

## Procurement Contracts Questionnaire

- 1) How many organizations will be involved in the implementation?
- 2) Will any of these organizations establish and administer standard contract policies and terms at the global level?
- 3) Do your local organizations require customizing to meet local business and policy? Regulations?
- 4) Do you have the following user roles for the library defined?
  - Contract Terms Library Administrator
  - Approvers for the contract terms library for procurement contracts
- 5) If you are also implementing Sales Contracts, you can have an Approver defined who is different than for Procurement Contracts.
- 6) Which organizations will administer and control the Standard contract terms at the global level?
- 7) How does your organization create and store Contracts.
- 8) Do you need to translate your standard terms into multiple languages?
- 9) Does your org have formal approval cycle for the standard contract terms? If so, do you need additional approvers to approve business documents with contract terms as compared to business documents w/o contract terms.
- 10) What are the processes that you and your suppliers will collaborate on in order to complete and sign off on the Contractual Obligations?
- 11) What are the Std print formats for your Contracts
- 12) Are there standard business rules based on which Contract clauses need to be included while authoring a Contract.
- 13) Is the Contract term always the same based on a purchasing document type.

### **Setup Sequence Tasks:**

- Ø Setup Organizations
- Ø Profile options
- Ø Approval workflows
- Ø Lookup Codes
- Ø Enable Keyword search
- Ø Setup layout template
- Ø Setup purchasing document format
- Ø Associate layout template to document types
- Ø Setup Duff's
- Ø Setup auto numbering
- Ø Value sets
- Ø Functions Security
- Ø Migrate clause to contract terms library
- Ø Import clauses from external sources
- Ø Setup contract folders
- Ø Setup variables

## Practice of Setup steps for Procurement Contracts on R12 Version

- Ø Setup numbering schemes
- Ø Sections
- Ø Standard clauses
- Ø Contract templates
- Ø Contract expert
- Ø Contract repository
- Ø Setup Contract work bench

First setup:-

A) Auto adopt global Clause

This enables automatic adoption of global clauses in a Local organization. The clauses do not have to be approved separately in the local organization if the **Auto Adopt option is set to Yes**.

B) Library Administrator (Buy Intent)

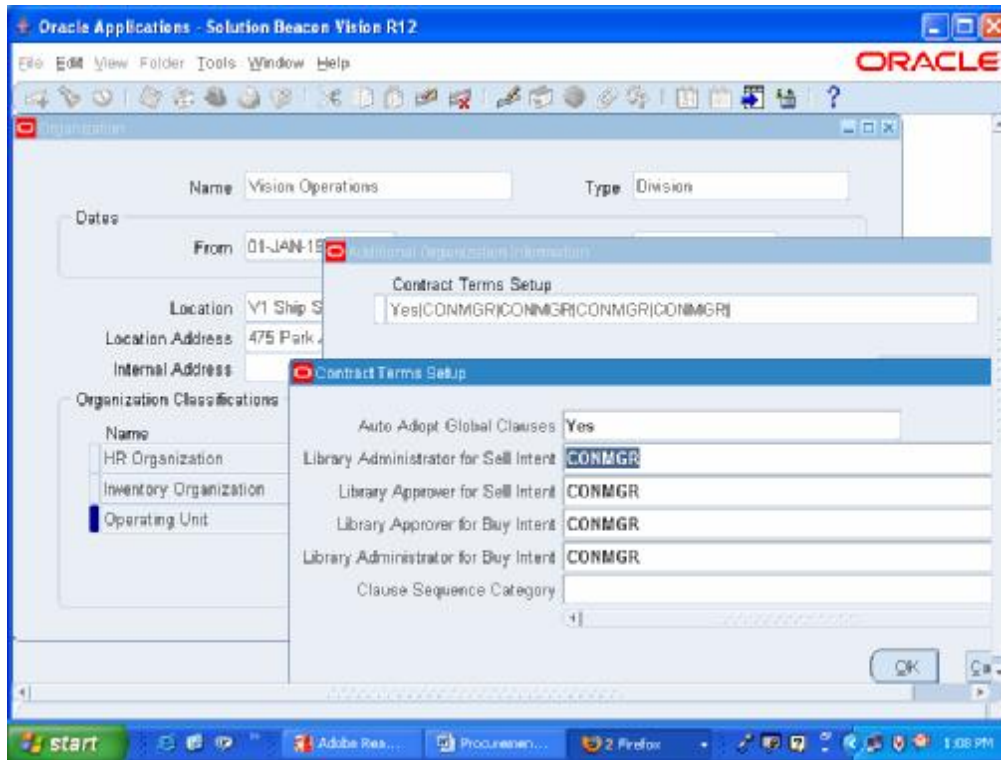
Set a library administrator to receive Notifications including

**Steps:**

To set up operating units:

1. Log in to the Human Resources responsibility.
2. Open the Find Organization window.  
Navigation: Work Structures -> Organization -> Description.
3. Select the desired operating unit from the list of values.
4. Click the Find button.
5. In the Organization Classifications region, place the cursor in the Operating Unit Classification.
6. Click the others button.
7. Select the Contract Terms Setup option from the list of values.
8. In the Contract Terms Setup window, enter values for the following options:
  - **Auto Adopt Global Clauses:** This enables automatic adoption of global clauses in a local operating unit. The clauses do not have to be approved separately in the local operating unit if the Auto Adopt option is set to Yes.
  - **Library Administrator for Buy Intent:** Set a library administrator Buy intent to receive notifications when a global clause is created and needs adoption in the local operating unit.
  - **Library Approver for Buy Intent:** Set a library approver for Buy intent to route workflow approval notifications for clauses and templates.
  - **Clause Sequence Category:** Provide a value here if you want to activate the AutoNumbering function for clauses in the operating unit. Leave it blank if you want to number clauses manually

## Practice of Setup steps for Procurement Contracts on R12 Version

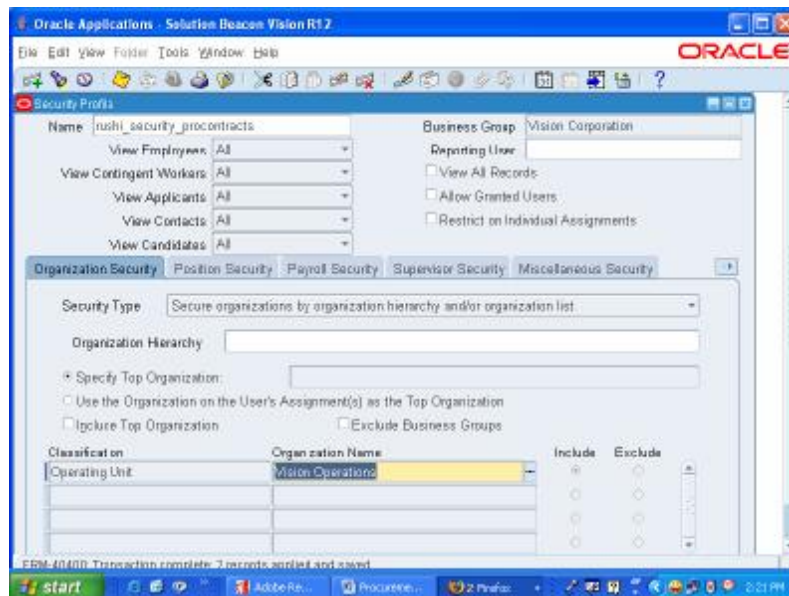


## Implementing Multiple Organizations Access Control

You can set up Multi-Org access control in the Contract Terms Library which enables users to access multiple operating units from one responsibility.

### To define security profiles:

1. Log in to the Human Resources responsibility.
2. Open the Profile page.  
Navigation: Security > Profile page
3. Provide a name for the profile.
4. Select a business group to which all the operating units belong. If you have not defined your own business groups, select the default business group.
5. In the Security type field, select the "Secure Organizations by organization hierarchy and/or organization list" option from the list of values.
6. Navigate to the Organization Security tab. At this stage, you can select one of the following options:
  - Navigate to the Classification region and provide a list of operating units and their names. This will be the list of operating units under the security profile.
  - Select an organization in the Organization Hierarchy field. To use this option, you must first set up an organization hierarchy. See: Setting Up Organization Hierarchy, page 4-5.
7. Save your work.



## 8. Run the Security List Maintenance program

Once this request is submitted , the subsequent requests are automatically fired as mentioned below :-

- Ø Maintain person security list
- Ø Payroll worker Process.

## Procurement Contracts Profile Categories

- Ø Contract Security
- Ø Contract Setup

## Procurement Contracts Profile Options

- Ø EDR: E-Records & E-Signatures
- Ø MO:Default Operating Unit
- Ø MO:Security Profile
- Ø OKC:Clause Import XML File location
- Ø Contract expert enabled
- Ø Contract repository accessible intents
- Ø Contract Repository Auto – Numbering Enabled
- Ø Generate deviations report for approval
- Ø Global operating unit
- Ø Layout template for contract deviations report
- Ø Use clause number in contracts
- Ø Terms library intent
- Ø Auto apply default contract templates'
- Ø Contracts enabled
- Ø PO: Generate amendment documents
- Ø Self service accessibility feature
- Ø PO: Auto apply default contract templates

## Contract Security Category

- Ø OKC: Contract repository accessible intents
- Ø OKC: Terms Library Intent

## Approval Workflow

- Ø Contract Template Approval: OKCTPAPP
- Ø Contract Clause Approval : OKCARTAP

## Enabling Keyword Search

In order to enable the keyword search , you must run the concurrent program as mentioned below on periodic bases.

- Ø **Synchronize Clauses Text Index:** This program synchronizes the clauses text index.
- Ø **Optimize Clause Text Index:** This program optimizes the clauses text index
- Ø **Synchronize Template Text Index:** This Program synchronizes the contract template text index.
- Ø **Optimize template text index:** This program optimizes the Contract Template text index.

## Setting Up Layout Templates

Here we need to prepare the layout in Oracle XML publisher and then need to upload the same.

1. Log in to the XML Publisher Administrator responsibility.
  2. Click the Templates link.  
The Templates Search page opens.
  3. In the Application field, enter Oracle Contracts Core.
  4. Click Go to view the search results.
  5. Click the Duplicate icon for the Oracle Contract Terms Template.
- 4-14 Oracle Procurement Contracts Implementation and Administration Guide
6. In the Code field, enter a new code for the template.
  7. In the Name field, enter a new name.
  8. Click Apply to save the new template.
  9. In the Template Files region, click the Download icon for the OKCTERM\_en.XSL file.
  10. Save the template to your desktop.
  11. Open the template with a text or XSL editor.
  12. Modify the layout or boilerplate to suit your needs.
  13. Save the template with a new name, for example, MyTemplate\_en.xml.

14. In the Template Files region, click the Update icon for the OKCTERMS\_en.xml file.
15. Click the Browse button to locate and select your customized XSL-FO stylesheet  
(Example: MyTemplate\_en.xml).
16. Click Apply.  
The system uploads the file and associates it with your layout template.
17. Click the Preview button to preview a sample document using your new layout Template.

## Setting Up Purchasing Document Format

To generate the contract document in the PDF format, you need to set the PO Output Format value to PDF.

### Steps:

1. Log in to the Purchasing Super User responsibility.
2. Navigate to the Purchasing Options window.  
Navigation: Set Up > Organization > Purchasing Options
3. Navigate to the Control tab.
4. In the PO Output Format field, select the PDF option from the list.
5. Save your work.

## Setting Up AutoNumbering

Use this setup to number clauses automatically during creation.

### Guidelines

In all responsibilities that create clauses, set the Sequence Numbering profile option to yes.

For more information on setting this profile option, see the *Oracle Applications System Administrator's Guide*.

**Note:** You can only delete a numbering scheme that is not assigned to a contract template.

If you define a numbering scheme with the "a,b,c," numbering type and a specific level with more than 26 entries, the system does not create further alphabets. Instead, the system uses symbols for all entries beyond 26. Preview the template or contract, as applicable, and make sure the numbering scheme used is changed to use some other type.

## Practice of Setup steps for Procurement Contracts on R12 Version

### Steps:

1. Log in to the System Administrator responsibility.

2. Define a document sequence.

Navigation: Application > Document > Define

Enter a sequence name, the Contracts Core application, an effective date, Automatic type, and an initial value.

3. Define a sequence category.

Navigation: Document > Categories.

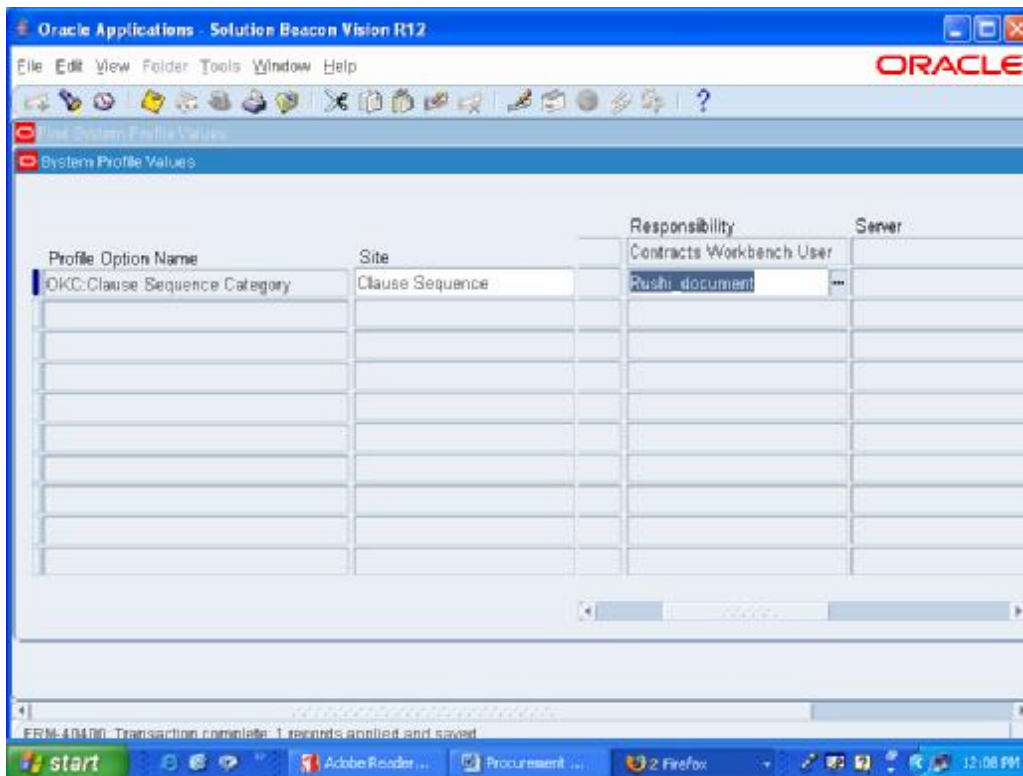
Define the category using OKC\_ARTICLES\_ALL as the table to be associated.

4. Assign the category to a set of books.

Navigation: Document > Assign.

Associate the category defined with the set of books and sequence.

5. Set the OKC: Clause Sequence Category profile option with the sequence created above.





## Setting Up Value Sets

Define Value sets, pl be sure for format type and validation type.

