and click **OK**.
6. In the Schedule New Process window, click **OK**.
7. In the Process Details window, click **Submit**.
8. In the Confirmation window, click **OK**.
9. In the Process Details window, click **Close**.
10. On the Scheduled Processes, Overview page, enter Import Oracle Fusion Data Extensions for Transactional Business Intelligence in the **Name** field.
11. Click **Search** to see the status of the job.

> Note
> The job may take several minutes, depending on your system.

Creating an Analysis in Transactional Business Intelligence

After you have successfully run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process:

1. In the Navigator menu under Tools, select **Reports and Analytics**.

2. In the Reports and Analytics work area, click **Create** and select **Analysis.**
3. In the Select Subject Area window, find and select the subject area that contains the flexfield that you deployed and imported.

Related Topics

- Flexfields and Oracle Transactional Business Intelligence

What happens to customized analytics and reports when a patch is applied?

All custom analytics and reports are preserved if you save them in the Custom subfolder within Shared Folders, or in My Folders in the business intelligence (BI) catalog.

Changes to predefined analytics and reports outside the Custom folder are preserved only if the patch doesn't include a new version of those BI objects. If the patch does include a new version of a predefined object that you edited outside the Custom folder, then:

- The new version overwrites the existing predefined object.
- A copy of the existing object (with your edits) is automatically created in the same folder, with a new name that indicates it's a custom version.

If the patch includes a new version of both the predefined object and a folder in its file path, then:

- The new folder, along with the new version of the object, overwrites the existing predefined folder and object.
- A copy of the existing folder (along with your edited object) is automatically created. The folder is renamed to indicate that it's a custom version, but your edited object is not renamed.

Note
Future patches won't affect renamed custom objects or anything within a renamed custom folder.

10 Understanding Profile Options and Lookups

Profile Options and Lookup Types: Overview

You set profile options to influence application behavior. For example, a profile option setting determines whether all territory members or only the territory owner is assigned to an opportunity by default. Additionally, lookup types provide the lists of values in applications, and many of these can be customized to fit your particular business needs.

Profile options and lookup types are introduced in this chapter. You can find additional topics in the online help and in the Oracle Sales Cloud Learning Library (www.oracle.com/oll/cloud/sales).

Profile Options

Profile Options: Explained

Profile options let you manage configuration data centrally by controlling and influencing application behavior. Profile options serve as permanent user preferences and application configuration parameters. You configure profile options with settings for specific contexts or groups of users. Users customize how their user interfaces look and behave by changing the values of available profile options.

Profile options store the following kinds of information.

Type of Information	Profile Option Example
User preferences	Settings to provide access to social networking features
Installation information	Setting to identify the location of a portal
Configuration choices	Settings to change user interface skins and behaviors
Processing options	Settings to affect how much information to log either for an entire site or a specific user

Profile options can appear on any user interface page without indication that a profile option is what is being set.

Profile Option Definition and Configuration

In addition to configuring predefined profile options that are implemented as updateable, you can add and configure new profile options. Application developers add new profile options and configure ones that are not to be updated by other users. Application administrators and implementation consultants configure profile options with profile option values that are implemented as updateable.

Profile option definitions consist of the following.

- Profile option name
- Application and module in the application taxonomy
- Profile option values
- Profile options categories
- Profile option levels
- Profile option level hierarchy

Profile Option Values

Some profile options have predefined profile option values.

The Manage Profile Option Values task allows an administrator to set updateable profile option values at the available levels, including the user level. You can access the Manage Profile Option Values task starting in the Setup and Maintenance Overview page and searching for profile option tasks.

You can set profile option values at different levels: Site, Product, and User.

The following table shows an example of a profile option set at different user levels, one with a value that supersedes all others, the other with no user level value, causing the product-level value to be in effect. The product level is for a specific product potentially to use a different value from that used at the site level for profile options not set at any other level.

Profile Option Level	Value of the Profile Option Level	Profile Option Value	Effect
User	Manager1	UK pound sterling	Access to site and all products shows UK pounds sterling in effect
User	Manager2	US dollar	Access to site and all products shows US dollars in effect
Product	Financials for EMEA	Euro	Unless superseded by a user level value, Euros in effect for Financials for EMEA applications
Site	Site	UK pound sterling	UK pounds sterling in effect for all other users and products

Context such as user session or accessed product determines which profile option value is associated with the profile option name. In the example, if manager1 does not set a profile option value for this profile option, access to Financials for EMEA shows currency in Euros; and access to other products shows currency in UK pounds sterling.

Profile Option Categories

Categories group profile options based on their functional area. Profile option categories facilitate searching and defining data security.

For example, in Oracle Fusion Receivables, the Transactions profile option category groups profile options related to setting how Receivables transactions are to be processed, such as Require Adjustment Reason.

A profile option can be in more than one category.

Profile Option Hierarchies and Levels

Application developers specify at which hierarchy level a profile option is enabled. The predefined profile option hierarchy levels are Site, Product, and User.

The hierarchy levels specified in the profile option definition determine the context in which a profile option value may be set. If the profile option value at a particular level is updateable, an administrator can update the profile option value for that context.

Note
Profile options should only be enabled for context levels that are appropriate for that profile option. For example, a profile option indicating a global configuration setting should not be enabled at the user level, if users cannot choose a different value for that setting.

For security, one level in the hierarchy is designated as a user level. A profile option may be enabled at any or all hierarchy levels. When enabled at all levels, the predefined ordering of profile option hierarchy levels gives precedence to the values that are set at the user level over values set at the product and site levels, and precedence to values set at the product level to values set at the site level. If there is no value for the current user, then the product value applies. If there is no value for the user or product, then the site value applies.

The table shows the predefined profile option hierarchy and ordering.

Hierarchy Level	Priority When Multiple Levels Set	Effect on Applications	Example
Site	Lowest	Affect all applications for a given implementation	Currency for the site is set to Euros.
Product	Supersedes Site	Affect all applications of a product family such as Financials	Currency for the Financials products set to UK pound sterling.
User	Highest, supersedes Product	Affect only the experience of the current user	Currency for the user of Financials applications set to US dollars.

You can configure updateable values for profile options at one or more levels depending on which levels are enabled in the profile option definition. When a profile is set at more than one level, higher levels of specificity override lower levels of specificity.

In the example, if the currency setting for the site is UK pounds sterling, but the Financials division works in the Netherlands using the Euro, a manager in the US can override that product level setting at the user level to use US dollars when accessing Financials applications.

In another example, if a profile option called Printer is set only at the site and product levels. When a user logs on, the Printer profile option assumes the value set at the product level, since it is the highest level setting for the profile.

> **Tip**
> Set site-level profile option values before specifying values at any other level. The profile option values specified at the site-level work as defaults until profile option values are specified at the other levels.

For more information on the predefined profile options, see assets with the Profile Option type in the Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com).

Obtaining a List of Predefined Profile Options

Oracle supplies hundreds of profile options. You can get a list of the predefined profile options in the Oracle Enterprise Repository. Use the following procedure.

1. Navigate to Oracle Enterprise Repository (fusionappsoer.oracle.com) and sign in as Guest.
2. In the Assets search pane, under **Type**, pick Profile Option.
3. Click the **Documentation** link and then download the spreadsheet applicable to your Oracle Sales Cloud release version.

Lookups

Lookup Types: Explained

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

Customization Levels

Many lookup types are customizable and can be changed during or after implementation.

The customization level of a lookup type determines whether the lookups in that lookup type can be edited. The customization levels are: User, Extensible, and System.

- User: You can update the lookup type and the lookup codes.
- Extensible: You can edit, end date, delete, enable, and disable the lookup codes. However, you cannot edit the lookup codes if they are predefined data. You cannot either edit or delete the lookup type.
- System: You cannot edit the lookup type or lookup codes.

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

Allowed Task	User	Extensible	System
Deleting a lookup type	Yes	No	No
Inserting new codes	Yes	Yes	No
Updating start date, end date, and enabled fields	Yes	Yes, only if the code is not predefined data	No

Allowed Task	User	Extensible	System
Deleting codes	Yes	Yes, only if the code is not predefined data	No
Updating tags	Yes	No	No
Updating module	Yes	No	No

If a product depends on a lookup, the customization level should be system or extensible to prevent deletion. Once the customization level is set for a lookup type, it cannot be modified. The customization level for lookup types created using the Define Lookups page is by default set at the User level.

Finding Lookup Types

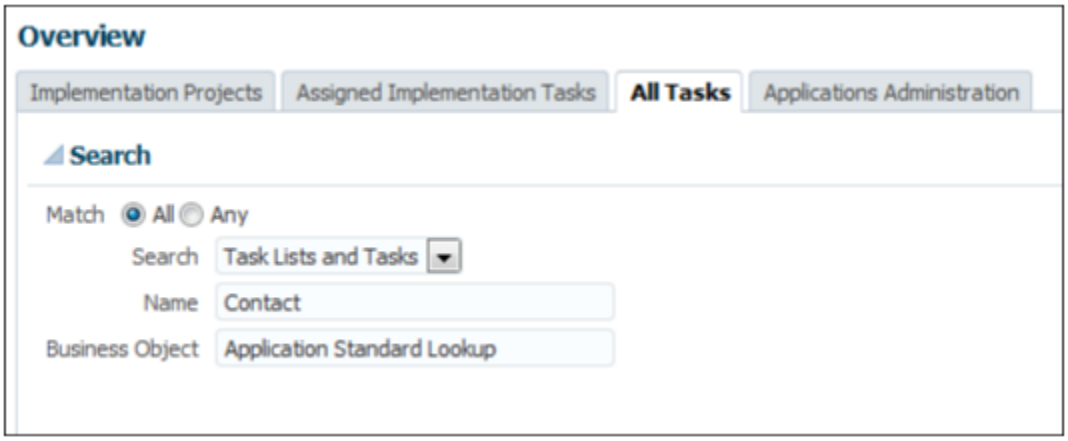
You can find lookup types by searching for an associated setup task in the Setup and Maintenance work area. For example, you can use the Manage Contact Lookups task to find lookup types related to contacts.

To access lookup types:

1. Sign in to the application as a user with the Sales Administrator job role.
2. From the Navigator, select **Setup and Maintenance**, under the Tools menu.
3. In Setup and Maintenance, click the **All Tasks** tab.
4. Enter Application Standard Lookup in the **Business Object** field.

> **Tip**
> You can narrow down the list by entering an object name in the Name field. For example, to find all of the lookup types for contacts, enter Contact.

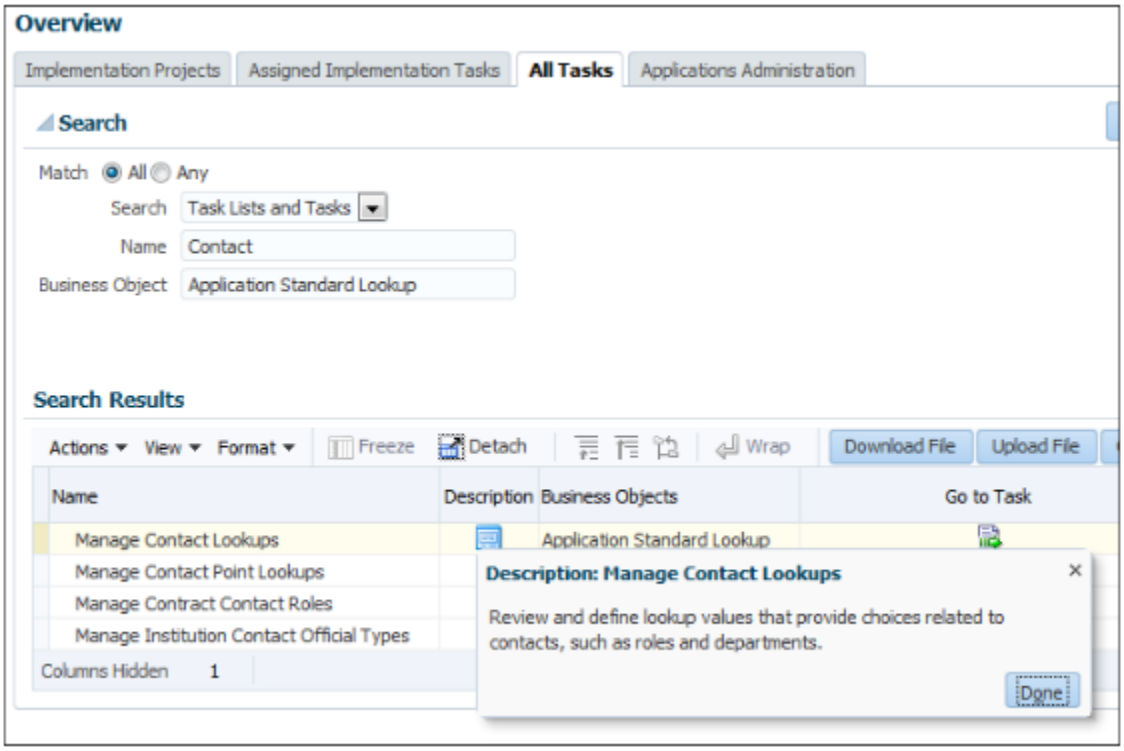
The following figure shows an example of the All Tasks tab with a search for contact-related lookup types.



5. Click **Search**.
6. Find the functional area you want to customize in the search results and click the **Go to Task** icon.

> **Tip**
> You can review the description of each task by displaying an additional column in your search results. To display the description, select **View**, **Columns**, and **Description**.

The following figure shows an example of the list of tasks returned in the search, with the Description column displayed.



Obtaining a List of Predefined Lookup Types

Oracle supplies tens of thousands of lookup types for use with the applications. You can get a list of the predefined lookup types in the Oracle Enterprise Repository. Use the following procedure.

1. Navigate to Oracle Enterprise Repository (fusionappsoer.oracle.com) and sign in as Guest.
2. In the Assets search pane, under **Type**, pick Lookups.
3. Click the **Documentation** link and then download the spreadsheet applicable to your Oracle Sales Cloud release version.

Essential Oracle Sales Cloud Lookups

The following table identifies the lookups that are required for Oracle Sales Cloud implementation. Review these lookups, and edit them as appropriate to meet your business requirements.

Lookup Type	Description
COMMUNICATION_ TYPE	Defines the contact point type. Sample lookup codes are E-mail, Social network, and Phone.

Lookup Type	Description
CONTACT_TYPE	Defines the preferred contact method for a contact. Sample lookup codes are Call, E-Mail, Fax, and Visit.
PREFERENCE_ CODE	Defines the preference of the contact for a contact type. It includes the lookup codes Do and Do not.
PARTY_ SITE_USE_CODE	Indicates the purpose of the address. Sample lookup codes are Correspondence, Deliver to, and General mail.
HZ_ PARTY_ CERT_LEVEL	Indicates the certification level of a party. Sample lookup codes are Highest, Minimum, and Not met.
HZ_GENDER	Indicates the gender of a person. Sample lookup codes are Female, Male, and Unspecified.
HZ_ ORGANIZATION_ SIZE	Indicates the size of the organization based on revenue, number of employees.
MARITAL_STATUS	Indicates the marital status of a person.
HZ_ SLS_ CNTCT_ INFLUENCE_ LVL_CD	Indicates the level of influence of the sales contact in the decision making process, for example, political or inner circle.

How can I edit lookups?

On the Define Lookups page, you can edit the existing lookup codes of a lookup type or add new lookup codes. To access the page, navigate to the Setup and Maintenance work area and search for the Define Lookup task.

You may not be able to edit a lookup if its customization level doesn't support editing.

Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. However, the generic tasks provide access to all lookups types of a kind, such as all common lookups that are associated with the Manage Common Lookups task.

If the lookups in an application are available in the standards, common, or set-enabled lookups view, they are central to an application and can be easily managed. However, lookups defined in a specific application view can only be managed by following instructions provided by that application.

11 Configuring User Assistance

Setting Up Help: Overview

Applications Help works without you having to set anything up. You can do the optional setup, mainly if you want to customize help. Select the help features you want, perform tasks in the Define Help Configuration task list, and customize help.

Help Feature Choices

Select help feature choices on the Configure Offerings page in the Setup and Maintenance work area, to determine:

- What's available in Applications Help
- What you can configure to set up help

The first feature choice for help is Local Installation of Help, and you must leave it selected. Other feature choices are:

- Access to Internet-Based Help Features
- Help Customization
- Custom Help Security

Define Help Configuration Task List

In the Setup and Maintenance work area, use these tasks in the Define Help Configuration task list to configure Applications Help for all users:

- **Set Help Options:**
  - Determine if certain features of Applications Help are available to users.
  - Control how aspects of Applications Help work.
- **Assign Help Text Administration Duty:** Contact your security administrator to determine who can customize help.
- **Manage Help Security Groups:** Set up security to limit access to certain help files.

Help Customization

After you configure help, you can review the predefined help and see if you want to add or customize any content. You can also customize help text that appears on the page, for example hints.

Related Topics

- Feature Choices: Explained
- Help File Customization: Overview
- Customizing Help That Appears on the Page: Highlights

Help Concepts

Setting Up Help Customization: Procedure

Users with the appropriate roles can customize predefined help or add their own files to help. To enable and set up help customization, do the following steps in the Setup and Maintenance work area, in the specified order.

Selecting Feature Choices

Perform these steps:

1. On the Configure Offerings page, leave the Location Installation of Help feature choice selected.
2. Select the Help Customization feature choice.
3. Select the Custom Help Security feature choice if you want certain help files to be available only to a restricted set of users.

   > Warning
   > Don't select this feature choice if you don't have this requirement, because the feature can affect performance.

4. Save your work.

Setting Help Options

Perform these steps:

1. Open the Set Help Options task in the Setup and Maintenance work area.
2. Optionally set options in these sections:
   - **Help Site Customization:**
     - Determine how users can identify custom files in Applications Help.
     - Upload your own image to use as the background picture on the help home page.
   - **Oracle User Productivity Kit (UPK):** Add a link in the Navigator in Applications Help to your custom UPK library.

- **Privacy Statement:** Give users a link to your own privacy statement when they click their user name in the global area of Applications Help.

3. Save your work.

Providing Users Access to Help Customization

Only users with job roles containing the ATK_CUSTOMIZE_HELP_TOPICS_PRIV privilege can customize help. The Assign Help Text Administration Duty task is a reminder for you to follow up with your security administrator, to make sure that users who need to customize help have the access to do so.

Setting Up Help File Security

If you selected the Custom Help Security feature choice, then go to the Manage Help Security Groups task and select job roles to include in help security groups.

When you later customize a help file, you can select a group to determine which job roles have access to the file.

Related Topics

- When do I link to the Oracle User Productivity Kit library from the help site?
- Creating Help Security Groups: Worked Example

Who can add and manage custom help?

Users with the ATK_CUSTOMIZE_HELP_TOPICS_PRIV privilege can customize help in Applications Help and help windows, as well as the pages in the Getting Started work area. This privilege is assigned by default to the administrators for product families. Your security administrator can define which users have job roles with this privilege.

12 Customization, Extensibility, and Integration

Sales Cloud Customization, Extensibility, and Integration: Overview

Oracle Sales Cloud offers several customization and extensibility options for its services, components, and modules. You can import and export data and integrate the service with other products and modules.

Customization, extensibility, and integration options include:

- Customize objects, user interfaces (UIs), and the Navigator menu
- Customize online help
- Access a rich set of subject areas around which to build customized reports
- Configure reporting dashboards by adding new reports changing the layout
- Configure security components
- Use web services to integrate and extend the services
- Export data, modify it, and then import it back into the services
- Integrate with other applications to extend the functionality.

Customizing Objects, UIs, and the Navigator

Use Application Composer to customize and extend Oracle Sales Cloud. For example, create a new object and related fields, then create new desktop pages where that object and its fields are exposed to users.

Use Page Composer to edit the UI at run time. For example, show and hide regions, fields, and tables. Change the order of regions, or change a dashboard page layout.

In the simplified UI, you can determine which icons to display across the top of the page (the area known as the springboard), as well as the welcome message or announcement.

You can add and remove links from the Navigator menu. Customizing navigation items is done using Setup and Maintenance.

You also can change the default text in the UI.

For more information, see these guides:

- Oracle Sales Cloud - Customizing Sales
- Oracle Applications Cloud - Extending the Applications for Functional Administrators

Customizing Online Help

You can customize the help text displayed when a user hovers over a button, link, icon button, or tab title. For the page-level help popup windows, you can create customized files to show in the windows that link out to the online help.

Customizing Reports and Dashboards

Oracle Sales Cloud comes predefined with reports that give you instant data about your customers, leads, opportunities, forecasts, and sales revenue. If the supplied reports do not meet all of your business needs, you can use Oracle Business Intelligence (BI) Composer to create your own reports against a rich variety of subject areas.

Both the desktop and simplified UIs feature reporting dashboards that you can customize, such as changing the layout and adding custom reports.

For more information, see these guides:

- Oracle Sales Cloud - Creating Analytics and Reports
- Oracle Sales Cloud - Customizing Sales

Extending Applications Using Web Services

You can use web services available to Oracle Sales Cloud to integrate with your external applications.

Example extensions include:

- Integrate Oracle Sales Cloud with back-office applications
- Create customized Web-based portal applications that access Oracle Sales Cloud through a Web services interface.

Utilize Oracle Enterprise Repository (http://fusionappsoer.oracle.com) to gain access to application artifacts and assets.

For more information, see the article Oracle Fusion Sales Cloud Web Services (available on My Oracle Support, Doc ID 1354841.1).

Configuring Security Components

If the predefined security configuration doesn't meet your business needs, then you can make changes.

For example, the predefined Sales Representative job role includes sales forecasting duties. If some business groups in your organization have the sales managers perform forecasting tasks instead of the sales representatives, then you can create a custom Sales Representative role without those duties. Alternatively, if a predefined job role is too narrowly defined, then you can create a job role with a greater range of duties than its predefined equivalent.

See the Oracle Sales Cloud - Securing Oracle Sales Cloud guide for more information.

Exporting and Importing Data

You can import data into or export data out of Oracle Sales Cloud for various purposes. For example, you may want to:

- Export territory data, modify it offline, and re-import it.
- Import customers from a legacy system so you can use the object records in Oracle Sales Cloud.
- Move functional setup data from one instance into another.
- Create Microsoft Excel spreadsheets and load the data into the services.

See the following guides for more information:

- Oracle Fusion Functional Setup Manager User's Guide

- Oracle Applications Cloud - Using Common Features

You can find an introduction to Bulk Export and File-Based Import and Export in the chapter, Import and Export, in this guide. Get more information on territory and quota export and import in this guide, in the Setting Up Territories and Understanding Sales Quotas chapters.

Integrating with Other Products

For additional functionality, you can integrate Oracle Sales Cloud with other products, including, Oracle E-Business Suite, JD Edwards EnterpriseOne, Siebel CRM, Oracle Marketing Cloud, and Oracle Configure, Price, and Quote (CPQ) Cloud.

For more information on these integrations, see the article Oracle Sales Cloud Integration Documentation (available on My Oracle Support, Doc ID 1962226.1).

Related Topics

- My Oracle Support

13 Import and Export

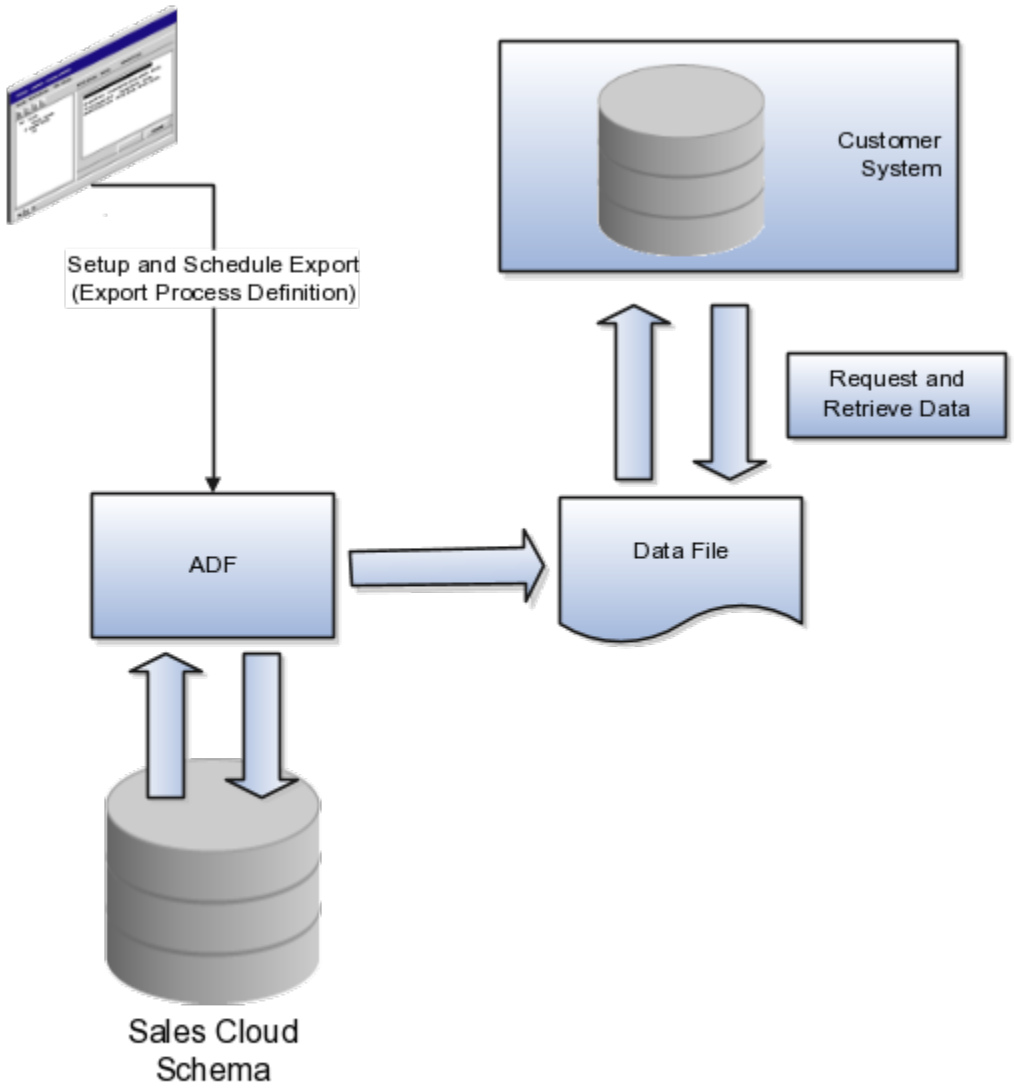
Bulk Export

Bulk Export: Overview

You can extract large volumes of data from Oracle Sales Cloud objects using bulk export. You can either extract a full set of records for an object, or perform incremental extracts. For example, you can extract complete set of account data or extract updated set of records every week.

Bulk export creates comma separated or tab delimited files, which are attached to the export process.

The following figure depicts the process of selecting data for export, scheduling and delivering the data file.



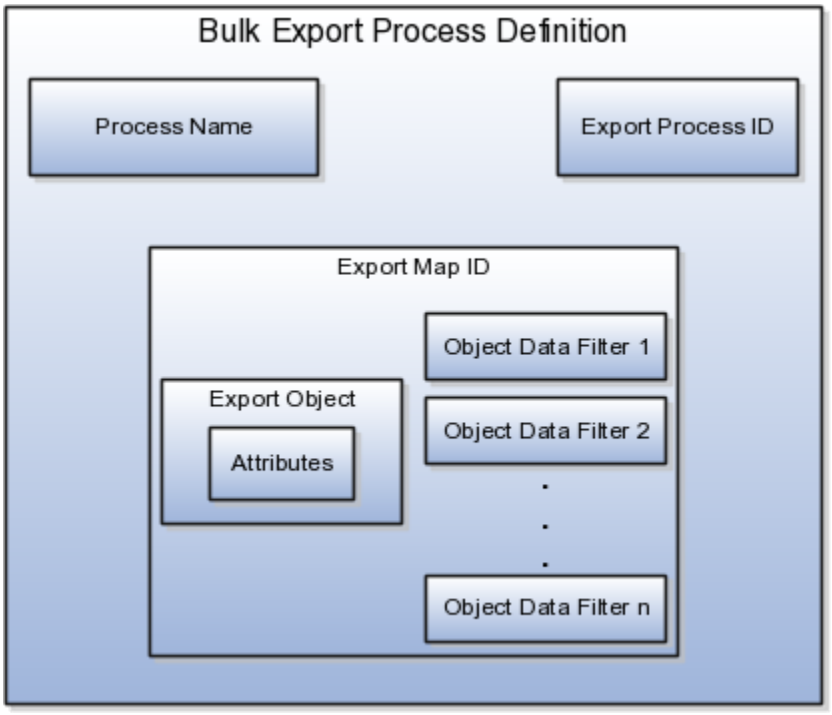
For more information on bulk export, see the Oracle Sales Cloud - Understanding File-Based Data Import and Export guide.

Bulk Export Process Components: How They Work Together

Bulk export makes exporting data easier by leveraging the export maps. To export files using bulk export, you create a process definition, map files for full and incremental extract processes, and then schedule the export process.

Bulk Export Process Components

The following figure shows the bulk export process components.



