# Oracle Contract Lifecycle Management for Public Sector

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**E-BUSINESS SUITE**
ADVANCED PROCUREMENT

Oracle® Contract Lifecycle Management for Public Sector (CLM) is a comprehensive, integrated and end-to-end solution that provides automated and streamlined contract management support for procurement professionals. It enables public sector agencies to enhance the efficiency of their contracting process for both routine and complex acquisitions in a single system while complying with the rules and regulations of the public sector acquisition process. CLM is built on the proven Oracle Advanced Procurement Suite and allows contracting professionals to perform all acquisition activities within a fully integrated ERP environment.

**KEY FEATURES**

- Complex Contract Authoring compliant with government rules and regulations
- Pre-built integration with Integrated Acquisition Environment (IAE)
- Contract Line Item/Sub Line Item hierarchy (CLIN/SLIN)
- Complex Pricing in accordance with US Federal Government pricing standards
- Configurable document numbering
- Out-of-the-box support for Federal Attributes in requisition, solicitation and award documents.
- Incremental Funding capability
- Option Lines, exercising of Options and Standalone Option lines
- Acquisition Plan capability
- Requisition Amendments for changes to Requisitions
- Workload Assignment
- Procurement Action Lead Time (PALT) tracking for performance measurement

## End to End Acquisition and Contracting Solution for Public Sector

From the creation of demand via a purchase request, through the initiation of a solicitation document and related negotiations, and to the subsequent award of a contract document to a supplier/provider, CLM provides a fully integrated, end-to-end acquisition and contract writing capabilities.

With Oracle Contract Lifecycle Management for Public Sector you can:

- Enforce compliance with Federal Acquisition Regulations and other contracting guidelines for the public sector
- Enhance contracting efficiency and reduce cycle times with end-to-end automation
- Reduce total cost of ownership and enable strategic decisions through an integrated procure to pay solution

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ORACLE DATA SHEET

- FedBizOpps integration
- Solicitation Amendments
- Online Offer creation by suppliers & Surrogate Offers
- Orders referencing IDV capability for Delivery Orders
- Modifications
- Electronic Signature
- Warrants
- Federal Forms (Standard and DoD Forms) printing capability for Solicitation and Award documents
- Contract Closeout
- Federal Nomenclature in accordance with US government standards
- Support for contract and clauses upload from legacy systems
- Out-of-the-box integration with Oracle Federal Financials
- FPDS-NG integration
- Business Intelligence for improved operations management and strategic sourcing
- Out-of-the-box reports
- CLM Web Services for integration
- Requisition lines with no Distributions
- Multiple Contract Templates for a Transactional Document
- Contract Files
- Multi & Concurrent Modifications
- Novation
- Umbrella Programs and Notice of Fair Opportunity
- ACRN
- ORCA & EDA Integration
- Unsolicited Lines
- Multiple Active Offers and Multiple Rounds of Offers
- Post Award Requests
- Military Inter-departmental Purchase Requests
- Automated Contract Closeout
- Undefinitized Contract Actions
- Exhibit Lines (ELINs) & Data Deliverables (CDRLs)
- Integration with EPLS (SAM)
- Integration with WDOL
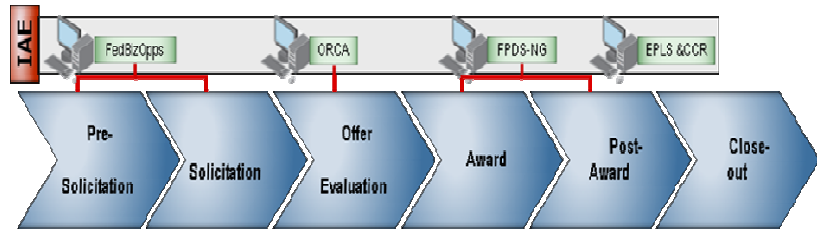- Integration with Clause Logic Service



*Figure 1: CLM supports the full spectrum of Requisition to Close-out business processes for Public Sector purchases*

## Enforce compliance with Federal Acquisition and Contracting Guidelines

Oracle CLM supports the FAR, DFARS, and other agency regulations that outline the federal business processes around routine and complex acquisitions and also allows simple transaction processes for non-FAR purchases. While many public sector regulations are in-built into the CLM offering, CLM it also provides a flexible and extensible framework to configure the application to fit specific business needs of individual public sector agencies. This flexibility enables the customers to promptly adapt to changes in policies and regulations.

