

Mastek

Cloud Enhancement Services

Live Webinar

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Consultant I

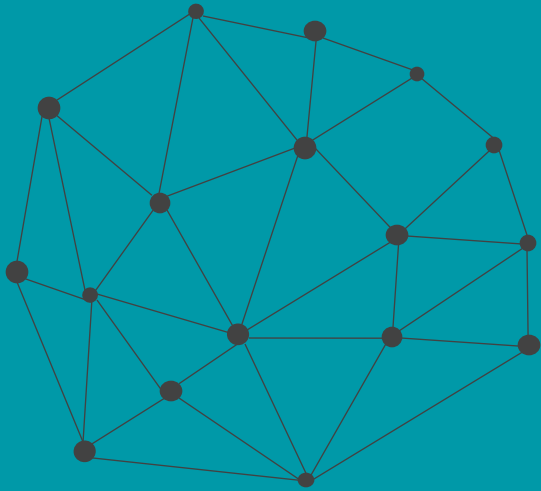
23C - SCM (PROCUREMENT & ADVANCE PROCUREMENT)

Empowering you for the next update



ORACLE | Partner



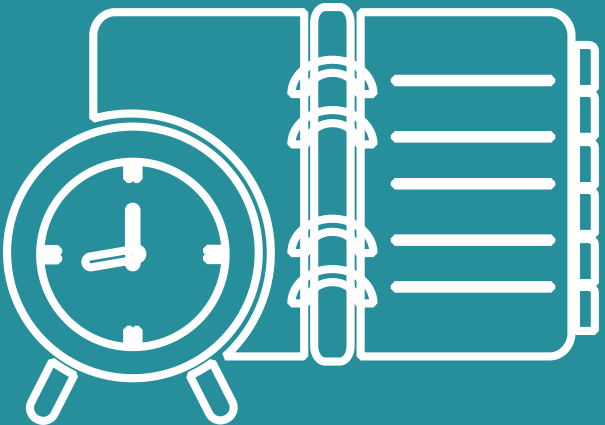


DISCLAIMER

These advisory webinars are organized to equip you with the latest updates.

The content of this session is based on the interpretation of the material and documentation that Oracle has released and is a general guideline/recommendation only.

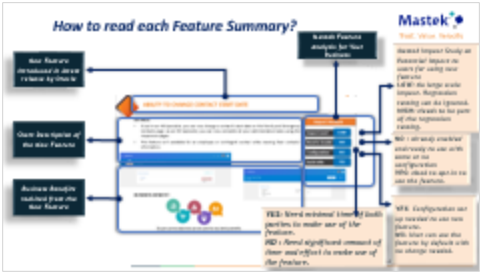
AGENDA



● Our Approach to Oracle Update

● Our Analysis of Latest Release
 - New Features
 - Known Issues (If any)

● Closing
 - Q&A



How to read each Feature Summary?

Mastek Feature Analysis for Your Business

New Feature Introduced in latest release by Oracle

Short Description of the New Feature

Business Benefits realized from the New Feature

ABILITY TO CHANGE CONTACT START DATE

DETAILS:

- If you're an HR Specialist, you can now change a contact's start date on the Family and Emergency Contacts page. As an HR Specialist, you can now complete all your administrative tasks using the responsive pages.
- This feature isn't available for an employee or contingent worker while viewing their contacts' information.

BUSINESS BENEFIT:

Ensure correct data that can be used for any family benefits

Impact Analysis

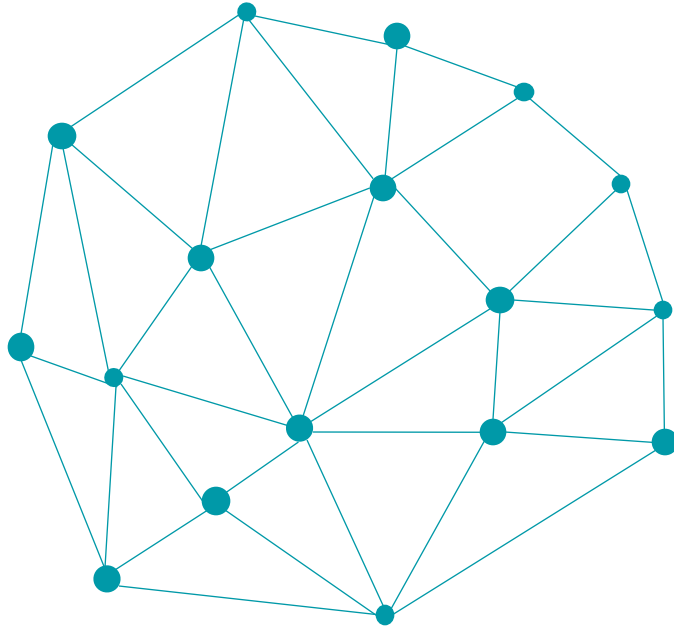
Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

Mastek Impact Study on Potential Impact to users for using new feature
LOW: No large scale impact. Regression testing can be ignored.
HIGH: Needs to be part of the regression testing.