Bulk export process includes three components:

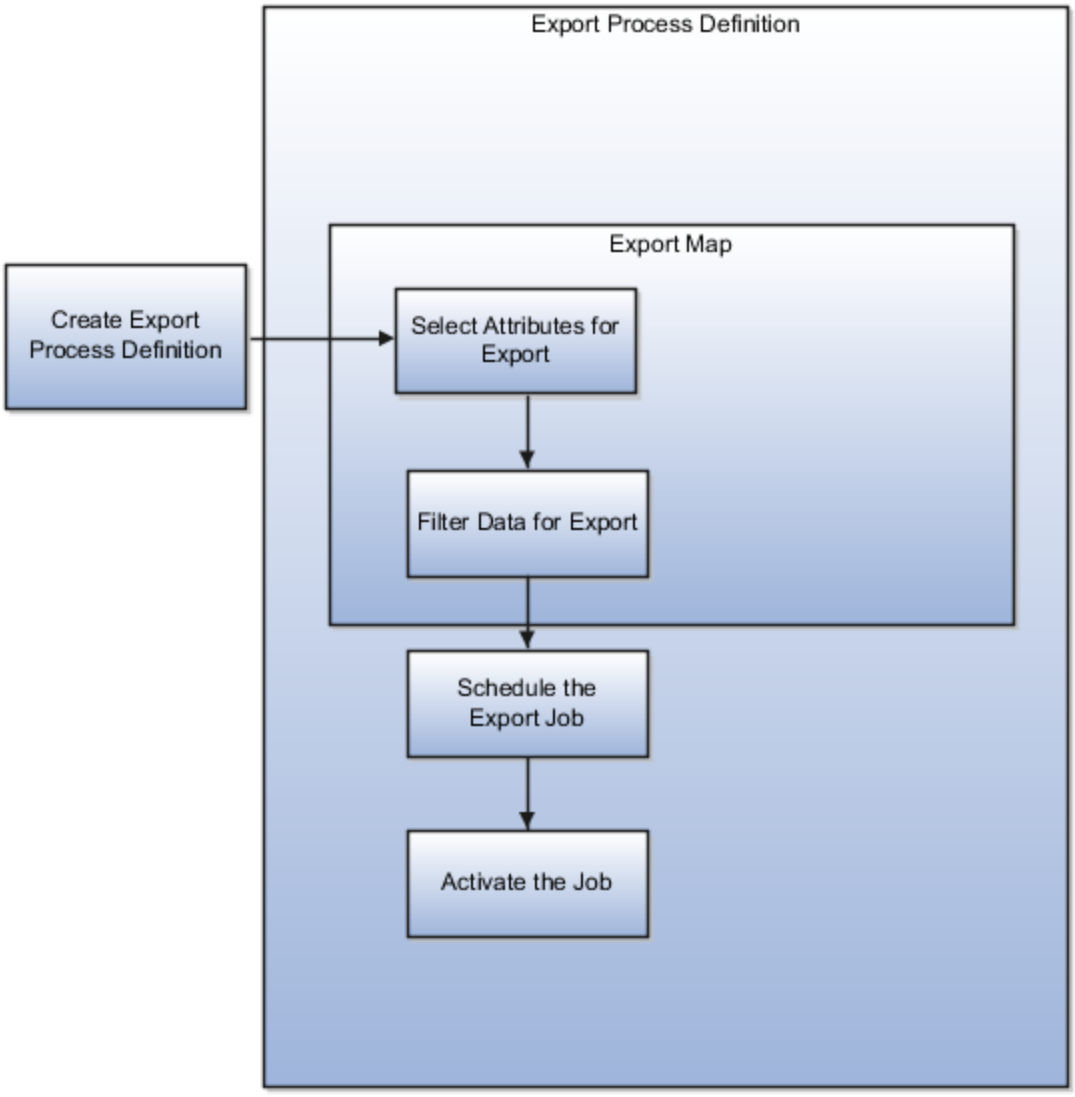
- Process name: A name for the export process that lets you easily refer the export process rather than using the machine generated ID such as 100000019897192.
- Export process ID: A unique, system generated identifier for the export process definition for the export process. The process Id ties the export map with its export objects, filters, and the export schedule.
- Export map ID: A unique identifier for the export map. You can reuse the export map in different process definitions. For example, you create a process definition to export all the data from the Customer export object. You can then reuse that export map and apply a new filter on the data to create an incremental export, such as data accrued since the last export date.

Defining Bulk Export Process: Procedure

You can extract large volumes of data from Oracle Sales Cloud objects using bulk export. You can either extract full set or records for an object, or perform incremental extracts. Bulk export creates comma separated or tab delimited files, which are attached to the export process after export.

The following image depicts the bulk export process definition:

The Bulk Export Process Definition is made up of the Export Map and the processing schedule. See the steps below.



Defining the Bulk Export Process

After defining the mapping files, you create an export process to export an object's data using the mapping files created.

To define a bulk export process:

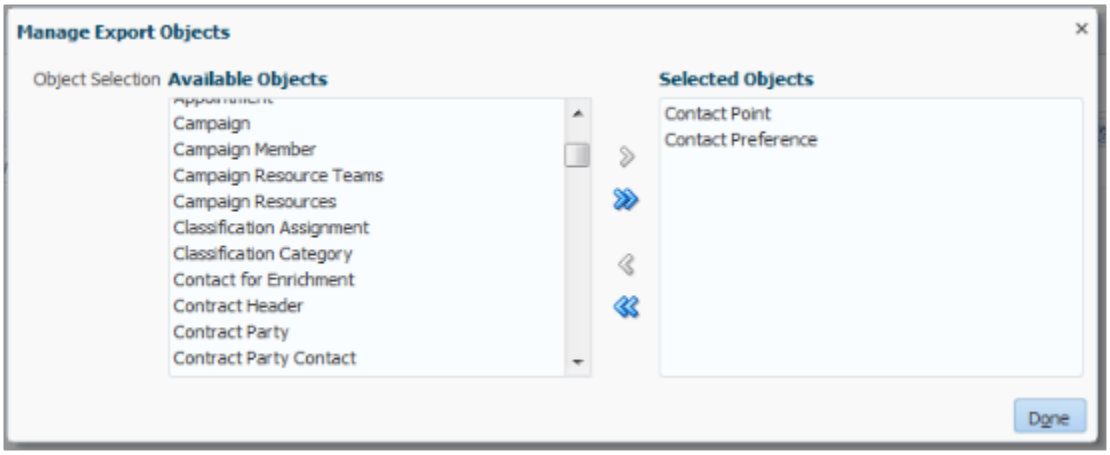
1. Navigate to the Schedule Export Processes task from Setup and Maintenance.
2. Select **Create** from Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map, in the page.
4. Click **Next** to view the Create Export Process Definition: Configure Export Objects page.

In this page, you define the export object you want to export and the mapping you want use for the export process.

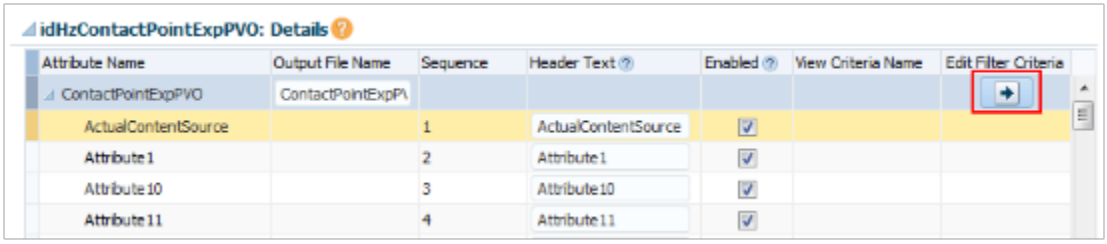
5. Optionally, you can enter a name for the mapping if you would like to reuse this mapping for other export processes. An object's mapping file determines what data is exported every time an object is exported. You can have multiple mapping files for an export object for various object details you want to export.

> **Note**
> The export mapping is optional,. You don't need to select an existing mapping to perform an export.

6. Select **Create from Actions** menu to view the Manage Export Objects dialog box.
7. Select the objects you want to export and click **Done**.



8. Define the attributes you want to export in the Detail region of the page. You can define:
   - Attributes you want to export. Select Enabled for the attributes you want to export.
   - Header text of the attributes. Edit the header text in the Header text column. This value is used as the column header in the files generated by the export process
9. Define the filters to determine the data you want to export by clicking on the Edit Filter Criteria button.



For the incremental extracts, you can create filters using time stamps to determine which rows to export.

10. Click **Next** to view Create Export Process Definition: Create Schedule page.
11. Select if you want to run the export process immediately or at a later time. Two types of scheduled exports are supported:
    a. Incremental Export

b. Normal Export

12. Click Next to view the Create Export Process Definition: Review page.
13. Review the export process details, and click on Activate.

After each export process executes and completes, a comma or tab delimited data file is created and stored as an attachment in the export process.

You can also use web services to schedule and start an export process. In this case, you can use the getAttachment() web service to download the data file.

How can I determine which data objects to select for successful export?

Review the requirements for the data to be exported and determine the source view objects that hold the attributes you want.

How can I create a subset of data for export?

Full sets of data are not always required for export. To create a subset of data, use filter criteria to determine the time frame or scope of data, based on values of the attributes. To find activities for a specific date range, for example 1/1/11 through 3/31/11, navigate to the **Export Objects Detail** Sub Page and click the filter icon. Fill in the filter criteria dialog for the project start dates to select the data to be exported. You run the export by navigating to the **Setup and Maintenance** menu, selecting **Manage Task Lists and Tasks**. Then, search for **Schedule Export Processes** and click the **Go to Task** icon on the line for this task.

How can I see my exported data?

You can look on the Schedule Export Processes, Overview page to see the History subpage. The column Exported Data File shows a hyperlink to your output file This file will be a comma separated variable or a tab delimited file. Click that link to open the file and see the exported data.

How can I use my own view object for export?

You can define your own view object for export. However, before you can use your view object for export, you must register and enable it as an export object in the Setup and Maintenance, Manage Export Objects task.

What happens if you change the sequence number or header text in an exported data file?

Changing the sequence number changes the order of the attributes in the exported data file. Changing the header text enables you to give a more intuitive meaning to the attribute and the associated data.

What happens if I need data from multiple export view objects?

Select as many view objects as required for the export process. Choose the individual attributes required from each export object.

File-Based Data Import

File-Based Data Import and Export: Overview

You can use File-Based Data Import in Oracle Sales Cloud to import a wide range of application data from text or XML files. Your import can create or update application records. Most of the Sales Cloud business objects are able to be imported, including:

- Accounts
- Addresses
- Appointments
- Classification codes
- Click-to-dial agents
- Consumers
- Contacts
- Contracts
- Country structures
- Customer hierarchies
- Employee resources
- Geographies
- Households
- Legal entities
- Marketing campaigns and responses
- Leads
- Notes
- Opportunities
- Partners
- Promotions
- Product groups
- Resource teams
- Quotas
- Source system references
- Territories
- Tasks
- Users

Oracle Enterprise Repository (http://fusionappsoer.oracle.com) contains spreadsheets detailing whether a specific object requires or conditionally requires certain attributes for import. For more information, see the Oracle Sales Cloud - Understanding File-Based Data Import and Export guide.

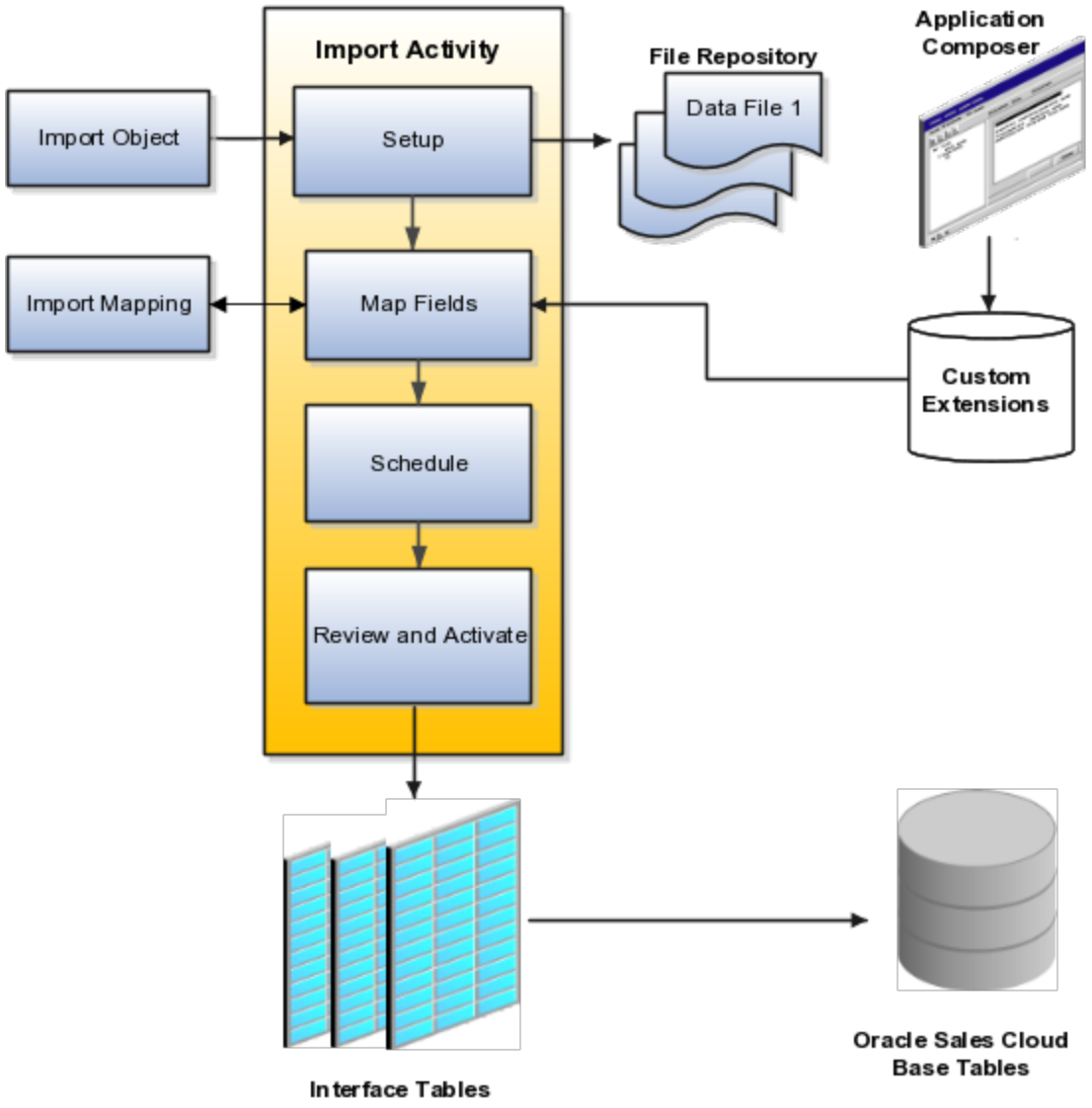
File-Based Data Import: How It Works

The Define File-Based Data Import group of tasks relies on integration with different Oracle Sales Cloud and architecture components, such as interface tables and application base tables. This topic provides an overview of these components to help you understand the import process and the different import activity statuses.

The following figure provides an overview of the major application components used when you import data from a file. These components include

- Import object
- Import mapping
- Import activity
- File repository
- Application Composer
- Interface tables

- Oracle Sales Cloud base tables



Import Objects, Import Mapping, and Import Activity

The import objects you select when you create an import activity are provided by Oracle. They are managed using the Manage File Import Objects task.

> **Note**
> Avoid concurrent submission of File-Based Data Import jobs for the same import object. Concurrent submission of multiple import jobs with same content results in creation of duplicate object records.

When you create an import activity, you must specify a mapping of the fields in your file to the attributes of the import object. You can create the mapping while creating an import activity or separately using the Manage File Import Mappings task. The mapping is stored and managed as a separate object.

File Repository

The text or XML data file you upload for import is stored in a file repository so that it is available for import processing when you schedule an import activity. Any attachments you upload are stored in the same repository.

Application Composer and Custom Extensions

When you create additional attributes for import using Application Composer, these extensions are stored in a separate repository and are available when you generate import and export artefacts in composer.

Interface Tables

The import activity populates the application interface tables with your data.

Oracle Sales Cloud Base Tables

The import activity loads your data into Oracle Sales Cloud base tables to complete the import.

Related Topics

- File Import Activity Statuses: Explained
- Importing Data from a File: Procedure

14 Define Contracts Common Configuration

Specifying Customer Contract Management Business Function Properties

Contract Security Setup: Explained

The contract security model provides different levels of access to admin and non-admin users.

Contract security works as follows:

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

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

Users can be of two types: admin and non-admin users, whose access is as follows:

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

The following table clearly illustrates the access scenario:

Contract Privilege > Role	Admin User	Non-admin User
Creating a contract	Can create contracts in all the BUs that he/she is authorized to, based on resource/ resource organization mapping.	Can create contracts in all the BUs that he/she is authorized to, based on resource/ resource organization mapping.
Editing a contract	Can edit all the contracts of the BUs that he/she is authorized to.	Can edit all the contracts in which he/she is a team member.

Contract Privilege > Role	Admin User	Non-admin User

> **Note**
> Though a user is authorized to a BU, he/she may not be authorized to all contracts in that BU.

> **Note**
> You can access a contract even if you are not authorized to its BU provided you are a team member in the contract.

Customer Contracts Business Unit Setup: Explained

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

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

- Enable related accounts
- Set currency conversion details

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

- Manage project billing options
- Set up clause numbering
- Set up the Contract Terms Library

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

Enabling Related Customer Accounts

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

Managing Currency Conversion Options

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

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

In the Invoice Currency to Ledger Currency region:

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

Managing Project Billing Options

The options available for selection in the Project Billing region control the behavior of project invoicing and revenue recognition for contracts with project-based work.

Project billing can behave differently for external contracts (customer billing) or intercompany and interproject contracts (internal billing).

Set these options, which apply to all contracts:

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

There are two sets of the following options, one for customer billing and a second for internal billing:

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

Set this option only for customer billing:

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

Managing Clause Numbering

You can choose to number clauses manually or automatically.

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

Contract Terms Library Business Unit Setup: Explained

You can specify a wide variety of Contract Terms Library settings for either customer or supplier contracts within each business unit, by using either the **Specify Customer Contract Management Business Function Properties** or the **Specify Supplier Contract Management Business Function Properties** tasks. These tasks are available by navigating to the **Setup and Maintenance** work area and searching on the task name.

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

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

Enabling Clause Adoption

If you plan to use clause adoption in your implementation, then set up the following:

- Specify a global business unit

  You must 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 is not available for the business unit you are setting up, this means that you already designated another business unit as global.

- Enable automatic adoption

  If you are implementing the adoption feature, then 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 do not select this option, the employee designated as the Contract Terms Library Administrator must approve all global clauses before they can be adopted and used in the local business unit. This option is available only for local business units.

- Specify the administrator who approves clauses available for adoption

  You must designate an employee as the Contract Terms Library administrator if you are using adoption. If you do not 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.

Setting Clause Numbering Options

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

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

Enabling Contract Expert

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

Specifying the Printed Clause and Deviations Report Layouts

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

- The printed contract terms

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

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

Related Topics

- How the Selection of a Business Unit Affects Clauses and Other Objects in the Library
- Contract Expert: How It Works
- Contract Printing and Layout Templates: Explained

Specifying Supplier Contract Management Business Function Properties

Supplier Contracts Business Unit Setup: Explained

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

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

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

Managing Contract Terms Library Setup Options

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

Contract Terms Library Business Unit Setup: Explained

You can specify a wide variety of Contract Terms Library settings for either customer or supplier contracts within each business unit, by using either the **Specify Customer Contract Management Business Function Properties** or the

Specify Supplier Contract Management Business Function Properties tasks. These tasks are available by navigating to the **Setup and Maintenance** work area and searching on the task name.

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.

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If you plan to use clause adoption in your implementation, then set up the following:

- Specify a global business unit

  You must 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 is not available for the business unit you are setting up, this means that you already designated another business unit as global.

- Enable automatic adoption

  If you are implementing the adoption feature, then 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 do not select this option, the employee designated as the Contract Terms Library Administrator must approve all global clauses before they can be adopted and used in the local business unit. This option is available only for local business units.

- Specify the administrator who approves clauses available for adoption

  You must designate an employee as the Contract Terms Library administrator if you are using adoption. If you do not 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.

Setting Clause Numbering Options

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

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

Specifying the Printed Clause and Deviations Report Layouts

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

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

- The contract deviations report

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

Related Topics

- How the Selection of a Business Unit Affects Clauses and Other Objects in the Library
- Contract Expert: How It Works
- Contract Printing and Layout Templates: Explained

Defining Notes: Points to Consider

A note is a record attached to a business object. Notes capture nonstandard information received as you do business. When setting up notes for your application, you should consider the following points:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.

Note Types

Note types are assigned to notes when they're created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type.

When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.

Note Type Mappings

If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.
- If no other note types appear, then note type mapping doesn't exist for that object and the default note types are used. Select **Default Note Types** to see which default note types exist in the system.
- 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.

> **Note**
> Extensibility features are available on the Note object. For more information refer to the article Extending Oracle Sales Cloud Applications: How it Works.

Related Topics

- Extending Oracle Sales Cloud: How It Works

Managing Contract Party Roles and Sources

Setting Up Contract Party Roles and Making Them Available in Contracts: Explained

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

This topic:

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

Managing Party Roles

The application comes with the following predefined party role names in the lookup type OKC_PARTY_ROLE. You can add additional lookup codes in the Setup and Maintenance work area by selecting the **Manage Contract Party Roles** task.

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

Making Party Roles Available for Use in Contracts

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

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

The application includes the following party sources which you cannot modify:

Party Source Code	Name	Description
OKX_PARTY	Customer	Parties in the Trading Community Architecture (TCA) where the party usage is External Legal Entity.
OKX_OPERUNIT	Business Unit	Internal business units.
OKX_VENDOR	Supplier	Parties in TCA where the party usage is Supplier.
OKX_ INT_ COMP_PARTY	Internal party	Internal parties available for Oracle Fusion Projects interproject billing.
OKX_PARTNER	Partner	Partners. This source is reserved for Oracle Fusion Partner Relationship Management.

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

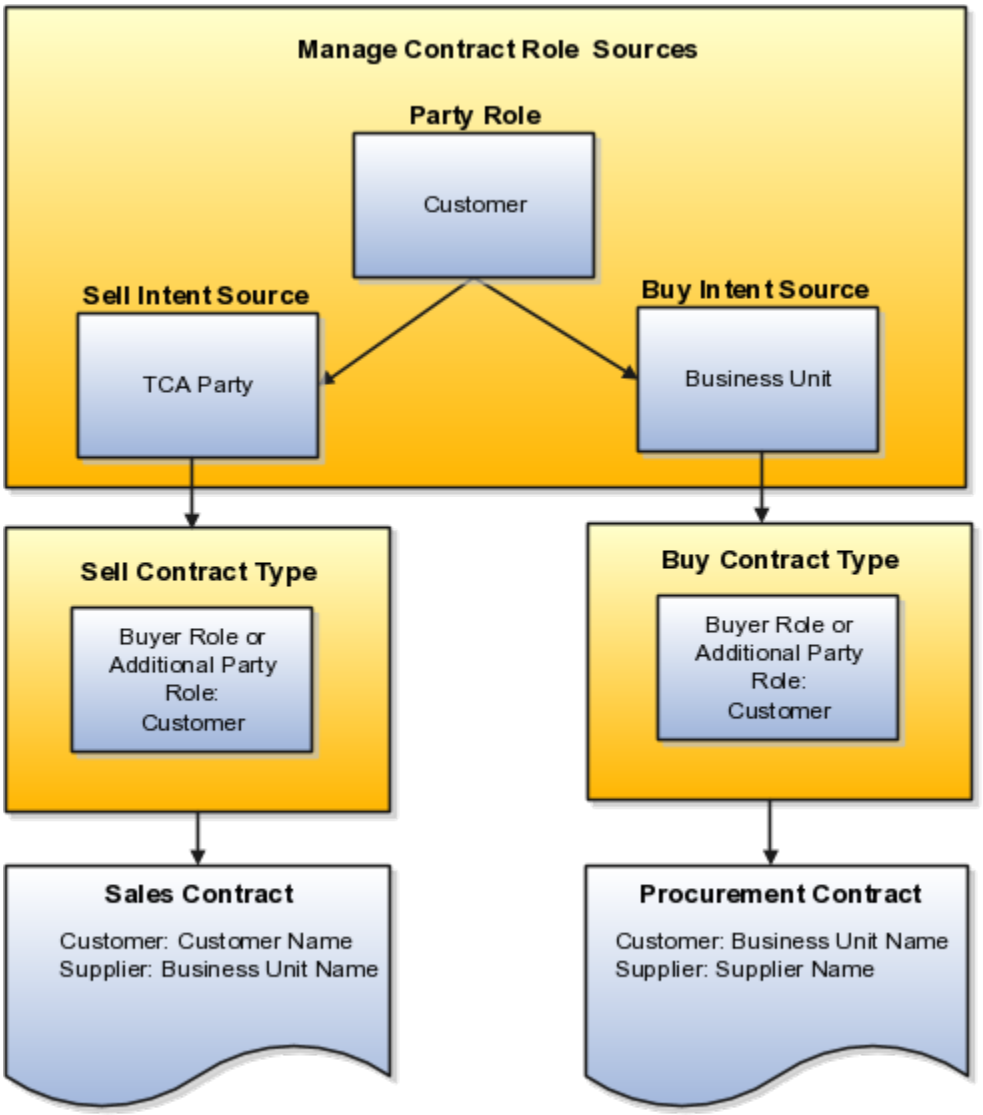
To reuse the same party in buy and sell contracts, you:

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

The setup in this figure has the following effect:

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

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



Managing Party Contact Roles

Setting Up Party Contact Roles and Making Them Available for Use: Explained

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

This topic:

- Lists the predefined contact roles and explains how you can add your own.

- Explains how you associate the contact roles with party roles and contact role sources.

Predefined Contact Roles

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

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 additional contact roles by selecting the **Manage Contract Contact Roles** task in the Setup and Maintenance work area.

Making Contact Roles Available for Use in Contracts

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

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

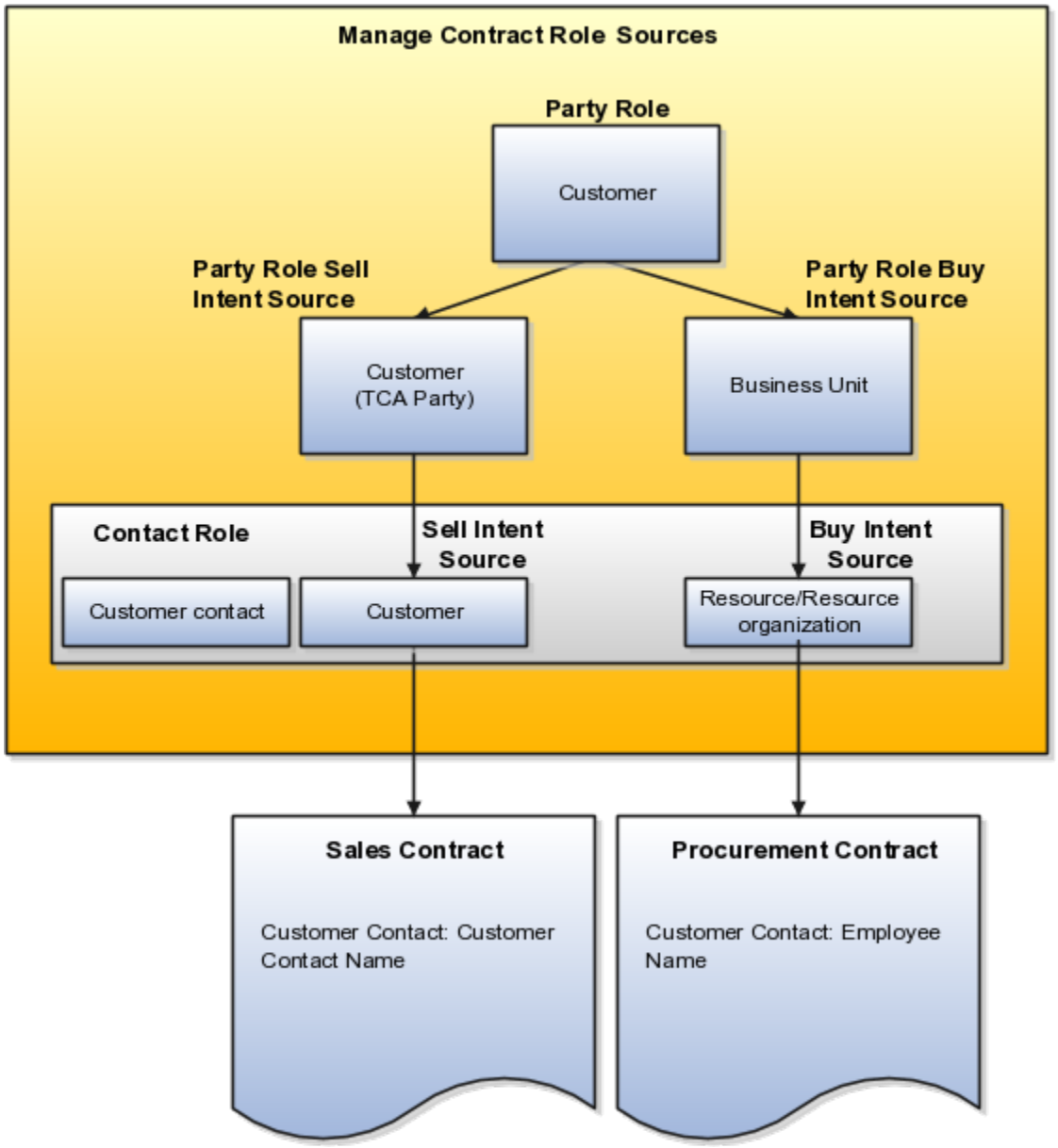
The following contact sources are predefined in the application in the system lookup type OKC_PARTY_CONTACT_SOURCE. You can't edit the contract role sources or add additional ones.

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 (TCA) 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.

The following figure illustrates the setup required to make a contact role available in both customer and supplier contracts.

1. 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.
2. 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**.

3. In sales contracts, customer contacts are now TCA party contacts. In procurement contracts, customer contacts are resources.



Managing Contract Types

Contract Types: Explained

A contract type is a contract category that you must select when creating a contract. It is a mandatory setup that determines the nature of the contract. For example, this step determines if the contract is a project contract, a purchasing contract, or simple nondisclosure or employment agreement. A contract type also specifies what kind of information you can enter and what contract lines, parties, and party contacts are permitted.

The contract type also specifies if electronic signature is required for contract acceptance and activation and if yes, then the standard email format to be used for notifying signers. In turn, the requirement for electronic signature means that you must designate contacts as signers on the contract. It also means that additional statuses and contract header actions are available.

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

Create contract types by selecting the **Manage Contract Types** action from the Setup and Maintenance work area. You can also create contract types in the Contracts work area by selecting **Contract Types** under the Setup task heading. In each contract type you can:

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

Common Contract Type Entries

The following table describes the common contract type entries:

Field or Option	Description
Class	Indicates the category of the contract you are authoring: • Enterprise Contract: Used for authoring both buy and sell contracts where you are buying or selling items and services now. Examples of contracts of this class include contract purchase agreements, project contracts, and repository contracts. • Partner Agreement: Used exclusively for Oracle Fusion Partner Management. • Purchase Agreement: Used for negotiating a future purchase of goods and services. You cannot change the class after the contract type is created.

Field or Option	Description
Set	Determines the data security for contracts of this type.
Name	The name of the contract type that you select when authoring contracts.
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 cannot change the setting after the contract type is created.
Use external item master	Selecting this option lets you reference items from an external item source master. Note This option is available only for sell intent contracts if you selected the available Allow lines option.
Enable Automatic Numbering	Enables automatic numbering of contract lines during contract authoring.
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.
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 is generated automatically based on the numbering level and the document sequence category that you specify.