## Oracle Procurement Contracts Function Security

Oracle Procurement Contracts enables organizations to control users' access to contact authoring features. In this way, users with different roles, such as contract negotiators, contract administrators, and contract approvers, can have access to only those features they need to use. For example:

Contract negotiators may have standard authoring privileges allowing them access to standard clauses and pre-approved alternates from the library.

- Contract administrators may have additional privileges allowing them to author non-standard clauses or remove contract terms.
- Contract approvers or super users may have privileges that allow them to override standard authoring controls. For instance, with override authoring privileges, users can delete a mandatory clause from a business document or edit a protected clause.

So here you can control the access by setting up the main functions.

Main Menus are:

OKC Repository Super User Menu  
OKC Contract Repository Setup Main Menu

These two menus are exclusions from the Main menu: OKC Contract Repository root menu

There are few functions which can be kept as " View only / Authoring Responsibility / Adminsitrator responsibility.

- Ø View Contract
- Ø Create and Update Contract
- Ø Change Status for approved signed
- Ø Manage deliverables
- Ø Manage risk
- Ø Terminate contract
- Ø Update contract administrator of a contract
- Ø Change status from draft directly to signed
- Ø Import Contracts
- Ø User Repository Setup Tab

You are import clauses in order to stay update with the current business regulations and scenario .

## Setting Up Contract Folders

You can organize clauses under different folders for easier retrieval.

### Setting Up Variables

Oracle Procurement Contracts supports the use of business variables (tokens) in clause text.

### Setting Up Numbering Schemes

When creating contract templates, you can apply a numbering scheme to the sections and clauses structure. This numbering scheme is applied to business documents in which the contract template is used.

Use the Contract Terms Library to set up and manage numbering schemes.

#### Steps:

1. Log in to the Contract Terms Library Administrator responsibility.
2. Navigate to the Numbering Schemes page.  
Navigation: Library > Numbering Schemes tab > Create Numbering Scheme button
3. Enter the Scheme Name.
4. Optionally, enter a Description for the scheme.
5. Optionally, select the Number Clauses check box to automatically number the clauses in the contract.
6. Click the Add Another Level button to define the first numbering level.
7. Enter the following information for the numbering level:
  - In the Sequence field, choose a sequence from the list of values.
  - Optionally, enter an End Character. For example, a close parentheses ()).
  - Optionally, select the Concatenate with Child check box to ensure that the child level includes the numbering of its parent during previewing and printing of the contract.For instance, you would set up the numbering scheme as:  
First level:
  - a,b,c
  - end character is "."Concatenate with Child check box selected  
Second level:
  - I,II,III
  - end character is ")"The document will be numbered as:
  - First Level = a.
  - Second Level = a.I)
8. Click the Refresh button to preview the layout.
9. Optionally, add additional numbering levels.
10. Click Apply to save and close the Numbering Scheme page

## Practice of Setup steps for Procurement Contracts on R12 Version

The screenshot shows the Oracle Applications R12 interface for managing numbering schemes. The browser window is titled "Numbering Schemes - Mozilla Firefox". The URL is [http://vis1200.solutionbeacon.net/OA\\_HTML/RF.jsp?function\\_id=1001](http://vis1200.solutionbeacon.net/OA_HTML/RF.jsp?function_id=1001). The page displays a list of existing numbering schemes:

Scheme Name	Description	Number Clauses	Update	Delete
Licensing & Service Agreement Scheme	I. First Level > a. Second Level	✓		
Vision Corp Numbering Scheme II		✓		
Vision Operations Numbering Scheme	1. First Level 1.1. Second Level 2. First Level 2.1. Second Level	✓		
Vision Standard Numbering Scheme	I. First Level 1. Second Level			

The user is logged in as RP-1965. The taskbar shows the Start button and several open applications including Adobe Reader and Procurement.

The screenshot shows the "Create Numbering Scheme" form in the Oracle Applications R12 interface. The browser window is titled "Create Numbering Scheme - Mozilla Firefox". The URL is [http://vis1200.solutionbeacon.net/OA\\_HTML/OA.jsp?OAFunc=ORC\\_TE](http://vis1200.solutionbeacon.net/OA_HTML/OA.jsp?OAFunc=ORC_TE). The form fields are as follows:

- Scheme Name:** Rushi\_Patil\_Numbering\_scheme
- Description:** This numbering scheme will be applicable to clauses and corresponding sections of the clauses.
- User:** Rushi Patil
- Number Clauses:**

**Scheme Details:**

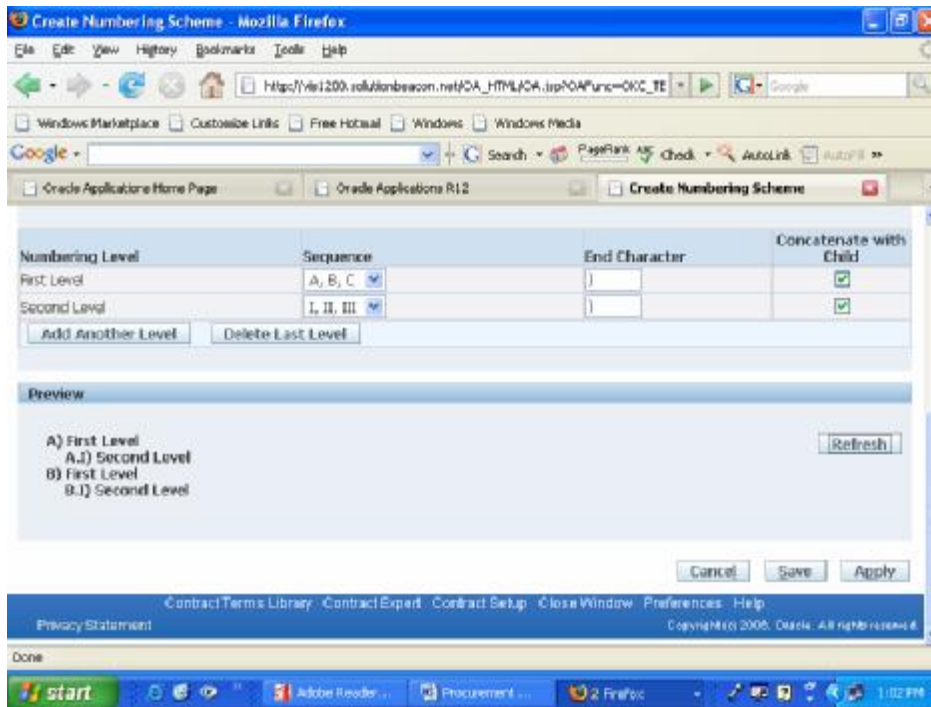
Numbering Level	Sequence	End Character	Concatenate with Child
First Level	A, B, C	)	<input checked="" type="checkbox"/>
Second Level	I, II, III	)	<input checked="" type="checkbox"/>

Buttons: Add Another Level, Delete Last Level, Refresh.

The taskbar shows the Start button and several open applications including Adobe Reader and Procurement.

See the below preview.

## Practice of Setup steps for Procurement Contracts on R12 Version



### Setting Up Sections

Sections are headings under which you organize contract clauses. The headings provide structure and organization to a printed contract document. You can define sections that can be used in authoring templates and contracts.

### Setting Up Standard Clauses

A standard clause is the text that describes the legal or business language used to author a contract. Clauses are drafted based on both business and statutory requirements.

### Setting Up Contract Templates

Oracle Procurement Contracts enables you to define a standard set of templates to easily default contract terms for contracts authored by your organization. You can create templates that include both clauses and deliverables.

## Setting Up Contract Expert

- Ø Setup Contract terms library
- Ø Set the Use Contract Expert profile option – Yes – Site Level
- Ø To use Contract Expert on Business documents, you need to setup Contract Expert Rules in the Contract Terms Library.
- Ø Create and Approve Clauses
- Ø Create and Approve Contract Templates
- Ø Define Value Sets
- Ø Define Constants
- Ø Create Questions
- Ø Create and activate a library of rules and assign them to appropriate Contract Templates
- Ø Enable Contract Expert on Contract Templates.
- Ø Determine the sequence of display of questions when Contract Expert is used on Business Documents.

## Setting Up Contract Repository

Oracle Contracts now enables you to create miscellaneous contracts, such as license Agreements, non-disclosure agreements, and merger agreements, which are not Specifically related to the functionality of other Oracle applications. You can also create Purchase or sales agreements for miscellaneous items that are outside the normal Purchasing or sales flows, for which full execution capabilities are not required. These types of contracts are stored in a new Contract Repository, and are called Repository contracts.

### Setting Up Profile Options

- **Contract Repository Auto-Numbering Enabled**
- **Contracts Intent Access Control**

### Defining Approval Workflows

Define approval hierarchy and approval rules through the Oracle Approvals Manager.

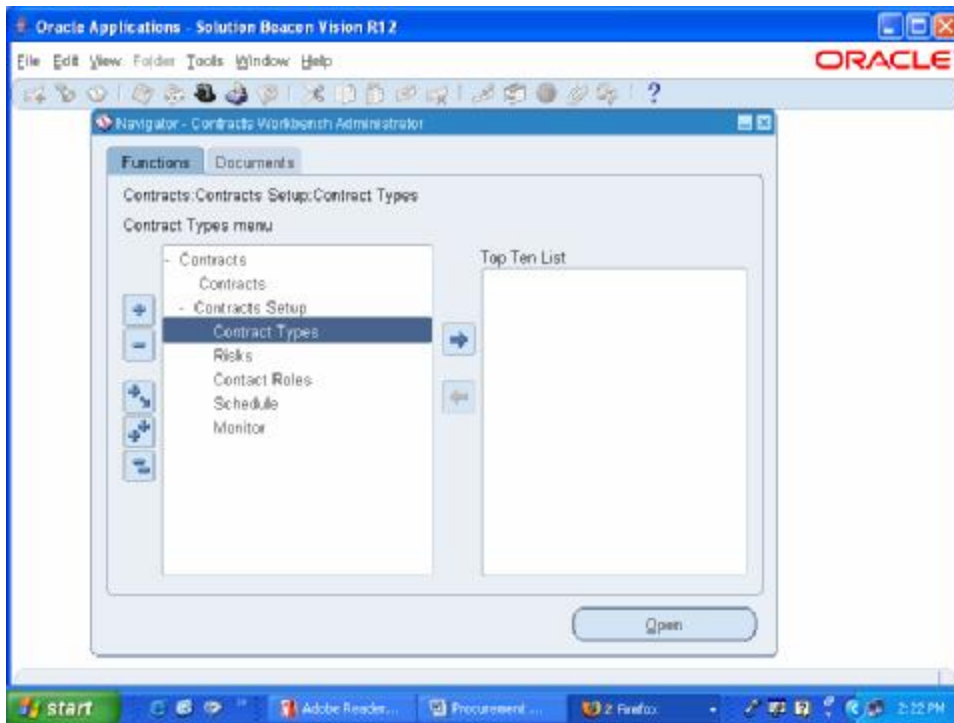
### Setting Up Contract Types

When users create Repository contracts in Oracle Contracts, they must select and assign one of the user-defined contract types, such as Non-Disclosure Agreement and Partnership Agreement, to the contract. You must define the contract types in advance. Steps

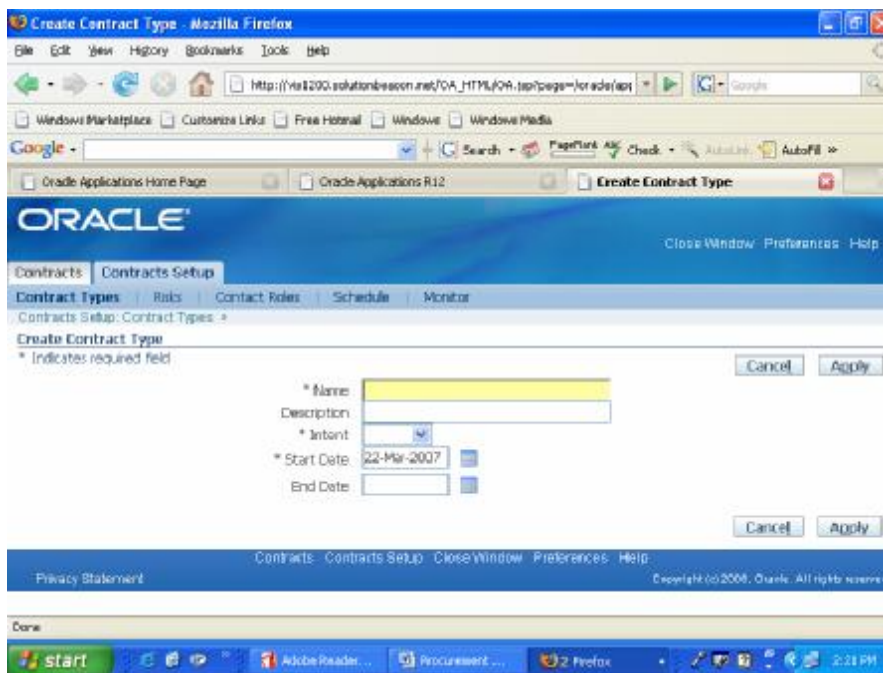
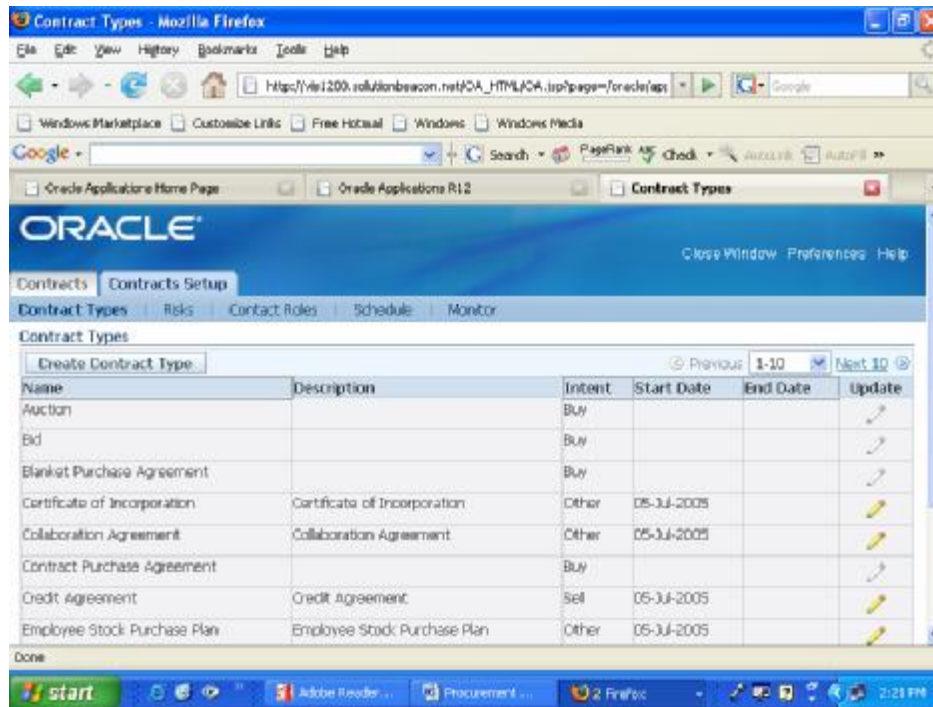
1. Log in to the Contracts Workbench Administrator responsibility.
2. Click the Contract Types link. The contract types you define should be unique across all organizations within the company. Note: For your reference, the Contract Types page displays the list of seeded and current user-defined contract types.
3. Click the Create Contract Type button. The system displays the Create Contract Type page.
4. In the Name field, enter a unique identifier for the contract type.
5. Enter a Description for the contract type.