NO : Already enabled and ready to use with some or no configuration
YES: Need to opt-in to use the feature.

YES: Need minimal time of both parties to make use of the feature.
NO : Need significant amount of time and effort to make use of the feature.

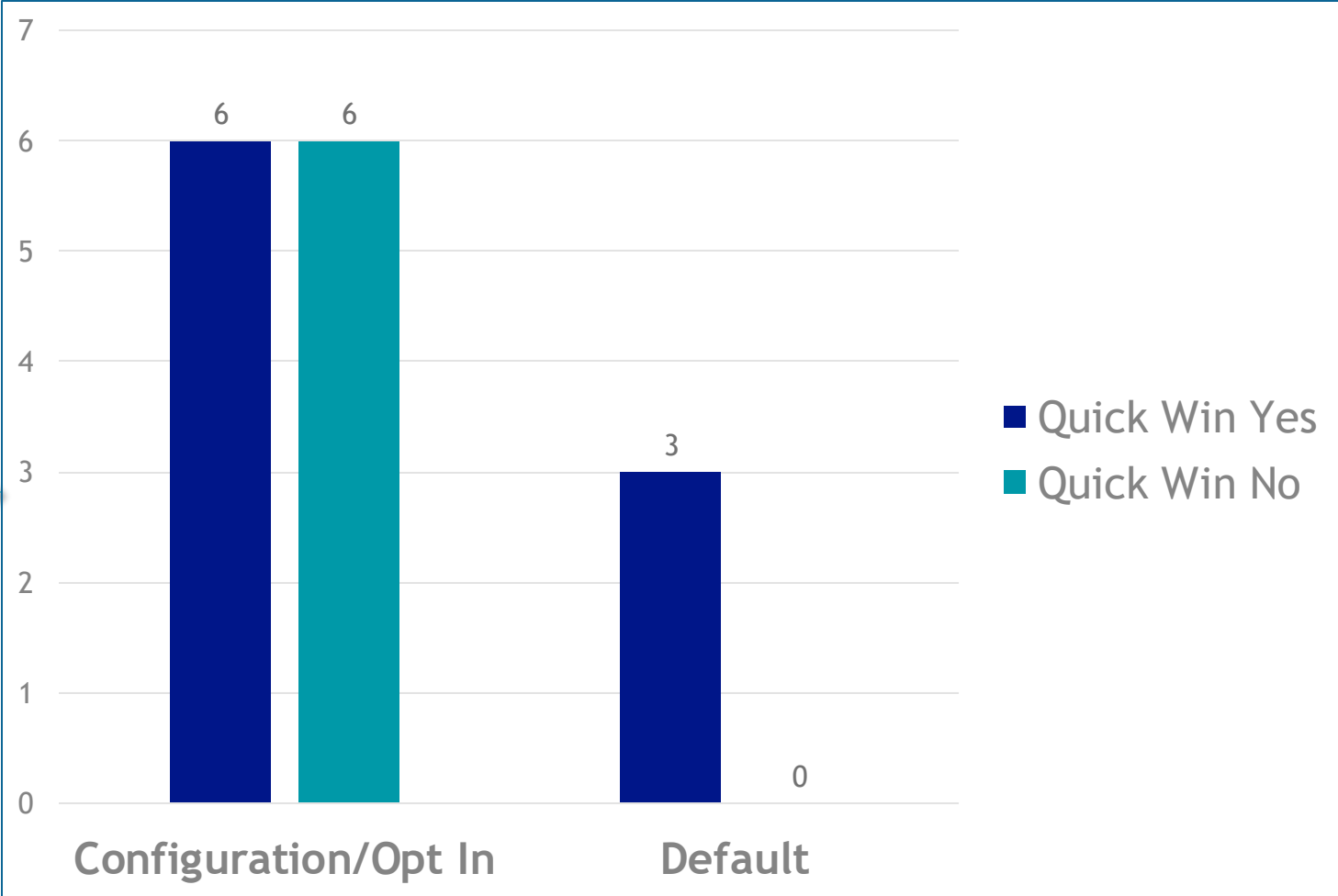
YES: Configuration set up needed to use new feature.
NO: User can use the feature by default with no change needed.