Field or Option	Description
Intent	Contracts can have either a sell intent (project contracts and partner agreements) or buy intent (purchase contracts). You cannot 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 is the role you set up for the business units in your organization. You cannot 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 is the role you set up for the supplier. You cannot 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. Note 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.

Field or Option	Description
Contract Layout Template	The Oracle BI Publisher template that is used to print the entire contract. Note This option is not available if you enabled Use external item master.
Terms Layout Template	The Oracle BI Publisher template used to print the contract terms. Note This option is not 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 specified the **Days to Expiration** field. Note These options are not available if you enabled Use external item master.

Line Types

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

Line Type	Description
Buy agreement, 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.
Buy agreement, item	Enables entry of inventory items for purchasing. You can create master agreements in the purchasing application from lines of this type.
Buy intent, 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.

Line Type	Description
Buy intent, item	Enables entry of inventory items for purchasing. You can create purchase orders in the purchasing application from lines of this type.
Sell intent, free-form, project-based	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.
Sell intent, item, project-based	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.

If you enable Use external item master when creating a contract type, you can create only the following line types:

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

Additional Party Roles

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

Project Billing Options

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

Option	Description
Intercompany	Enables project billing between internal organizations.
Interproject	Enables billing to other projects.

Option	Description
Enable Billing Controls and **Billing Limit Type**	Enables billing controls for each contract line, making it possible for you to specify a hard limit or a soft limit as the **Billing Limit Type**. A soft limit warns you if the billing limit is reached. A hard limit prevents you from billing above the limit.

Enabling Contract Fulfillment Notifications for Purchase Contracts

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

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

Enabling Contract Terms Authoring and Other Advanced Options

If you do not 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 is not available but Related Contracts option is automatically enabled.

The advanced authoring options are described in the following 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.

Option	Description
	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 selecting the **Manage Contracts Risks** task in Oracle Fusion Functional Setup Manager.
Enable Related Contracts	Makes it possible for you to relate contracts to each other.

Enabling Customer E-Signature

For a contract created from a contract type enabled for electronic signature, the contract must be signed by all designated signers on the contract before the contract can become active.

Before enabling a contract type for electronic signature, you must have used the Manage Electronic Signature setup task to set up contract user accounts with the electronic signature solution provider.

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

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

Related Topics

- Contract Numbering: Explained
- Setting Up Enterprise Contracts: Procedure Part 1

Contract Line Types: Explained

Using the **Manage Contract Line Types** task, you can rename the types of lines available for selection when you create contract types. This optional implementation task is available by selecting **Setup and Maintenance** from the Tools menu and searching on the task name.

Line Types

Line types are names you give to the contract lines.

You must associate each line type name with one of the fixed set of predefined line sources. A line source determines what item you can enter in a contract line and enables functionality of one of the integrated applications to that line. For example,

project line sources expose Oracle Fusion Projects fields in contracts and make it possible for contract authors to relate lines to projects. Buy sources make it possible to create contract deliverables for the line and use those contract deliverables to create and manage purchase orders and purchase agreements in Oracle Fusion Purchasing or other integrated purchasing systems.

The application includes a set of predefined line type names for all available line sources. You may create additional names for use in different contract types.

The predefined line types names are the same as the line source names they are associated with.

Line Sources

The application includes the following predefined line sources, which you cannot modify or extend.

If you do not enable the Use external item master option, you can create the following line sources only:

Line 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.
Product, sell agreement, standalone	Enables entry of inventory products. You can create sales agreements from lines of this type.

If you enable Use external item master, you can create the following line sources only:

Line 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.

Key Contract Type Settings for Different Kinds of Contracts: Examples

This topic provides examples of key contract type settings for different kinds of enterprise contracts, including employment agreements, purchase contracts, purchase agreements, and sales contracts with project work.

Employment Agreement

You want to create a standard employment agreement that can be edited during negotiations with a new employee.

Key Contract Type and Related Setups	How It Works
Key contract type setups: • **Class**: **Enterprise Contract** • **Intent**: **Sell** or **Buy** • **Allow Lines** option: Leave unselected • Select the **Enable Terms Authoring** option to permit the use of the contract terms template with the employment agreement. In the Contract Terms Library, you create the contract terms template and set the template as the default for this contract type.	When you select the contract type, the contract terms template automatically populates the Contract Terms tab in the contract with the terms and conditions. You can edit them during the negotiation with the employee.

Purchase Contract

You want to create a purchase contract that can be used to create and monitor purchase orders within Oracle Fusion Purchasing.

Key Contract Type Setups	How It Works

• **Class**: **Enterprise Contract**
• **Intent**: **Buy**
• **Allow Lines** option: Selected
• You can add two types of lines:
  ◦ **Buy-intent Freeform**
  For items not tracked by inventory.
  ◦ **Buy-intent Item**
  For items tracked by inventory.
	You enter the goods and services you are purchasing in contract lines. By creating contract fulfillment items for individual or multiple lines, you automatically create purchase orders in Oracle Fusion Purchasing. You can then use these deliverables to monitor the status of each purchase order from within the contract.

Purchase Agreement

You want to create a contract for future purchases which creates blanket purchasing agreements within Oracle Fusion Purchasing.

You want to create a blanket purchase agreement when you know the detail of the goods or services you plan to buy from a specific supplier and want to negotiate their price, but you do not yet know the detail of your delivery schedules.

Key Contract Type Setups	How It Works

• **Class**: **Purchase Agreement**
• **Intent**: **Buy**
• **Allow Lines** option: Selected
• You can add two types of lines:
  ◦ **Buy-intent Freeform**
  For items not tracked by inventory.
  ◦ **Buy-intent Item**
  For items tracked by inventory.
	By adding deliverables for one or more contract lines, you automatically create blanket purchase agreements in Purchasing. You can use the deliverables to monitor the status of the blanket purchase agreements from within the contract.

Enterprise Sales Contract with Project Work

You want to create a sales contract that governs the billing of items and services to projects in Oracle Fusion Projects.

Key Contract Type Setups	How It Works

• **Class**: **Enterprise Contract**
• **Intent**: **Sell**
• **Allow Lines** option: Selected
• You can add two types of lines:
  ◦ **Freeform, Project-Based**
  For entering item not tracked in inventory.
  ◦ **Item, Project-Based**
  For entering inventory items.
• Use external item master: Selected for referencing an external item master.
  Note
  If you enable Use external item master, the Advanced Options tab is not available.
• On the Advanced Options tab, leave the **Contract Terms Authoring** option unselected.
  Note
  While nothing prevents you from using the Contract Terms Library to author contract terms for sales contracts with project work, there is no functional link between the contract terms and the Oracle Fusion Projects application. This means that you cannot monitor the adherence of a project to the terms in the contract.
	You add contract lines to specify the goods and services sold, specify the project they are billed to, and enter billing details. The fulfillment and billing of those items is tracked within Oracle Fusion Projects.

Setting Up Contract Types for Different Kinds of Contracts: Points to Consider

This topic explains how to set up contract types for different kinds of enterprise contracts.

Your contract type setup depends on the type of contract you are 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 the following questions:

1. Are you selling or buying?

   For **Intent**, you select either **Sell** or **Buy**.

2. 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 are buying or selling now. If you are negotiating a future purchase or sale, select one of the agreement classes, for instance **Purchase Agreement** for a future purchase.

3. 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. Some line types permit contract authors to select items tracked in inventory; others permit the entry of any item as text, for example, for free-form services.

   Some of the line types support integration with other Fusion applications, for example, project line types support the billing of items through Oracle Fusion 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. Some functionality is planned for a future release.

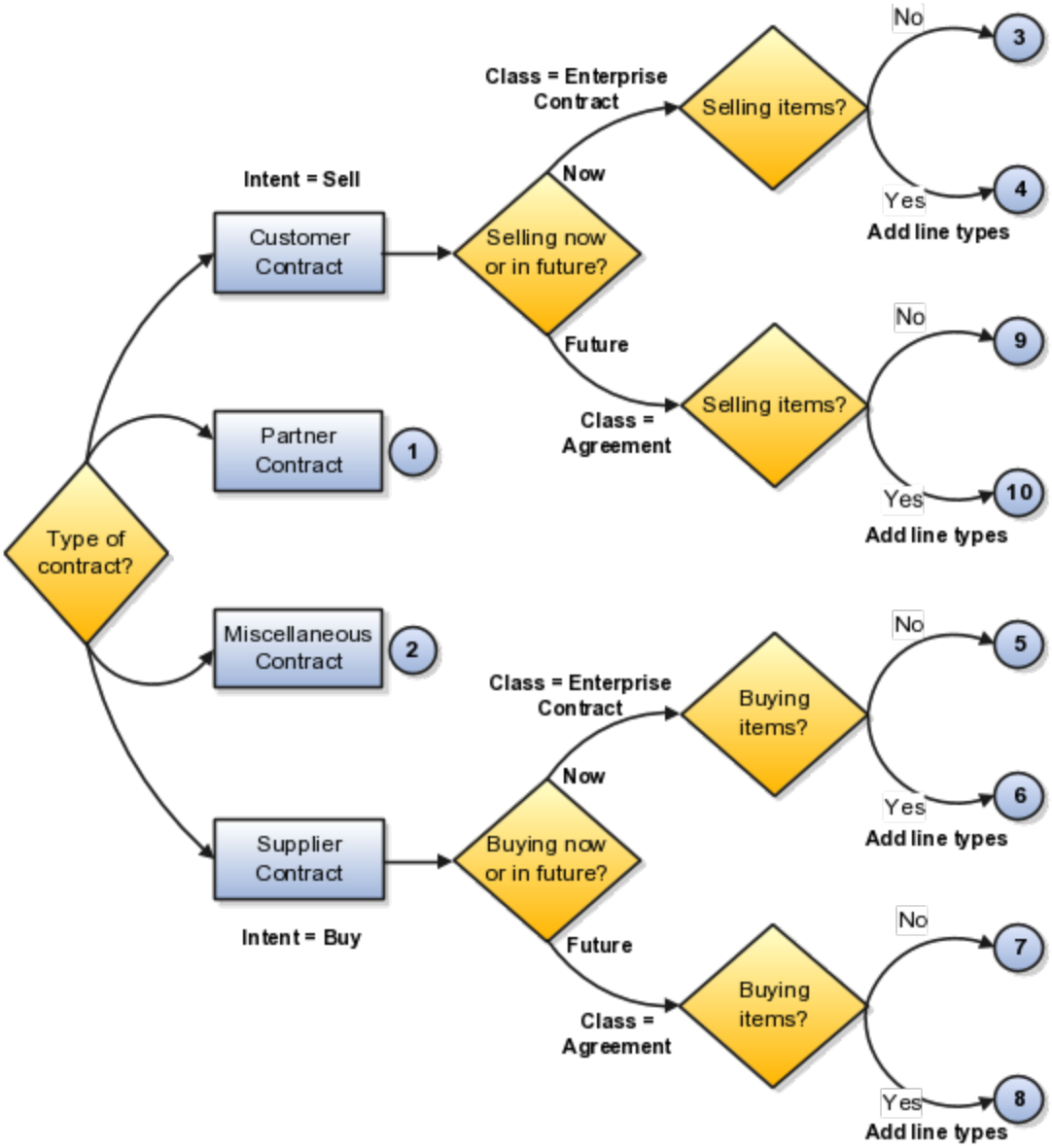
There are other special kinds of contracts where these questions are less relevant or do not apply. These include:

- Partner Agreements

  Contracts with partners. See description of Case 1 for suggested contract type settings.

- Miscellaneous Contracts

Contracts such as nondisclosure agreements or employment agreements. See description of Case 2 for suggested contract type settings.



Customer Contracts

This section describes the settings for sell-intent contracts.

Case 3: Customer Contracts with No Lines

Use the following 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

The following 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. Lines for selling services and regular inventory-based tangible items are planned for a future release.

Purpose of Contract	Contract Type Settings

Sell items and services that are tracked and billed to one or more projects.	• **Class**: **Enterprise Contract**
	• **Intent**: **Sell**
	• **Allow Lines** option: Selected
	• You can add two types of lines:
	  ◦ **Freeform - Project Based**
	  For selling items not tracked in inventory.
	  ◦ **Item - Project Based**
	  For selling inventory items.
	• On the Advanced Options tab, leave the **Contract Terms Authoring** option unselected.
	Note
	While nothing prevents you from using the Contract Terms Library to author contract terms for project contracts, there is no functional link between the contract terms and the Oracle Fusion Projects application. This means that you cannot monitor the adherence of a project to the terms in the contract.

Supplier Contracts

This section describes contract type settings for buy-intent contracts.

Case 5: Supplier Contracts Without Lines

The following table describes the key contract type setups for supplier contracts where you are 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	• **Class**: **Enterprise Contract** • **Intent**: **Buy**

Purpose of Contract	Contract Type Settings
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.	• **Allow Lines** option: Leave unselected

Case 6: Supplier Contracts with Lines

The following 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:
	  ◦ **Buy-intent Freeform**
	  For items not tracked by inventory.
	  ◦ **Buy-intent Item**
	  For items tracked by inventory.

Case 7: 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.	• **Class**: **Agreement** • **Intent**: **Buy** • **Allow Lines** option: Leave unselected

Case 8: 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 do not yet know the detail of your delivery schedules. You can use this type of contract, sometimes called a blanket purchase agreement, a standing order, or a blanket order, 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 affectivity 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.
	• **Class**: **Agreement**
	• **Intent**: **Buy**
	• **Allow Lines** option: Selected
	• You can add the following types of lines:
	  ◦ **Buy-intent Freeform**
	  To purchase items not tracked by inventory.
	  ◦ **Buy-intent Item**
	  To purchase items tracked by inventory.

Case 9: Contracts for Future Sales Without Lines

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

Purpose of Contract	Contract Type Settings
Contract for future sales, without specifying the goods and services as contract lines.	• **Class**: **Agreement** • **Intent**: **Sell** • **Allow Lines** option: Leave unselected

Case 10: 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 do not 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. The customer can issue a blanket release against a blanket sales agreement to place the actual order (as long as the release is within the blanket agreement affectivity 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.
	• **Class**: **Agreement**
	• **Intent**: **Sell**
	• **Allow Lines** option: Selected
	• You can add the following types of lines:
	  ◦ **Sell-intent Product**
	  • If item source is Product Master, item is selected.
	  • If item source is Catalog, Product is selected.

Special Contracts

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

Case 1: Partner Agreements

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

Purpose of Contract	Contract Type Settings
Partner enrollment agreement	• **Class**: **Partner Agreement** • **Intent**: **Sell** • You must enable contract terms authoring by selecting the **Enable Terms Authoring** option. Note Oracle Fusion Partner Relationship Management uses contract types only for applying contract terms templates with boilerplate contracts, so most of the contract type entries do not apply or have no effect.

Case 2: Miscellaneous Contracts

The following table lists the key contract type settings for nondisclosure, employment contracts, and other simple contracts.

Purpose of Contract	Contract Type Settings
Nondisclosure agreement or employment agreement	• **Class**: **Enterprise Contract** • **Intent**: **Sell** • **Allow Lines** option: Leave unselected

FAQs About Contract Types

Why can't I delete a contract type?

You cannot delete a contract type after it is 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?

If you want to author contract terms on individual purchase orders or other Oracle Fusion Sourcing documents, such as RFQs, you are not 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.

Managing Contract Risks

How can I set up contract risk?

You can set up the list of contract risks by selecting the Manage Risks task from the Setup and Maintenance work area. Contract authors use this list during contract authoring to record contract risks.

Recording contract risks helps your organization prepare for potential problems. It does not affect contract processing.

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

Related Topics

- How can I specify contract risk?

Enabling Different Levels of Contract Terms Editing During Contract Authoring: Explained

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

Privilege Levels and What They Permit

The following 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 are not 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

Level	Privilege	Description
		the template or attach the contact 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 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 mandatory clauses and sections in contract terms.

Related Topics

- How can I make a clause mandatory in a contract?

Setting Up Contract Text Search: Highlights

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

Indexing Schedule Name	Description
Enterprise Contracts	Indexes and enables text search on contracts created in Oracle Contracts.
Purchasing Contracts	Indexes and enables text search in the POs and agreements within Oracle Purchasing.
Sourcing Contracts	Indexes and enables text search in the RFIs and other negotiation documents in Oracle Sourcing.

Indexing Schedule Name	Description
Contract Documents	Indexes and enables text search in documents attached to Oracle Contracts.
Purchasing Contract Documents	Indexes and enables text search in documents attached to Oracle Purchasing POs and agreements.
Sourcing Contract Documents	Indexes and enables text search in the documents attached to Oracle Sourcing RFIs and other negotiation documents.

Running Indexing Schedules

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

- Deploying and starting indexing schedules.

  See: Managing Index Schedules

15 Define Procurement Contracts Configurations

Specify Supplier Contract Management Business Function Properties

Supplier Contracts Business Unit Setup: Explained

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

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

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

Managing Contract Terms Library Setup Options

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

Related Topics

- Contract Terms Library Business Unit Setup: Explained

Contract Terms Library Business Unit Setup: Explained

You can specify a wide variety of Contract Terms Library settings for either customer or supplier contracts within each business unit, by using either the **Specify Customer Contract Management Business Function Properties** or the **Specify Supplier Contract Management Business Function Properties** tasks. These tasks are available by navigating to the **Setup and Maintenance** work area and searching on the task name.

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

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

Enabling Clause Adoption

If you plan to use clause adoption in your implementation, then set up the following:

- Specify a global business unit

  You must 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 is not available for the business unit you are setting up, this means that you already designated another business unit as global.

- Enable automatic adoption

  If you are implementing the adoption feature, then 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 do not select this option, the employee designated as the Contract Terms Library Administrator must approve all global clauses before they can be adopted and used in the local business unit. This option is available only for local business units.

- Specify the administrator who approves clauses available for adoption

  You must designate an employee as the Contract Terms Library administrator if you are using adoption. If you do not 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.

Setting Clause Numbering Options

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

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

Enabling Contract Expert

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

Specifying the Printed Clause and Deviations Report Layouts

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

- The printed contract terms

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

- The contract deviations report

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

Related Topics

- How the Selection of a Business Unit Affects Clauses and Other Objects in the Library
- Contract Expert: How It Works
- Contract Printing and Layout Templates: Explained

Contract Fulfillment: How It Works

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

The figure below illustrates how you can create and work with both contractual and noncontractual fulfillment lines and how you can initiate purchasing activity from those fulfillment lines:

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

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

2. Review the notifications that are sent automatically to interested parties regarding fulfillment progress and deadlines. The contract type can be set up to automatically specify who gets notified and when. You can change and add additional notifications for the contract.

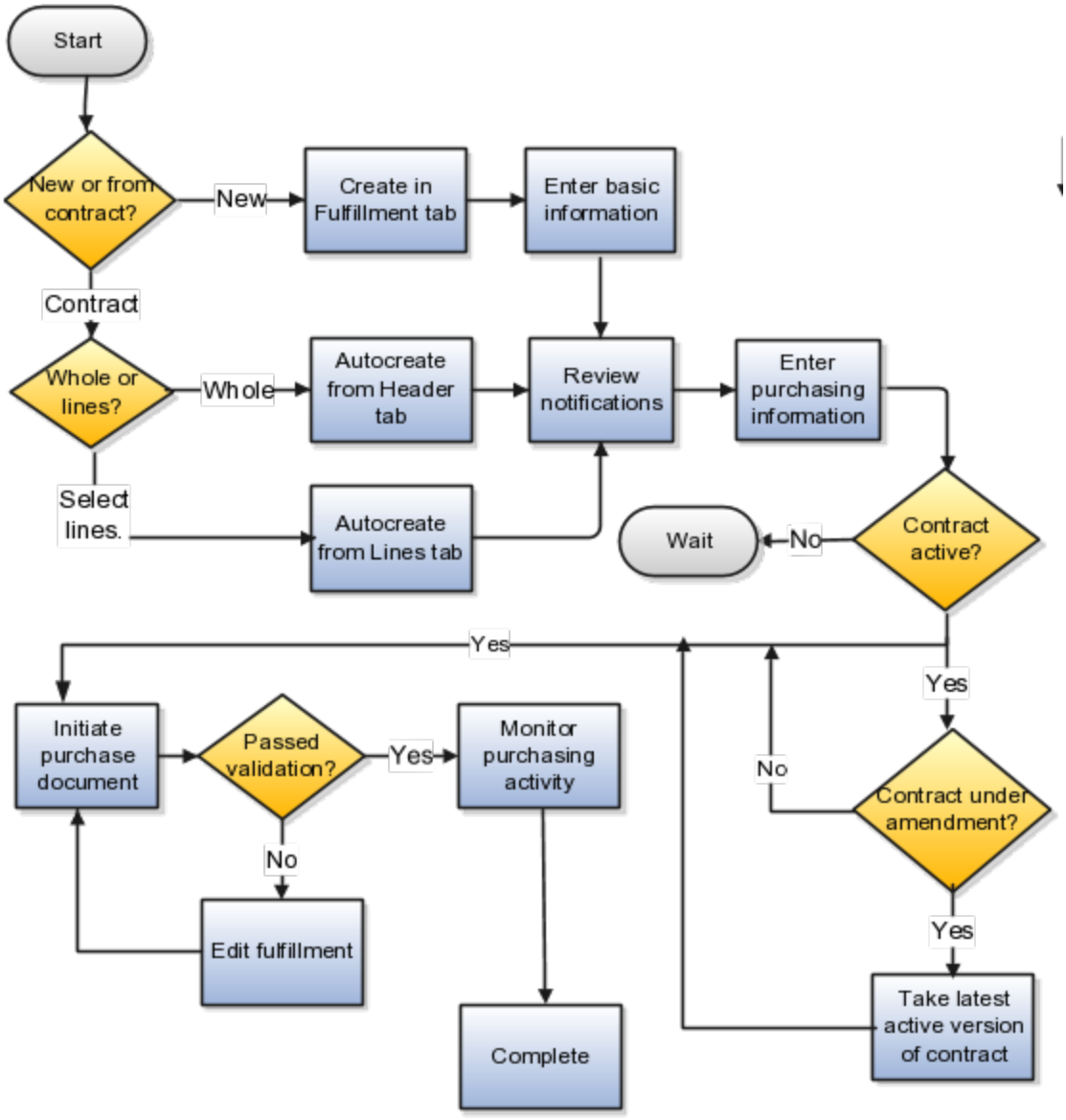
3. If you are using the fulfillment to initiate the purchase of goods and services using the integrated purchasing applications, then you must enter the required purchasing details. For autocreated fulfillment, these details are copied automatically from the corresponding contract lines.

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

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

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

6. You can mark a fulfillment as complete after execution of the purchasing document is completed.



Creating a Contract Fulfillment

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

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

> **Note**
> The Create Fulfillment and Autocreate Fulfillment Lines actions are not available for a contract that is under amendment.

> **Tip**
> You can create multiple fulfillment lines for a single contract line if you need the fulfillment line items to be shipped to different destinations, for example. This is accomplished by autocreating a fulfillment line, duplicating it, and then editing the fulfillment line information.

Setting Up Fulfillment Notifications

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

You can notify internal contacts:

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

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

Creating the Purchasing Document

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

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

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

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

Monitoring Purchasing Activity

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

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

Specifying Purchasing Activity for a Fulfillment is Complete

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

Related Topics

- Can I create multiple contract fulfillment lines for a single contract line?
- What Actions You Can Use on Contract Fulfillment Lines and When: Explained
- Types of Contract Fulfillment: Explained
- Initiating a Single PO from a Contract Line to Ship Items to Different Destinations: Example
- Enabling the Creation and Monitoring of Agreements in Oracle Sales Cloud Purchasing: Explained

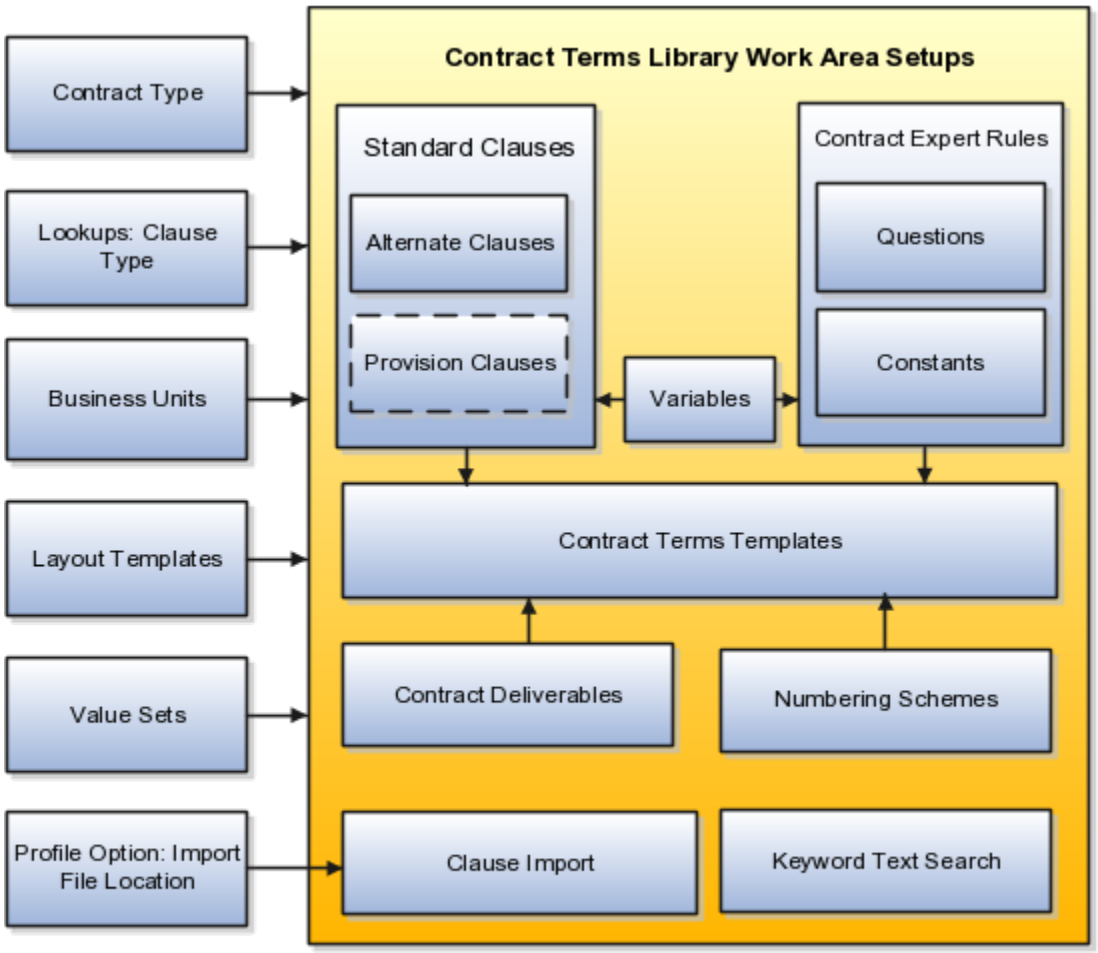
16 Define Contract Terms and Clause Library Configuration

Contract Terms Library Setup Overview

Contract Terms Library Setups: How They 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 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 BI 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 Business Function Properties** or the **Specify Supplier Contract 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 BI 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 BI 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 system 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 defaulting 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

- Setting Up Enterprise Contracts: Procedure Part 2

How the Contract Terms Library Supports Translation: Explained

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 Oracle Fusion 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 are 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 are translating from. To translate the global clause, you localize it using the localize action and 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 check box. This check box 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.

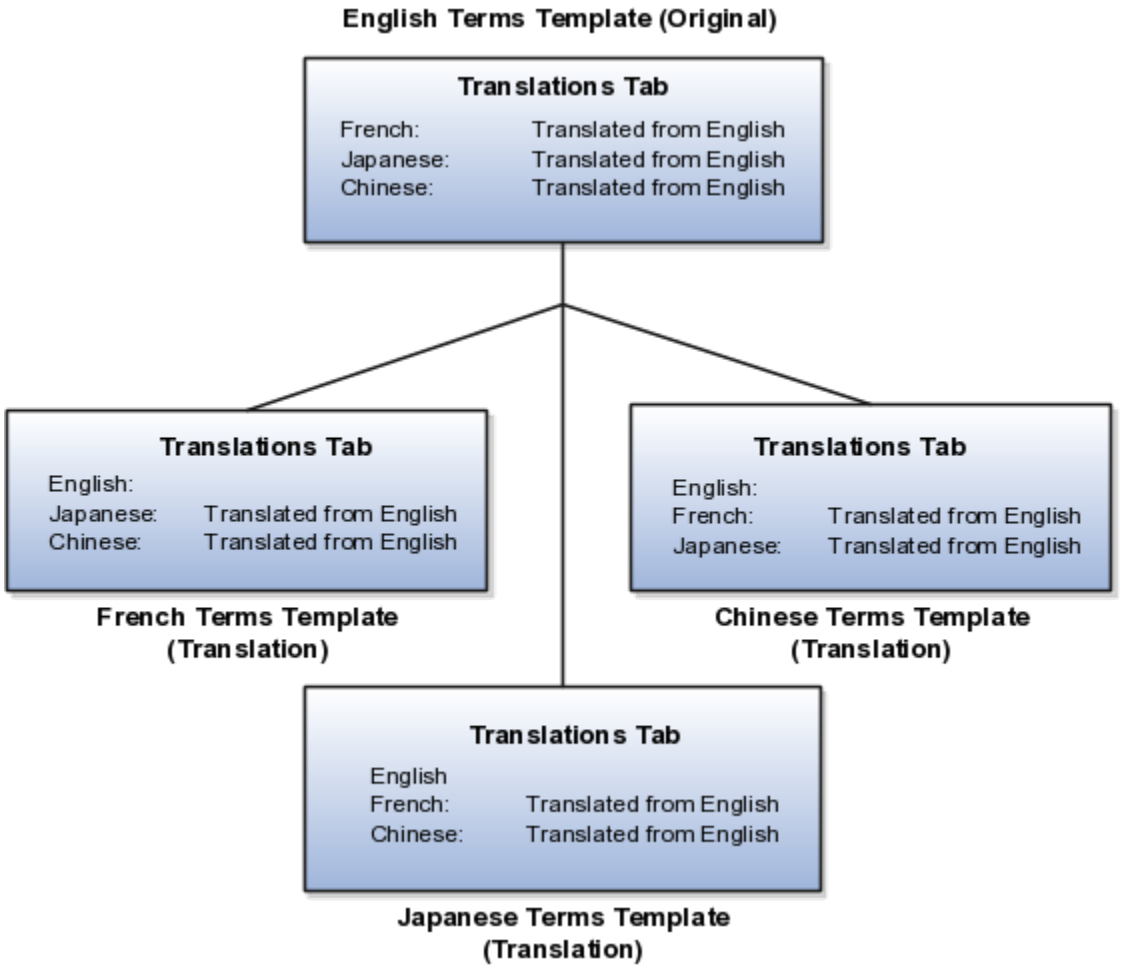
Tracking Contract Terms Template Translations

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

The Translations tab in the contract terms template edit page shows all of the templates related by translation. 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 diagram.