## Practice of Setup steps for Procurement Contracts on R12 Version

6. Select an Intent from the list of values. Depending on the nature (Intent) of a contract, the contract could be buy-side, sell-side, or neither. Each Contract Type should be associated with one Intent. The possible values for Intent are Buy, Sell, and Other. If the Contracts Intent Access Control profile option is used, this selection will limit which users will be able to select this Contract Type.
7. Select a Start Date. This is the date that the contract type becomes available.
8. Optionally, select an End Date for the contract type. After the End Date has passed, when creating new contracts, users will not be able to select this type.
9. Click the Apply button.



## Practice of Setup steps for Procurement Contracts on R12 Version



### Setting Up Risks

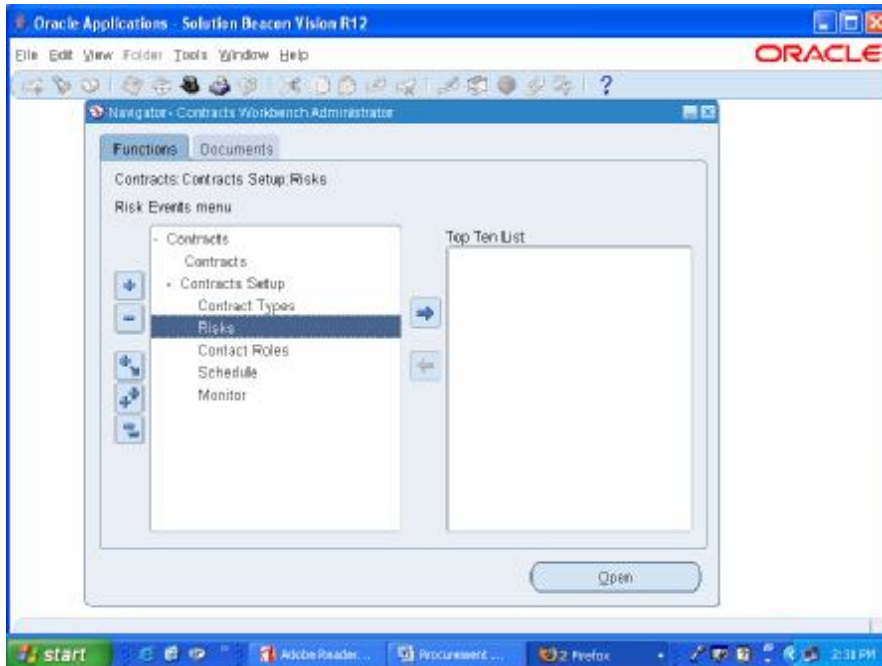
When users create Repository contracts in Oracle Contracts, they may select multiple risks associated with these contracts. For example: partner bankruptcy, non-performance of a deliverable, non-compliance with non-disclosure terms, loss or

## Practice of Setup steps for Procurement Contracts on R12 Version

infringement of intellectual property, and damage to property or humans. This risks must be defined in advance.

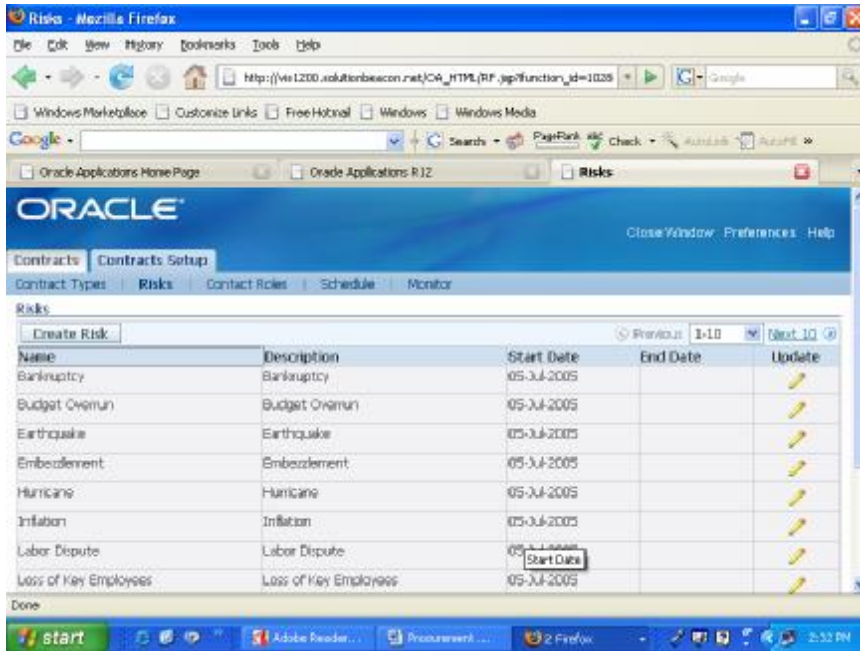
### Steps

1. Log in to the Contracts Workbench Administrator responsibility.
2. Click the Risks link.
- Note:** For your reference, the Risks page displays the list of all user-defined risks. Oracle Contracts does not provide seeded risks.
3. The risks you define should be unique across all organizations within the company.
4. Click the Create Risk button. The system displays the Create Risk page.
5. In the Name field, enter a unique identifier for the risk.
6. Enter a Description for the risk.
7. Select a Start Date.
8. Optionally, select an End Date for the risk. After the End Date has passed, the risk cannot be selected on a contract.
9. Click Apply to save the risk.

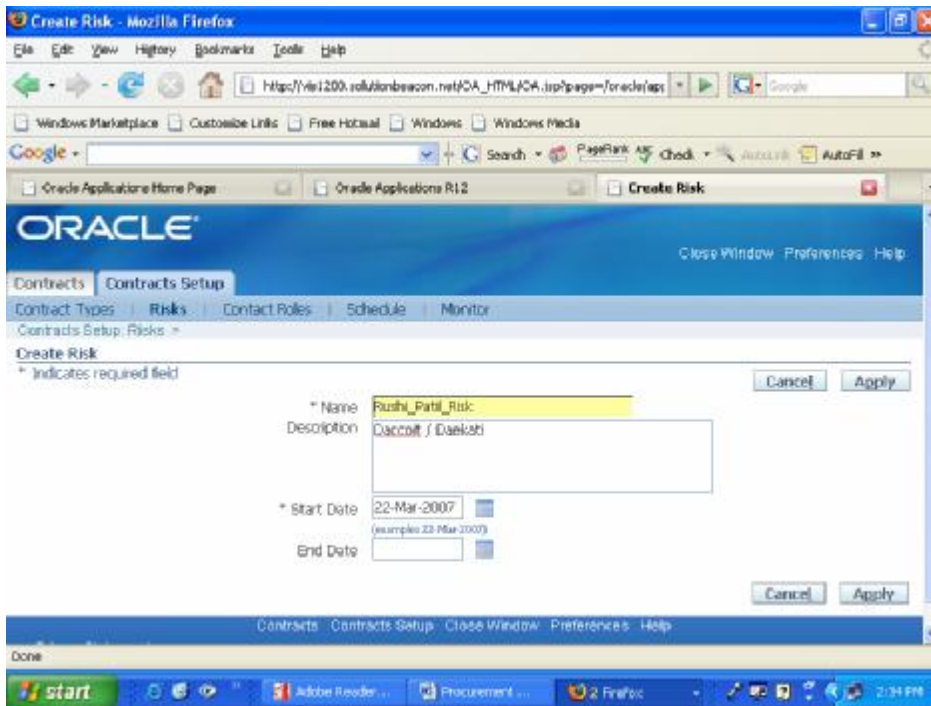




## Practice of Setup steps for Procurement Contracts on R12 Version



Click Create Risk Button:



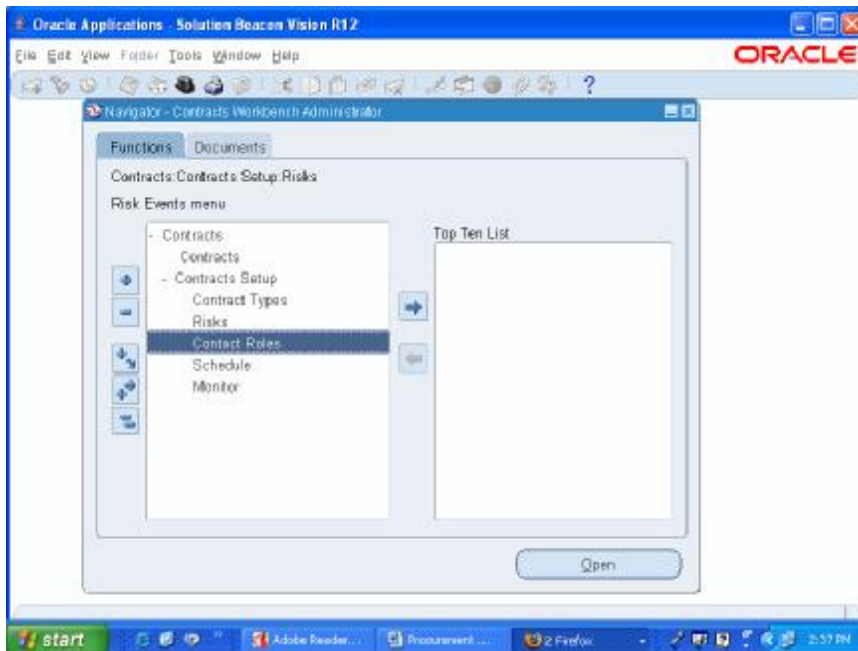
## Practice of Setup steps for Procurement Contracts on R12 Version

### Setting Up Contact Roles

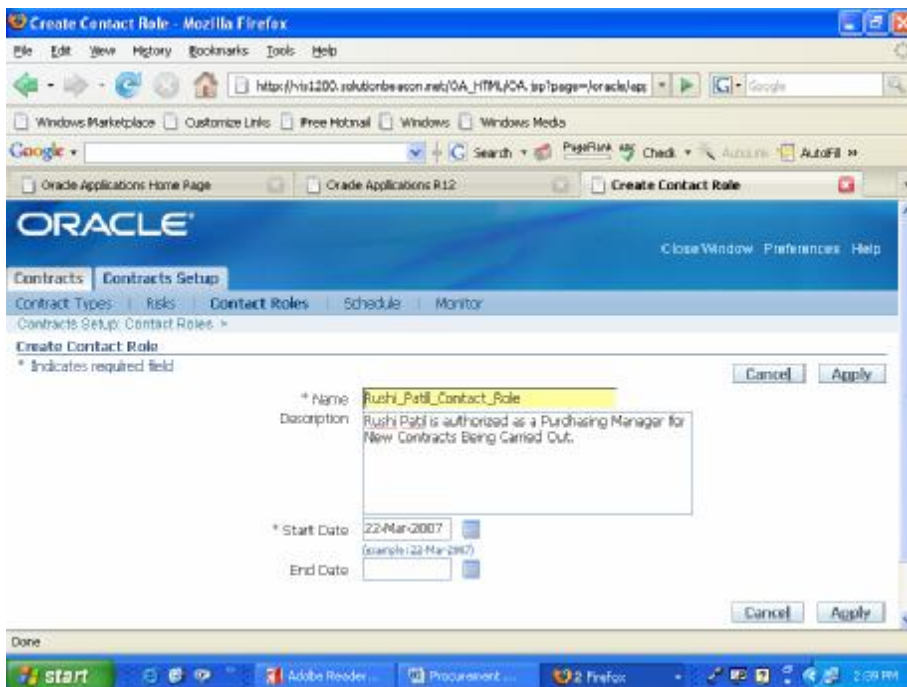
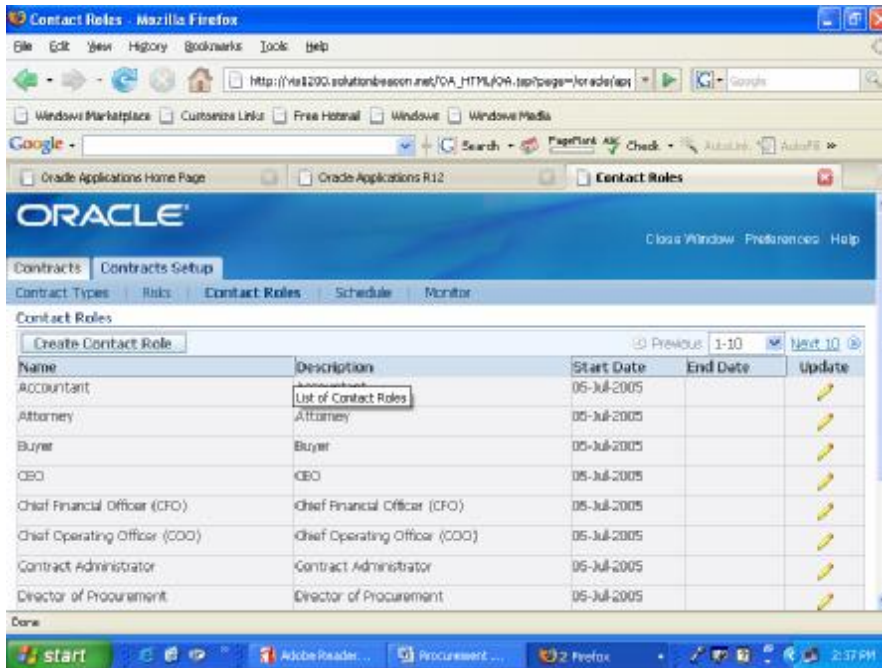
The contact role indicates the responsibility or function of different people in a contract. For example, an employee (internal contact) can be assigned the role of "Purchasing Manager" in a contract. There are no seeded contact roles. You can define an unlimited number of contact roles. These roles will be available to users when adding internal or external contacts to a party on a Repository contract.

Steps

1. Login to the Contracts Workbench Administrator responsibility.
2. Click the Contact Roles. For your reference, the Contact Roles page displays the list of all user-defined roles. The roles you define should be unique across all organizations within the company.
3. Click the Create Contact Role button. The system displays the Create Contact Role page.
4. In the Name field, enter a unique identifier for the role.
5. Enter a Description for the role.
6. Select a Start Date.
7. Optionally, select an End Date for the role. After the End Date has passed, the role cannot be selected on a contract.
8. Click Apply to save the role.



## Practice of Setup steps for Procurement Contracts on R12 Version



## Setting Up Contracts Workbench

A single view of all enterprise contracts is essential for effective management of contract activities, and for reporting and analysis of outstanding supplier and customer commitments. Oracle Contracts provides a centralized Contracts Workbench that gives you access and visibility to all contractual agreements in the enterprise. Contracts Workbench allows contract administrators to see which contracts require attention, provides extensive search capabilities, and has links to common tasks such as creating or approving a contract.

Contracts Workbench provides a single view of the following types of contracts:

- Contracts created in buy-side and sell-side Oracle applications: purchase orders, purchase agreements, negotiations, orders, quotes and sales agreements.
- Repository contracts: For information, see Contract Repository, page 4-24.

### Setting Up Profile Options

You can use the Contracts Intent Access Control profile option to restrict the access to Contracts. Oracle Framework includes the OA Personalization Framework, which enables you to personalize the appearance of Contracts Workbench without modifying any underlying code.