## Enhance contracting efficiency and reduce cycle time with end-to-end automation and reduced cycle times

CLM enables contracting officers to drive operational excellence in federal procurement functions by automating the end-to-end contracting process, including acquisition planning; the creation of requisitions, solicitations, offers, and awards; and the administration and close-out of contracts. . The contracting cycle time as well as the disbursement cycle time can be dramatically reduced since CLM supports integrated financial, logistics, and acquisition business processes in a single environment. The contracting offices for public sector agencies can improve their productivity by combining the federal business processes with commercial best practices available in the Oracle Advanced Procurement Suite of products. The efficiencies and other benefits gained from the fully automated, end-to-end capabilities in CLM extend to the suppliers/providers who contract with government agencies.

## Reduce total cost of ownership and support strategic decision making process

By providing core contract-writing functionality within the ERP, Oracle Contract Lifecycle Management eliminates costly and difficult-to-maintain integrations with niche procurement applications. CLM also eliminates the data transformation and reconciliation issues associated with multiple disparate systems for procurement, financials and logistics needs. Contracting officers can focus on value-added activities including data analysis and data management, yielding better negotiations and contracts, instead of spending their valuable time in navigating across multiple systems and reconciling data across these disparate systems. CLM provides contracting officers with actionable information for strategic sourcing and workload management. By providing comprehensive business intelligence with a single source of data, CLM provides transactional traceability, auditability and data transparency. It enables

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- Protest Tracking
- Event Based Deliveries
- Small Business Co-ordination Record (SBCR)
- Payment Instructions
- Purchase Request Data Standard (PRDS)
- Procurement Data Standard (PDS)

contracting officers with strategic planning and improved decision making.

## Key Features

CLM supports the authoring of FAR/DFARS compliant documents and also enables contracting officers to print various documents in appropriate forms and formats used by government.  Federal nomenclature is supported across all user interfaces and menus to ensure familiarity and ease of use for federal users. CLM provides seamless integration between financial and acquisition areas with a single, integrated system providing transparency and visibility to the entire enterprise. CLM offers out of the box integration with Integrated Acquisition Environment (IAE) systems like FPDS-NG and FedBizOpps.

## Effectively Manage Pre-Solicitation Activities

CLM offers a wide range of support for pre-solicitation activities leading to the creation and administration of a solicitation document.  In the pre-solicitation phase, formal Acquisition Plans are created by authorized users. The Acquisition Plan can then be linked to Purchase Requests and related solicitation documents.  CLM enables employees of federal agencies to perform various requisitioning activities, from routine to complex. Requesters can create, manage and track their requisitions using an intuitive web based interface, while agencies can ensure that preferred pricing agreements are reflected in requisitions. CLM supports federal requisition features including CLIN/SLIN, federal document numbering, option lines, complex pricing contract types in accordance with FAR Part 16 requirements, additional federal attributes, and incremental funding capabilities.  The Requisition Amendment feature in CLM enables the requester to make changes to approved requisitions, even after Requisition lines have been solicited, offers have been received, and a draft award has been created. The requester can add additional funds to requisition lines through an amendment and can carry it over to an existing award or modification document. CLM also provides contracting officers with the capability of acquisition plan administration, workload assignments and PALT (Procurement Action Lead Time) tracking.