All of the templates listed display the source template in the Translated From column. For the source template, this column is blank.

In this example, you can tell the English template is the source template for the French, Chinese, and Japanese translations because there is no entry in the Translated From column.



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

Setting Up Business Units for the Contract Terms Library

Contract Terms Library Business Unit Setup: Explained

You can specify a wide variety of Contract Terms Library settings for either customer or supplier contracts within each business unit, by using either the **Specify Customer Contract Management Business Function Properties** or the **Specify Supplier Contract Management Business Function Properties** tasks. These tasks are available by navigating to the **Setup and Maintenance** work area and searching on the task name.

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

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

Enabling Clause Adoption

If you plan to use clause adoption in your implementation, then set up the following:

- Specify a global business unit

  You must 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 is not available for the business unit you are setting up, this means that you already designated another business unit as global.

- Enable automatic adoption

  If you are implementing the adoption feature, then 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 do not select this option, the employee designated as the Contract Terms Library Administrator must approve all global clauses before they can be adopted and used in the local business unit. This option is available only for local business units.

- Specify the administrator who approves clauses available for adoption

  You must designate an employee as the Contract Terms Library administrator if you are using adoption. If you do not 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.

Setting Clause Numbering Options

You can set up automatic clause numbering for the clauses in the business unit by selecting Automatic in the **Clause Numbering** field and setting the clause numbering level. Then select the appropriate clause sequence category for the

specified numbering level. You must have previously set up document sequences for the document sequence categories of global, ledger, and business unit. If clause numbering is manual, contract terms library administrators must enter unique clause numbers each time they create a clause.

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

Enabling Contract Expert

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

Specifying the Printed Clause and Deviations Report Layouts

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

- The printed contract terms

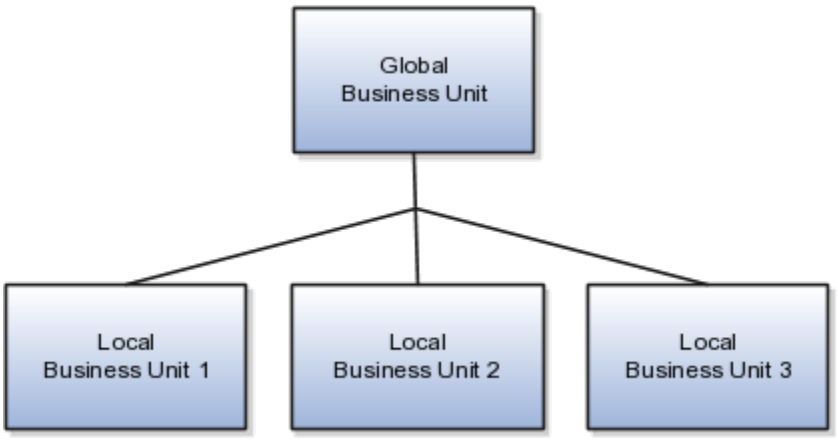
  Enter the RTF file you want used for formatting the printed clauses in the **Clause Layout Template** field.
- The contract deviations report

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

How the Selection of a Business Unit Affects Clauses and Other Objects in the Library

The choice of a business unit while creating many Contract Terms Library objects restricts where you can use these objects. Objects affected include clauses, contract terms templates, and Contact Expert rules. Objects created in a local business unit can only be used in that local business unit. Objects created in a global business unit can be adopted or copied over to other business units provided they are specified as global. This topic details the impacts of the business unit 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 business unit affects different objects in the Contract Terms Library.

Terms Library Object	Impact of Business Unit
Clauses	Different restrictions apply depending on business unit type: • Local Business Unit Use restricted to the local business unit where it is created. • Global Business Unit Clauses created in the global business unit, can be made available to other business units by selecting the Global check box. Local business units can either adopt the clause as is or localize it.
Contract terms templates	Different restrictions apply depending on business unit type: • Local Business Unit Use restricted to the local business unit where it is created. • Global Business Unit Contract terms templates created in the global business unit, can be made available to other business units by selecting the Global check box. Local business units can copy the templates to their business units.
Contract Expert rules	Use of rules is restricted to the business unit where you create them.
Contract Expert questions	Use of questions is restricted to the business unit where you create them.
Contract Expert constants	Use of constants is restricted to the business unit where you create them.
User variables	No effect. User variables created in any business unit and are available across all business units.
Contract terms sections	No effect. Contract terms sections can be created in any business unit and are available across all business units.

Terms Library Object	Impact of Business Unit
Clause numbering schemes	No effect. Numbering schemes can be created in any business unit and are available across all business units.

FAQs for Setup Overview

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

You must navigate to the Terms Library work area to set up the content of the Contract Terms Library.

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.

Managing Clauses in the Contract Terms Library

Contract Terms Library Clauses: Explained

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, if it is mandatory, and if it is 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.

Related Topics

- Understanding a Clause in the Contract Terms Library
- Creating a Clause in a Contract Terms Template
- Creating a Clause in the Contract Terms Library

Clause Versioning: Explained

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 making a selection from the Actions menu in the clause search page. Keep in mind that:

- 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 does not affect the setup of contract terms templates or rules.
- You can view all clause versions and compare version text but you cannot restore an old version.

Clause Versioning is Restricted by Status

You can create versions for clauses in the approved or expired statuses only. You do not create new versions to edit clauses that were rejected in the approvals process. These should be edited and resubmitted for approval.

A New Version Is Not Effective Until Approved

When you create a new version of an approved clause, your edits do not 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 cannot 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 select the History tab.

Related Topics

- How does creating a new clause version affect existing contracts, templates, and Contract Expert rules?

Changing the Title of a Clause After the Clause Is Approved: Example

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:

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.

Different Ways of Removing a Clause from Use: Points to Consider

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.

Setting Up Numbering for Clauses in the Contract Terms Library: Explained

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 Business Function Properties** or the **Specify Supplier Contract Business Function Properties** tasks from the Setup and Maintenance work 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: Explained
- Document Sequences: Explained

Including a Clause by Reference: Example

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.

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

Field	Entry
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.

Related Topics

- What's a clause reference and when do I include a clause by reference?

Importing Clause Text from Microsoft Word: Points to Consider

You can enter the text of a clause in the Contract Terms Library using one of the following options:

- 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.

Note the following:

- 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.

Note

To import large numbers of clause records rather than the text of individual clauses, use the Import Clauses from XML File concurrent program.

FAQs About Managing Clauses

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 following table 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? Yes. You can delete versions in the Draft and Rejected statuses
Pending Approval	The status of a clause after it is submitted for approval.	• Available for authoring and adoption?

Status	Description	Effect
		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.

Status	Description	Effect
		• Deletion? Yes.
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 is already in a template or rule, then the application displays an error during template or rule activation. • Deletion?

Status	Description	Effect
		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. • 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

- 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 view 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?

The title you enter in the Clause Title field must be unique for each clause within a business unit and cannot be changed after the clause is approved. You can use the Display Title field, which has no uniqueness requirement, to modify the title that appears in contracts or to specify the same title for multiple alternate clauses.

Related Topics

- Setting Up Alternate Clauses: Examples

How can I create clauses with the same title?

You cannot have two clauses with the same title entered in the **Clause Title** field in the Contract Terms Library, but by entering the same title in the **Display Title** field for each clause, you can create multiple clauses with the same printed title. The **Display Title** overrides the **Clause Title** in printed contracts.

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 searches clause title, display title, and description.

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?

Even if you are printing the clause reference instead of the clause text in a contract, you must still enter text in the clause text field. The text you enter in this field is not printed in the contract, but it is used for searching clauses by text. For this reason, it is preferable if you enter the text of your referenced clause.

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 are in the global business unit, you can search clauses that have been localized or adopted by other business units using the Search Clauses page (you select the business unit and the adoption type). 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?

Use the clause **Instructions** field to enter instructions for contract authors on clause use.

Use the clause **Description** field to enter any information about a clause.

Both text fields are visible to contract authors during contract terms authoring and the text of both 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?

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

- Alternate and Incompatible Clause Relationships: How They Work
- Setting Up Alternate Clauses: Examples

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 ledit the clause information?

You cannot edit clause information if you lack the proper privileges or if the clause is not in the draft status. When the clause is pending approval, the approvers must approve or reject the clause before you can edit it. If the clause is rejected or approved, you must create a new version before editing.

Why can't I edit the clause text?

You cannot edit the clause text if it was imported from a Word document or if you do not have adequate privileges assigned to you. To edit imported clause text, download the clause text, use Word 2007 or later version to make your edits, and then import your changes. To edit protected or mandatory clauses, you must obtain the Override Contract Terms and Conditions Controls privilege from the application administrator.

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.

Managing Contract Terms Templates

Contract Terms Templates: How They Work

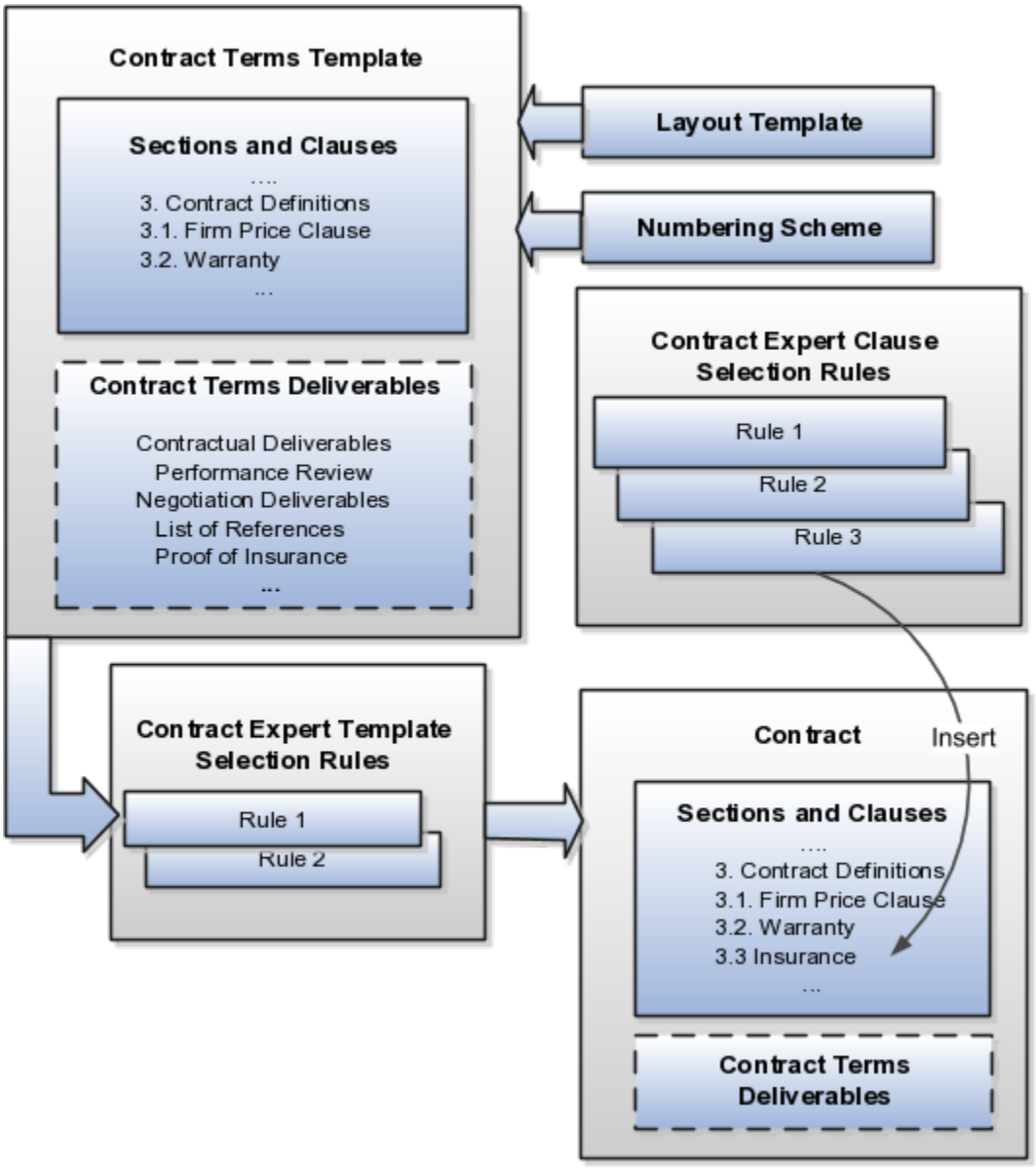
You can create contract terms templates in the Contract Terms Library to insert appropriate terms and conditions into contracts during contract authoring. You can apply the templates manually while authoring contracts or the application can apply the templates automatically using defaulting rules you 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.



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 Fusion Purchasing purchase orders, Oracle Fusion 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 gets 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.

Defaulting the Template on Contracts

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 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 defaults 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 gets 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

- Understanding a Contract Terms Template
- Creating a Contract Terms Template

Activating and Revising Contract Terms Templates: Explained

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.

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. **Note** 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. **Note** 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.

Validation Check	Type	Action
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.

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.

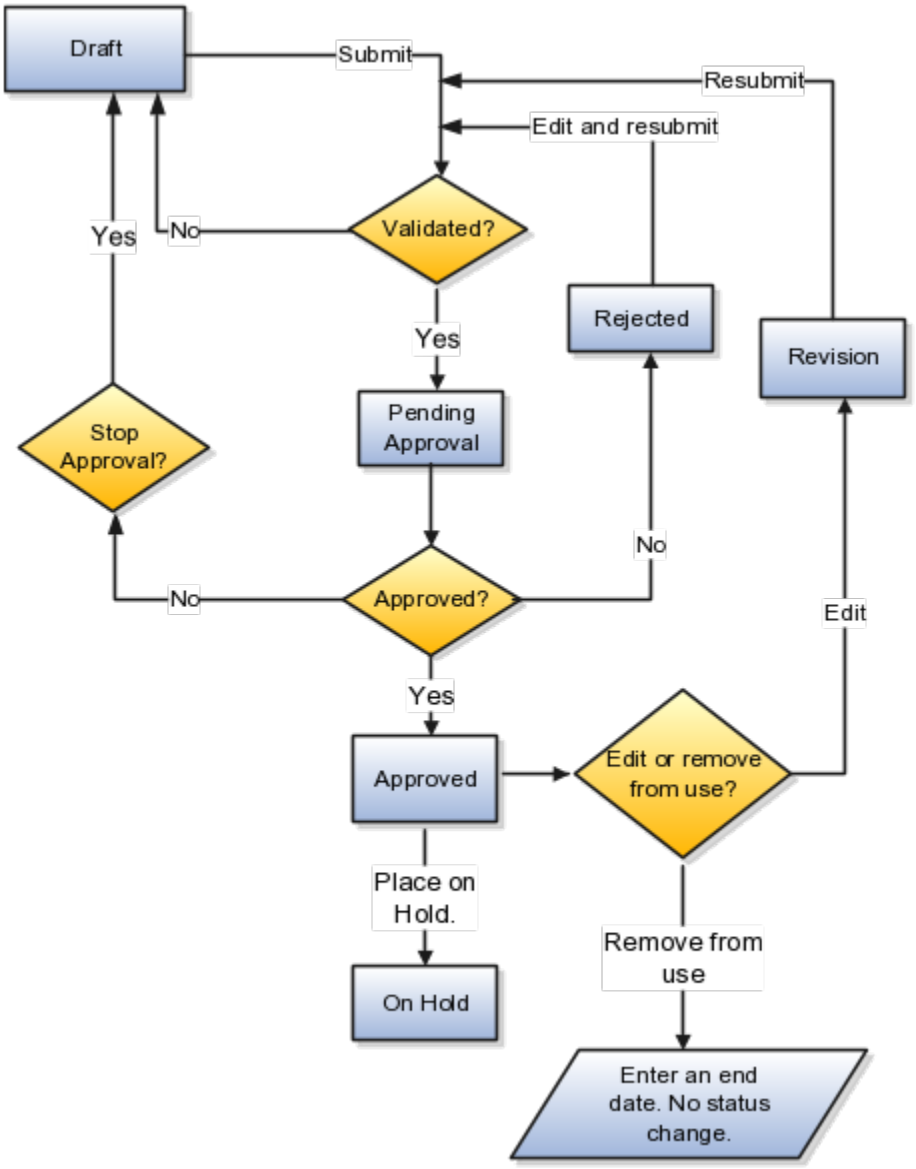
- An approved template is automatically available for use in the business unit where it is created.

- 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.

Setting Up Contract Expert

Contract Expert: How It 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 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.

Contract Expert consists of two components.

- Rule Setup

  Administrators create the rules that are stored in the Contract Terms Library. A rule can be based on the following 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.

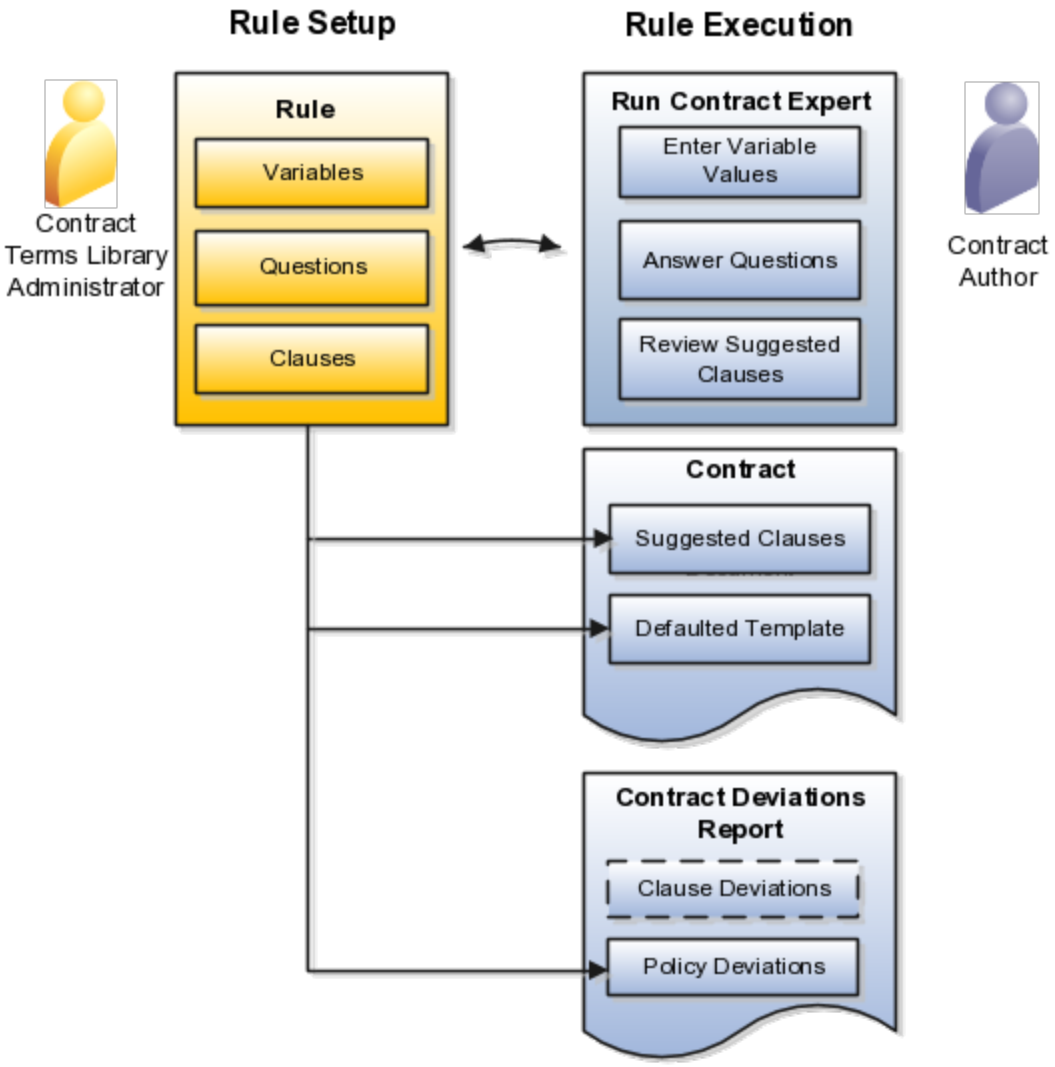
    For example, if the contract includes a hazardous materials clause, then insert additional insurance clauses.

  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 do not require Contract Expert rules.

The following figure illustrates the two components:



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 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 during contract terms authoring or when you run Contract Expert in the Contract Terms tab.

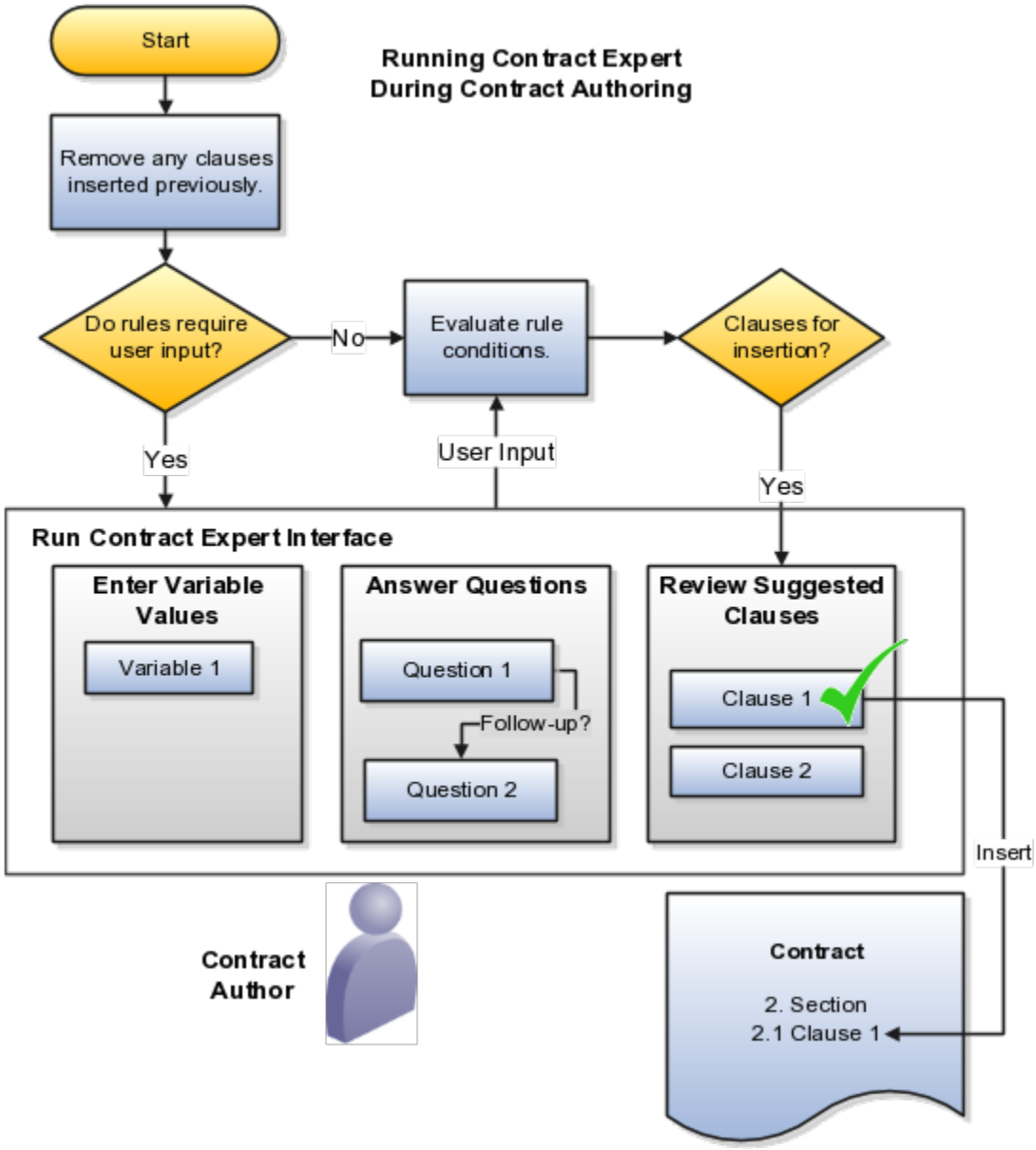
The following figure illustrates what happens when you run Contract Expert during contract authoring:

1. 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.

2. Contract Expert displays any recommended clauses for your review. You can choose which of the recommended clauses to insert into the contract provided that you have sufficient privileges.

3. 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 does not already exist in the contract. The clauses recommended for insertion may also be placed in their predetermined locations, if you defined these locations in the terms template associated with the contract.

4. 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.



If you do not 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

- Running Contract Expert
- Reviewing Contract Terms and Running Contract Expert on a Supplier Contract

Contract Expert Rules: How They Work

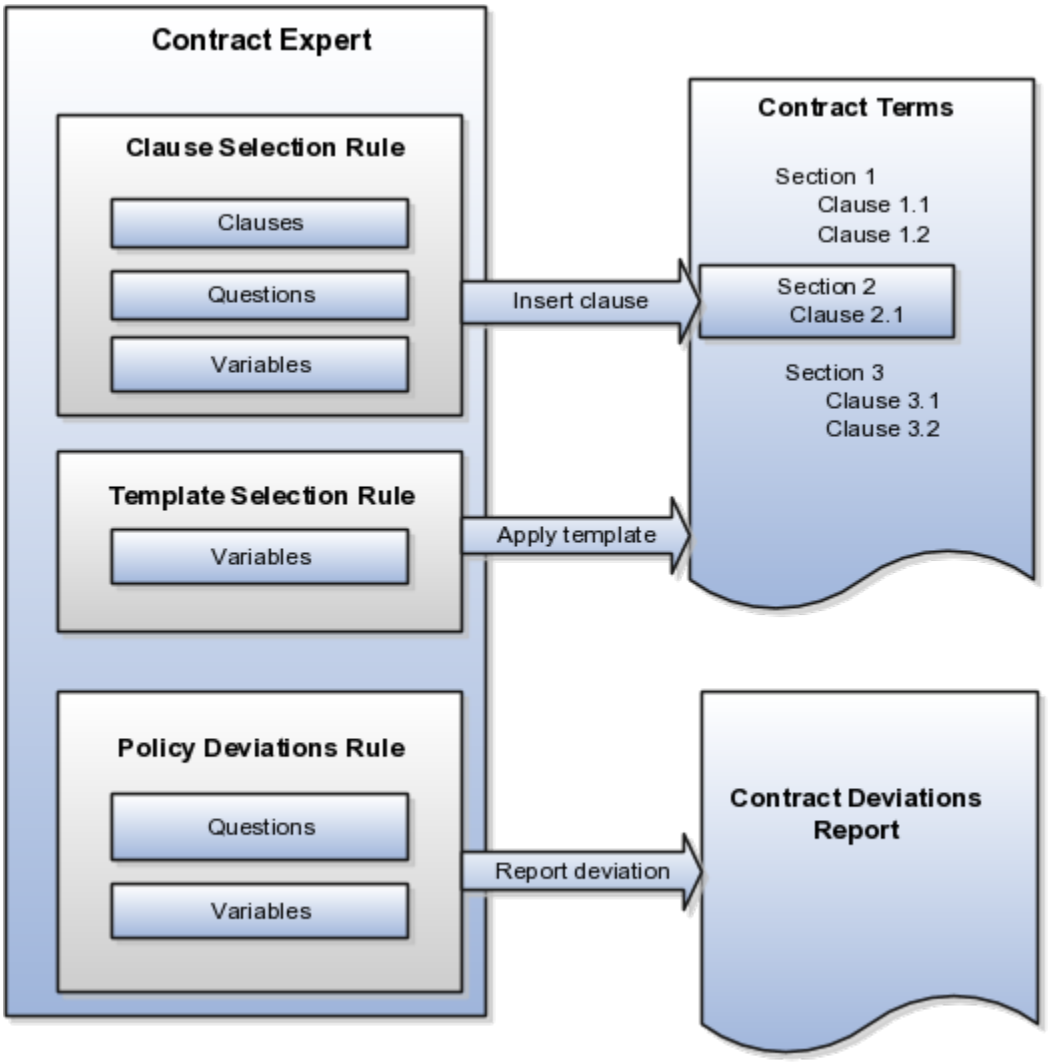
You can set up Contract Expert rules to apply contract terms templates automatically to contracts, to suggest additional clauses for insertion during contract terms authoring, and to flag any contract deviations from company policy.

Each rule comprises 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 flag contract deviations from company policies, use questions and variables only.



Key rule properties include:

- All rules can use multiple conditions linked together with either the AND or OR logical operators.
- The values of non-numeric conditions are supplied by value sets.
- The values for numeric conditions are supplied by constants.
- Rule types that permit the inclusion of questions can trigger follow-up questions, permitting you to chain rules together.
- Rules are restricted to the specific business unit and the contract intent where you create them.
- Rules do not 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 .

Rule Property	Details
	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.
When the rule is evaluated	The rule is evaluated every time that a user runs Contract Expert. Users receive an 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.