The following are the most common ways to personalize Contracts Workbench:

- Ø Notifications
- Ø Recent Contracts
- Ø Expired Contracts
- Ø Expiring Deliverables
- Ø Contracts at Risk.

## Setting Up Contract Terms Library

Contract terms Library is the central library of all pre-approved clauses and contract templates that can be used to create contracts across the enterprise.

Clauses can be grouped into sections and stored as reusable contract templates to codify best practices. Templates provide a framework for rapid assembly and creation of contracts.

Organizations can manage clauses and templates centrally in a global organization. Local organizations can then use or duplicate these clauses and templates and customize them to meet their own specific local requirements.

In addition to standard clauses and contract templates, the Contract Terms Library supports the creation and maintenance of a library of folders, sections and variables.

A standard clause is the text that describes the legal or business language used to author a contract. Clauses are drafted based on both business and statutory requirements.

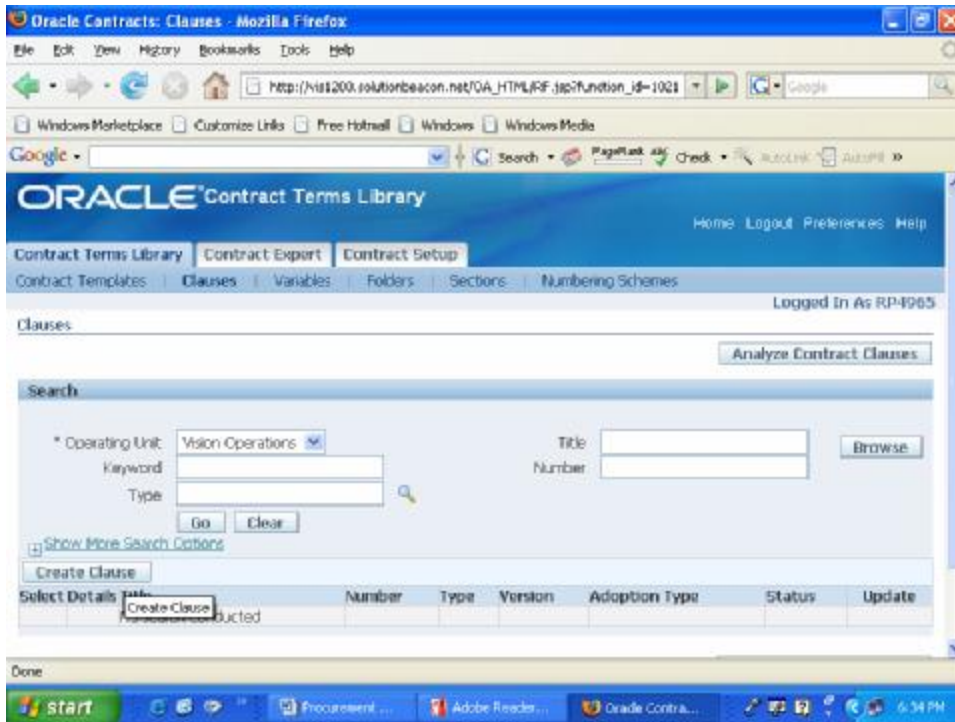
### Creating Standard Clauses

**Responsibility:- Contract terms library administrator**

1. Navigate to the Create Clauses page.

Navigation: Library > Clauses tab > Create Clause button

## Practice of Setup steps for Procurement Contracts on R12 Version



- Ø Choose the Create Clause button.
- Ø Before going ahead your document sequence numbering should be checked to know the generating clause number.

### 2. Enter the following attributes:

- **Number.** This field can be manually entered or automatically generated. To automatically generate the number, see the Setting Up Auto Numbering section.
  - **Clause Title:** Enter a title for the clause. The clause title is unique within an organization.
  - **Display Name:** Optionally enter the display name for the clause. The display name does not have to be a unique name. Your organization could have alternate names with the same display name. The system uses the Display Name on a printed contract field. If you leave this field blank, the Clause Title is used as the display name.
  - **Intent:** Select the intent of the contracts that can use the clause. Select the Buy or Sell option from the list of values.
- Note:** Based on the OKC: Clause Intent profile option setup, you can create clauses for buy, sell, or both intents. If you set the profile option to either Buy or Sell, the system provides read-only access to the Intent field. This profile option also governs other feature in the Contract Terms Library, including contract templates and variables.
- **Type:** Use the Type field to classify the clause according to the business purpose (for example, General or Payment terms). Select a clause type from the list of values.

## Practice of Setup steps for Procurement Contracts on R12 Version

- **Default Section:** Optionally select the default section from the list of values. You can use sections as heading to format contracts.
- **Description:** Optionally enter a description for the clause.
- **Status:** The system controls this field. During the creation process, the clause is in Draft status.
- **Version:** The system generates the version number.
- **Start date.** Accept the default or change the start date.
- **End date.** Optionally enter an expiration date for the clause.

### Setting Up Contract Terms Library 6-3

- **Provision.** Provisions are used in negotiation documents in Oracle Sourcing only. If applicable, select the Provision check box.
- **Protect text.** To prevent modification to the clause text in documents, select the protect Text check box.
- **Global.** To make the clause available to all organizations, select the global check box. This field is only available in the Global operating unit.
- **Text.** Enter the necessary text for the clause. Clause texts can include business variables. In the text area you can choose one of the following modes:
  - **Rich Text.** The Rich Text editor provides special formatting of the text that is driven by business and legal requirements. The Rich Text editor provides a Tool bar and a Text area.
  - **Text.** The Text mode provides a plain text area only. If you use the Rich Text mode to enter the clause text and then toggle to the Text mode, the system displays the HTML source for the text you have entered. However, the system prints the clause using the Rich Text features even if you have toggled to the Text mode.
- **Add Variables.** Click Add Variables to search for available variables, The Add Variables page appears. From this page you can search for available variables, then click the Insert icon to add the variable that you want into your text, at the location of the cursor within the text area. In the clause text, variables are displayed as tags in the format [variable name@].  
**Note:** If you do not use the Rich Text editor to author clause text, the system inserts the variables at the end of the text instead of where the cursor is located. You can use the Cut and Paste operation to move a variable tag, within the clause text to the appropriate location.
- **Instructions.** Optionally enter instructions on how and when to use the clause in a contract template or business document. Users can view these instructions when they add the clause to a contract template or business document.
- **Allow Include by Reference.** Select the check box to replace the clause text with the Reference text when the clause is used in a contract. Optionally enter the following information:
  - **Reference Source.** Provide the source of the clause that may not Be printed

## Practice of Setup steps for Procurement Contracts on R12 Version

in full text.

The screenshot shows the Oracle Contract Terms Library interface in a Mozilla Firefox browser window. The browser address bar shows the URL: [http://ns1200.solutionbeacon.net/OA\\_HTML/OA.jsp?OAFunction=OWC\\_AF](http://ns1200.solutionbeacon.net/OA_HTML/OA.jsp?OAFunction=OWC_AF). The page title is "ORACLE Contract Terms Library". The navigation menu includes "Contract Templates", "Clauses", "Variables", "Folders", "Sections", and "Numbering Schemes". The "Clauses" tab is active, and the "Create Clause" form is displayed.

**Create Clause**  
\* Indicates required field

**Operating Unit:** Vision Operations  
**Number:** 1  
**Clause Title:** A\_Rushi\_Patil\_New\_Clause  
**Display Name:** Rushi Patil Business Clause  
**Intent:** Buy  
**Type:** General Terms  
**Default Section:** Commitments  
**Description:** General Terms for Commitment

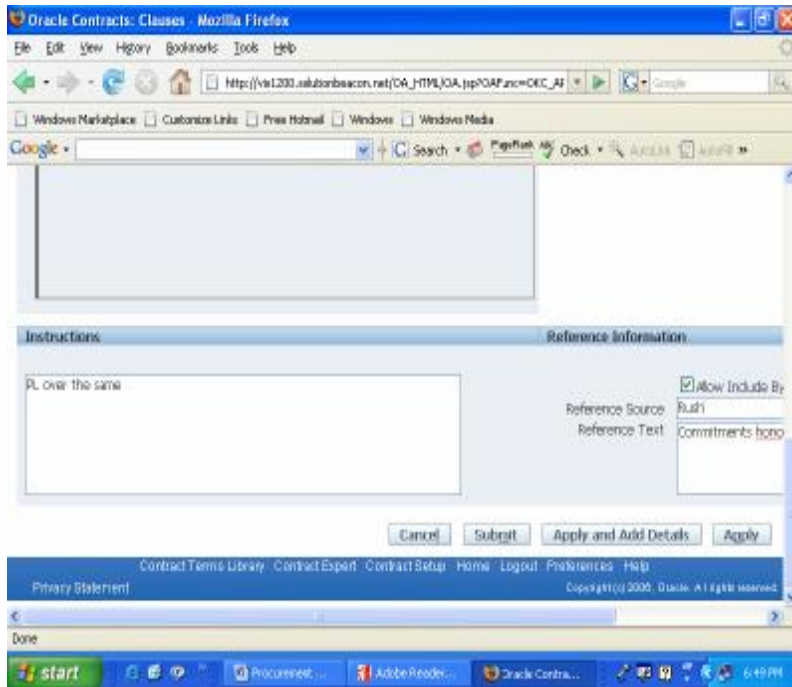
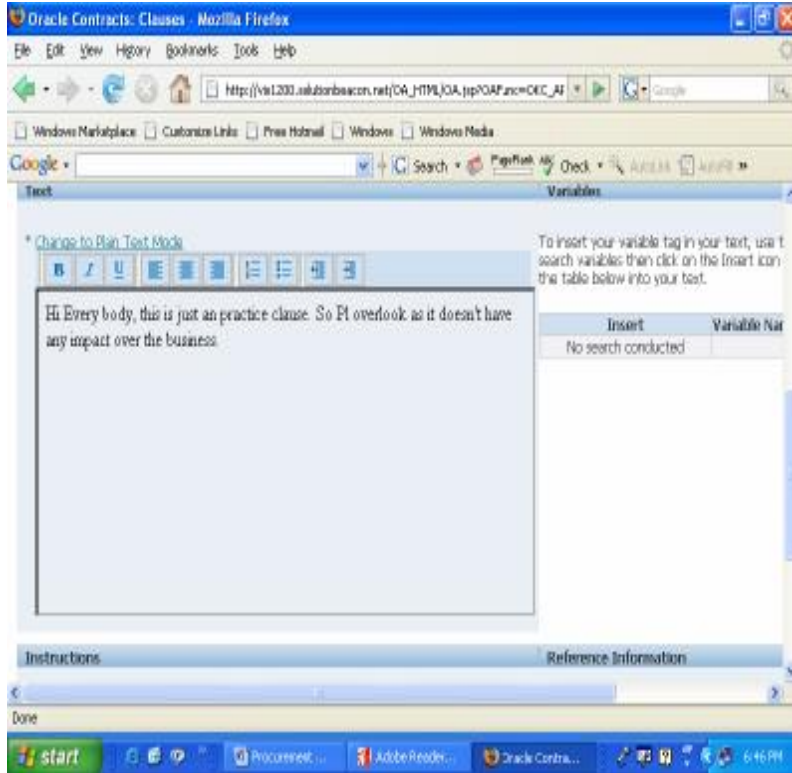
**Buttons:** Cancel, Submit, Apply and Add Details, Apply

**Metadata:**  
**Status:** DRAFT  
**Version:** 1  
**Start Date:** 22-Mar-2007 (Example: 22-Mar-2007)  
**End Date:** (Example: 22-Mar-2007)  
**Adoption Type:** Local

**Options:**  
 Provision  
 Protect Text (Check to protect the clause)

The Windows taskbar at the bottom shows the Start button and several open applications: Procurement..., Adobe Reader..., and Oracle Contra... The system clock shows 6:46 PM.

## Practice of Setup steps for Procurement Contracts on R12 Version

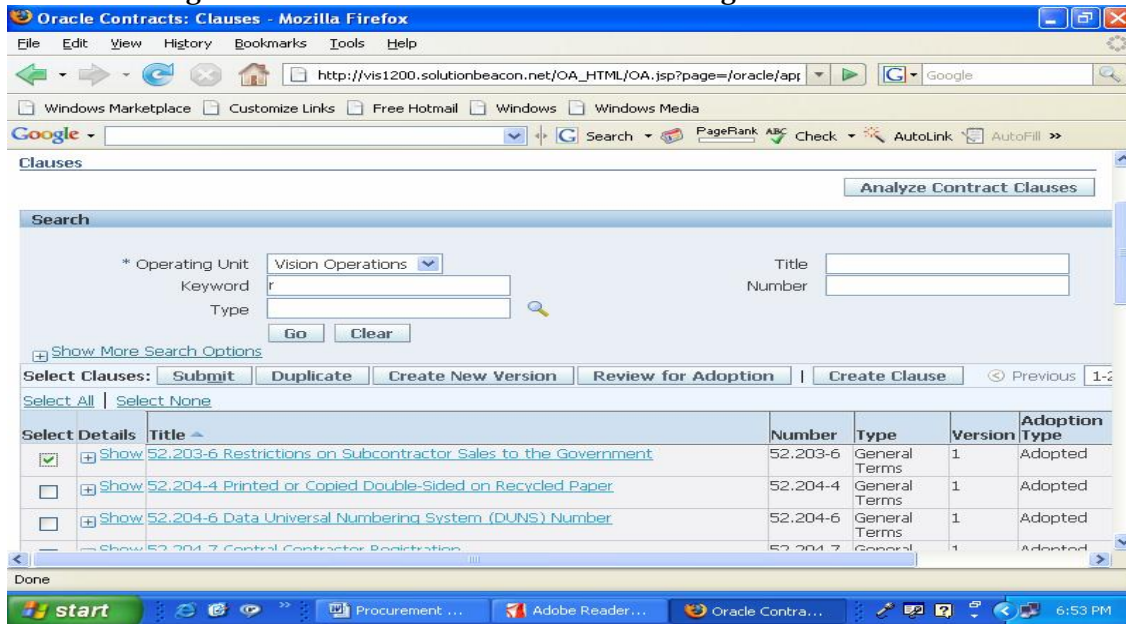




**Duplicating an Existing Clause:**

You can use the Duplicate feature to create new clauses form existing ones. The Duplicate feature is available from the Search and View Clauses pages.

1. Navigate to the Search Clauses page.
2. Search and select a clause. For more information , see the searching for Clauses section.
3. Click the Duplicate button.
4. In the New Clause Title field, enter a unique title.
5. Optionally choose to copy folders and related clauses.
6. Click the Save and Continue button.
7. Enter of change the information as describes in the Defining Clauses section.