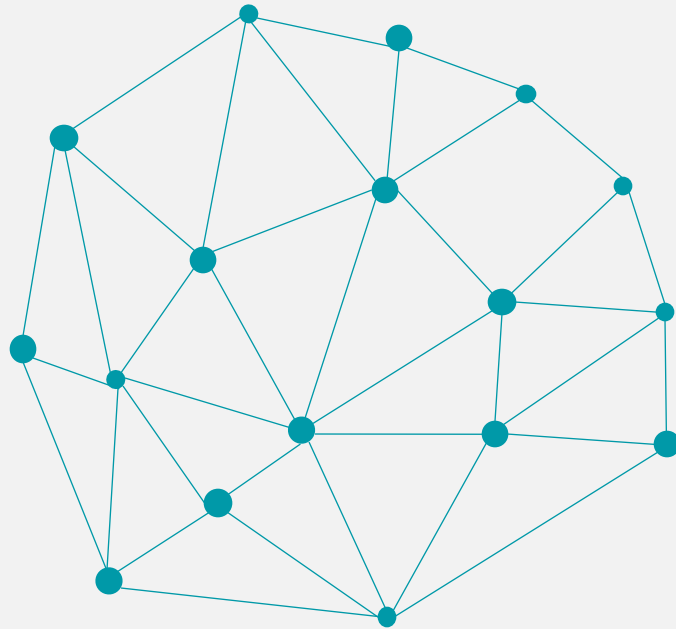


OUR ANALYSIS OF LATEST RELEASE

NEW FEATURES

15
Procurement/
Adv. Proc





OUR ANALYSIS

Latest Release

INTEGRATE AND EXTEND PROCUREMENT USING REST SERVICES

Details

In this update, Oracle Fusion Cloud Procurement and Oracle Fusion Cloud Self Service Procurement deliver new and modified REST APIs to enable and simplify integration with external systems.

The new REST APIs introduced in this update are:

- Personal Shopping Lists
- Supplier Negotiation Responses

These REST APIs are enhanced:

- Purchase Requisitions
- Draft Purchase Orders
- Procurement Approved Supplier List Entries
- Supplier Negotiations

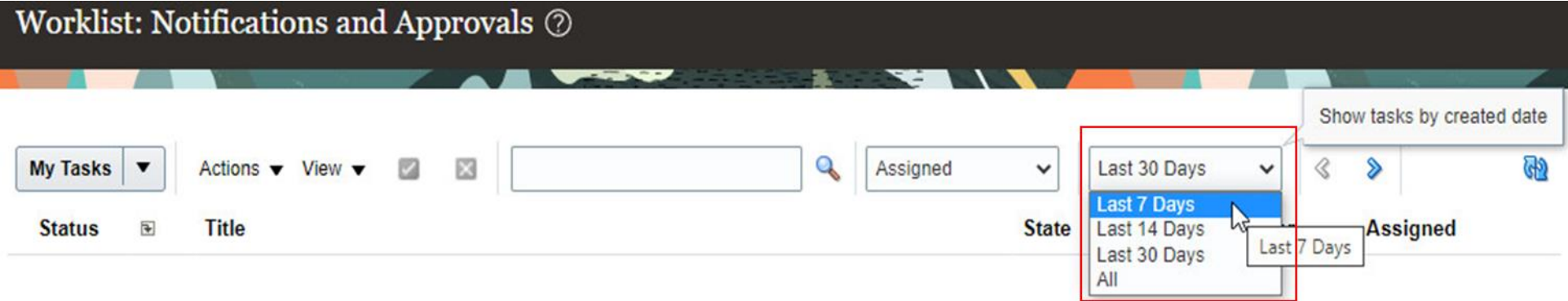
Business Benefit: You can use these new and modified REST services to simplify integrations and support standards-based interoperability with your other applications and external systems.

Impact Analysis	
Impact Level	MED
Need to Enable	YES
Configuration	NO
Quick Win	NO

WORKLIST: NOTIFICATIONS AND APPROVALS WORK AREA INCLUDES NEW TASK FILTER

Details

In the Worklist: Notifications and Approvals Work Area, a drop-down list has been added to filter tasks by when they were created. This additional filter applies only to the default My Tasks view, showing tasks created in the last seven days by default. The filter's options include 7, 14, or 30 days. Select All to display a complete list of tasks for you and your groups. The filter drop-down is also available in BPM Worklist if the My Tasks view and Me & My Groups filter are selected, which is the default.