Rule Property	Details
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

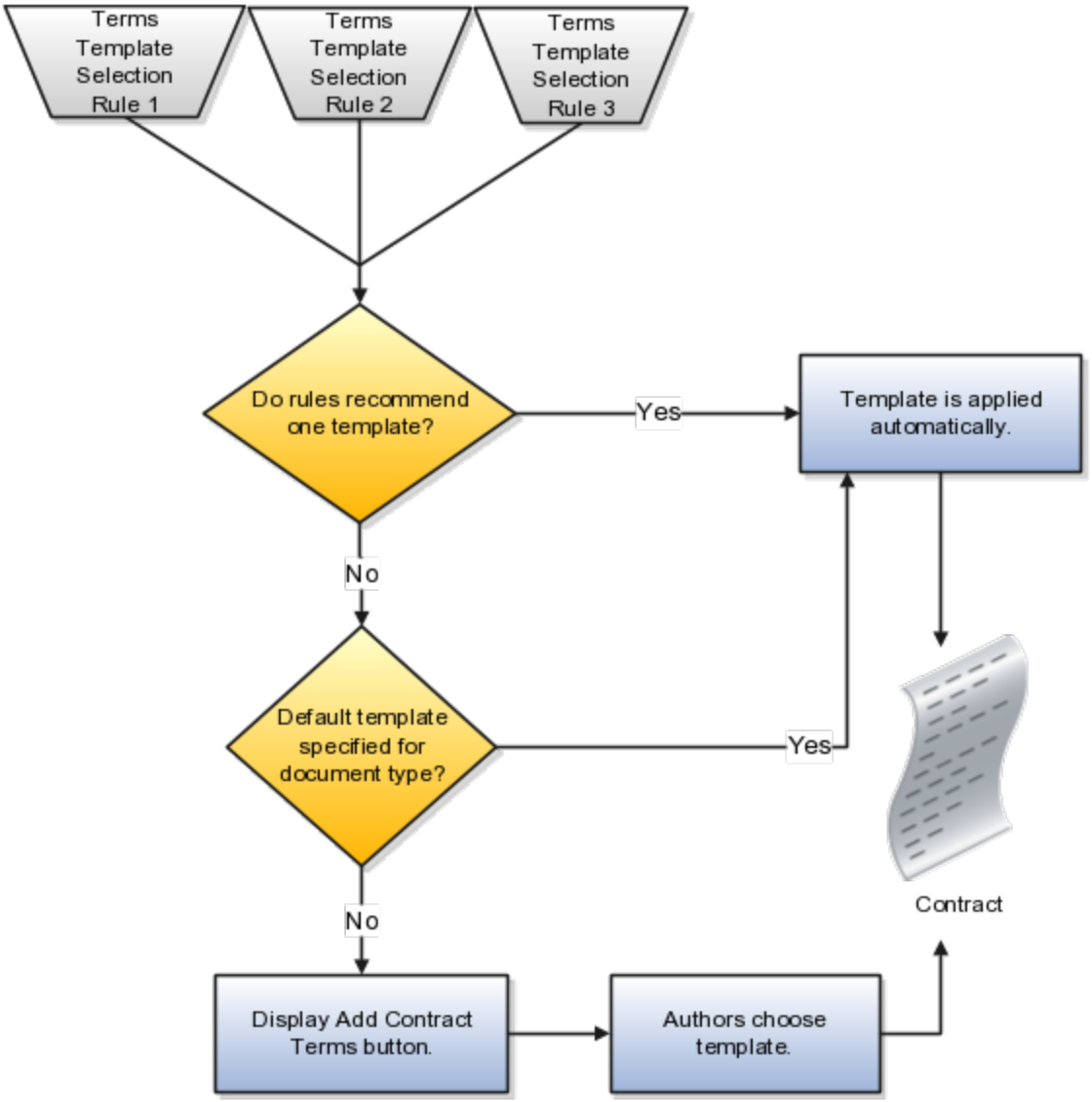
Contract terms template selection rules permit you to automatically apply a contract terms template to a contract.

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 are not 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.

Rule Property	Details
Where it applies	The rule applies only within the business unit and for the intent specified in the rule.

Contract Expert doesn't apply a contract terms template if the contract terms template defaulting 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.



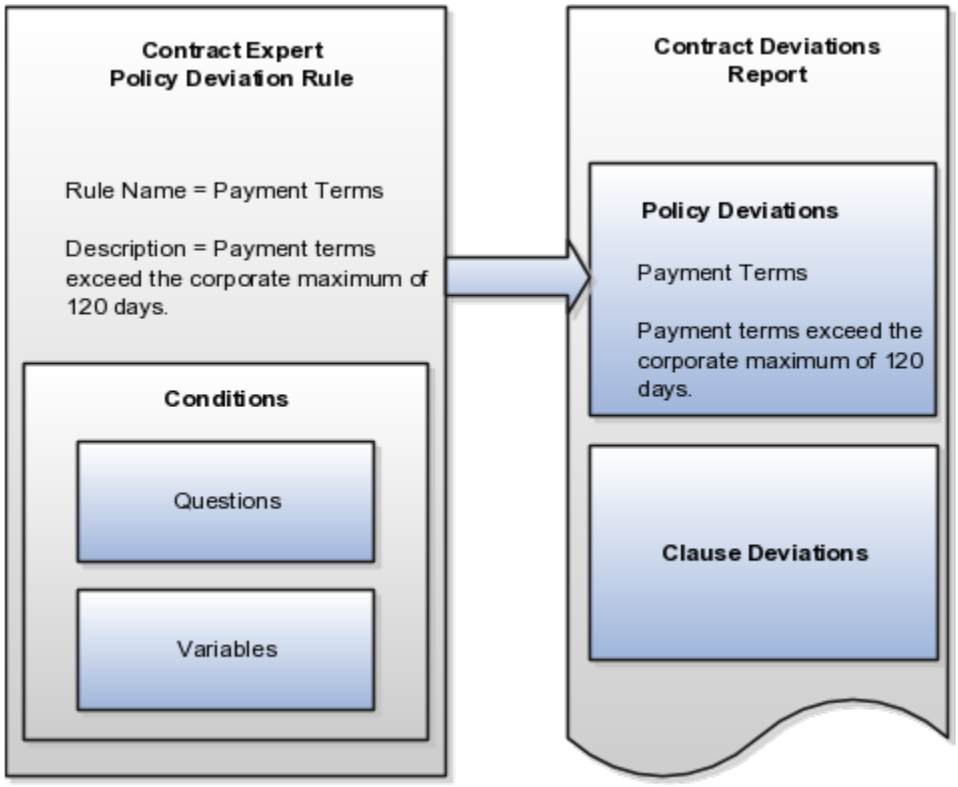
Policy Deviation Rules

Policy deviation rules flag 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 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.

The following figure illustrates the policy deviation rule setup. 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.



Policy deviation rules list policy deviations in the contract deviations report, along with any clause deviations that are flagged 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 do not require approval before activation, but the contract terms templates that they apply to do.

> **Note**
> In order 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 does have to 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

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

Contract Expert Rule Statuses and Available Actions: Explained

Statuses track the life-cycle of a Contract Expert rule from creation through activation and versioning and restrict available actions.

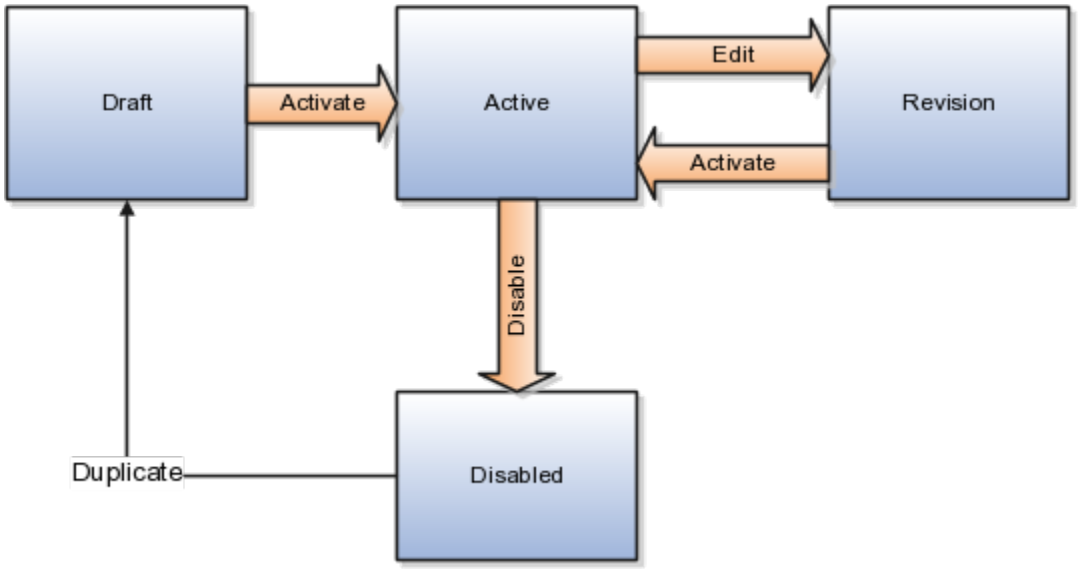
Contract Expert Statuses and Available Actions

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
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

Status	Description	Available Actions
Disabled	The rule was disabled using the Disable action.	Duplicate

The following diagram illustrates the rule statuses and main actions.



Contract Expert Question Setup: Explained

You can set up Contract Expert questions in the Contract Terms Library to solicit contract author input 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**.

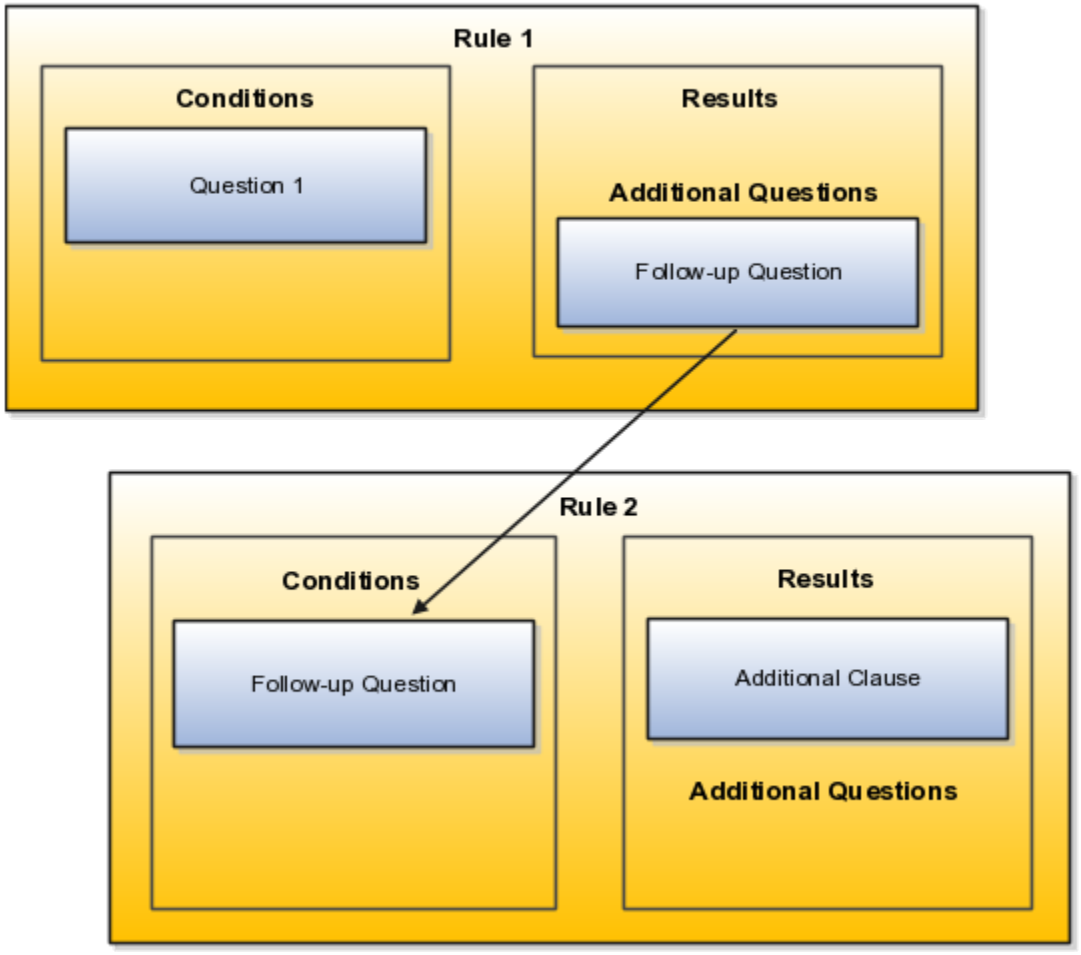
Note
Contract Expert does not permit you to provide default responses to user questions. However, the application sets numeric questions without a user response to 0.

Inserting Additional Clauses Based on Follow-up Questions : How It Works

You can ask follow-up questions and insert additional clauses into the contract terms based on the answers that the contract author gives.

The following diagram illustrates how you can ask a follow-up question using the follow-up question to link two rules.

Asking a Follow-up Question to Insert an Additional Clause



Asking Follow-up Questions

To ask follow-up questions, you:

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).

Contract Expert Constants: Examples

Contract Expert constants supply numerical 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.

Contract Expert Clause Selection Rules and Asking Follow-up Questions: Examples

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 numerical 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.

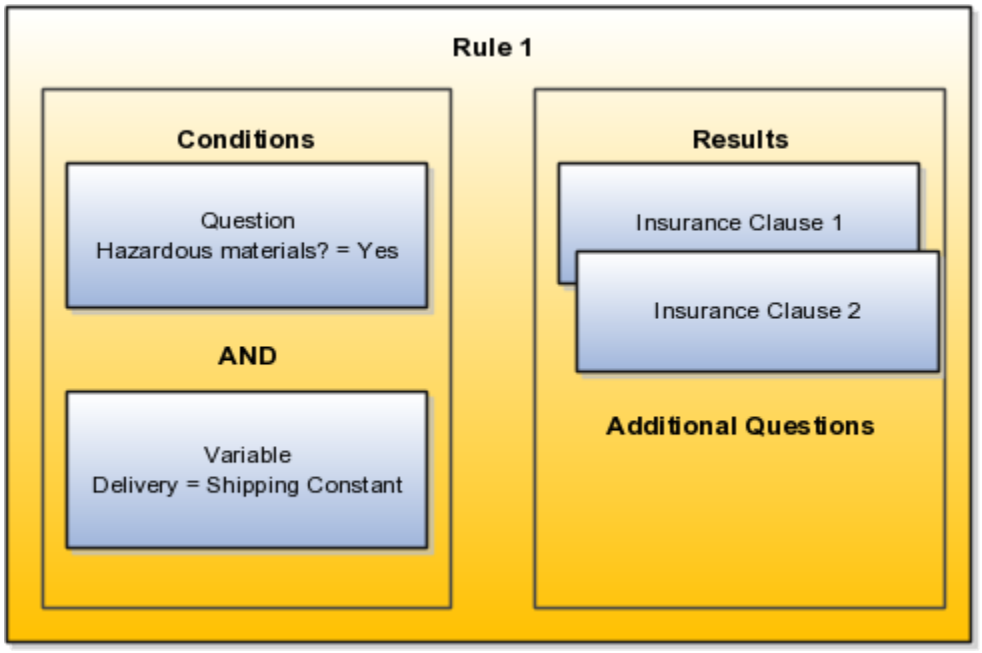
6. Associate the rule with the contract terms templates where you want the rule to apply.

   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 defaults the two insurance clauses.

This diagram illustrates the clause selection rule example.

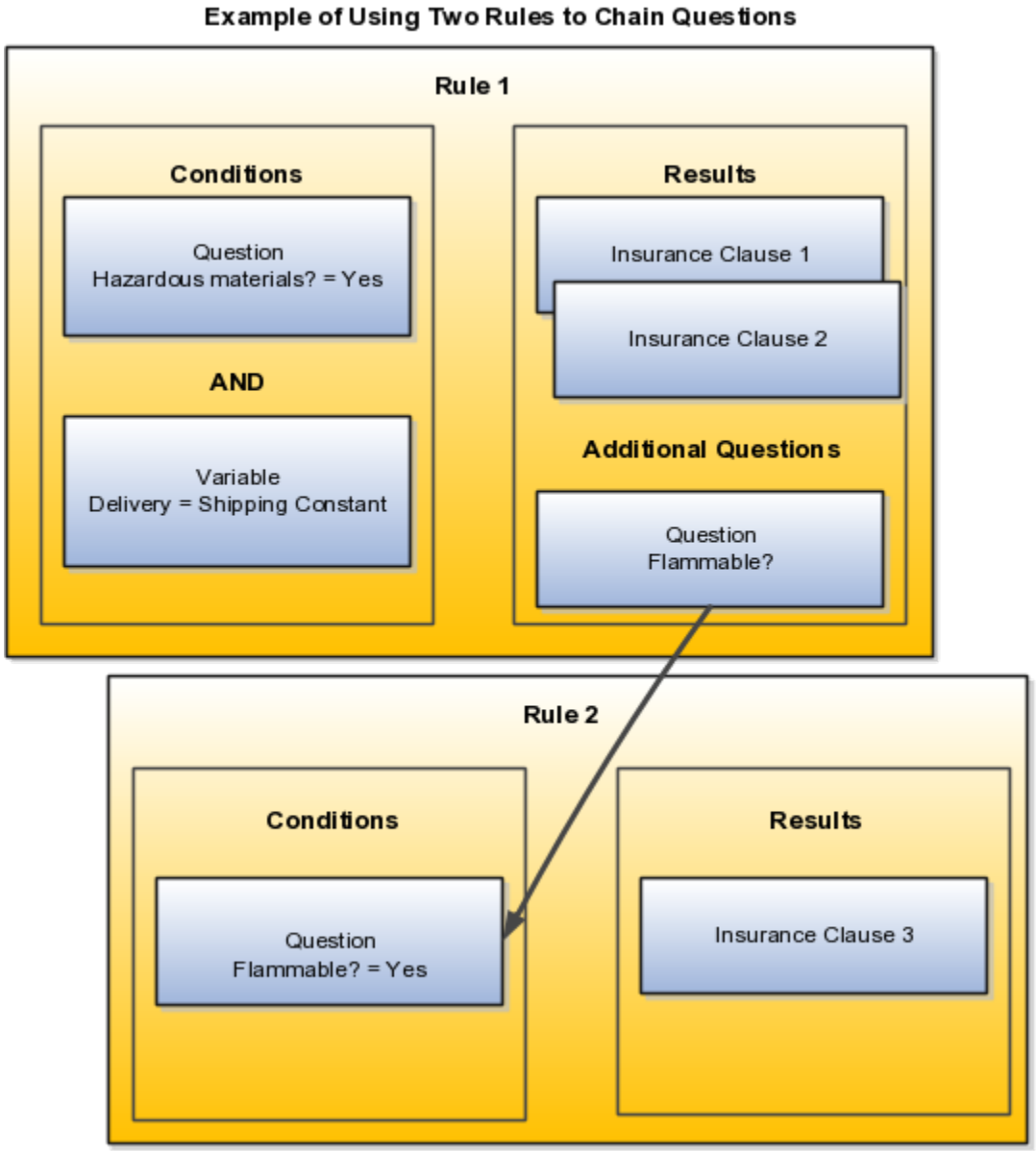


Scenario

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.

FAQs About Contract Expert Setup

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.

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.

What happens if the clause to be inserted by the Contract Expert rule is versioned or removed from use?

If the current clause version is not approved or removed from use, Contract Expert automatically uses the previous approved version. If none exists, the contract author receives an error when validating the contract.

What happens to existing contracts if I disable a Contract Expert rule?

The change applies to all new and existing contracts whenever the contract authors run Contract Expert. Approved contracts are not affected. If you disable a clause selection rule, for instance, Contract Expert removes the suggested clause the next time Contract Expert is run. If you disable a contract terms template selection rule, the application does not make changes to the templates that are already applied to contracts, but does flag the change during contract validation and on the contract deviations report.

What validations get 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

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 becomes effective 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.

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.

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.

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.

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.

Setting Up Variables

Variables: Explained

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.

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, which are available in buy-intent contacts only, permit you to list the titles of contract terms deliverables within a clause in the contract terms. For instance, if a vendor 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

User Variables: Explained

The following sections explain how to create and user different types of user variables.

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 programing. To do so, you:

1. Create a value set using Oracle Fusion Application Setup Manager 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 Flexfields 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.

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.

To define the global segments that you need to reference in your contract variable, you need to set up the Contract Headers flexfield under Setup and Maintenance > Manage Descriptive flexfields.

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.

> **Note**
> You must 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.

Object Variables

You can use the variable source Object to create variables that reference fields associated to the Sales Account and Opportunity objects in Application Composer.

To define 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 custom 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

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 type Checkbox, enter a lookup type that has codes defined as True (Yes) and False (No).

> **Note**
> You should add the following duty roles to the FUSION_APPS_CRM_ADF_APPID user:
>
> - A user that needs to view or edit contracts or opportunities must be assigned to these duties: Opportunity Administration Duty, Marketing Operations Manager Duty, and Customer Contract Management Duty.
> - 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.

Object variables have the following limitations:

- Object variables based on fields of type Dynamic Choice List are not supported.
- Variables cannot be based on child objects.

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 invoke 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 invoke 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.contractsCoreTransactionService.ContractsCoreTransactionServiceWrapper.getContractTypeIdentifier(adf.s
 contractTypeName );
 // Get businessUnitId Id using Business Unit Name
 def businessUnitId =
 oracle.apps.partnerMgmt.partnerProgram.util.service.contractsCoreTransactionService.ContractsCoreTransactionServiceWrapper.getBusinessUnitIdentifier(adf.sc
 businessUnitName );
// Delete all versions of the Contract using Chr Id and MajorVersion
 try {
 oracle.apps.partnerMgmt.partnerProgram.util.service.contractsCoreTransactionService.ContractsCoreTransactionServiceWrapper.deleteContract(externalSourceI
 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.contractsCoreTransactionService.ContractsCoreTransactionServiceWrapper.createContract(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.

Method Signature	Description
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.
public static void deleteContract(Long contractId, Long majorVersion) (Existing PRM API)	Delete a contract using the contract ID and major 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:

- Commit or rollback is not recommended in the Application Composer groovy script because of which the user must click Save on the Opportunity page to persist the custom 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 custom 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.

Using Value Sets for User Variables and Contract Expert Rules: Explained

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

Value Set Format Type	Value Set Validation Type	Supported?
Number	None	Yes Numeric operators.
Standard Date / Standard Date Time	Not Applicable	No
Date / Date Time	Not Applicable	No

Related Topics

- Value Sets: Explained

Creating Java Methods for User Variables: Examples

If you want to use attribute values captured in application documents and these attributes are not defined as existing system variables, then you can create user variables that obtain these values from Java methods you write based on the sample code in this topic.

This topic provides two sample methods with comments to help you write such Java methods. The sourcing of the Java variable value in these methods are different based on the database table and view object (VO).

If the Java user variable is an attribute of the Document Header VO (for example, Contract Header VO or PO Header VO) then use the first method. Use the second method if the Java user variable is an attribute on any child table of the document header VO.

Sample Java Method 1

This sample assumes that CurrencyCode is an attribute on the PO Header VO. This Contract Expert Java variable works even if the header information is not saved during document authoring. In this scenario, getCurrencyCode() is the method name associated with the user-defined Java variable in the variable definition page.

> **Note**
> Because Java is case sensitive, be careful when entering VO attribute names. Do not change the signature of any method or the parameter names.

1. Using JDeveloper 11g, create an application and a project within that application.
2. Within the project, create a Java file with the method for the Java user variable.
3. Create a temporary folder and copy the ContractsTermsLibraryPublicModel JAR file from the fusionapps/jlib directory to this folder.
4. Right click the project in jDeveloper and in the **Project Properties**:
    a. Select **Libraries** and **Classpath**.
    b. Add the ContractsTermsLibraryPublicModel JAR from the temporary folder.
5. Create a JAR for the current project, by right-clicking on the project and selecting **Project Properties** and **Deployment profile**.

6. Copy this new JAR to the following directory: mw_home_standalone/user_projects/domains/fusion_domain/servers/AdminServer/upload/ContractManagementApp/V2.0/app/ContractManagementApp/APP-INF/lib
7. Bounce the server.

The following is a sample Java class to implement Java user variables. To customize, change the class name (MyPurchaseUDV). Do not change or remove any of the import statements.

```
/**
*/
MyPurchaseUDV.java
package oracle.apps.contracts.termsLibrary.publicModel.Attributes.model.java;
import java.math.BigDecimal;
import java.sql.*;
import java.util.Collection;
import java.util.HashMap;
import java.util.Iterator;
import oracle.apps.contracts.termsLibrary.publicModel.variables.model.java.ProgrammaticUDV;


/**
This class extends the abstract class ProgrammaticUDV.
TO CUSTOMIZE: Change the Class name only (MyPurchaseUDV).
*/

public class MyPurchaseUDV extends ProgrammaticUDV {


/**
CASE 1: For achieving CASE 1 use the methods registerAttributes() and getCurrencyCode().
*/


 /**
 The following method registers the Java variable present in the Header VO. The name of the variable should be the same as the name of the attribute
 in the Header VO.
TO CUSTOMIZE: Change only the VO attribute name of the variable (in this case CurrencyCode) to match the attribute name in the Header VO.
Do not change the method name or scope of the method. The only thing can be changed is the VO attribute name of the user variable.
*/

protected void registerAttributes() {
 registerAttribute("CurrencyCode");
 }

/**
 The following method obtains the value of java variable used in the Header VO. The attribute name of the java variable used in this method
 is CurrencyCode. This method returns the value of the CurrencyCode. The value of the variable which we are trying to get using this method
 (getCurrencyCode) should be registered in the previous method registerAttributes().
TO CUSTOMIZE: Change the name of the method (getCurrencyCode()). Do not change the scope of the method.
The return type can be changed. To get the value of the variable we have to use the getAttributeValue() method only.
 */

 public String getCurrencyCode() throws Exception {

 String retVal = null;

 retVal = getAttributeValue("CurrencyCode");

 return retVal;
 }
```

Sample Java Method 2

The following method is used to get the value of Java variable through SQL queries. In this scenario, we want to add clauses to the contract terms if the contract has any sales credit. Sales credit information is stored in a different table from the contract header. To work this scenario, the document must be saved before invoking Contract Expert. Java variable used is in this case is Sales Credit. Use method getSalesCredit() if the Java user variable is an attribute on any child table of the document header VO.

To customize, change the name of the method getSalesCredit() and the return type of the method. The other attribute values, such as document ID and document type, which might be needed while executing the query, can be obtained from the getter methods getDocumentId(), getDocumentType(), and getDocumentVersion().

The executeQuery method:

- Will always return a scalar value which is present in the first row and first column in the result set.
- Will always return a string value:
  - If you are expecting an integer value, then you must do a conversion before returning value.
  - No conversion is required if you are expecting a string.

In the following example, an ID value of a Yes or No value set value is returned based on whether the contract has sales credits entries or not.

```
*/


public int getSalesCredit() throws SQLException, Exception {
 int retVal = 0;
 int value = 0;
 String s1 = null;
 BigDecimal id = getDocumentId();
 s1 = executeQuery("SELECT to_char(count(*)) FROM OKC_K_SALES_CREDITS where dnz_chr_id = " + id);
 value = Integer.parseInt(s1);

 if(value > 0) {
 retVal = 271230; // Value Set id for "YES"
 } else {
 retVal = 271229; // Value Set id for "NO"
 }

 return retVal;

 }
 }


/*******************************************************
 The following file content is provided here only for reference.
 DO NOT INCLUDE THE FOLLOWING CODE IN ANY USER METHOD.
*******************************************************/
ProgrammaticUDV.java
package oracle.apps.contracts.termsLibrary.publicModel.variables.model.java;

import java.math.BigDecimal;

import java.sql.ResultSet;

import java.sql.SQLException;
import java.sql.Statement;

import java.util.ArrayList;
import java.util.HashMap;

import oracle.jbo.server.DBTransaction;

public abstract class ProgrammaticUDV {

 private HashMap attributesData;
 private DBTransaction dBTransaction;
 private Statement statement;
 protected BigDecimal documentId;
 protected String documentType;
 protected BigDecimal documentVersion;
 private ArrayList<String> attributeNamesUsed = new ArrayList<String>();
```

```
public ProgrammaticUDV(){
registerAttributes();
}

protected abstract void registerAttributes();

protected void registerAttribute(String attributeName) {
attributeNamesUsed.add(attributeName);
}

protected String getAttributeValue(String attributeName) throws Exception {
if(attributesData.get(attributeName) == null){
throw new Exception("Attribute name '" + attributeName + "' is either invalid or not registered.");
}
return (String)attributesData.get(attributeName);
}

public HashMap getAttributesData() {
return attributesData;
}

public void setAttributesData(HashMap variableData) {
this.attributesData = variableData;
}

public ArrayList getAttributesUsed() {
return attributeNamesUsed;
}

public void setDBTransaction(DBTransaction dBTransaction) {
this.dBTransaction = dBTransaction;
}

protected String executeQuery(String query) throws SQLException {
ResultSet rs = null;
String s =null;
if (statement != null) {
statement.close();
}
statement = dBTransaction.createStatement(0);
rs = statement.executeQuery(query);
if(rs.next()){
s = rs.getString(1);
}
statement.close();
return s;
}

protected void closeQuery() throws SQLException {
if (statement != null) {
statement.close();
statement = null;
}
}

public void setDocumentId(BigDecimal documentId) {
this.documentId = documentId;
}

public void setDocumentType(String documentType) {
this.documentType = documentType;
}

public void setDocumentVersion(BigDecimal documentVersion) {
this.documentVersion = documentVersion;
}

public BigDecimal getDocumentId() {
return documentId;
}

public String getDocumentType() {
```

```
return documentType;
}

public BigDecimal getDocumentVersion() {
return documentVersion;
}
}
```

FAQs About Variables

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?

When you create a variable, it is 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 any variable as long as it is not being used in a clause or a Contract Expert rule. If it is in use, you can only disable it. Disabling a variable by selecting the **Disabled** option in the Edit Variable page prevents a variable from being used. The application displays an error for all clauses and rules that already use the variable.

Setting Up Adoption of Content Between Libraries

Adoption of Content from Global to Local Terms Libraries: How It Works

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.