## Practice of Setup steps for Procurement Contracts on R12 Version

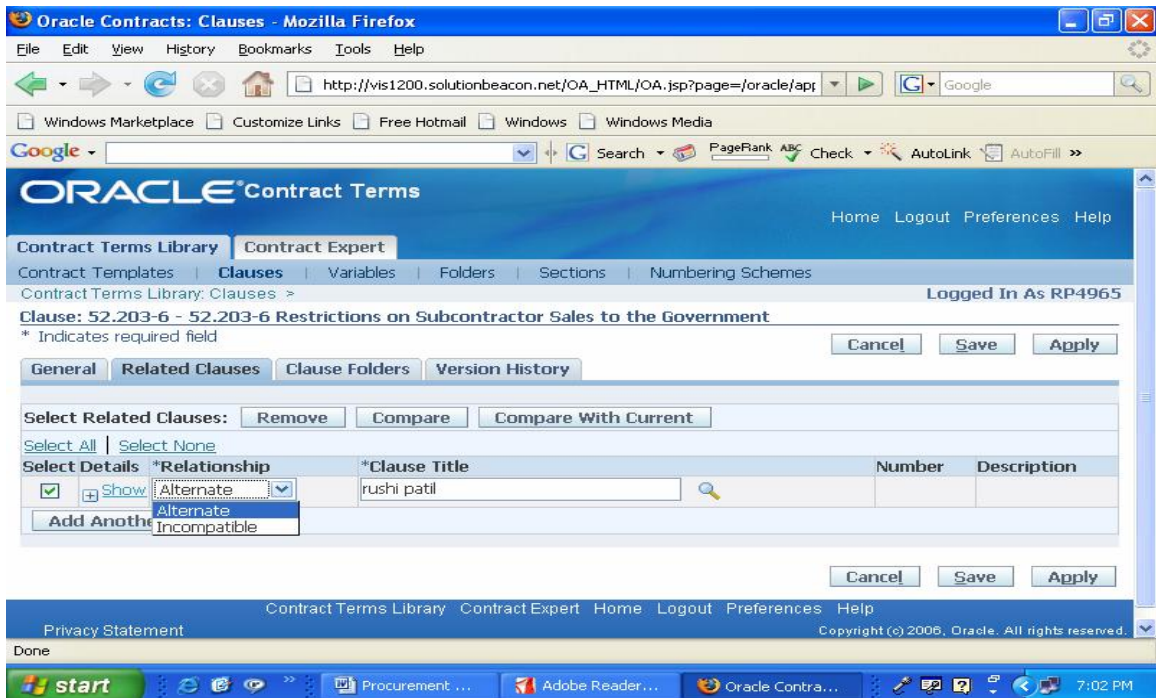
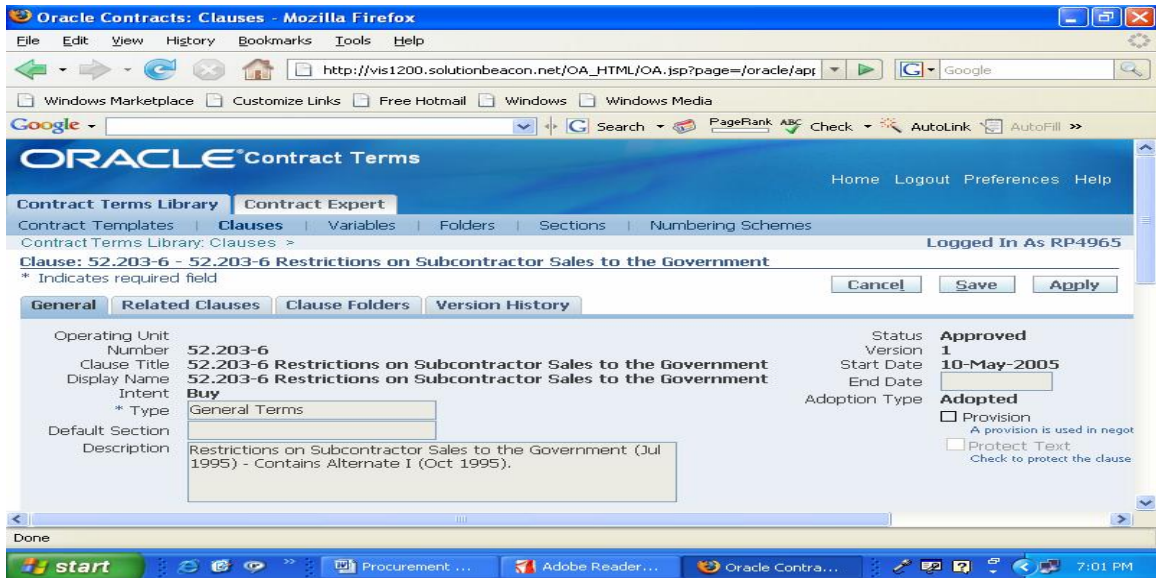


### Defining Related Clauses

For any given clause, you can define alternate and incompatible clauses. You can use alternate clauses as a substitute for the main clause on a contract. Incompatible clauses cannot be used on the same contract.

1. Navigate to the Create Clauses or Update Clauses page.
2. Open the Related Clauses subtab.
3. Click Add Another Row.
4. In the Relationship field, select one of the following options:
  - Alternate
  - Incompatible
5. In the Clause Title field, enter the clause title. You can also use the List of Values icon to search and select the clause.
6. Click Save.
7. Click Compare to compare related clauses. Select the two clauses that you want to compare and then click the button.
8. Click Compare with Current to compare the related clause with the current clause. Select only one clause from the list and click the button
9. Click Remove to delete a clause relationship.

## Practice of Setup steps for Procurement Contracts on R12 Version



Save and Apply.

## Assigning Clauses to Folders

You can assign clauses to folders from the Update Clause page. Note that you must have previously defined the folder

1. navigate to the Clauses page.

Navigation: contract Terms Library > Clauses tab.

2. Open a clause for update.

3. Open the Clause Folders subtab.

## Practice of Setup steps for Procurement Contracts on R12 Version

4. Click Add Another Row

5. In the Name field, enter the folder name. You can also click the List of Values icon to search and select the folder name.

6. Click Save or Apply.



## Approving Clauses

To make standard clauses available for use in contracts, they must be approved first.

You can

- Approve once clause at a time.
- Select and submit more than one clause for approval at the same time.
- Respond to approval.
- Comment on either approval or rejection decision.

You must have set up an approver first.

**Note:** The default workflow supports a single approver. However, you can modify the workflow processes to include more approvers and route approvals based in additional business conditions.

1. Navigate to the Clauses page.

Navigation: Contract Terms Library > Clauses tab.

2. Create a new clause or search and open a clause in Draft status.

3. Click Submit to

- Change the clause status from Draft to Pending Approval.
  - Send a workflow notification to the approver.
4. The approver opens the notification and reviews the clause.
5. The approver either approves or rejects the clause. As a result
- The clause status is changed to Approved or Rejected.
  - A workflow notification informs the author of the clause of the decision.

### Creating Global Clauses:

- Ø Adopt Global Clause as-is.
- Ø Localize Global Clauses.

1. Create a standard clause.
2. Select the Global check box. This check box is only available in the designated global organization. When a global clause is approved, it remains global on subsequent versions. However, if an earlier version of a clause is not global, make the subsequent versions global.

**Note:** When a global clause is approved, it remains global on all subsequent versions. However, if an earlier version of a clause is not global, you can make the subsequent versions global.

### Adoption of clauses. ( Explore more )

Whenever the clause is adopted an email notification is send to the local administrator and the global administrator for information and approval process of the clause. If the global clause is adopted for local org , notification is send to the local administrator stating the date and type of adoption of clauses.

Global organizations can monitor when and how global clauses are adopted across local organizations. The Adoption Status report provides an overview of the adoption status across multiple local organization for a given global clause. This report is only available in the global organization and allows the global organization to analyze cases where the global clauses are not adopted in a timely manner.

### Viewing Adoption status:

Global organizations can monitor when and how global clauses are adopted across local organizations. The Adoption Status report provides an overview of the adoption status across multiple local organization for a given global clause. This report is only available in the global organization and allows the global organization to analyze cases where the global clauses are not adopted in a timely manner.

1. Navigate to the Clauses page.

Navigation: Contract Terms Library > Clauses tab

2. In the global organization, search for global clauses. For more information, see the Searching for Clauses, page 6-12.
3. Click the clause title to view the clause detail.
4. select the View Adoption Status option from the list.
5. Click Go

the View Adoption Status report provides the following information:

- Organization Name
- Clause Title
- Version
- Adoption Type (indicates if the global clause was adopted as-is or localized)
- Translation Only (indicates if the global clause was only translated to the local language).
- Adoption Status (indicates if the clause was approved in the local organization or not).

## Practice of Setup steps for Procurement Contracts on R12 Version

- Adoption Date (the date the clause was adopted).

### Adopting Global Clauses in a New Organization:

To copy the all the global clauses in a new org you just need to run the concurrent program “Adopt Global Clauses for a New Organization concurrent program”.

### Comparing Clauses:

You can compare any two versions of a clause. the system provides a redline comparison of the changed made to the clause text.

You can choose any two versions of a clause, and then click the Compare button available in the Version History subtab of Updating Clause page.

### By:- Analysis Contract Clause:

Contract Clause Analysis - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://vis1200.solutionbeacon.net/OA\_HTML/OA.jsp?page=/oracle/apr

Windows Marketplace Customize Links Free Hotmail Windows Windows Media

Google Search PageRank Check AutoLink AutoFill

Oracle Applications Home ... Oracle Applications R12 Contract Clause Analysis Advanced Search

Contract Templates Clauses Variables Folders Sections Numbering Schemes

Contract Terms Library: Clauses >

Contract Clause Analysis

Logged In As RP4965

Search by Specific Clauses

Intent Buy

Clause Usage Standard and Non-Standard

Include Non-Standard From Scratch

Clause Keyword

Summarize By

Document Type All Buy Types

Operating Unit

Clause Type

Clause Title

Clause Number

Contract Criteria

Contract Template

Supplier

Go Clear

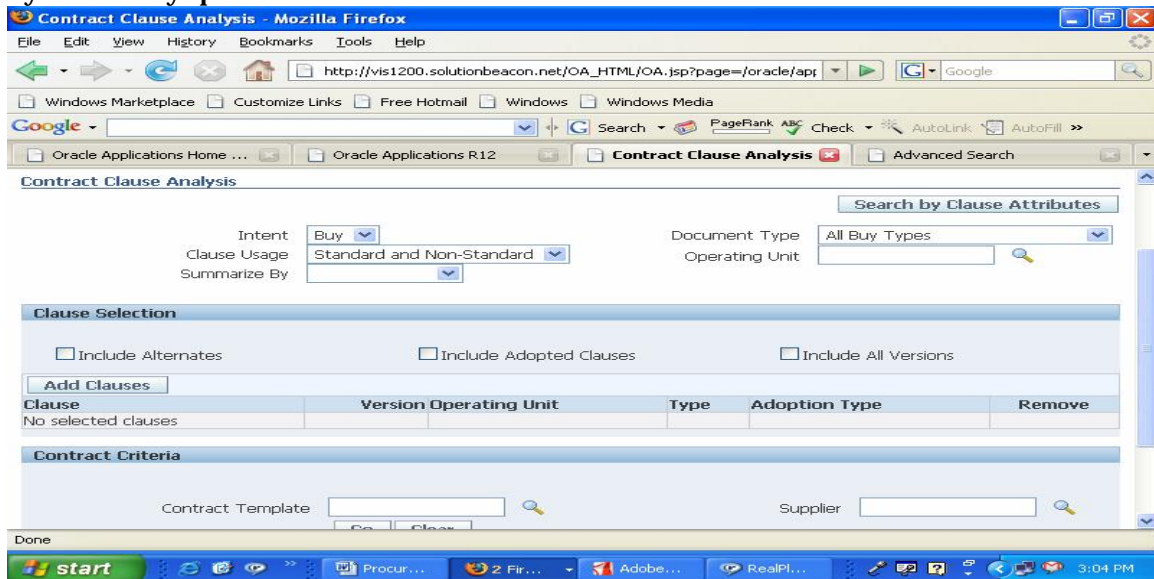
Return to Oracle Contracts: Clauses

Search by Specific Clauses

Done

start Procurement Firefox Adobe RealPlayer 3:03 PM

**By:- Search by specific Clause.**



## Importing Clauses

You use the Clause import feature to import clauses into the Contract Terms Library. In addition to clauses, you can import the following related entities:

- Variables
- Value sets that are used in variables
- Value set values
- Clause relationships that establish a clause to be an alternate or incompatible with one or more clauses

Clause import can also be used on an ongoing basis to update these entities in the library.

You can import clauses and the related entities using the following methods:

- Open Interface, page 6-25: For this method, use SQL\*Loader, PL/SQL Scripts, or JDBC to load the entities directly into the corresponding interface tables. This process is outside the scope of the Clause import program. The clause import validates the data and imports the content into the library.
- XML Data File, page 6-27: Using this method, you import data directly from a source XML file that conforms to the XML schema that is published for import. The clause import validates the XML data and imports the content into the library.

# Practice of Setup steps for Procurement Contracts on R12 Version

## Variables:-

Oracle Contracts: Variables - Mozilla Firefox

Contract Terms Library | Contract Expert | Contract Setup

Contract Templates | Clauses | Variables | Folders | Sections | Numbering Schemes

Logged In As RP4965

Variables

Search

Name: a Type: All Intent: All

Go Clear

Select Variable: Delete Display Clauses Create Variable

Select	Variable Name	Description	Type	Intent	Enabled	Update
<input type="radio"/>	Acceptance Method	Acceptance method	System Defined	Buy	✓	✎
<input type="radio"/>	Acceptance Required By Date	Date acceptance is required by	System Defined	Buy	✓	✎
<input type="radio"/>	Activation Date	Activation Date	System Defined	Sell	✓	✎
<input type="radio"/>	Agreement Amount (Functional)	Total agreement amount for blanket or contract	System Defined	Buy	✓	✎

Oracle Contracts: Variables - Mozilla Firefox

Contract Terms Library | Contract Expert | Contract Setup

Contract Templates | Clauses | Variables | Folders | Sections | Numbering Schemes

