

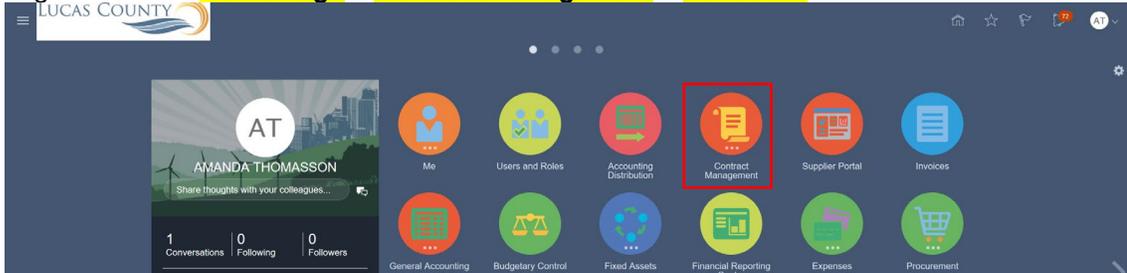
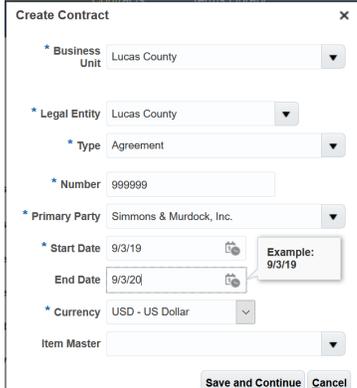
Create Enterprise (Procurement) Contracts

Audience: Procurement Managers, Procurement Contract Administrators, Buyers

Purpose: Enterprise Contracts allow the following:

- **Standardize the contract process** - with standard templates, clauses, and contract policy rules that can be enforced enterprise-wide. Global organizations can establish company-wide standards that can be adopted and tailored by regional administrators to comply with local or country-specific regulations. Contract administrators and legal personnel may author and negotiate many complex contracts each year. Oracle Enterprise Contracts simplifies the process by allowing contract administrators to maintain a central library of standard clauses, contract templates, and policy rules across the enterprise. Contract templates enable rapid assembly and creation of contracts by providing standard contract boilerplate language for each type of sale or procurement. Policy rules specify which clauses are mandatory for a contract or protected against updates during negotiation.
- **Accelerate contract renewal cycles** - Contract Expert feature guides users through a questionnaire. Based on the user's responses and other negotiated business terms, such as products, prices, and contract amount, Contract Expert adds any required clauses. Standards-based contracts can be generated, reviewed, and approved with little or no legal supervision. Users can print the contract as a PDF document for signature. The application also enforces contract policy controls to prevent unauthorized modifications. Contract collaboration and negotiation is streamlined using the two-way integration with Microsoft Word. The change tracking in Microsoft Word enables the contract administrator, legal department, or the external party to make changes offline. The document is synchronized with the structured contract terms stored in the application.
- **Improve visibility and drive contract compliance** - A single view of all enterprise contracts is essential for effective management of contract activities and for reporting and analysis of outstanding supplier, customer, and partner commitments. Contracts enables contract professionals to search and view all contracts from a single location. The text-based search engine can combine keyword searches with structured information like contract dates or amounts. Therefore, the text-based search engine provides unprecedented access to contracts for all key stakeholders. The Contracts Dashboard provides a snapshot of all contract-related activities, including deliverables progress, approvals, and contracts that need attention.

This job aid will assist with creating and managing enterprise contracts.

Step	Action
1	<p>Log into Oracle. Home Page > Contract Management > Contracts</p> 
2	<p>From the Task List, select Create Contract.</p> 
3	<p>Enter the following fields: Business Unit = (Default) Legal Entity = (Default) Type = Agreement Number: (Enter a number) Primary Party = Select active Party Start Date = Enter Date End Date = Enter Date.</p> 
4	<p>Select Save and Continue.</p>
5	<p>Enter the following field: Name = Test Agreement.</p>

Edit Contract: 123, Version 1: Overview

Overview Lines Fulfillment Parties Deliverables Documents History Notes

Number 123
Name Test Agreement
Start Date 8/22/19
End Date 9/22/20
Description
Version Description

Agreed Amount 10,000.00 USD
Amount Limit USD

Payment Terms
Carrier

Status Draft
User Status
Assignee
Type Agreement
Intent Buy
Item Master

Minimum Release Amount USD
Encumbrance Level
Freight Terms
FOB

Commitments
Terms
Additional Information
Context Segment

Actions Save Submit Cancel
Last Saved: 9/3/19 12:56 PM

6 Click the **Deliverables** link. Click the + icon to Add deliverables as required.

Edit Contract: 123, Version 1: Deliverables

Overview Lines Fulfillment Parties **Deliverables** Documents History Notes

Actions View Format + X Activate Freeze Detach Wrap Change Print Sequence

Deliverable Name	Deliverable Type	Responsible Party Type	Party Name	Contact	Print Sequence
No data to display.					

7

- *Name** = Name describing the deliverable
- Description** = Describing the deliverable
- Responsible Party Type** = Internal
- External Party Contact** = Search and select a contact
- Internal Party Contact** = Search and select a contact
- Under Due Date: Fixed date** = Select a date
- Under Notifications: Prior to due date** = Select a period and unit of measure

Click **Ok**

Create Deliverable

Name Contract Review
Description Review Contract Details
Type Contractual

Responsible Party Type Internal
External Party Name Office Depot, Inc.
External Party Contact Susan Brodie
Internal Party Name Lucas County
Internal Party Contact THOMASSON, AMANDA
Requester

Due Date
 One-time deliverable Repeating deliverable
 Fixed date 9/1/20
 Relative date

Notifications
 Prior to due date
 Period 1 Days
 On status change
 When deliverable is overdue
 Escalate after due date

Additional Information

OK Create Another Cancel

- 8 Click the **Documents** link to add contract documents as required. Click the **+** icon to add documents.

Edit Contract: 123, Version 1: Documents Actions Save Submit Cancel
Last Saved: 9/3/19 1:15 PM

Overview Lines Fulfillment Parties Deliverables **Documents** History Notes

Primary Contract Document 123-1.pdf

Contract Documents +

Actions View + X

Type	Category	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.						

Supporting Documents +

Actions View + X

Type	Category	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.						

Uploaded Revisions +

Actions View + X

Type	* File Name or URL	Title	Description	Attached By	Attached Date
No data to display.					

Columns Hidden 1

- 9 Enter the following:
Type = File
Category = Contract
File Name or URL = (Select a file or URL)
Title = Enter text optional
Description = Enter text optional
Click the **Submit** button.

Edit Contract: 123, Version 1: Documents Actions Save Submit Cancel
Last Saved: 9/3/19 1:15 PM

Overview Lines Fulfillment Parties Deliverables **Documents** History Notes

Primary Contract Document 123-1.pdf

Contract Documents +

Actions View + X

Type	Category	* File Name or URL	Title	Description	Attached By	Attached Date
File	Contract	Purchasing 2019 Contract - Services Agreement.docx	U Copy of Negotiation13-aw	Contract Attachment[AMANDA THO...	9/3/19 1:19 PM