## Effectively Manage the Solicitation & Offer Process

Purchase Request documents can be carried over to a formal solicitation document in order to - receive competitive proposals from interested suppliers/service providers. CLM supports the authoring of FAR/DFARS compliant solicitation and solicitation amendment documents while supporting CLIN/SLIN structures, federal document numbering, option lines, complex pricing contract types in accordance with FAR Part 16 requirements, additional federal attributes pertinent to federal business, and federal nomenclature that is familiar to Procurement Office staff. Solicitations are rendered on standard forms (SF18, SF33, SF1449, SF1447, and SF1442).  Depending on the dollar value of the anticipated procurement, CLM also enables submission of the required Pre-solicitation notice to FedBizOpps for purposes of announcing the Procurement Office's intent to release a solicitation.  Following the posting to FedBizOpps, authorized users may utilize CLM to finalize and release the solicitation package for either directed procurements or for public competitive scenarios.  Following receipt of Offers through the Surrogate Offer process, CLM facilitates the evaluation of the documents for negotiation/award to assist with the award decision process.

When changes need to be made to a solicitation prior to Contract award due to supplier comments or questions, a need to clarify requirements, or a change to the requirements, CLM enables the creation of an amendment to the solicitation document. A system generated description, highlighting the changed elements of the solicitation, provides visibility to internal staff as well as vendors and suppliers who may wish to provide Proposals in response to the solicitation. Solicitation amendments are rendered on the SF30.

## Automate and Streamline the Contract Award process
### Create Strategic Agreements with Indefinite Delivery Vehicles (IDVs) and initiate Orders referencing the IDVs

CLM enables you to manage IDVs (BPAs, Basic Agreements, BOAs, and ID/IQ Contracts) effectively. IDVs can be created with applicable terms and conditions along with complex ordering and pricing arrangements including quantity-based pricing. CLM supports creation of IDVs with various constraints like maximum and minimum amount or quantities that need to be ordered, maximum or minimum amount that need to be ordered over the life of the IDV etc. When orders are created against these IDVs, CLM ensures that the ordering constraints are honored before these orders are approved. CLM also supports the seamless flow of information related to suppliers, pricing and other federal attributes from the IDVs on to the Orders that are created against those IDVs.

### Effectively Manage Standalone Awards

CLM helps procurement professionals to streamline their awards (standalone contracts, purchase orders) processing. In a typical business scenario, a requisition document is first issued and approved, followed by issuance of a Solicitation, which is negotiated and finally awarded to the successful vendor/supplier. Awards can also be created directly from a requisition that has committed funding. In this case too, the standalone award document includes all of the federal compliant document capabilities including support for CLIN/SLIN structure, document numbering, Complex Pricing Contract Types, Option Lines, Incremental Funding, Federal naming conventions and integration with Oracle Financials.

### Streamline the formal Contract Modifications process

Award and IDV documents may be modified to allow for needed changes to the document, such as adding new items or services, or changes to price and quantity of the procured item / service, or change to the requirements/deliverables or Terms and Conditions of the award or an increase/decrease to the scope of work. Modifications may also be issued to make administrative changes to an award, such as making a change to an address of one of the government parties to the contract, or to revise a named point of contact in a procurement office. With CLM's modification feature, users can create a formal modification document to capture the changes or additions made to an award or an Indefinite Delivery Vehicle (IDV) document. Modifications are created and maintained as separate documents within the CLM system. While the modification is being processed, CLM allows its users to continue transactions on the original award /

IDV (receipts, invoices, orders referencing the IDV, etc.). Users can approve the modification document with the help of a configurable approval process. When the modification document is approved the changes are merged - to create a conformed version of the award or IDV.

## Standardize Contracts Process and Reduce Time to Contract

CLM will allow the contracting officers to create quality contracts by leveraging the contract authoring capabilities in the product. This will enable faster contract creation and reduce risk by implementing enterprise standards and providing flexible administration. Sections and clauses in contracts can be now managed based on the document type like solicitation, solicitation amendment, etc.

## Structure Supplier Communication, Simplify Fulfillment and Payment

Oracle iSupplier Portal module for CLM, with its powerful platform for online collaboration, enables you and your suppliers to become more efficient. Suppliers access the latest information, including awards, delivery information, and payment status. The rich two-way collaboration enables suppliers to submit advance shipment notices and online invoices and allows the buying organization to get improved service from suppliers by sharing delivery and quality data.