Logged In As RP4965

Variables

Search

Name: a Type: All Intent: All

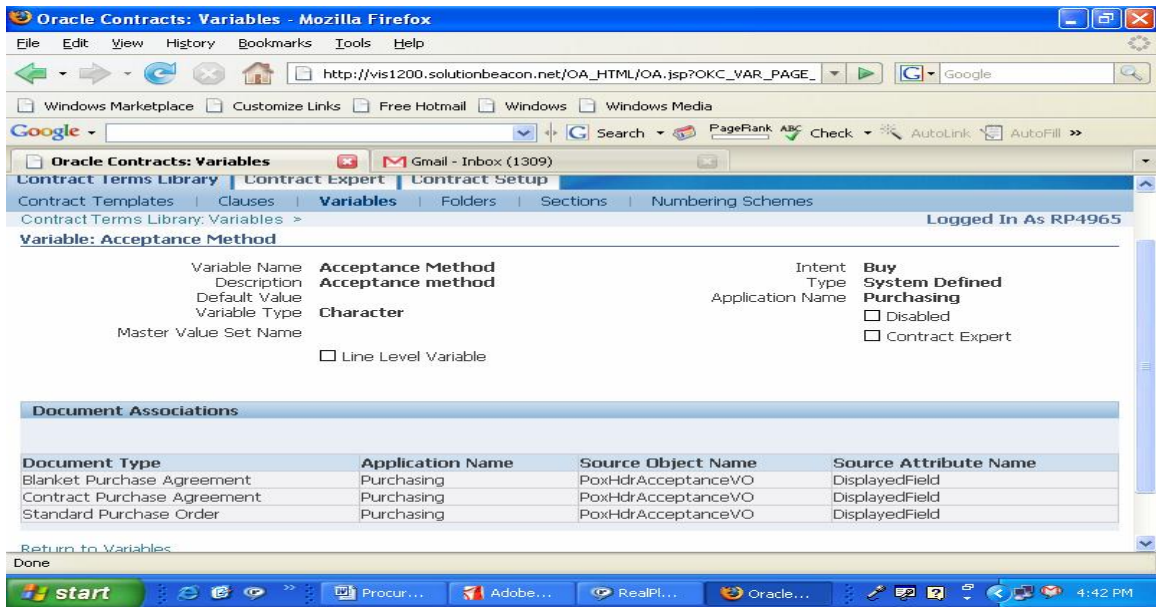
Go Clear

Select Variable: Delete Display Clauses Create Variable

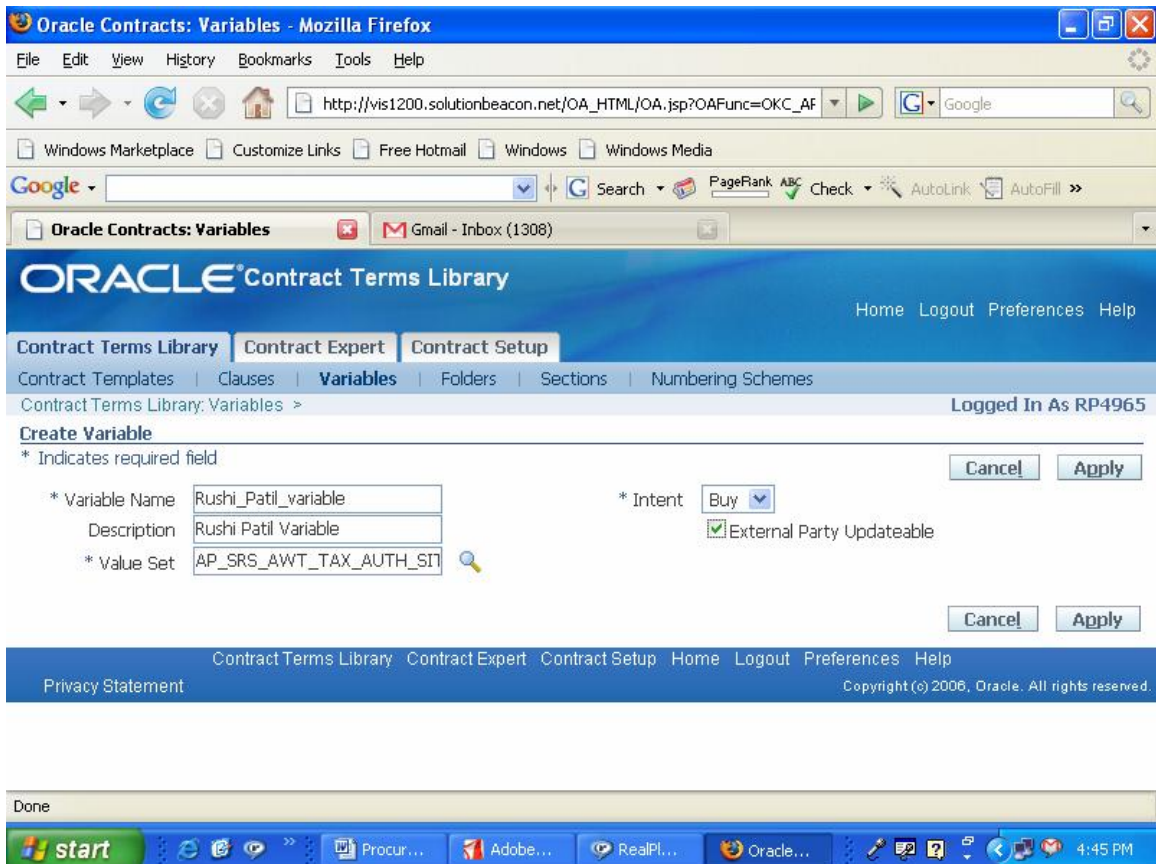
Select	Variable Name	Description	Type	Intent	Enabled	Update
<input type="radio"/>	Acceptance Method	Acceptance method	System Defined	Buy	✓	✎
<input type="radio"/>	Acceptance Required By Date	Date acceptance is required by	System Defined	Buy	✓	✎
<input type="radio"/>	Activation Date	Activation Date	System Defined	Sell	✓	✎
<input type="radio"/>	Agreement Amount (Functional)	Total agreement amount for blanket or contract	System Defined	Buy	✓	✎



## Practice of Setup steps for Procurement Contracts on R12 Version



**Create Variable : ( Rushi Just check where this Value set is created from )**



**When u click on update, again one more check box appears which is meant for “DISABLE” just below the check box of “External Party Updateable.**

## Practice of Setup steps for Procurement Contracts on R12 Version

### Folders :-

The screenshot shows the Oracle Contracts Folders page in a Mozilla Firefox browser. The browser's address bar displays the URL: [http://vis1200.solutionbeacon.net/OA\\_HTML/OA.jsp?page=/oracle/apr](http://vis1200.solutionbeacon.net/OA_HTML/OA.jsp?page=/oracle/apr). The page title is "Oracle Contracts: Folders". The navigation menu includes "Contract Terms Library", "Contract Expert", and "Contract Setup". Under "Contract Setup", there are links for "Contract Templates", "Clauses", "Variables", "Folders", "Sections", and "Numbering Schemes". The user is logged in as "RP4965".

The "Folders" section contains a search form with the following fields:

- \* Operating Unit: Vision Operations (dropdown)
- Description: (text input)
- Name: (text input, partially filled with "a")

Buttons for "Go" and "Clear" are present. Below the search form is a "Create Folder" button. A table lists existing folders:

Name	Description	Update	Delete
<a href="#">A&amp;D Contract Clauses</a>	A&D Contract Clauses		
<a href="#">Administration</a>	Administration		
<a href="#">Assignment Terms</a>	Assignment Terms		

### Create Folder:-

The screenshot shows the "Create Folder" form in the Oracle Contracts Folders page. The browser's address bar displays the URL: [http://vis1200.solutionbeacon.net/OA\\_HTML/OA.jsp?page=/oracle/apr](http://vis1200.solutionbeacon.net/OA_HTML/OA.jsp?page=/oracle/apr). The page title is "Oracle Contracts: Folders". The navigation menu includes "Contract Terms Library", "Contract Expert", and "Contract Setup". Under "Contract Setup", there are links for "Contract Templates", "Clauses", "Variables", "Folders", "Sections", and "Numbering Schemes". The user is logged in as "RP4965".

The "Create Folder" form contains the following fields:

- \* Operating Unit: Vision Operations (dropdown)
- \* Name: A\_Rushi\_patil\_folder (text input)
- Description: This is just meant for Practice Purpose. (text area)

Buttons for "Cancel", "Save", and "Apply" are present. At the bottom of the page, there is a footer with "Contract Terms Library", "Contract Expert", "Contract Setup", "Home", "Logout", "Preferences", "Help", "Privacy Statement", and "Copyright (c) 2008, Oracle. All rights reserved."

## Practice of Setup steps for Procurement Contracts on R12 Version

After creating folder, you save the same,. Again another window for “ ADD CLAUSE” appears.

The screenshot shows the Oracle Contracts: Folders page in Mozilla Firefox. The browser address bar displays [http://vis1200.solutionbeacon.net/OA\\_HTML/OA.jsp?page=/oracle/apr](http://vis1200.solutionbeacon.net/OA_HTML/OA.jsp?page=/oracle/apr). The page content includes a 'Clauses' section with a table of clause details.

Select Details	Clause Title	Number	Type
<input type="checkbox"/>	<a href="#">Show</a> PROC - Invoices	1005	Payment Provision
<input type="checkbox"/>	<a href="#">Show</a> PROC - Payment Terms	1003	Payment Provision

Buttons for 'Remove', 'Add Clauses', 'Cancel', 'Save', and 'Apply' are visible. The footer includes 'Privacy Statement', 'Contract Terms Library', 'Contract Expert', 'Contract Setup', 'Home', 'Logout', 'Preferences', 'Help', and 'Copyright (c) 2006, Oracle. All rights reserved.'

### SECTIONS:

The screenshot shows the Oracle Contracts: Sections page in Mozilla Firefox. The browser address bar displays [http://vis1200.solutionbeacon.net/OA\\_HTML/OA.jsp?page=/oracle/apr](http://vis1200.solutionbeacon.net/OA_HTML/OA.jsp?page=/oracle/apr). The page content includes a search form and a table of section details.

**Search**

Name:   
Code:   
Go Clear

Create Section

Section Name	Code	Effective From	Effective To	Update
<a href="#">Access</a>	SEC0002	22-Jul-2004		

The footer includes 'Contract Terms Library', 'Contract Expert', 'Contract Setup', 'Home', 'Logout', 'Preferences', 'Help', and 'Logged In As RP4965'.

Create Section:

## Practice of Setup steps for Procurement Contracts on R12 Version

Oracle Contracts: Sections - Mozilla Firefox

http://vis1200.solutionbeacon.net/OA\_HTML/OA.jsp?page=/oracle/apr

Oracle Contracts: Sections

ORACLE Contract Terms Library

Contract Terms Library | Contract Expert | Contract Setup

Contract Templates | Clauses | Variables | Folders | Sections | Numbering Schemes

Contract Terms Library: Sections >

Logged In As RP4965

**Create Section**

\* Indicates required field

\* Code: A\_Rushi\_Patil\_Section

\* Name: A\_Rushi\_Patil\_Section

Description: This is purely for practice.

\* Effective From: 23-Mar-2007

Effective To:

Cancel Save Apply

### RULES:

Contract Expert > Rules > Create Rules

Note, to rules you have to attach the "Questions".

Rule type: Policy Deviation  
Clause Selection

Oracle Contracts: Rules - Mozilla Firefox

http://vis1200.solutionbeacon.net/OA\_HTML/OA.jsp?page=/oracle/apr

Oracle Contracts: Rules

ORACLE Contract Terms Library

Contract Terms Library | Contract Expert | Contract Setup

Rules | Questions | Constants

Contract Expert: Rules >

Logged In As RP4965

**Create Rule**

\* Indicates required field

\* Operating Unit: Vision Operations

\* Rule Type: Clause Selection

\* Name: A\_Rushi\_Patil\_Rule

Description: This is just for an Practice Purpose.