Impact Analysis	
Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

Note: Because the new task filter applies only to the default My Tasks view, if you select a different view in the work area, for example, Initiated Tasks, it won't be available.

PROCESS REQUISITIONS INTO PURCHASE ORDERS IN THE INVOICE CURRENCY OF THE SUPPLIER SITE

Details

Generate purchase orders from requisitions in the invoice currency of the supplier site. You can now create requisitions where the price is negotiated in a foreign currency and release purchase orders to fulfill them in the local currency of the business unit. To release the purchase orders in the local currency, you must set the supplier site invoice currency.

Use the Opt In UI of Offering - Procurement to enable this feature.

Business Scenarios

- Prices on blanket purchase agreements are negotiated with suppliers in a foreign currency (for example, USD), and purchase orders need to be generated from requisitions in the local currency (for example, INR).
- Procurement Requester creates noncatalog requests by providing the negotiated price in a foreign currency (for example, USD), and purchase orders need to be generated from those requisitions in the local currency (for example, INR).
- Requisitions originating from a punchout catalog contain the negotiated price in a foreign currency (for example, USD), and purchase orders need to be generated from those requisitions in the local currency (for example, INR).

Impact Analysis	
Impact Level	HIGH
Need to Enable	YES
Configuration	YES
Quick Win	NO

PROCESS REQUISITIONS INTO PURCHASE ORDERS IN THE INVOICE CURRENCY OF THE SUPPLIER SITE

Blanket agreement is created with the supplier site as Mumbai, and the price is negotiated in Foreign Currency i.e. US dollars.

Overview Manage Agreements × Blanket Purchase Agreement: 9 ×

Blanket Purchase Agreement: 9 ⓘ ★ View PDF

Main Controls

General

Procurement BU Vision India - BU02
Agreement 9
Status Open
Buyer Clare Furey
Creation Date 3/30/23

Supplier Gallant P1 002
Supplier Site Mumbai Address

Supplier Contact
Supplier Agreement
Communication Method None

Start Date
End Date
Agreement Amount ⓘ
Minimum Release Amount
Released Amount 13.00 USD
Description
Master Contract

PROCESS REQUISITIONS INTO PURCHASE ORDERS IN THE INVOICE CURRENCY OF THE SUPPLIER SITE

The local invoice currency of the supplier site Mumbai is Indian Rupees.

Edit Site: Mumbai Address ⓘ

Procurement BU Vision India - BU02

Address Name Mumbai Address

Address Mumbai,MUMBAI-A11111,Maharashtra,INDIA

*** Site** Mumbai Address

Inactive Date m/d/yy ⓘ

Status Active

▶ **Additional Information**

General Purchasing Receiving **Invoicing** Payments Site Assignments Qualifications

Controls

Invoice Currency Indian Rupee ▼

PROCESS REQUISITIONS INTO PURCHASE ORDERS IN THE INVOICE CURRENCY OF THE SUPPLIER SITE



A requisition is created in US Dollars, which is a foreign currency for the Vision India business unit.

Requisition: 26 ?

Requisitioning BU Vision India - BU02
 Entered By Rosalinda Fillion
 Description AS92888

Creation Date 10-4-2023
 Status Approved
 Justification

Requisition Amount 645.24 INR
 Approval Amount 645.24 INR
 Attachments None
 Region
 Region_RRF
 ABP_Region
 Effective Date

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Line Type	Item	Description	Category Name	Quantity	UOM	Price	Price (INR)	Amount	Amount (INR)	Status	Conversion Rate Type
1	Goods	AS92888	AS92888	Miscellaneous_1	10	Each	1.00 USD	64.52	10.00 USD	645.24	Approved	Corporate

Rows Selected 1 Columns Hidden 5

Line 1: Details

Requester Rosalinda Fillion
 Requested Delivery Date 17-4-2023
 Deliver-to Location Type Internal
 Deliver-to Location New Delhi

Destination Type Expense
 Buyer Clare Furey

Suggested Supplier Gallant P1 002
 Supplier Item
 Agreement 9 (Vision India - BU02)

PROCESS REQUISITIONS INTO PURCHASE ORDERS IN THE INVOICE CURRENCY OF THE SUPPLIER SITE



When the requisition is processed into a purchase order, it's created in Indian Rupees, which is the local currency of the Vision India business unit.