## Enable strategic decision making using Business Intelligence

CLM users can leverage the comprehensive procurement transaction footprint and Oracle's Business Analytics capabilities to create strategic reports and intelligence dashboards using data that resides in the connected data-model. The enhanced business intelligence will provide deeper business insight, enable strategic planning and enhanced decision making capabilities.

## Purchase Request Data Standard (PRDS)

CLM has the capability to generate Purchase Request Data Standard (PRDS) XML for approved requisitions and also it enables users to generate PRDS XML files automatically. This capability establishes standard and accurate data that is in compliance with Department of Defense standards. The purchase requisition is also the source for critical data used in contract awards, and thus accurate PRDS XML outbound generation is more important than ever before.

## Procurement Data Standard (PDS)

CLM also has the capability to receive purchasing documents in PDS (Procurement Data Standard) format and create Award/IDV/Modification. Using Service Invocation Framework and BSO Webservices, PDS XML is transformed into Award/IDV/Modification.

## Flexible Deployment Options - Integrated or Standalone

CLM may be deployed in a number of optional configurations to provide a best fit for your current infrastructure landscape. Some of the options include:

**KEY BENEFITS**

- ·Accommodate routine and complex procurements in a single system
- Compliance with government (FAR/DFARS) and agency specific regulations
- Out-of-the box integration with IAE systems
- Enhanced Contracting office productivity with end to end automation
- Timely and accurate issuance of contractual documents
- Reduced procurement lead time
- ERP integrated system
- Direct integration with Oracle Federal Financials
- Minimize the cost and complexity for integration to disparate systems
- Access to actionable information for workload assignment and strategic decisions
- Data traceability through single source of truth for procurement data

- CLM deployed as part of a complete EBS installation - CLM deployed as part of a larger EBS implementation with an out-of-the-box integration to all of the products in the Advanced Procurement Suite, including iProcurement, Purchasing, Sourcing, iSupplier Portal, and other related products, such as Federal Financials.

- CLM deployed in a standalone manner - In this option, CLM can be integrated to any external Financials system, including a previous version of Oracle EBS (please refer to Figure 2), PeopleSoft, or any legacy financial system(s). Figure 2 illustrates CLM touch points with an external system using the example for EBS 11.5.10. The touch points will mostly remain the same in the case of any other non-EBS external system.
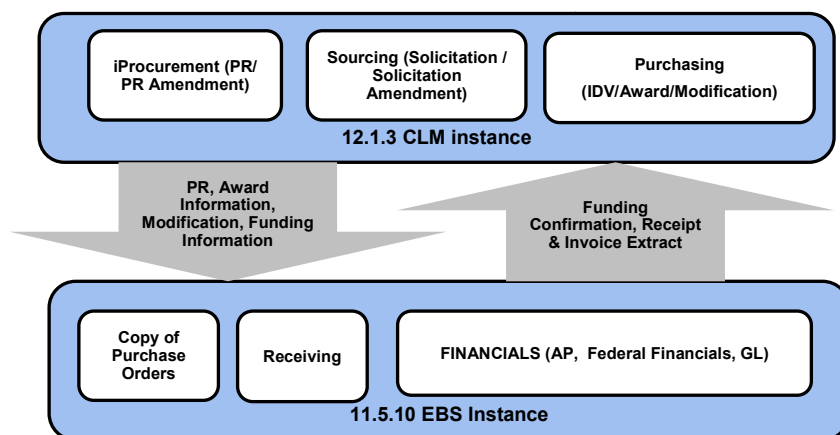
*Figure 2:  CLM Integration Touch points (Based on External EBS 11.5.10 Integration)*

## Contract Lifecycle Management for Public Sector— The Complete Solution

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on unified information architecture.  This information architecture provides a single definition of customers, suppliers, employees, and products—all aspects of the business.  Whether one module or the entire Suite is implemented, Oracle E-Business Suite enables procurement professionals to share unified information across the enterprise and make smarter decisions with better information.

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