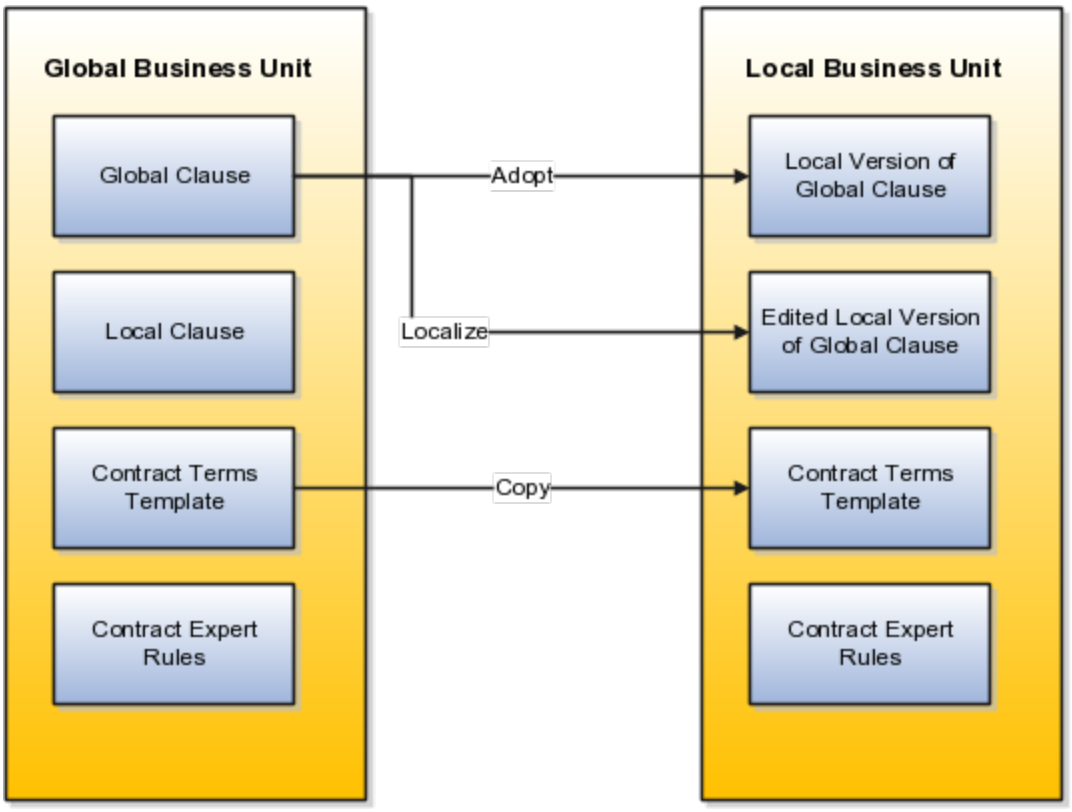
Different kinds of content in the global library can be adopted for use in a local library in different ways, as outlined in the following figure.

- 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 are 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 are created.

> Note
> Sections, folders, and numbering schemes do not need to be adopted or copied. They are automatically available across all business units.



Clause Localization and Adoption

Here is how you adopt and localize clauses:

1. In the global business unit, you create a clause with the **Global** option selected.
2. After the global clause is approved, it is automatically listed as available for adoption on the Terms Library Overview pages in the local business units.
3. Contract Terms Library administrators in local business units select **Adopt** or **Localize** from the Actions menu to adopt the clauses.
4. 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.

5. 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 are notified automatically

   > **Note**
   > You specify the administrator to receive the notification during the local business unit setup.

6. 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.

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.
2. After the global template is approved, it is automatically available for copying in the local business units.
3. Contract Terms Library administrators can search for the global templates available for adoption by selecting the **Global** option in the Search Templates page.
4. Global templates are copied over by selecting the **Duplicate** action.

   > Note
   > Clauses in the copied templates must be first adopted or localized in the local business unit.

5. The copied contract terms template must be approved in the local business unit before it can be used.

FAQs About Adoption

How can I find clauses that are available for adoption?

Clauses that are available for adoption are listed in the Clauses for Adoption region on the Terms Library Overview page. You can also search for them using the Search Clauses page by selecting the Available for Adoption from the Adoption Type drop-down list.

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 receives an automatic notification.

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.

Creating Folders to Organize Clauses

Folders: Explained

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.

Setting Up Contract Preview and Printing

Contract Printing and Layout Templates: Explained

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

You can copy and edit layout templates used for:

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

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

> Restriction
> The catalog includes additional layout templates which are used internally by the application. You can edit only the layout templates listed below.

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.
  There are two sample layout templates available for you to copy and edit. Both sample layout templates are available in the same directory.

Sample Layout Template Name	Description	Location in BI Publisher Catalog Directory
SupplierContract	Layout of contract information for buy-intent contracts.	Enterprise Contracts/ Contract Printing/ Contract Preview
CustomerContract	Layout of contract information for sell-intent contracts, including partner 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.

  If printing an amended contract, the layout template selected determines whether only a summary of amendments is printed, or both the amendment summary and the amended contract terms and conditions are printed.

  > **Note**
  > You cannot download the amendment summary to Word.

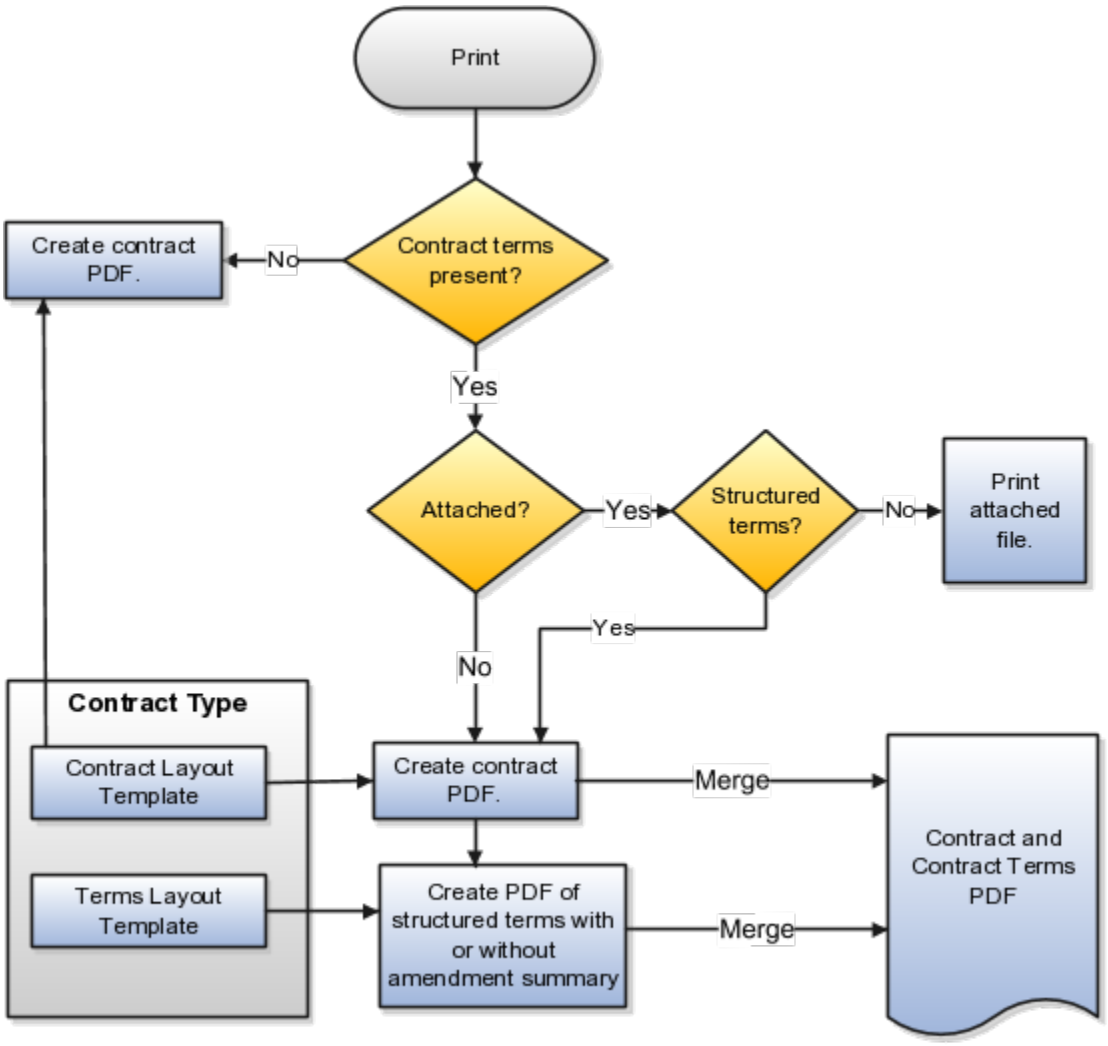
File Name	Description	Location in BI Publisher Catalog Directory
ContractTermsECM	Layout for printing the contract terms in enterprise contracts when the contract terms are authored in the application.	Enterprise Contracts/ Contract Terms Printing/ Contract Terms Download and Preview
ContractTermsAmendmentsOnlyEC	Layout for only printing a summary of the amendments made to contract terms in enterprise contracts.	Enterprise Contracts/ Contract Terms Printing/ Contract Terms Preview
ContractTermsPlusAmendmentsEC	Layout for printing the contract terms in enterprise contracts when the contract terms are authored in the application. In addition, for a contract that is 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 **Manage Contract Types** action from the Setup and Maintenance work area or **Contract Types** under the Setup task heading in the Contracts work area.

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

1. 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 does not include any contract terms, this is the only layout template used.
2. 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.
3. 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.

4. 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.
5. The application then merges the two generated PDFs (one for the basic contract and the other for contract terms) into a single PDF.
6. If the contract terms are attached in a file that is not structured, then the application prints only the contents of the file. It does not 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.



Printing of Contract Terms on Purchase Orders and Sourcing Documents

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

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

  The sample file provided is:

File Name	Description	Location in BI Publisher Catalog Directory
ContractTermsProcurement	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
ContractTermsAmendmentsOnlyPrc	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
ContractTermsPlusAmendmentsPrc	Layout for printing the contract terms in enterprise contracts when you author the contract terms in the application. In addition, for a contract that is 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 available by navigating to the Setup and Maintenance work area.

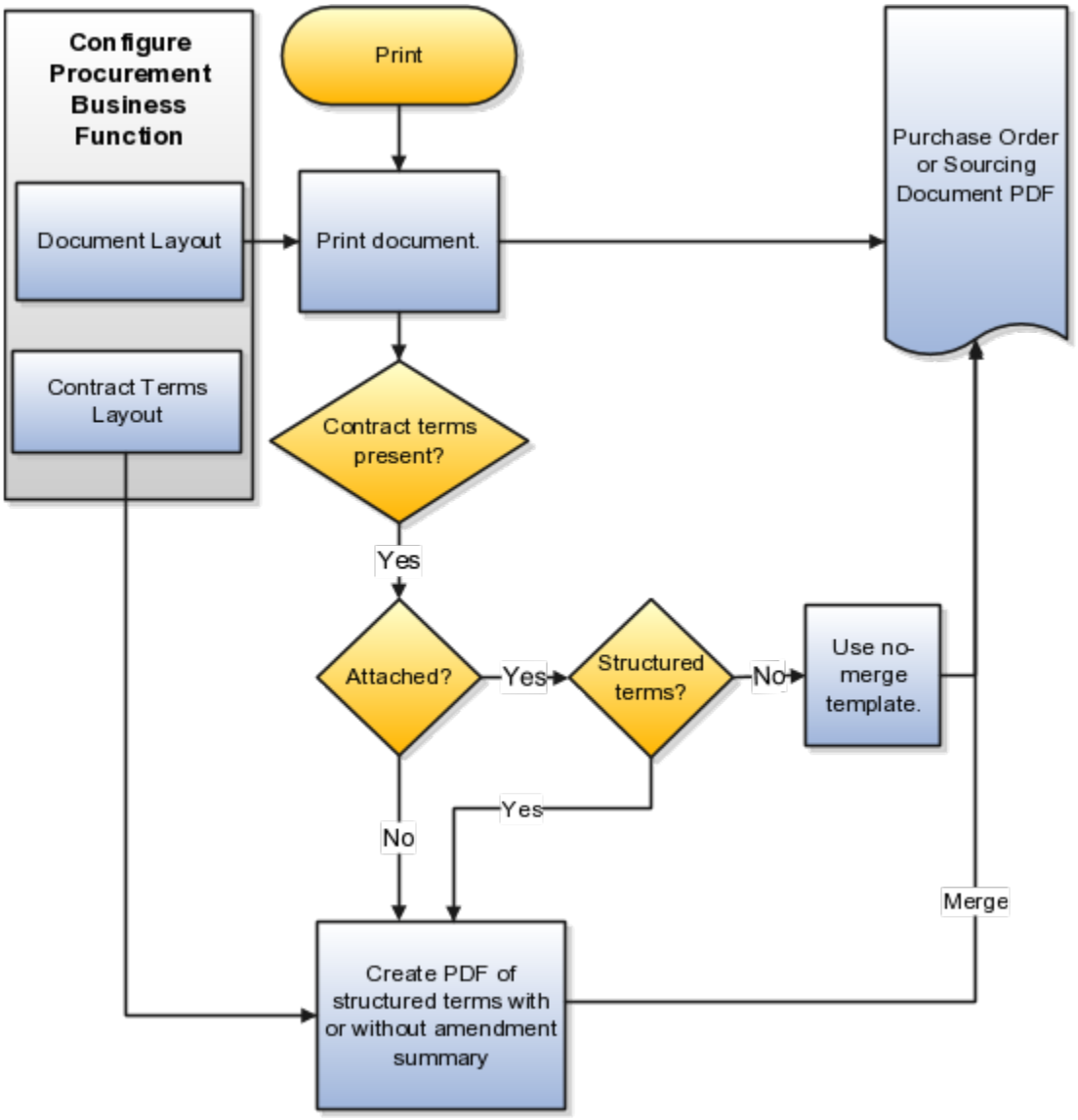
If you attach the contract terms rather than authoring them in the application and the attached file is not structured, then Procurement uses a third layout template which includes a brief sentence explaining that the contract terms are contained in a separate document.

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

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

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

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 is not 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.



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 Business Function Properties** or the **Specify Supplier Contract Business Function Properties** tasks. These tasks are available in the Setup and Maintenance work area.

Separate sample layout files are available for buy-intent and sell-intent contracts. Both are located in the same directory:

File Name	Description	Location in BI Publisher Catalog Directory
SupplierContractDeviations	Layout for printing the contract deviations for all buy-intent contracts.	Enterprise Contracts/ Deviations Report/ Deviations Report
CustomerContractDeviations	Layout for printing the contract deviations for all sell-intent contracts.	Enterprise Contracts/ Deviations Report/ Deviations Report

Previewing Contract Terms Templates

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

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. The sample layout template is:

File Name	Description	Location in BI 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

  You can either load clause data directly into interface tables using SQL*Loader, PL/SQL scripts, or JDBC or you can import the data from an XML file.

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

The sample layout template provided is:

File Name	Description	Location in BI 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 Types: Explained
- Contract Terms Library Business Unit Setup: Explained

FAQs About Contract Preview and Printing

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

No, you cannot print or create a PDF of a contract if no contract layout template is specified in the contract type that was used to create the contract. If you do not specify the terms layout template, you cannot preview the contract terms as a PDF.

Setting Up Contract Terms Deliverables

Contract Deliverables: Explained

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:

- 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 and fulfillments. .

To do this, the responsible party on the contract deliverable must update the contract deliverable such that this change is reflected in the Oracle Fusion Enterprise Contracts Application.

- To submit any required documents

  For an enterprise contract, the external contact that is the responsible party on the deliverable can log in to the Oracle Fusion 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.

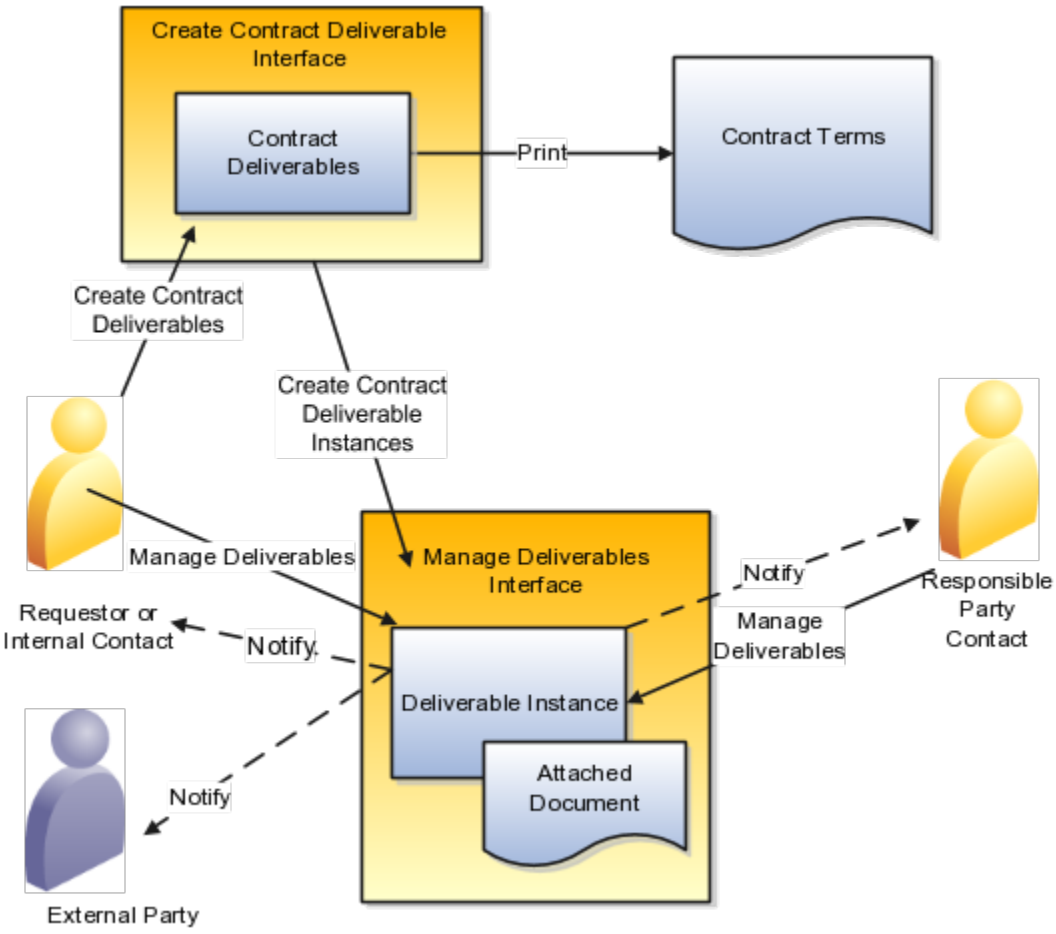
Creating and Managing Contract Deliverables

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 above example, each week the deliverable instance that is 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.



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.

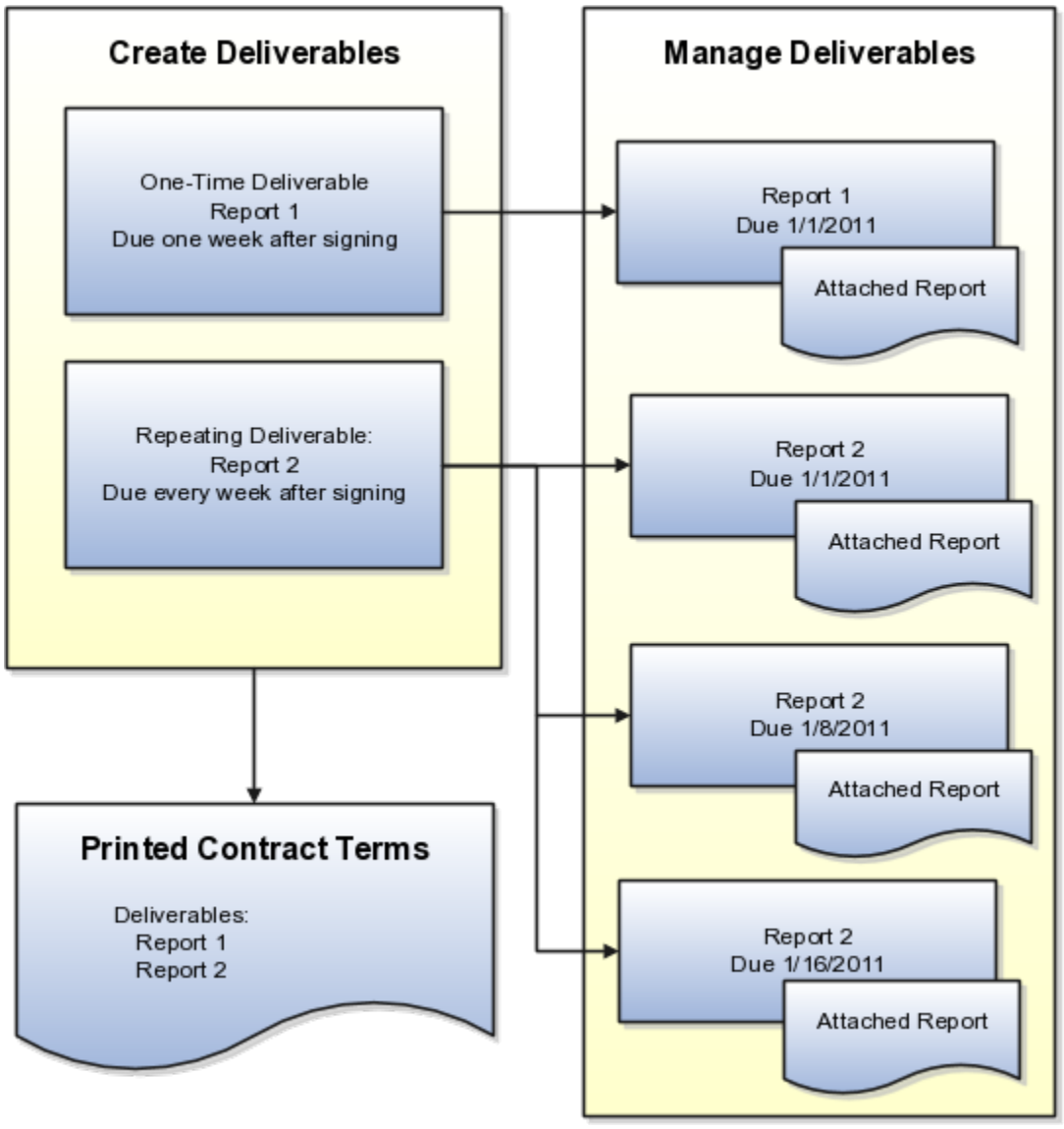
The following diagram uses an example to illustrate the two variable types:

- A one-time deliverable (Report 1) that the responsible party contact must provide that is 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**
> 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, requestor, or responsible external party contact attaches the report file to the appropriate instance of the deliverable and changes its status to Complete.



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:

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 is not compatible with the contract where the template is applied, then the deliverable does not 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 fixed 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.

Deliverables Notifications

You can notify interested parties using Oracle BPEL Process Manager via e-mail, voice message, instant messaging (IM), or short message service (SMS).

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 needs to be escalated after the due date

Who receives the notification depends on a combination of the notification type and the party who is 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

- What's the difference between internal and contractual deliverables?

FAQs About Contract Deliverables

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.

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 lines in procurement contracts denote commitments in terms of goods or services that must be delivered. You can use contract fulfillment lines to initiate and monitor purchasing activity in integrated procurement applications. For example, you can use contract fulfillment to create a purchase order in Oracle Fusion Purchasing for items in a contract line and then monitor the purchasing activity on that purchase order as it is being executed.

Related Topics

- Contract Fulfillment: How It Works
- Managing Purchasing for a Supplier Contract Using Contract Fulfillment

Indexing Clauses for Keyword Searches

Building and Maintaining the Text Index for Keyword Searches: Explained

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**.

Managing Clause and Section Numbering Schemes

Numbering Schemes: Explained

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.

FAQs About Numbering Schemes

How can I change the numbering scheme for sections and clauses?

You can apply a numbering scheme for sections and clauses by selecting the **Change Numbering Scheme** action on the Contract Terms tab while creating a contract terms template or authoring a contract. You can also change the numbering sequence for the printing and display of subsequent subsections and clauses in a section or sections and clauses in a contract by selecting the Suppress Title or Skip Numbering printing options for a section or clause. If you need to create additional numbering schemes, you can do so using the **Create Numbering Scheme** action on the Terms Library Overview page.

Related Topics

- How can I configure contract terms before I print them?

Importing Clauses into the Contract Terms Library: Explained

You can import clauses, values sets, and manual user variables from external sources into the Contract Terms Library by using interface tables. You can either load your data directly into the interface tables using SQL*Loader, PL/SQL scripts, or JDBC or you can import the data from an XML file by running the processes described in this topic.

This topic describes:

- What data you can import
- The interface tables
- Importing clauses by loading them into the interface tables

- Importing clauses from an XML file
- Purging the interface tables

What You Can Import

You can import:

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

Details about the fields and valid values for import are available in the import schema file OKCXMLIMPDFN.xsd which you can download from the following file location: fusionapps/crm/components/ contractManagement/okc/ termsLibrary/publicModel/ src/oracle/apps/contracts/ termsLibrary/publicModel/ libraryImport/model/ resource.

Note
Clause status determines when the clause becomes available for use in contract terms authoring:

- 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

The same interface tables are used whether you are importing clauses using an XML file or loading data directly into the interface tables. The following 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.
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.

Table	Description
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.

Importing Clauses by Loading Them Into the Interface Tables

To import clauses by loading them directly into the interface tables:

1. Format the data in a form that is suitable for loading into the interface tables. For example, if you are using SQL*Loader to load data into the interface tables, then you can use a comma separated data file (.csv) and a control file that describes the data format.
2. Select the **Manage Processes** task link from the Terms Library work area.
3. In the Managed Scheduled Processes page, click **Schedule New Process** and run the Import Clauses from Interface Tables process. It is recommended that you run the process first in the validation mode to review any errors. The following table describes the process parameters:

Parameter	Possible Values	Mandatory	Description
Batch Name	A name for identification purposes.	Yes	Provides a way for you to identify the records you are importing.
Run in Validation Mode	Yes or No	No	Set to Yes if you want to identify potential errors before you import.
Commit Size	1 to 300		Indicates the maximum number of records that the process commits to the database at one time. For example, if you are importing 1, 000 records and set the commit size to 100, then the process will commit records each time it processes 100

Parameter	Possible Values	Mandatory	Description
			records without error. If an error occurs on the 150th record, then the process will not reprocess the first 100 the next time that you run the program. Consult your database administrator for the appropriate value.

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

Importing Clauses From an XML File

To import clauses from a file:

1. Prepare the XML file as specified in the schema file OKCXMLIMPDFN.xsd and the sample file OKCXMLIMPDFN.xml. You can download both files from the following location: fusionapps/crm/components/ contractManagement/okc/ termsLibrary/publicModel/ src/oracle/apps/contracts/ termsLibrary/publicModel/ libraryImport/model/ resource.
2. Specify the location of the import file in the system profile Location of XML File for Importing Clauses. You can set this profile in the Oracle Fusion Setup Manager using the Manage Clause and Template Management Profiles task.
3. 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 location specified in the system profile Clause Import XML File Location.
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.

Parameter	Description
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.

4. Use the **Manage Process** task available in the Terms Library work area to monitor the progress of your import and review the log for any error messages. Records with errors remain in the interface tables until you purged them or correct them.

5. To improve performance, periodically purge the interface tables used in the import by running the Purge Contract Clause Import Tables process.

Purging the Interface Tables

To optimize import performance, periodically run the Purge Contract Clause Import Tables process. This process purges records in all of the interface tables. The following table describes the parameters you can use to restrict the extend of the purge. If you do not enter any parameters, the process purges all records.

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

- Alternate and Incompatible Clause Relationships: How They Work

17 Importing Customer Contracts

Importing Contracts: Explained

You can import contracts from a source file into the application. To set up file-based import for importing contract data, select the **Manage File Import Objects** and **Manage File Import Mappings** tasks. To schedule your contract imports, select the **Manage File Import Activities** task. These tasks are available by selecting **Setup and Maintenance** from the Tools menu and searching on the task name.

File-based import supports the import of data from an external text or xml file to interface tables, and from interface tables to target application tables.

This topic describes:

- What you can import
- The interface table
- The import process

What You Can Import

Contracts for import can be in Draft, Active, or Expired status but without lines. The import file can use names as well as IDs to identify data, for example, Party ID or Party Name. You can import only one version for each contract, with the following data:

- Contract header
- Primary party (supplier, customer, or partner)
- One contract owner: depending on the owner role, this is either an employee or salesperson of the contract's business
- One primary contract party: a supplier or partner or customer
- Primary contract document as an attachment
- Additional attachments: the import file lists the attachments which are imported using the file import UI, either individually or as a ZIP file.

You can import new contracts but not update or delete existing contracts through imports.

Interface Table

The application uses the following database table for importing contracts:

Table	Description
OKC_ IMP_ CONTRACT_ HEADERS	The interface table used to load contract data from external systems. This table maps to logical contract data: contract header, contract party, contract party contact, contract terms, and contract attachments.

Details about the fields and valid values for import are available from the Oracle Enterprise Repository for Oracle Fusion Applications.

Importing Contracts from a Source File

To import contracts, use the file-based import feature and upload contract data into the interface table. To access this feature, select the **Manage File Import Activities** task, available by selecting **Setup and Maintenance** from the Tools menu and searching on the task name. A detailed description of how to import data using file-based import is given in a related topic.

> Note
> The Edit Import Activity: Map Fields page contains an import mapping that details the mapping between source file columns and contract attributes, but you may define additional import mappings.

Related Topics

- File-Based Import Mapping: Explained
- File-Based Import Processing: How it Works

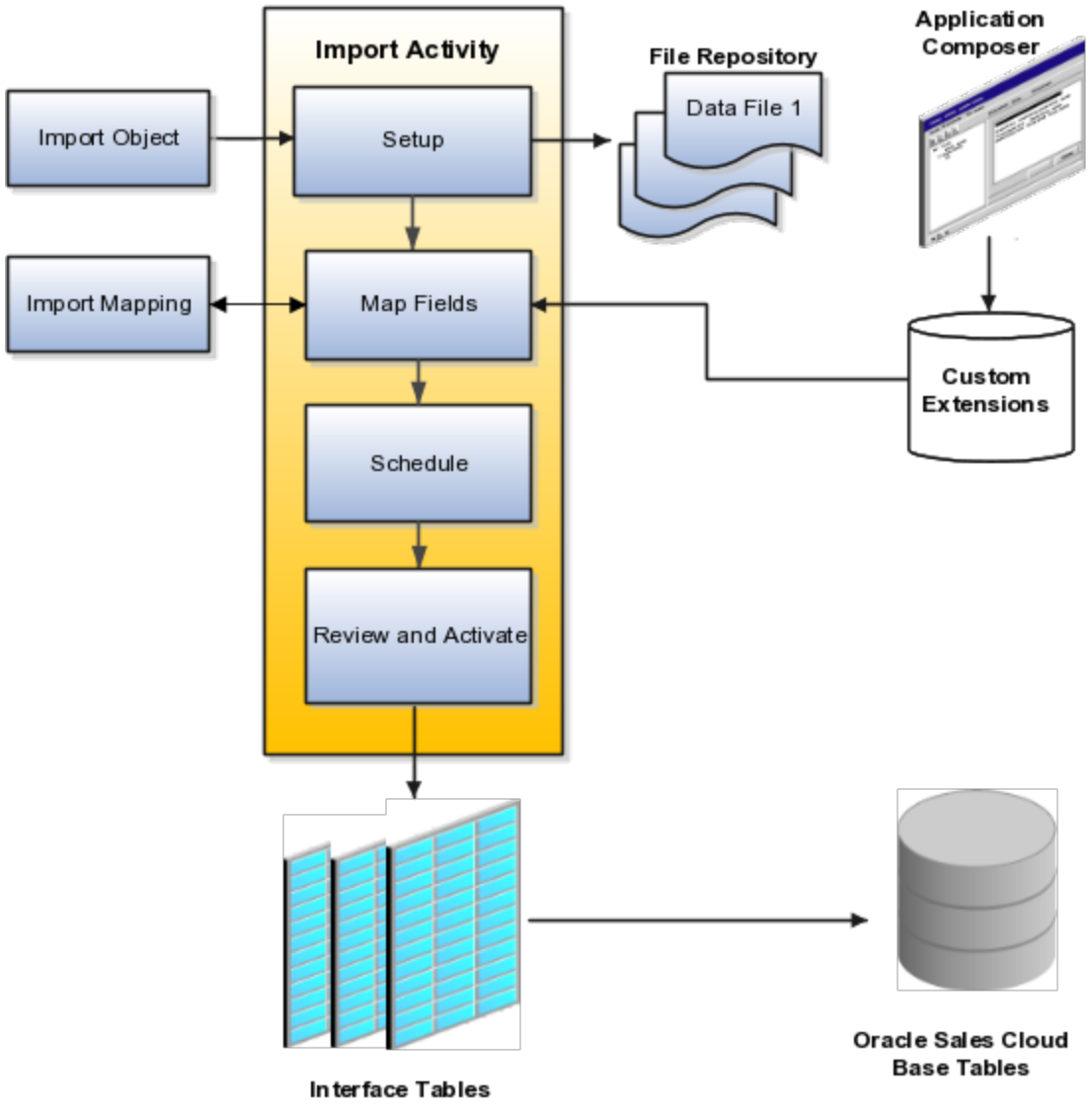
File-Based Data Import: How It Works

The Define File-Based Data Import group of tasks relies on integration with different Oracle Sales Cloud and architecture components, such as interface tables and application base tables. This topic provides an overview of these components to help you understand the import process and the different import activity statuses.