Status: Draft

\* Intent: Buy

Cancel Save Apply Apply and Add Another

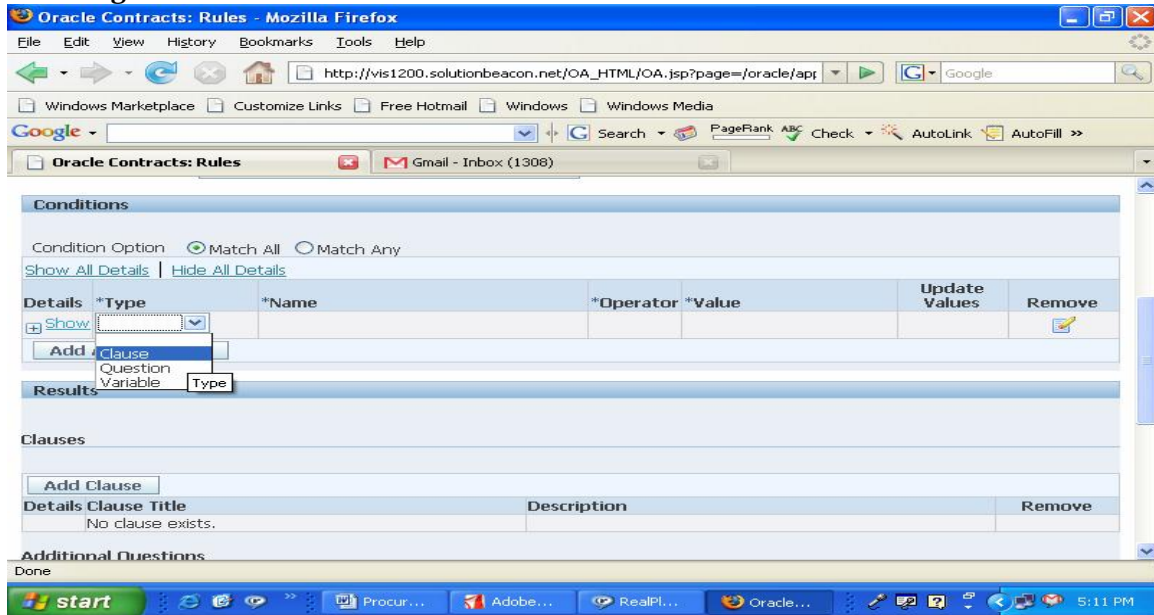
**Conditions**

Condition Option:  Match All  Match Any

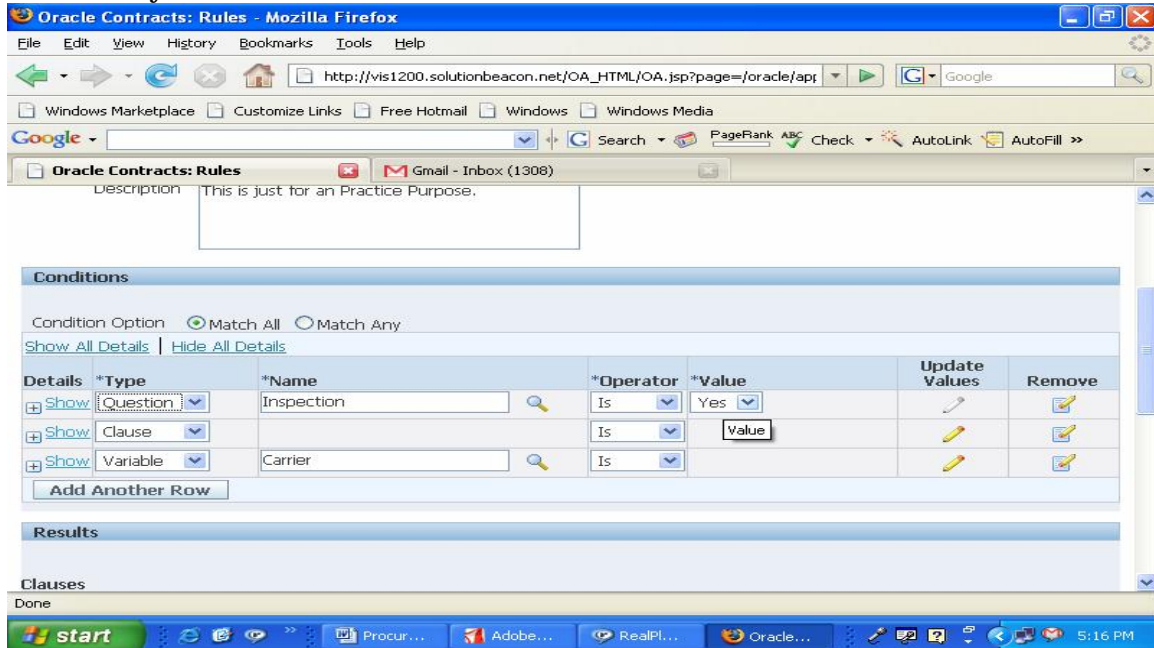
Update

# Practice of Setup steps for Procurement Contracts on R12 Version

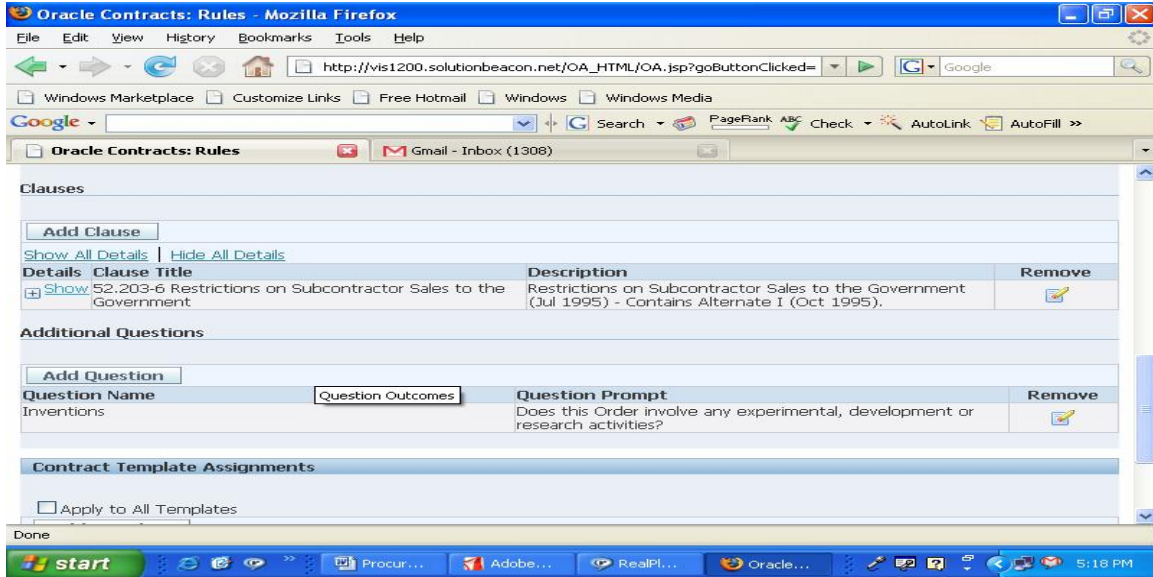
Go to Page Down:-



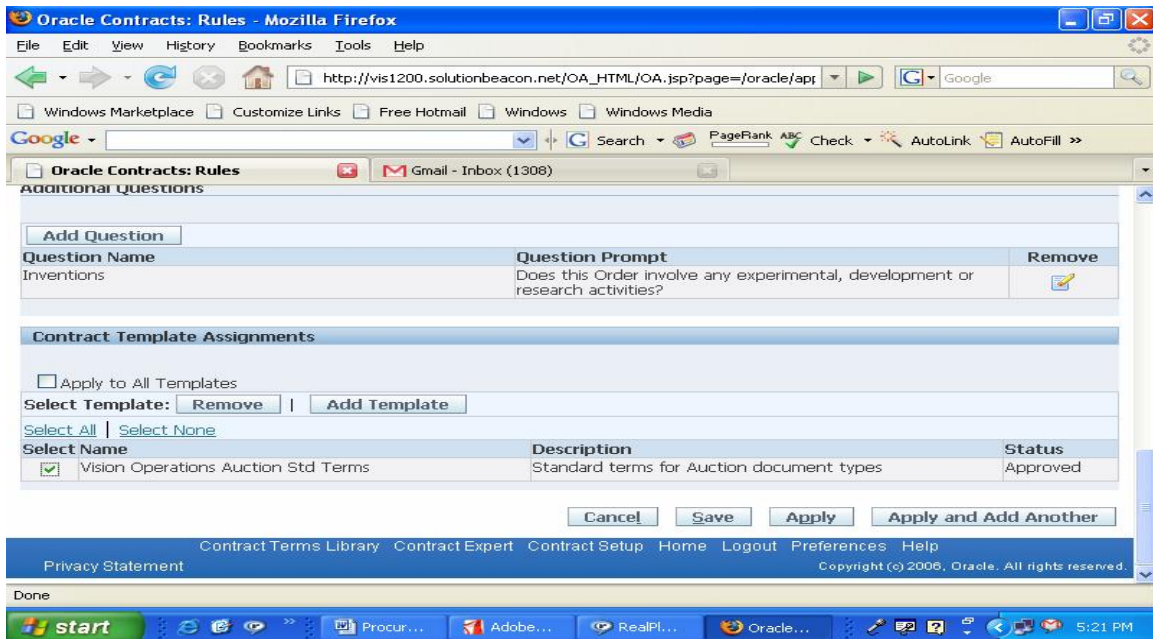
In Condition pl select the Type :- “ CLAUSE, QUESTION, VARIABLES “ .  
See carefully the Condition Selections as shown below:-



## Practice of Setup steps for Procurement Contracts on R12 Version



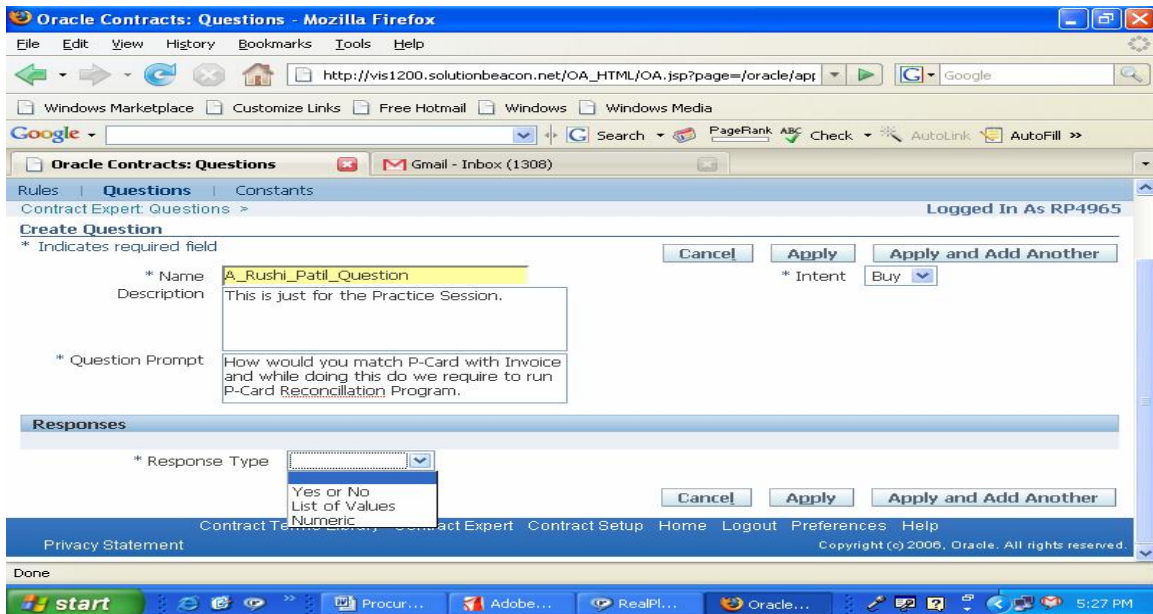
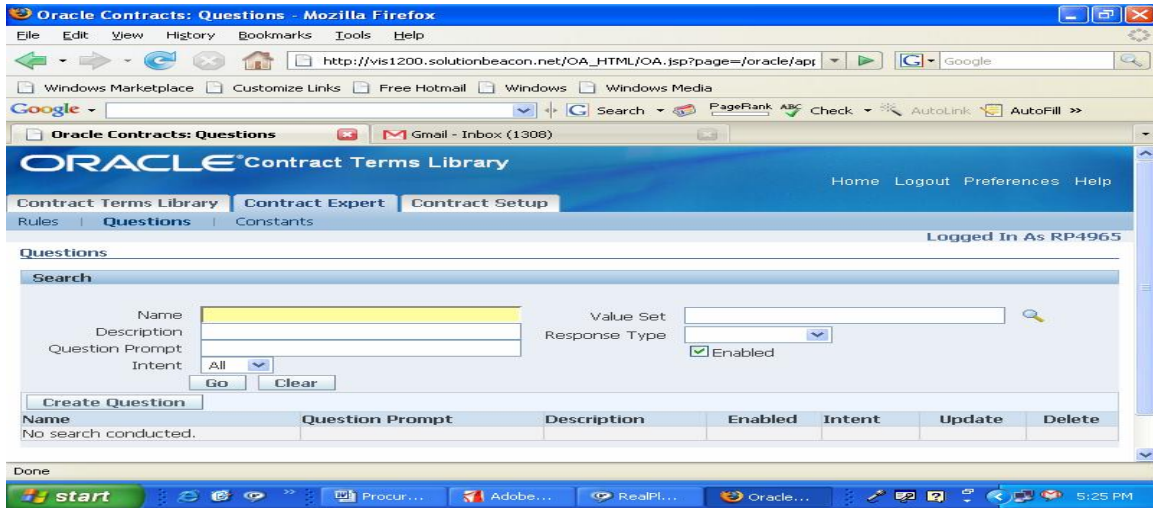
See above the “Questions and Clauses” are once again repeating though they are in Condition Column.



Don't "TICK" the check box of "Apply to all templates", if business demands then only do it.

# Practice of Setup steps for Procurement Contracts on R12 Version

## QUESTIONS:



## Practice of Setup steps for Procurement Contracts on R12 Version

### CONSTANTS:

#### Create Constants:

The screenshot shows the Oracle Contract Terms Library interface in a Mozilla Firefox browser. The browser address bar shows the URL: [http://vis1200.solutionbeacon.net/OA\\_HTML/OA.jsp?page=/oracle/apr](http://vis1200.solutionbeacon.net/OA_HTML/OA.jsp?page=/oracle/apr). The page title is "Oracle Contracts: Constants". The Oracle logo and "Contract Terms Library" are visible at the top. The user is logged in as "RP4965".

The main content area is titled "Create Constant" and includes the following fields and controls:

- Name:** A\_RUSHI\_PATIL\_CONSTANT
- Description:** Practice
- Intent:** Buy
- Value:** 1

Buttons for "Cancel", "Apply", and "Apply and Add Another" are present at the top and bottom of the form. A note indicates that an asterisk (\*) denotes a required field.

The bottom of the browser window shows the Windows taskbar with the Start button and several application icons, including Procurement, Adobe, RealPlayer, and Oracle. The system clock shows 5:31 PM.



## CONTRACT SETUP

**Schedule Request: Name**

Contract Terms Library | Contract Expert | **Contract Setup**

Schedule | Monitor

Name | Parameters | Schedule | Layout | Notifications | Printing | More

**Schedule Request: Name**

\* Indicates required field

\* Program Name

Request Name

The name can later be used to search for this request

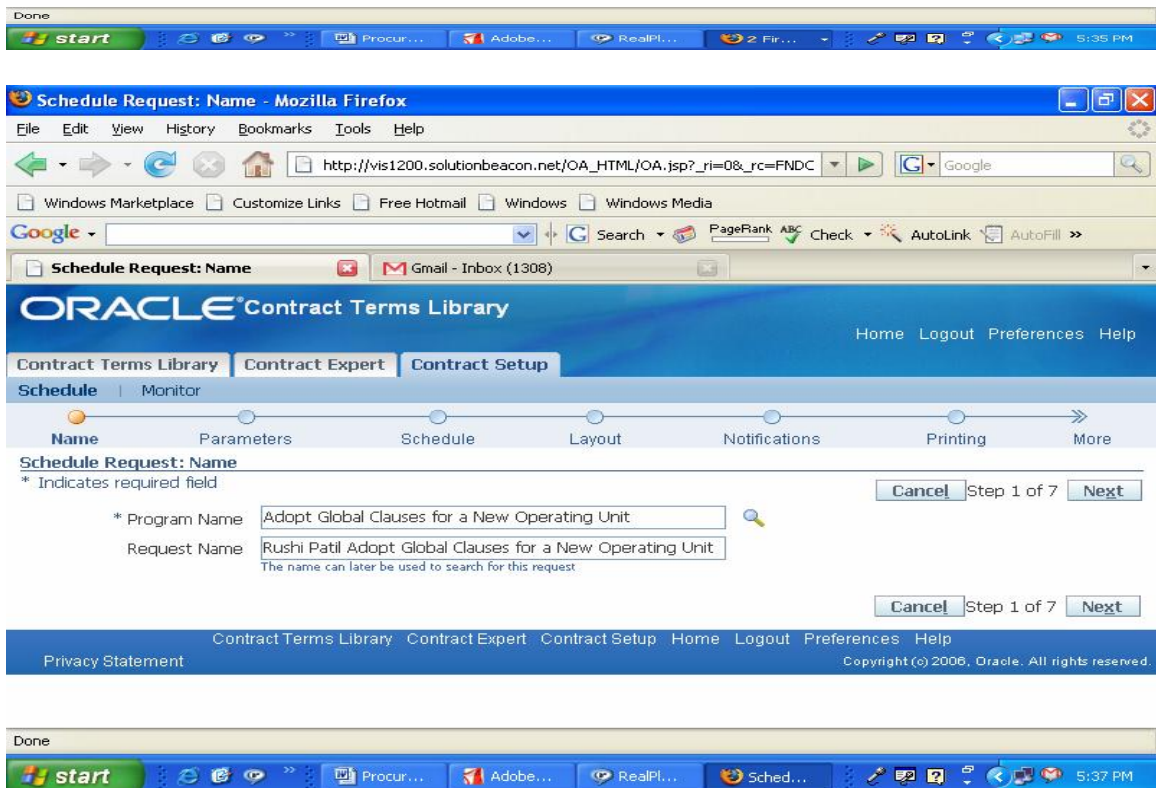
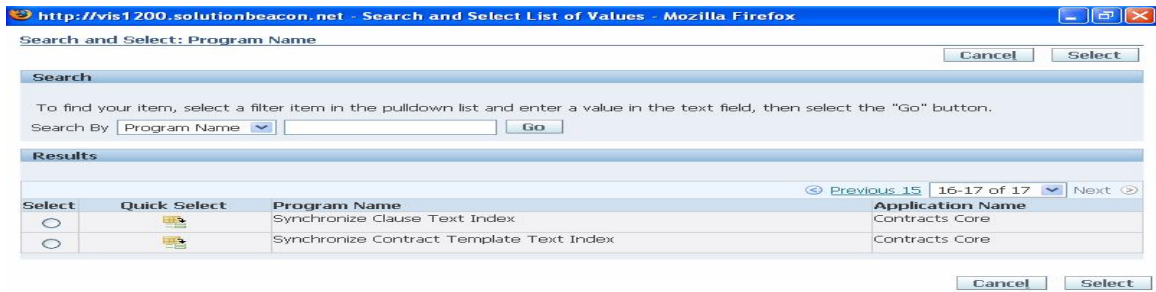
Cancel Step 1 of 7 Next

**Before filling up the details we need to provide the “Program Name”, for what purpose should we do this. This program names are nothing but the Request which we fire.**