The following figure provides an overview of the major application components used when you import data from a file. These components include

- Import object
- Import mapping
- Import activity
- File repository
- Application Composer
- Interface tables

- Oracle Sales Cloud base tables



Import Objects, Import Mapping, and Import Activity

The import objects you select when you create an import activity are provided by Oracle. They are managed using the Manage File Import Objects task.

> **Note**
> Avoid concurrent submission of File-Based Data Import jobs for the same import object. Concurrent submission of multiple import jobs with same content results in creation of duplicate object records.

When you create an import activity, you must specify a mapping of the fields in your file to the attributes of the import object. You can create the mapping while creating an import activity or separately using the Manage File Import Mappings task. The mapping is stored and managed as a separate object.

File Repository

The text or XML data file you upload for import is stored in a file repository so that it is available for import processing when you schedule an import activity. Any attachments you upload are stored in the same repository.

Application Composer and Custom Extensions

When you create additional attributes for import using Application Composer, these extensions are stored in a separate repository and are available when you generate import and export artefacts in composer.

Interface Tables

The import activity populates the application interface tables with your data.

Oracle Sales Cloud Base Tables

The import activity loads your data into Oracle Sales Cloud base tables to complete the import.

Related Topics

- Importing Data from a File: Procedure

Import Activity Source File Options: Explained

The Import Activity consists of a step by step guided process to assist you with creating an import activity for a given object.

This topic describes the source file options defined in the Import Activity that are used by the import process to locate and parse the source file data.

Source File Data

Enter attribute details pertaining to the source file as follows:

Option	Description
File Type	Source file must be either Text, ZIP, or XML.
Data Type, Delimiter, and Header Row Included	A Text file type can further be defined based on how the data is delimited and if the source file is expected to include a row of headings for each column.
Import Mapping	Displays a list of predefined mappings for the object selected for this import activity. The selected mapping will be used as the basis for mapping your source file in the next Import Activity step.

Source File Location

The following outlines the options that are available to you when locating your source file for import.

Option	Description
File Selection	Select from the following file selections: • Specific file Enables you to upload a specific source file from a local file system, such as your desktop, a URL address, or from a network path. A file name is required for this option. • Most recent file Enables you to schedule repeating import activities without having to select a new file every time. This selection is only available when you select **Network** from the **Upload From** options. You need to copy the new file to the specified network path for repeating import activities. You do not need to enter a file name for this option and can only upload your source file from a network path. The asterisk wildcard is supported for multiple characters. The question mark wildcard is supported for a single character.

Option	Description
Upload From	You can upload the source file from three locations: • Desktop • URL • Network • WebCenter Content Server If you select **Desktop**, then a **File Name** field with an associated Update button is displayed. Click **Update** and browse to search for and select the file you want to upload. If you select URL, enter the address location as in the following example format: http://www.example.com/ If you select Network, enter the file name path as in the following example format: \ComputerName\SharedFolder\Resource\ **Note** If you selected the **Specific File** as your file selection option, then you will have to include the file name for both URL and Network file path locations. If you select **WebCenter Content Server**, then a **File Name** field with an associated **Browse** button is displayed. Click and browse to search for and select the file you want to upload.

Importing Attachments Using File-Based Data Import: Procedure

This topic describes how to include attachments when you use the **Manage File Import Activities** task.

Prerequisites

You can import attachments only for the following business objects:

- Account
- Activity
- Contact
- Campaign
- Household
- Lead

- Opportunity
- Partner
- Notes

Importing Attachments

You can use the following steps to import attachments using file-based data import.

1. Add one or more of the following columns to the source file that you're importing.

   The ATTACHMENT_FILE _NAME header is the only required header. All other headers are optional. The **Manage File Import Activities** task reserves these header names for their described usage. You must not use them for any other purpose.

Column Header	Description
ATTACHMENT_ FILE _NAME	The ZIP selected when defining the import activity must contain a file with the specified ATTACHMENT_ FILE_NAME value. Otherwise an error will be generated.
ATTACHMENT_ FILE _DESC	A description of the file to be attached to the record.
ATTACHMENT_ FILE _TITLE	Enter the file title. This is not a mandatory field. If you don't specify a file title, then the **Manage File Import Activities** task uses the file name as the title. For example, if the file name is abc.txt, and the ATTACHMET_FILE_TITLE column value is not explicitly passed in the CSV, then it takes up the value as abc
ATTACHMENT_ CATEGORY _NAME	Specify the attachment category. An attachment category is used to classify and secure attachments. Each attachment UI must be defined with at least one category so that users can add attachments. For example, you can categorize attachments for an expense report as a receipt, scanned invoice image, and so on.

2. In each row of the source file, enter the name of the attachment file that the **Manage File Import Activities** task must attach to the record.

   In the following example, you enter file_1.doc as the attachment file for Lead 1.

LeadName	StatusCD	Score	ATTACHMENT _FILE _NAME
Lead 1	QUALIFIED	7	file_1.doc

LeadName	StatusCD	Score	ATTACHMENT _FILE _NAME
Lead 2	QUALIFIED	8	file_2.doc
Lead 3	QUALIFIED	3	file_3.doc
Lead 4	QUALIFIED	7	file_4.doc

Note

- To specify the same attachment file for more than one record, enter the same file name for each record in the ATTACHMENT _FILE _NAME column. For example, you can specify file_1.doc for Lead 1 and for Lead 2.
- You can specify multiple attachments for leads and tasks. You can't specify multiple attachments for any other type of business object. For example, you can include only one attachment for an asset, but you can include more than one attachment for a task. To specify more than one attachment for the same record, you add one ATTACHMENT _FILE _NAME column for each attachment. Lead 1 and Lead 3 in the following example each include three attachments, so this example includes three ATTACHMENT _FILE _NAME columns:

LeadName	StatusCD	ATTACHMENT _FILE _NAME	ATTACHMENT _FILE _NAME	ATTACHMENT _FILE _NAME
Note Lead 1	Note QUALIFIED	Note file_1.doc	Note file_2.doc	Note file_3.doc
Note Lead 2	Note QUALIFIED	Note file_4.doc		
Note Lead 3	Note QUALIFIED	Note file_5.doc	Note file_6.doc	Note file_7.doc
Note Lead 4	Note QUALIFIED			

- If you specify more than one attachment for the same record, and if you add any of the optional attachment columns, then you must repeat all the columns in the same order for each attachment file.

3. Create a ZIP file that includes the files that you must attach.

   For example, create a file named myfiles.zip that includes the following files:

   - file_1.doc

- file_2.doc
- file_3.doc
- file_4.doc

You can also use a JAR file. You can organize these files in folders and subdirectories, at your discretion.

4. Sign in to the Oracle Sales Cloud application.
5. Navigate to the Setup and Maintenance screen, and then search for the Manage File Import Activities task.
6. In the Search Results list, click Go to Task.
7. On the **Manage Import Activities page**, click the **Create** icon.
8. On the **Create Import Activity: Enter Import Options** page, choose an object from the **Object** drop-down list that supports attachments. To identify the objects that support attachments, see the Prerequisites section.
9. In the **Attachments** section, click **Browse**, and then locate your ZIP file.

   Note

   - You can upload only one ZIP file.
   - You can't add more attachments after you upload the ZIP file.

10. Enter the data in the remaining fields and activate the file-based data import activity.

    The **Manage File Import Activities** task recognizes the reserved column header names, so you don't have to map them in the **Create Import Activity: Map Fields** page. For more information about finishing this task, see the Related Links section at the end of this topic.

Related Topics

- Importing Data from a File: Procedure
- File-Based Data Import: Explained
- What's an attachment category?
- Managing Attachments for Partners: Explained

Import Activity Import Options: Explained

This topic describes the import options available while creating import activities.

Source File Data Transformation

The following options are used to identify the formatting of source file data so that the data can be correctly interpreted and transformed by the import process:

Option	Description
Decimal Separator	The format of the fractional portion of numerical values in columns mapped to attributes with a decimal attribute type.
Date Format	The format for values in columns mapped to attributes with a date attribute type.
Time Stamp Format	The format for values in columns mapped to attributes with a time stamp attribute type.
File Encoding	The overall encoding of the characters within the file.

Interface to Target Import Options

Depending on the object that you're importing and the application modules you've implemented, you can select one or more of these options.

Option	Description
Import Mode	For importing leads and employee resources only, you have the option of specifying if you want to create and update records or update only. If you select update, then any new records will be ignored by the import process. For all other import objects, both create and update are available.
Allowable Error Count	An error count above the threshold will stop the import process for all records. If the error count is below the threshold, then records without errors are imported. In either case, records with errors will be reported in the Error and Exception files. Validation errors include: • Missing required values • Values that exceed the attribute length • Invalid identifiers and lookup codes • Duplicates to existing records in the destination tables based on the combination of attributes selected for duplicate validation in the predefined Import Mapping

Option	Description
	Duplicates found using matching configurations for Customer Data Management objects do not contribute to the error count.
Notification EMail	The email of the intended recipient of import processing notifications.
Customer Data Management Duplicates	Using this option, which is available only if you've licensed the data quality functionality, you can select different options for handling duplicates when you're importing accounts and legal entities either alone or as part of another object. The duplicates are determined using the following matching configurations: • Batch Location Basic Duplicate Identification • Batch Person Basic Duplicate Identification • Batch Organization Basic Duplicate Identification You can select from one of the following: • Do Not Import Duplicate Records If the main object of the Import Activity is an account or a legal entity object, then the rows that are matched to existing records will not be imported. These duplicates records are reported in the Exception and Error reports. If the Customer Data Management objects are components of another object and one or more matches are found, then the existing duplicate records are evaluated to determine the most recent record. The most recent record will be associated with the main object being imported. • Import Duplicate Records The Customer Data Management objects will be imported even if matched records exist. • Import Duplicate Records and Create Resolution Request The Customer Data Management objects will be imported even if matched records exist. In addition, a duplicate resolution request is created and displayed in the Customer Data Management, Duplicate Resolution work area.

Option	Description
Duplicate Look Back Days	This option applies only to the Lead import object. Only existing leads created within the period determined by the look back days value are evaluated for duplicates based on the attributes selected for duplicate validation in the predefined import mapping. If a duplicate is found, the lead will not be imported and the duplicate record will be reported on the Exception report. Duplicate leads are included in the calculation of the allowable error count threshold.

Import Activity Field Mapping: Explained

After entering your import options, the second step of the import activity process is to map fields in the source file to the corresponding target attributes.

This topic explains the following steps in the process:

- Mapping the Fields
- Saving the Import Mapping
- Constant Values

Mapping the Fields

The Map Fields section can be subdivided into source file columns and target attribute columns.

The source column header value is derived from one of the following:

- Predefined mapping, if one is selected
- The source file, if the **Header Row Included** option is selected in the first step of the Import Activity definition (for Text file type only)
- Generic values of Column A, Column B, and so on, if the **Header Row Included** option is not selected (for Text file type only)
- XML tagging structure (for XML file type only)

The following table outlines the source columns:

Source Column	Description
Column Header	Represents the column header for Text file types and the tagging structure for XML file types.
Example Value	Values are derived from the first source file saved with the predefined mapping. If you didn't select a predefined mapping, then the example values are taken from the first data row in the source file selected in the first step of the Import Activity definition.

Source Column	Description
Ignore	Select this option if you don't want to import the source file data in that column.

The following table outlines the target columns:

Target Column	Description
Object	The group of import objects that represent the components of the business object being imported.
Attribute	The attribute name that represents the corresponding interface table column for the object.

Saving the Import Mapping

The mapping between source file information and target attributes is saved as a reusable mapping when the Import Activity is saved, using the import activity name and date to derive a mapping name. If you've selected a predefined mapping, then the modifications made in the Import Activity to an unlocked mapping will update and save to the predefined mapping. If the predefined mapping is locked, then a modified mapping will be saved as a new mapping. To specify a mapping name for new mappings, select the **Save As** option from the Map Fields **Actions** menu.

Constant Values

Constant values provide a way to specify a value for a target attribute that all imported objects will inherit. The value you're setting when you configure a constant value is at the record level. For example, if a source file doesn't contain a column for business unit and all of the objects in the file belong to the same business unit, then enter a constant value for the object and business unit attribute. Each imported record will have the specified attribute set to the constant value Constant value will take precedence over any values mapped or ignored in the Map Fields section. This value will apply for all input file types.

Related Topics

- File-Based Import Mapping: Explained

File Import Activity Statuses: Explained

This topic explains the meaning of the different import activity statuses when you import data from a file using the Manage File Import Activities task.

The following table lists and describes the import activity statuses.

Status	Description
No status displayed for the activity	The new import activity definition is not complete.

Status	Description
New	The import activity definition is complete, but the activity is not yet scheduled to run.
Scheduled	The import activity definition is complete and scheduled to run later.
Interface table upload in progress	The data file is being loaded into the interface tables.
Base table upload in progress	The data file is being loaded from the interface tables into the application tables.
Completed	All records were processed and loaded into the application tables.
Completed with errors	The import activity found errors in the data file that you must correct. You can view details about the errors by clicking the status link.
Completed with warnings	The import activity found warnings in the data file. You can view details about the warnings by clicking the status link.

Related Topics

- Importing Data from a File: Procedure
- File-Based Data Import: Explained

Importing Contracts Using File-Based Import: Explained

This topic explains how to prepare and import contract data from an external data source into Oracle Fusion Applications using the File-Based Data Import feature.

A contract is a business object that is used to capture the terms and conditions of a legally binding or valid agreement between two or more entities in which there is an offer and an acceptance of that offer. To create new contracts in Oracle Fusion Applications, you can either enter your contract information directly using the Create Contracts task in the Contracts work area, or you can import legacy contracts with no lines using the Enterprise Contracts: Define File-Based Data Import tasks in the Setup and Maintenance work area.

Consider the following when importing data for this business object:

- How does your legacy system or source system represent the contract compared to how Oracle Fusion Applications represent the same data?

- Do you have to configure values in Oracle Fusion Applications to map to your data values?
- Do you need to customize Oracle Fusion Applications to capture additional attributes that are critical to the way you do your business?
- What import features are available for importing your business object?
- How do you verify your imported data?

Comparing Business Object Structures

You must understand how your contract data corresponds with the data in Oracle Fusion Applications to be able to map your legacy data to the data needed by Oracle Fusion Applications. First, you must understand how Oracle Fusion Applications represent the structure of the data for a contract.

In Oracle Fusion Applications, one table stores the contract definition or header information and another table optionally stores line details for that contract. A contract line is an entitlement to a specific valuable consideration with its own terms and conditions, which businesses offer to their customers as part of a contract. Zero, one, or many contract lines can be associated with any given contract.

You can, however, import only contract header information and contract party information. Contract header information contains basic information about the contract, such as the name and number, start and end dates, type, amount, and status.

Import Objects for the Contract

To facilitate the import of contracts, Oracle Fusion Applications incorporate the structure of the contract into import objects. The import object for the contract is Contract.

Comparing Business Object Data

Each import object is a collection of attributes that help to map your data to the Oracle Fusion Applications data and to support one-to-many relationships between the structural components that make up the contract.

A good understanding of the attribute details of the import objects is critical to preparing your import data. Details about the Oracle Fusion Applications attributes are available for your reference in the Oracle Enterprise Repository. The reference guide files contain descriptions, logic used to choose default values, and validation information for each of the Oracle Fusion Applications attributes. The validation information includes the navigation to the task where you can define values in Oracle Fusion Applications. For example, if you have values in your data that correspond to a choice list in Oracle Fusion Applications, then the validation information for that attribute provides the task name in the Setup and Maintenance work area where you can define your values. For additional information, including a list of reference guide file names and locations that you need to complete this task, see the following table.

Import Object	Related Import Object Topic
Contract	Contract Import Objects: How They Work Together

Note
You can use the keywordimporting contracts to search for related topics in Oracle Fusion Applications Help.

Extensible Attributes

If you need to extend the Oracle Fusion object to import your legacy or source data, you must use Application Composer to design your object model extensions and to generate the required artifacts to register your extensions and make them available for importing. The corresponding import object is updated with the extensible attributes, which can then be mapped to your source file data.

You can use the same source file to import both extensible custom attributes and the standard import object attributes.

Importing Contracts Using File-Based Data Import

For the contract business object, you must use the File-Based Data Import feature. You prepare XML or text source data files in a form that is suitable for file-based import. The file-based import process reads the data included in your source file, populates the interface tables according to your mapping, and imports the data into the application destination tables.

The Define File-Based Data Import Setup and Maintenance task list includes the tasks needed to configure the import objects, to create source file mappings, and to schedule the import activities. You submit file-based import activities for each import object. When creating a new contract, you import the Contract object.

To access and submit import activities for contracts, you must map your predefined job roles to the Contract File Import Duty role or the Contract Import from File Setup Duty role. Predefined job roles can be the generic one of Customer Relationship Management Application Administrator or job roles that are specific to Oracle Fusion Enterprise Contracts.

The Oracle Fusion Enterprise Contracts application has the following predefined job roles:

- Customer Contract Manager
- Customer Contract Administrator
- Enterprise Contract Manager
- Enterprise Contract Administrator
- Supplier Contract Manager
- Supplier Contract Administrator
- Business Practices Director

Verifying Your Imported Data

Oracle Fusion Applications provide File-Based Import activity reports, which can be used to verify imported data. Users with the Contract File Import Duty role or the Contract Import from File Setup Duty role can also navigate to the Contracts work area to view the imported contracts.

Related Topics

- File-Based Data Import: How It Works
- Getting Started with File-Based Import: Documentation Overview
- Extending Oracle Sales Cloud: How It Works

Contract Import Objects: How They Work Together

You use the Contract import object to import your contract by submitting a file-based import activity. This topic describes the Contract import object.

This topic introduces the following:

- Target import object concepts
- Target objects for the Contract import object
- Target import object attributes
- Target object attribute reference guide files

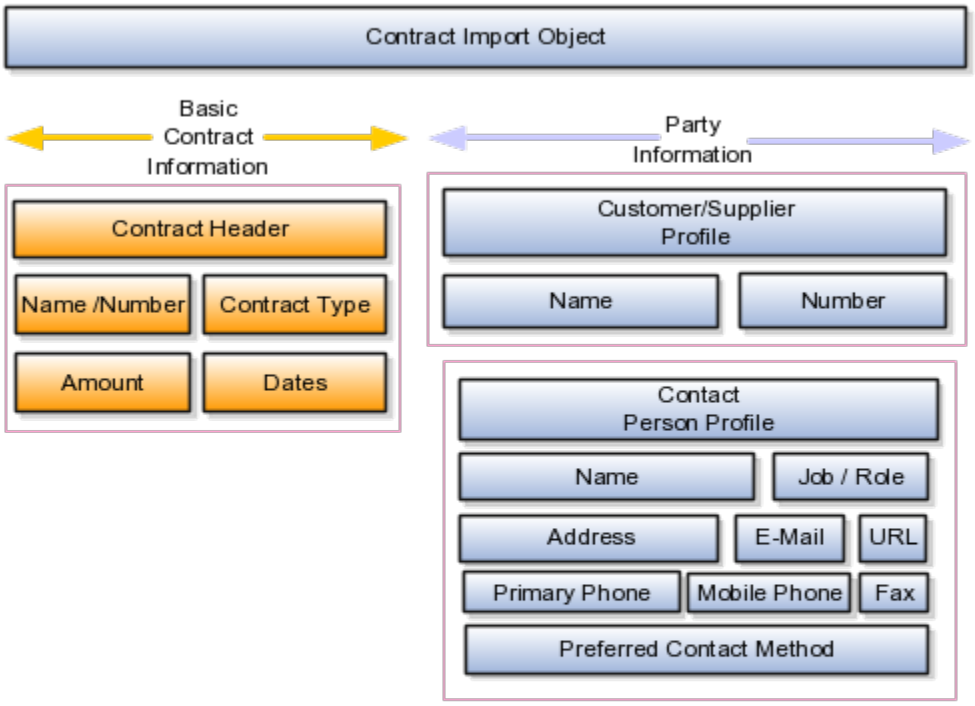
Target Import Objects

The Contract import object is used to import basic contract information and party information about the customer or supplier, the contract organization and party contacts. The Contract target import object organizes the individual attributes

of the contract and party information. To map the source data in your import file to the target attributes in Oracle Fusion Applications, you must understand the target object and the attributes that are included in the target object.

Contract Target Import Objects

The target import object in the Contract import object usually contains information about the contract and information about the parties. The party information can include the customer or supplier organization, a person who is a consumer or vendor and a person who is a contact of the customer or supplier. The following figure shows the information that forms the Contract import object and the familiar names for them.



A single contract includes specific information about the products that are to be exchanged between the customer or supplier and the contract-owning organization. The contract can include one or more goods or services. The Contract target object includes the attributes that are required to import this information.

If the customer or supplier is an organization and an existing party, then you can associate the customer or supplier with the contract by using the Contract target object.

Target Import Object Attributes

You must compare the attributes that you want to import with the target object attributes that are available and their valid values. To evaluate your source data and Oracle Fusion Applications attributes for mapping and validation, you use an Oracle Enterprise Repository reference guide, which is available for each target import object. The reference files contain descriptions, logic used to choose default values, and validation information for each of the Oracle Fusion Applications attributes. Review the validation for each attribute to determine whether there are functional prerequisites or setup tasks that are required.

To import your source file data, you define a mapping between your source file data and the combination of the target object and target object attribute. You can predefine and manage import mappings using the File-Based Import Mapping task, or you can define the mapping when you define the import activity using the File-Based Import Activity task. Both tasks are available in the Setup and Maintenance work area.

> **Note**
> If any of the attributes you want to import do not have an equivalent target object attribute, then review the Oracle Fusion CRM Application Composer extensibility features for the contract.

Target Import Objects Attributes Resources

To access the reference guide file for the contract target import object, see the File-Based Data Import assets in Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com).

The following table lists the reference guide file that is available from the Documentation tab for the Contract File-Based Data Import asset.

Target Import Object	Description	OER Attribute Reference File Name
Contract	Contract and party information	OKC_ IMP_ CONTRACT_ HEADERS_ Reference

Related Topics

- File-Based Data Import: How It Works
- Getting Started with File-Based Import: Documentation Overview
- Extending Oracle Sales Cloud: How It Works

Importing Contracts Using File-Based Import: Quick Start

This topic describes a few key concepts and provides guidance to get you started in importing contracts.

It includes the following information:

- The contract target import object

- The minimum data required and the prerequisites steps
- The minimum data required and the prerequisites steps
- How to use Oracle Enterprise Assets to evaluate optional attributes
- Additional tips

The following table displays the file-based import object and target object for importing contracts.

Import Object	Target Object
Contract	ImportContractHeader1

The Contract Target Import Object

The Contract import object is used to import basic contract information and party information about the customer or supplier, the contract organization or business unit, and party contacts. The Contract target import object organizes the individual attributes of the contract such as the contract number and contract type and the individual attributes of the party information such as the business unit and contract owner, and the primary party and primary party contact. These are the contract header attributes that are required to import contracts.

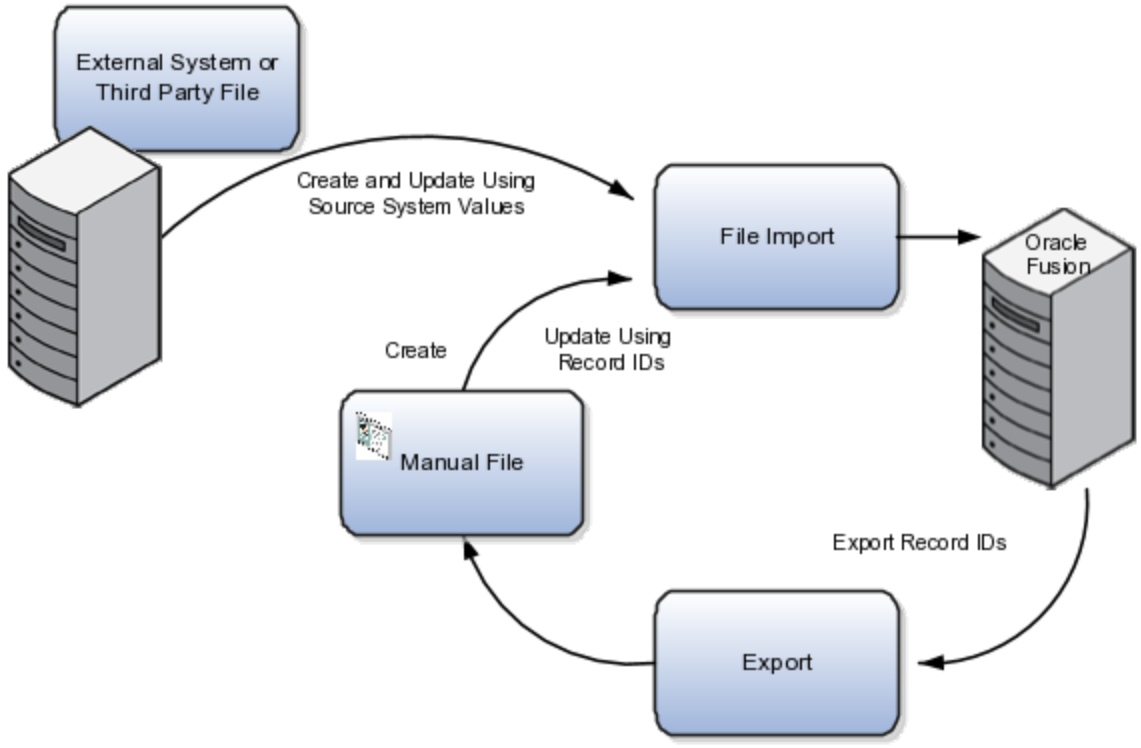
The employee of the associated business unit is the contract owner. The external party can be the customer, the supplier, or the partner. The contract type determines the properties of the contract. For example, the type of permitted contract lines, contract validation checks, and contract acceptance signature requirements.

Minimum Data Required and the Prerequisite Steps

To create a new contract or update existing contracts using file import, your source file must contain information about the contract and the associated business unit and contract owner, and external party and external party contact. When the data is imported, a record is created in Oracle Fusion Applications for each contract. Each contract record in Oracle Fusion has a unique ID. This ID is often referred to as the internal ID or object key. You can use these IDs to uniquely identify the records when importing updates.

When the source of your data is not an external system and you do not plan to regularly update the data, you do not need the source system information such as the contract number and the contract type. To import updates to your existing data, you

can export the Oracle Fusion record ID and add it to your source file. The import process uses the record ID to identify the existing record.



The minimum that is required to import contract information depends on the following:

- The purpose of the import. The data requirements are different when you are creating a contract or updating a contract record.
- Identifying records. The data requirements are different when using source system information such as contract number and contract type ID, or record IDs to identify records.

The values that you provide in your source file may require a setup task or manual step to ensure the information passes the import validation. Before you prepare your source file, complete the prerequisite steps to determine the data values, and then include those values in your source file.

The following table lists the minimum attributes that you require to import contract data based on the purpose of your import, any prerequisite setup or manual steps needed to prepare your data, and the import attributes that you use to map your data to Oracle Fusion.

Party Attributes	Description	Data Value Prerequisites	Create/Update Contract
BuId	The unique ID of the business unit associated with the contract.	The ID must exist in the FUN_ ALL_ BUSINESS_ UNITS_ V table.	Conditionally required. Must be provided if you do not provide a business unit name.

Party Attributes	Description	Data Value Prerequisites	Create/Update Contract
BuName	The name of the business unit associated with the contract.	The name must exist in the FUN_ ALL_ BUSINESS_ UNITS_ V table. You can view valid business unit names from the Manage Business Units, Setup and Maintenance task.	Conditionally required. Must be provided if you do not provide a business unit ID.
ContractOwnerId	The unique ID of an existing employee associated with the business unit of the contract, who owns the contract.	The ID must exist in the HZ_ ORG_CONTACTS table and must uniquely identify an existing employee associated with the business unit of the contract.	Conditionally required. Must be provided if you do not provide a contract owner name.
ContractOwnerName	The name of an existing employee associated with the business unit of the contract, who owns the contract.	The name must exist in the HZ_ ORG_CONTACTS table and must uniquely identify an existing employee associated with the business unit of the contract.	Conditionally required. Must be provided if you do not provide a contract owner ID.

Party Attributes	Description	Data Value Prerequisites	Create/Update Contract
PrimaryPartyId	The unique ID of the customer, supplier, or partner who is a member of your trading community and the primary party for the contract consistent with the contract type.	The ID must exist in the HZ_PARTIES table. You can obtain the PARTY_ID for an existing party by exporting the Party object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task. The party must have an associated party usage of a Partner, Supplier or a External Legal Entity (identifies sales or billing customers). The value is validated against the contract role source definition for the associated contract type.	Conditionally required. Must be provided if you do not provide a primary party name.
PrimaryPartyName	The name of the customer, supplier, or partner who is a member of your trading community and the primary party for the contract consistent with the contract type.	The name must exist in the HZ_PARTIES table. The party must have an associated party usage of a Partner, Supplier or a External Legal Entity (identifies sales or billing customers). The value is validated against the contract role source definition for the associated contract type.	Conditionally required. Must be provided if you do not provide a primary party ID.
PartyContactId	The unique ID of an existing employee associated with the business unit of the contract or a contact of the customer or supplier associated with the contract.	The ID must exist in the HZ_CONTACTS_V table. You can obtain the PARTY_ID for an existing party by exporting the Party object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.	Conditionally required. Must be provided if you do not provide a party contact name.

Party Attributes	Description	Data Value Prerequisites	Create/Update Contract
PartyContactName	The name of an existing employee associated with the business unit of the contract or a contact of the customer or supplier associated with the contract.	The name must exist in the HZ_CONTACTS_V table.	Conditionally required. Must be provided if you do not provide a party contact ID.

Contract Attribute	Description	Data Value Prerequisite	Create /Update Contract
ContractNumber	The number that identifies the contract.	The combination of the contract number and contract type must be unique.	Required
ContractTypeId	The unique ID of the contract type for the contract. The contract type sets various properties for the contract such as the type of permitted contract lines, party roles, contract validation checks, and the contract acceptance and signature requirements.	The ID must exist in the OKC_ CONTRACT_ TYPES_B table. You can view contract types using the Manage Contract Types, Setup and Maintenance task.	Conditionally required. Must be provided if you do not provide a contract type name.
ContractTypeName	The name used of the contract type for the contract. The contract type sets various properties for the contract such as the type of permitted contract lines, party roles, contract validation checks, and the contract acceptance and signature requirements.	The name must exist in the OKC_ CONTRACT_ TYPES_ TL table. You can view contract types using the Manage Contract Types, Setup and Maintenance task.	Conditionally required. Must be provided if you do not provide a contract type ID.

Using Oracle Enterprise Assets to Evaluate Optional Attributes

Information about all available attributes is included in a reference file located in Oracle Enterprise Repository. Review the reference file to explore other contract attributes that are available to import and the possible prerequisite steps for those attributes.

This in-depth reference file includes the following information:

- All contract header attributes available for import.
- The attribute descriptions. If the attribute is exposed in the user interface, then the corresponding user interface display name is included with the description.
- The data type, length, and validation logic. The validation information includes the task or work area where you can view or define valid values before importing data.
- The logic for default values, if values are not provided in your source file.

To access the reference file for party classifications, follow these steps.

1. Using your browser, enter http://fusionappsoer.oracle.com.
2. Sign in as a user or a guest. Search assets using the following value for your Search String: OKC_IMP_CONTRACT_HEADERS_T
3. Navigate to the results and click the Documentation tab.
4. Select the OKC_IMP_CONTRACT_HEADERS_Reference file.

Additional Tips

You can explore related topics by entering the following keywords in the Oracle Fusion Help Application search. The Help Application is available from any Oracle Fusion Application page by clicking Help in the top, right corner, and selecting Applications Help.

- Importing customers
- Importing suppliers
- Importing partners
- Importing contacts

Related Topics

- File-Based Data Import: How It Works

18 Define File-Based Data Import

File-Based Data Import: Highlights

You can import application data from external sources into the Oracle Sales Cloud database by using the Define File-Based Data Import group of tasks available from the Setup and Maintenance work area. The two primary sources of documentation on file-based data import are:

- My Oracle Support Article 1564536.1 (Oracle Sales Cloud File-Based Data Import Guide) at https://support.oracle.com.
- Oracle Enterprise Repository assets of type File-Based Data Import at http://fusionappsoer.oracle.com.

Oracle Sales Cloud File-Based Data Import Guide

The Oracle Sales Cloud File-Based Data Import Guide is a collection of topics that helps you in using file-based data import by providing:

- High-level information about the file-based data import process, architecture, and tools
- Detailed information for importing specific objects and their related objects
- Guidance on importing a minimal set of fields for specific objects
- References to Oracle Enterprise Repository assets that support import of specific objects

Oracle Enterprise Repository Assets

Oracle Enterprise Repository assets of type File-Based Data Import provide:

- Reference files that contain detailed object-specific import information, such as target import objects and attributes, required import fields, validation requirements, lookup sources, and default values
- References to other documentation sources, such as My Oracle Support and Oracle Sales Cloud Applications Help topics
- References to import file templates that you can adapt for your imports

Frequently Asked Questions for File-Based Data Import

What determinesthe list of File-Based Data Import objects displayed?

A single import object can have multiple associated components that are considered objects by themselves. Whether or not an associated object can be grouped as a component of another object for the purpose of file import is determined by the complexity of the object structure and how it is stored in the data model. Oracle Sales Cloud provides import objects predefined to meet the file processing import requirements. Consequently, in some cases, more than one source file may be required to capture all associated components of an object.

What happens if I inactivate an Import Activity?

The Import Activity will not stop the currently running process. However, it will cause the next scheduled process plus any future repeating file import activities not to start. You can always activate the process at a later stage.

What happens if I add a marketing list in the Import Activity definition?

File-based data import enables you to record consumers and organization contacts in a marketing list when importing consumer, lead, and response import objects. Select an existing list or create a new one. A marketing list is assigned the list type value of Imported if created while defining an import activity. After the objects are imported successfully, the consumers and contacts are added as members of the marketing list.

19 Manage Bulk Data Export

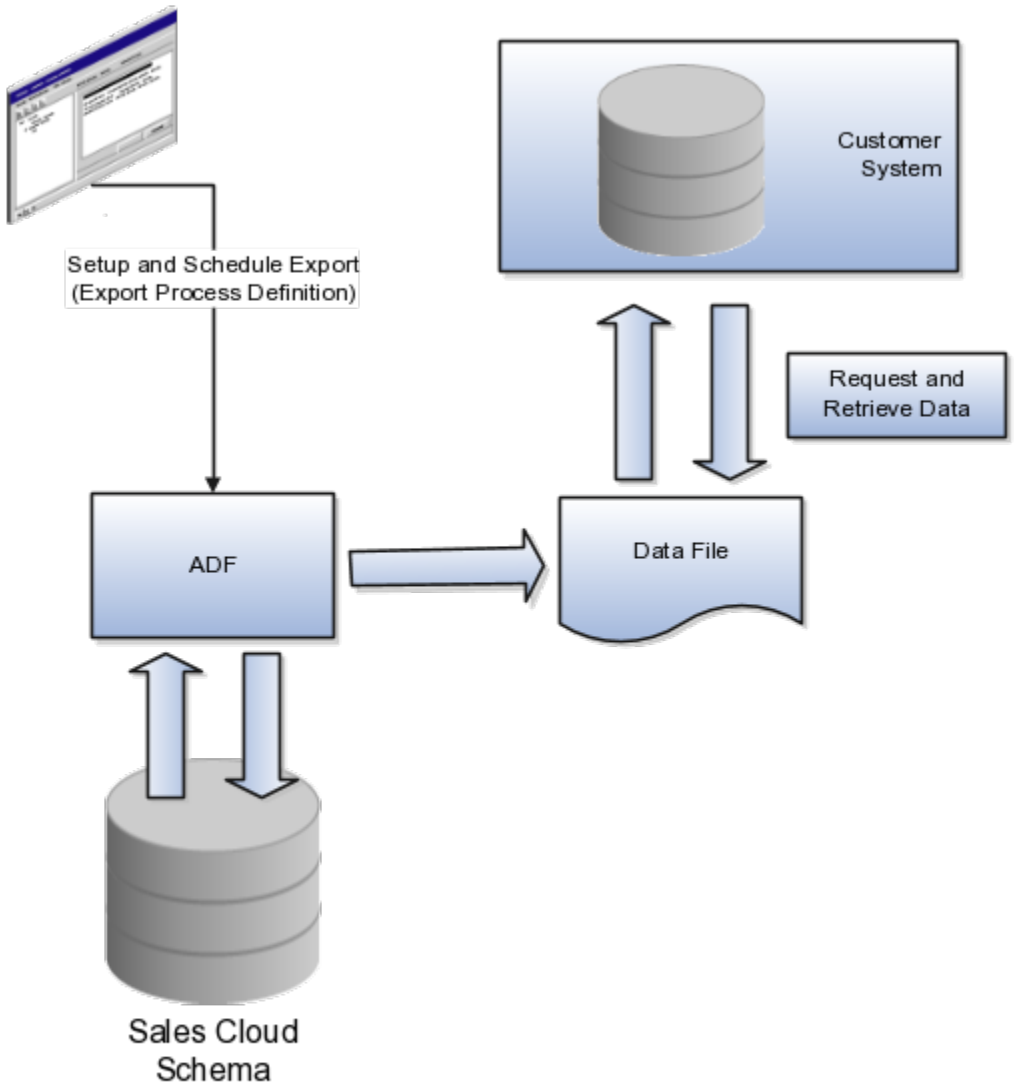
Manage Export Objects

Bulk Export: Overview

You can extract large volumes of data from Oracle Sales Cloud objects using bulk export. You can either extract a full set of records for an object, or perform incremental extracts. For example, you can extract complete set of account data or extract updated set of records every week.

Bulk export creates comma separated or tab delimited files, which are attached to the export process.

The following figure depicts the process of selecting data for export, scheduling and delivering the data file.



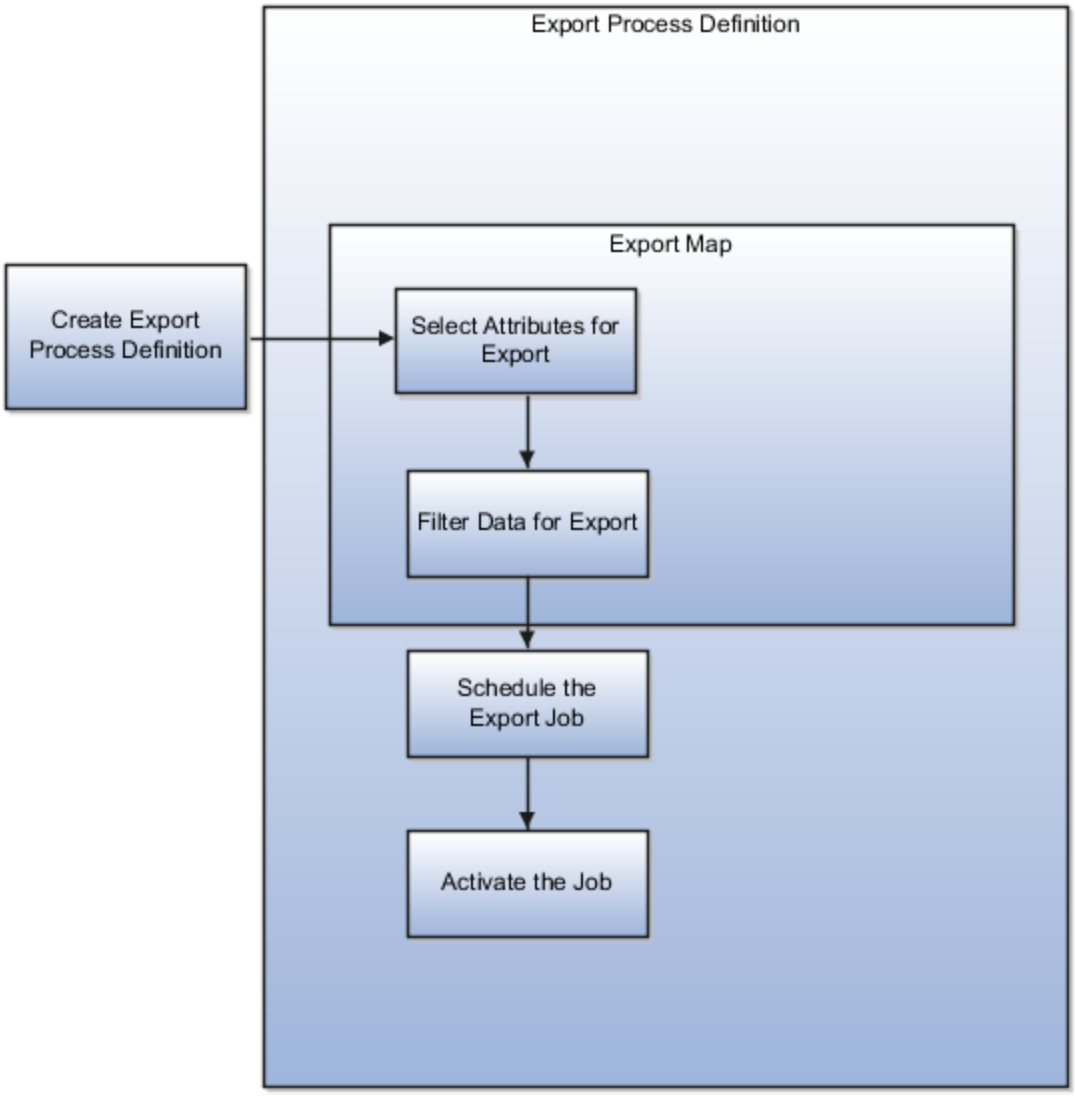
For more information on bulk export, see the Oracle Sales Cloud - Understanding File-Based Data Import and Export guide.

Defining Bulk Export Process: Procedure

You can extract large volumes of data from Oracle Sales Cloud objects using bulk export. You can either extract full set or records for an object, or perform incremental extracts. Bulk export creates comma separated or tab delimited files, which are attached to the export process after export.

The following image depicts the bulk export process definition:

The Bulk Export Process Definition is made up of the Export Map and the processing schedule. See the steps below.



Defining the Bulk Export Process

After defining the mapping files, you create an export process to export an object's data using the mapping files created.

To define a bulk export process:

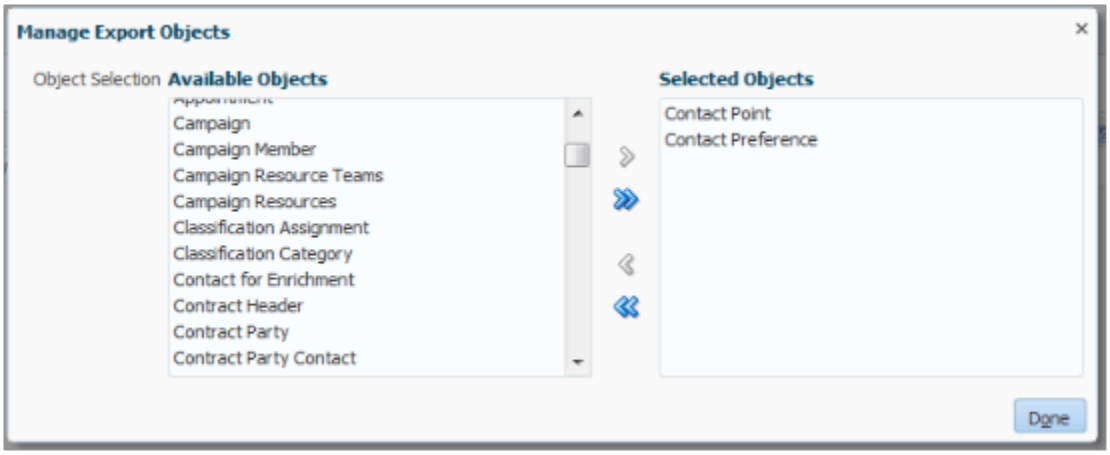
1. Navigate to the Schedule Export Processes task from Setup and Maintenance.
2. Select **Create** from Actions menu to view the Create Export Process Definition: Enter Basic Information page.
3. Enter basic information about the export process, such as name and export map, in the page.
4. Click **Next** to view the Create Export Process Definition: Configure Export Objects page.

In this page, you define the export object you want to export and the mapping you want use for the export process.

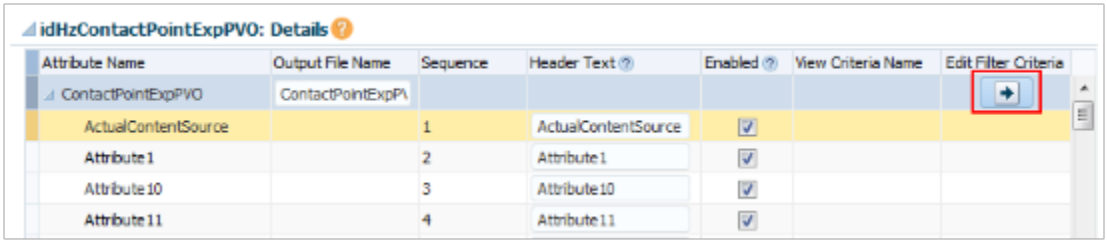
5. Optionally, you can enter a name for the mapping if you would like to reuse this mapping for other export processes. An object's mapping file determines what data is exported every time an object is exported. You can have multiple mapping files for an export object for various object details you want to export.

> **Note**
> The export mapping is optional,. You don't need to select an existing mapping to perform an export.

6. Select **Create from Actions** menu to view the Manage Export Objects dialog box.
7. Select the objects you want to export and click **Done**.



8. Define the attributes you want to export in the Detail region of the page. You can define:
   - Attributes you want to export. Select Enabled for the attributes you want to export.
   - Header text of the attributes. Edit the header text in the Header text column. This value is used as the column header in the files generated by the export process
9. Define the filters to determine the data you want to export by clicking on the Edit Filter Criteria button.



For the incremental extracts, you can create filters using time stamps to determine which rows to export.

10. Click **Next** to view Create Export Process Definition: Create Schedule page.
11. Select if you want to run the export process immediately or at a later time. Two types of scheduled exports are supported:
    a. Incremental Export

b. Normal Export

12. Click Next to view the Create Export Process Definition: Review page.

13. Review the export process details, and click on Activate.

After each export process executes and completes, a comma or tab delimited data file is created and stored as an attachment in the export process.

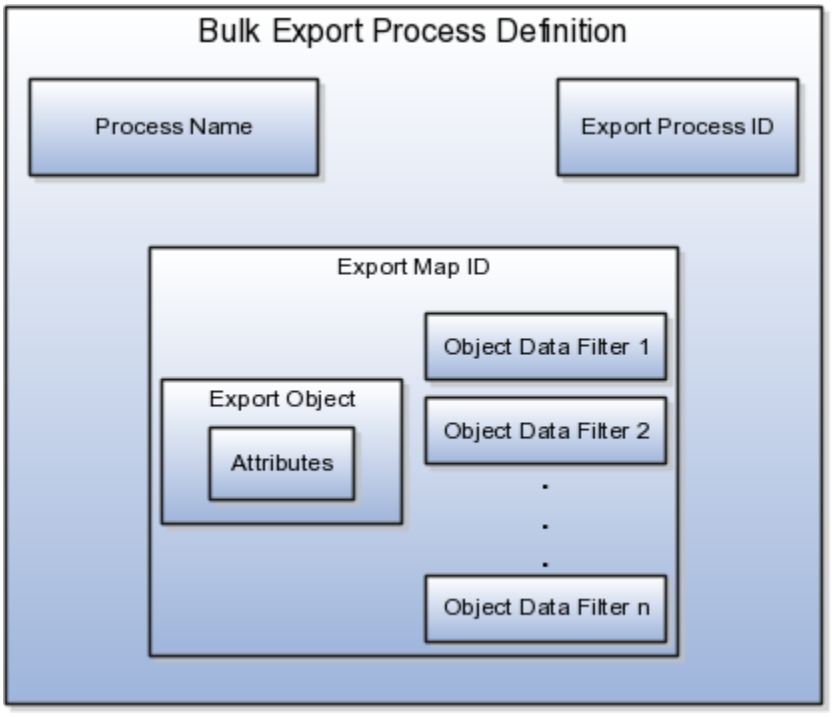
You can also use web services to schedule and start an export process. In this case, you can use the getAttachment() web service to download the data file.

Bulk Export Process Components: How They Work Together

Bulk export makes exporting data easier by leveraging the export maps. To export files using bulk export, you create a process definition, map files for full and incremental extract processes, and then schedule the export process.

Bulk Export Process Components

The following figure shows the bulk export process components.



Bulk export process includes three components:

- Process name: A name for the export process that lets you easily refer the export process rather than using the machine generated ID such as 100000019897192.
- Export process ID: A unique, system generated identifier for the export process definition for the export process. The process Id ties the export map with its export objects, filters, and the export schedule.
- Export map ID: A unique identifier for the export map. You can reuse the export map in different process definitions. For example, you create a process definition to export all the data from the Customer export object. You can then

reuse that export map and apply a new filter on the data to create an incremental export, such as data accrued since the last export date.

FAQs for Data Export

How can I determine which data objects to select for successful export?

Review the requirements for the data to be exported and determine the source view objects that hold the attributes you want.

How can I create a subset of data for export?

Full sets of data are not always required for export. To create a subset of data, use filter criteria to determine the time frame or scope of data, based on values of the attributes. To find activities for a specific date range, for example 1/1/11 through 3/31/11, navigate to the **Export Objects Detail** Sub Page and click the filter icon. Fill in the filter criteria dialog for the project start dates to select the data to be exported. You run the export by navigating to the **Setup and Maintenance** menu, selecting **Manage Task Lists and Tasks**. Then, search for **Schedule Export Processes** and click the **Go to Task** icon on the line for this task.

How can I see my exported data?

You can look on the Schedule Export Processes, Overview page to see the History subpage. The column Exported Data File shows a hyperlink to your output file This file will be a comma separated variable or a tab delimited file. Click that link to open the file and see the exported data.

How can I use my own view object for export?

You can define your own view object for export. However, before you can use your view object for export, you must register and enable it as an export object in the Setup and Maintenance, Manage Export Objects task.

What happens if you change the sequence number or header text in an exported data file?

Changing the sequence number changes the order of the attributes in the exported data file. Changing the header text enables you to give a more intuitive meaning to the attribute and the associated data.

What happens if I need data from multiple export view objects?

Select as many view objects as required for the export process. Choose the individual attributes required from each export object.

Glossary

abstract role

A description of a person's function in the enterprise that is unrelated to the person's job (position), such as employee, contingent worker, or line manager. A type of enterprise role.

action

The kind of access named in a security policy, such as view or edit.

alternate clause

A clause with an alternate relationship to another clause. Contract authors can substitute an alternate clause for the standard clause in their contracts.

analysis

A graph or table displaying select data to provide answers to business questions.

analytics

Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

business intelligence catalog

The repository where all business intelligence objects, including analytics, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and custom objects.

business intelligence repository

The metadata that determines all of the columns, or pieces of data, that you can include in analytics. You can also use the repository as a source of data for reports.

business object

A resource in an enterprise database, such as an invoice or purchase order.

clause adoption

Reusing a clause from the global business unit in local business units either by adopting the clause without change or by localizing it.

clause localization

A type of clause adoption where the adopted clause is edited to suit the local business unit needs.

clause numbering level

Specifies the determinant type of the document sequence for automatic clause numbering

clause relationships

Clauses in the Contract Terms Library can be incompatible with or alternates for other clauses.

condition

The part of a data security policy that specifies what portions of a database resource are secured.

constant

Holds the numeric value used to evaluate numeric conditions in Contract Expert rules. A constant permits you to reset the conditions of many rules with just one edit.

contact role source

Source of the contact role list of values, such as employees, salespeople, and customer contacts..

contract deliverable

A task that needs to be performed as part of the execution of a contract or business document, and that is tracked as part of the contract terms and conditions.

contract deviations

Differences between the contract terms in a contract and those in the contract terms template applied to that contract and any deviations from company policies as determined by Contract Expert feature rules.

Contract Expert

A feature of the application that permits you to create business rules in the Contract Terms Library to enforce corporate policies and standards for contracts.

Contract Expert

A feature that lets you create and evaluate business rules in the terms library such that the contract terms meet your business standards, by suggesting contract changes or additional clauses.

contract fulfillment

Tracks the progress of contractual and noncontractual commitments by interested parties in a procurement enterprise contract and can initiate purchasing activity in integrated purchasing applications.

Contract Terms Library

A repository of standard clauses, contract terms templates, and business rules built using Contract Expert.

Contract Terms Library

A repository of standard clauses, contract terms templates, and business rules maintained by your organization.

Contract Terms Library administrator

The employee, designated as administrator during business unit setup, who is responsible for approving Contract Terms Library content.

contract terms template

A template of standard clauses set up in the Contract Terms Library applied during contract authoring either automatically by the application or manually by contract authors.

contract type

A setup that specifies enterprise contract content, including the presence of contract terms and contract lines.

contractual fulfillment

Contract fulfillment lines that covered by the terms of the contract.

dashboard

A collection of analyses and other content, presented on one or more pages to help users achieve specific business goals. Each page is a separate tab within the dashboard.

data dimension

A stripe of data accessed by a data role, such as the data controlled by a business unit.

data model

The metadata that determines where data for a report comes from and how that data is retrieved.

data role

A role for a defined set of data describing the job a user does within that defined set of data. A data role inherits job or abstract roles and grants entitlement to access data within a specific dimension of data based on data security policies. A type of enterprise role.

data security

The control of access and action a user can take against which data.

data security policy

A grant of entitlement to a role on an object or attribute group for a given condition.

database resource

An applications data object at the instance, instance set, or global level, which is secured by data security policies.

determinant

A value that specifies the use of a reference data set in a particular business context.

document sequence

A unique number that is automatically or manually assigned to a created and saved document.

document sequence category

A classification that groups the documents of a particular type that need to be assigned a particular document sequence.

document type

A categorization of contracts, including auction, blanket purchase agreement, contract purchase agreement, RFI, RFQ, standard purchase order, and enterprise contract.

EDI

Abbreviation for electronic data interchange.

EFT

Acronym for Electronic Funds Transfer. A direct transfer of money from one account to another, such as an electronic payment of an amount owed a supplier by transferring money from a payer's disbursement bank account into the supplier's bank account.

enterprise

An organization with one or more legal entities under common control.

enterprise contract

A contract created in the Oracle Fusion Enterprise Contracts application.

enterprise role

Abstract, job, and data roles are shared across the enterprise. An enterprise role is an LDAP group. An enterprise role is propagated and synchronized across Oracle Fusion Middleware, where it is considered to be an external role or role not specifically defined within applications.

entitlement

Grant of access to functions and data. Oracle Fusion Middleware term for privilege.

feature choice

A selection you make when configuring offerings that modifies a setup task list, or a setup page, or both.

flexfield

A grouping of extensible data fields called segments, where each segment is used for capturing additional information.

flexfield segment

An extensible data field that represents an attribute on an entity and captures a single atomic value corresponding to a predefined, single extension column in the Oracle Fusion Applications database. A segment appears globally or based on a context of other captured information.

global area

The region at the very top of the user interface that remains the same no matter which page you're on.

global business unit

A business unit, designated as global during business unit setup, that can make its clauses and contract terms templates available for adoption by local business units.

infolet

A small, interactive widget on the home page that provides key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.

intent

Specifies if an object in the Contract Terms Library is used for procurement contracts or for sales contracts.

interface table

A database table used for transferring data between applications or from an external application or data file.

job definition

The metadata that determines what a job does and what options are available to users when they submit the scheduled process. A job is the executable for a scheduled process.

job role

A role for a specific job consisting of duties, such as an accounts payable manager or application implementation consultant. A type of enterprise role.

layout template

RTF document that contains the contract layout for printing and preview.

local area

The main part of the work area, where you perform most of your tasks.

local business unit

A business unit, not designated as global during business unit setup, which can adopt global clauses created in the global business unit.

lookup code

An option available within a lookup type, such as the lookup code BLUE within the lookup type COLORS.

lookup type

The label for a static list that has lookup codes as its values.

mandatory clause

Clause from the Contract Terms Library that you cannot edit or delete without special permission.

marketing list

A static selection of contacts for the purpose of communicating a marketing message by e-mail, direct mail or phone.

noncontractual fulfillment

Contract fulfillment lines that are not negotiated as part of the contract, but are used to monitor the progress or quality of contractual fulfillment.

nonstandard clause

A clause created during contract terms authoring by editing a standard clause or by creating a new clause that is not in the Contract Terms Library.

numbering scheme

The style of numbering used for the sections and clauses in contract terms.

offering

A comprehensive grouping of business functions, such as Sales or Product Management, that is delivered as a unit to support one or more business processes.

OWLCS

Abbreviation for Oracle WebLogic Communication Services. Offers the TPCC service to Oracle Sales Cloud and sets up the calls via SIP integration with the telephony network.

party source

Source of the list of values for entering contract parties, such as business units, customers, suppliers, and partners.

primary contract document

A file containing the contract terms and conditions. This file can be generated automatically by the application from the structured terms or attached to the contract by the contract author.

privilege

A grant of access to functions and data; a single, real world action on a single business object.

profile option

User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.

profile option level

The category or layer that defines a profile option. **Site**, **Product**, and **User** are the predefined levels.

profile option level hierarchy

The ordering of profile option levels, where **Site** is the lowest and **User** is the highest level. Among the enabled levels, the preferences configured with the higher level profile option always take precedence.

profile option value

The setting mapped to the level of a profile option. A profile option may have multiple values set at different levels, such as **Site** or **User**.

prompt

A parameter that you set when you use analytics, limiting the data in the analysis or in all analyses on the dashboard or dashboard page (tab).

protected clause

Standard clause that you cannot edit unless you are granted special permission by the Contract Terms library administrator.

provision clause

A clause that is used only in negotiations and is dropped when the negotiation is converted to a contract.

PSTN

Abbreviation for public switched telephone network which is the network of the world's public circuit-switched telephone networks.

purchasing document

A document such as a purchase order, a purchase agreement, or a blanket purchase agreement created in an integrated purchasing application from a contract deliverable.

reference data set

Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

report

An output of select data in a predefined format that's optimized for printing.

repository contract

An enterprise contract with no contract or fulfillment lines, such as a nondisclosure agreement or an employment agreement.

role

Controls access to application functions and data.

scheduled process

A program that you run to process data and, in some cases, generate output as a report.

set enabled

A property that describes entities that an organization shares as reference data. For example, you can indicate a lookup, customer, location, or document attachment as set enabled.

standard clause

Legally approved language that is part of the terms and conditions in the Contract Terms Library.

structured terms

Contract terms that are authored within the Oracle Fusion Enterprise Contracts application.

subject area

A set of columns, or pieces of data, related to a specific business object or area.

system variable

A predefined variable that gets its value from an attribute of the contract or other document.

translation-only clause

A clause with text that was translated but not edited.

user variable

A variable that can be created by the Contract Terms Library administrator for use within clause text or in Contract Expert rules.

view

A specific way to present the results of an analysis, for example as a table or graph. Other types of views, such as the title view, show other components of the analysis.

work area

A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.