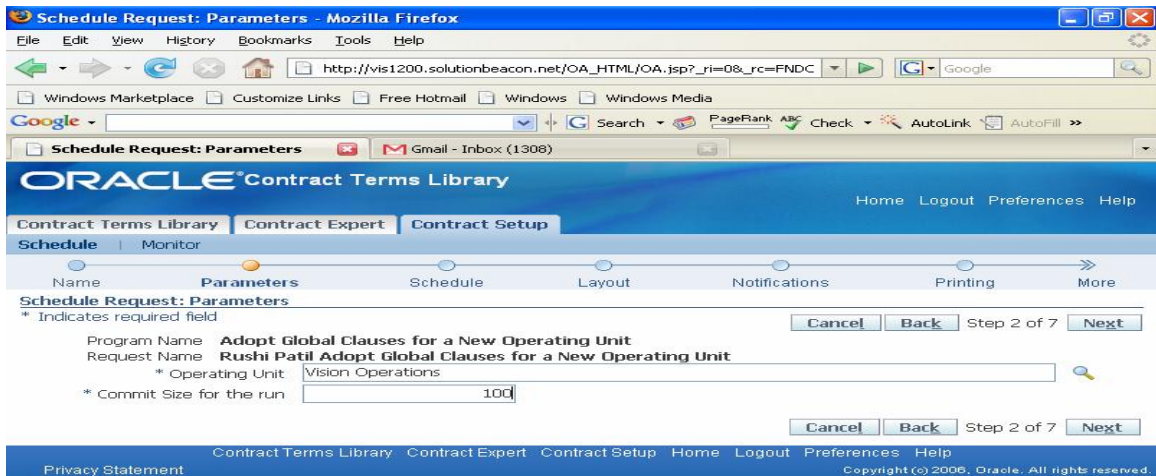
http://vis1200.solutionbeacon.net - Search and Select List of Values - Mozilla Firefox

Select	Quick Select	Program Name	Application Name
<input type="radio"/>		Adopt Global Clauses for a New Operating Unit	Contracts Core
<input type="radio"/>		Contract Expert: Activate Rules	Contracts Core
<input type="radio"/>		Contract Expert: Disable Rules	Contracts Core
<input type="radio"/>		Contract Expert: Synchronize Templates	Contracts Core
<input type="radio"/>		Create Clause Text Index	Contracts Core
<input type="radio"/>		Deliverable Due Date Notifier	Contracts Core
<input type="radio"/>		Deliverable Escalation Notifier	Contracts Core
<input type="radio"/>		Import Clauses	Contracts Core
<input type="radio"/>		Import Clauses from XML File	Contracts Core
<input type="radio"/>		Migrate Standard Clauses to 11.5.10	Contracts Core
<input type="radio"/>		Optimize Clause Text Index	Contracts Core
<input type="radio"/>		Optimize Contract Template Text Index	Contracts Core
<input type="radio"/>		Oracle Contracts Purge Routines	Contracts Core
<input type="radio"/>		Overdue Deliverable Notifier	Contracts Core
<input type="radio"/>		Purge Clause Import Interface Table	Contracts Core

## Practice of Setup steps for Procurement Contracts on R12 Version



## Practice of Setup steps for Procurement Contracts on R12 Version



**Schedule Request: Parameters** - Mozilla Firefox

http://vis1200.solutionbeacon.net/OA\_HTML/OA.jsp?\_ri=0&\_rc=FNDC

Contract Terms Library | Contract Expert | Contract Setup

Schedule | Monitor

Name Parameters Schedule Layout Notifications Printing More

**Schedule Request: Parameters**

\* Indicates required field

Program Name **Adopt Global Clauses for a New Operating Unit**

Request Name **Rushi Patil Adopt Global Clauses for a New Operating Unit**

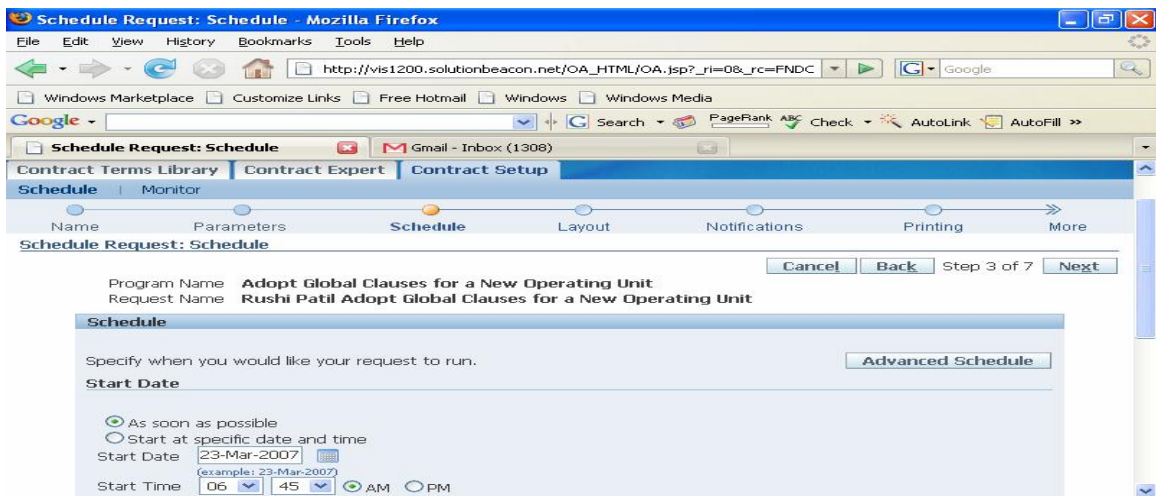
\* Operating Unit

\* Commit Size for the run

Cancel Back Step 2 of 7 Next

Contract Terms Library | Contract Expert | Contract Setup | Home | Logout | Preferences | Help

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**Schedule Request: Schedule** - Mozilla Firefox

http://vis1200.solutionbeacon.net/OA\_HTML/OA.jsp?\_ri=0&\_rc=FNDC

Contract Terms Library | Contract Expert | Contract Setup

Schedule | Monitor

Name Parameters **Schedule** Layout Notifications Printing More

**Schedule Request: Schedule**

Program Name **Adopt Global Clauses for a New Operating Unit**

Request Name **Rushi Patil Adopt Global Clauses for a New Operating Unit**

Specify when you would like your request to run. **Advanced Schedule**

**Start Date**

As soon as possible

Start at specific date and time

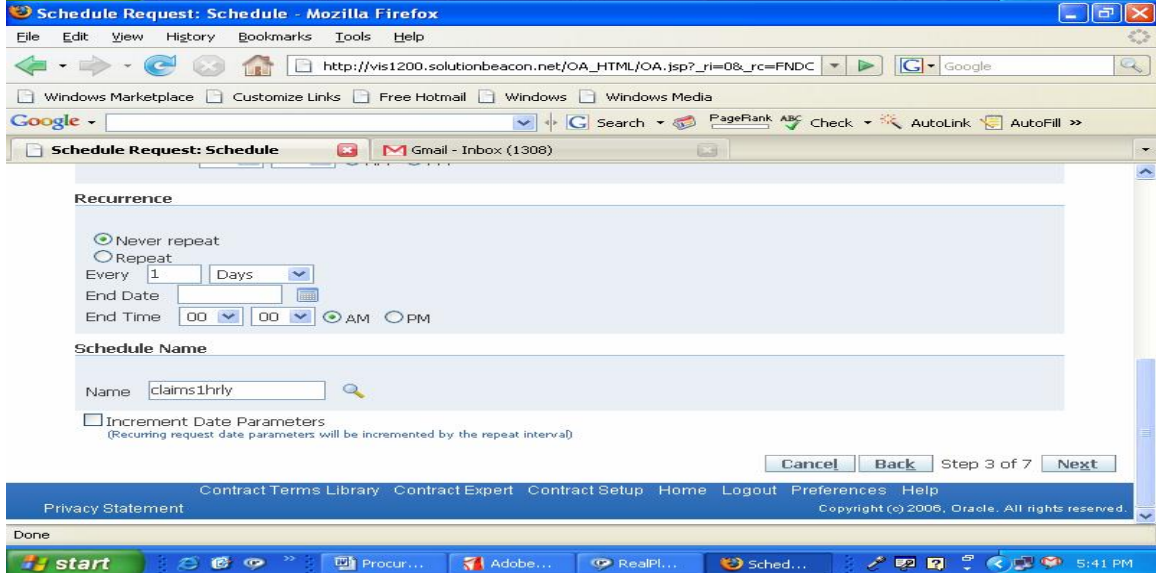
Start Date  (example: 23-Mar-2007)

Start Time  :   AM  PM

Cancel Back Step 3 of 7 Next

Contract Terms Library | Contract Expert | Contract Setup | Home | Logout | Preferences | Help

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**Schedule Request: Schedule** - Mozilla Firefox

http://vis1200.solutionbeacon.net/OA\_HTML/OA.jsp?\_ri=0&\_rc=FNDC

Contract Terms Library | Contract Expert | Contract Setup

Schedule | Monitor

**Recurrence**

Never repeat

Repeat

Every  Days

End Date

End Time  :   AM  PM

**Schedule Name**

Name

Increment Date Parameters  
(Recurring request date parameters will be incremented by the repeat interval)

Cancel Back Step 3 of 7 Next

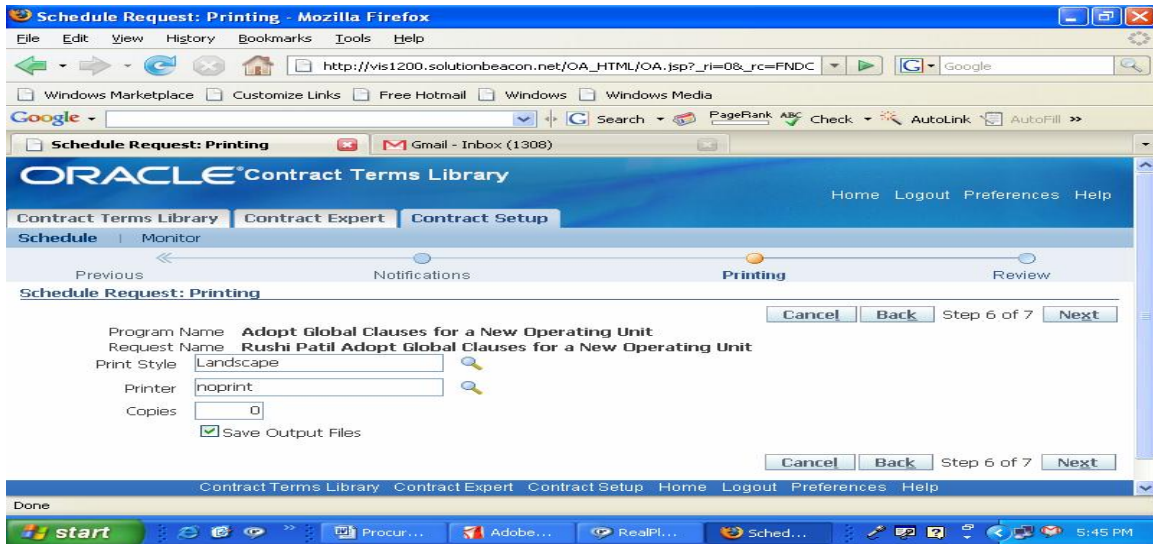
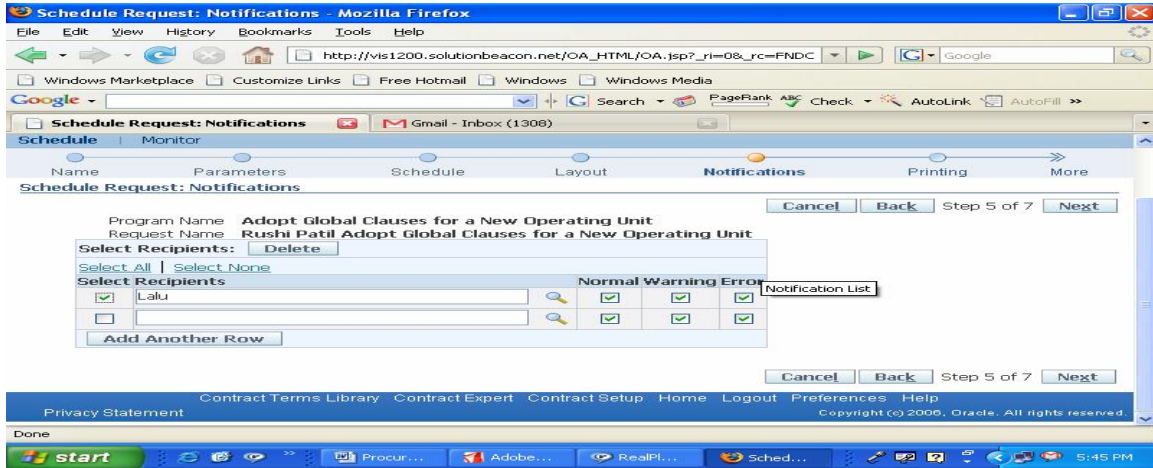
Contract Terms Library | Contract Expert | Contract Setup | Home | Logout | Preferences | Help

Privacy Statement Copyright (c) 2006, Oracle. All rights reserved.

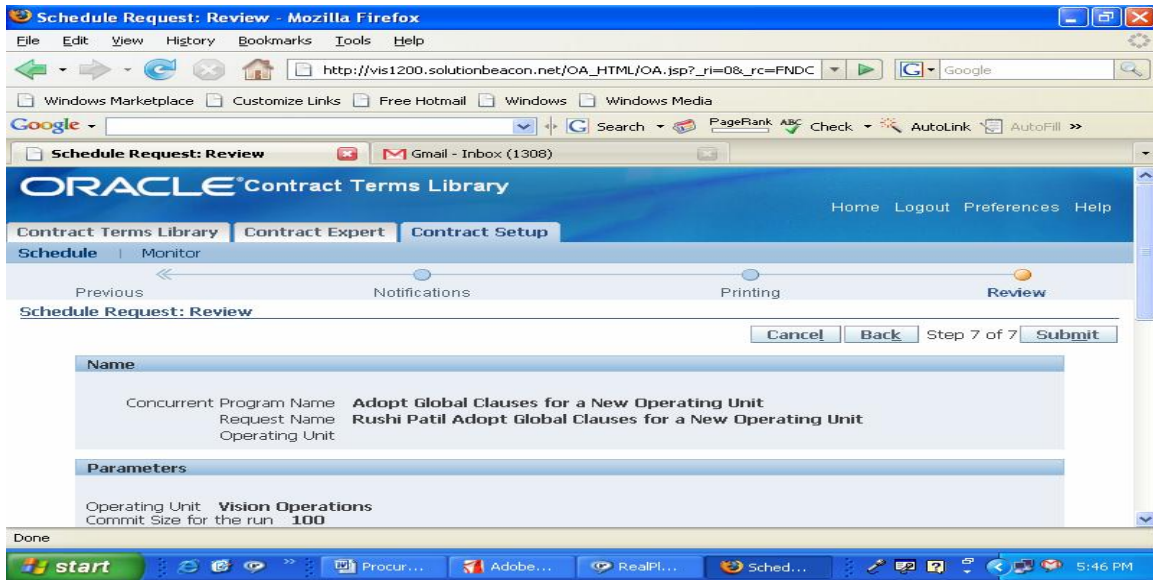


## Practice of Setup steps for Procurement Contracts on R12 Version

When we select next why it is jumping directly to notifications, and not taking “LAYOUT”.



## Practice of Setup steps for Procurement Contracts on R12 Version



**Click on SUBMIT, after this ( where ) does this document go.**