Purchase Order: 21 ? ★ View PDF Actions ▾ Refresh Done

Main

General

Procurement BU	Vision India - BU02	Supplier	Gallant P1 002
Requisitioning BU	Vision India - BU02	Supplier Site	Mumbai Address
Sold-to Legal Entity	Vision India - LE01	Supplier Contact	
Bill-to BU	Vision India - BU02	Communication Method	None
Order	21	Bill-to Location	Hyderabad-IN_VI
Status	Open	Ship-to Location	New Delhi
Buyer	Clare Furey		
Creation Date	4/10/23		

Ordered	645.24 INR
Total Tax	116.14 INR
Total	761.38 INR
Description	
Requisition	26
Source Agreement	9

Supplier Order

Master Contract

PROCESS REQUISITIONS INTO PURCHASE ORDERS IN THE INVOICE CURRENCY OF THE SUPPLIER SITE

Important Considerations

- You can use this feature for purchase orders created from **backing requisitions** regardless of how the purchase order was created from the requisition. The purchase order could have been created using touchless buying, the Process Requisitions page, or the Requisition Processing Requests REST API. However, purchase orders that **don't have a backing requisition can't be released in a different currency** if they reference a blanket purchase agreement.
- When you cancel a **purchase order, unfulfilled requisition demand will be reinstated in the purchase order currency** instead of the original requisition line currency.
- When using this feature:
 - The **Conversion Rate Type** on the purchase order defaults from the **Procurement Business Unit Configuration**.
 - The **Conversion Date** on the purchase order defaults from the **purchase order creation date in the legal entity's time zone**.
- You can't procure configured items in the local currency using this feature.

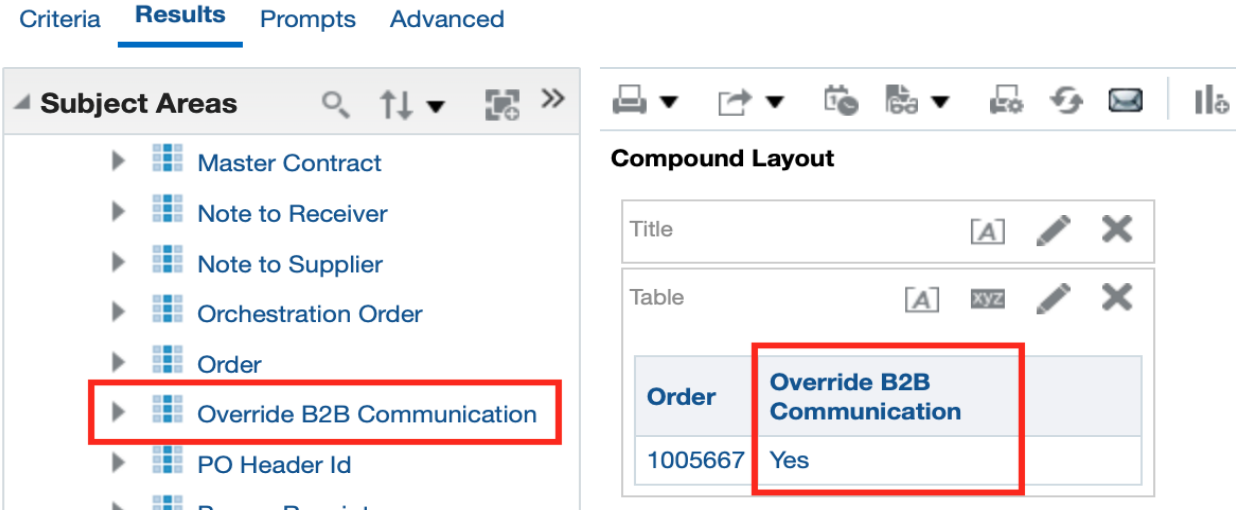
GENERATE REPORTS ON PURCHASE ORDERS WHERE B2B COMMUNICATION WAS OVERRIDDEN

Details

Generate reports and inquiries on purchase orders for which B2B communication was overridden for another communication method by the buyer. The Override B2B Communication attribute is now available in this subject area and folder:

Procurement - Purchasing Real-Time > Purchase Order Header Detail

Use the Opt In UI of Offering - Procurement to enable this feature.



Impact Analysis

Impact Level	HIGH
Need to Enable	YES
Configuration	NO
Quick Win	YES

Business Benefit: This feature can be used to get visibility into purchase orders where the supplier site was set up for B2B communication, but the buyer chose to override B2B communication.

GENERATE REPORTS ON PURCHASE ORDERS WHERE B2B COMMUNICATION WAS OVERRIDDEN

Important Considerations

- The Override B2B Communication attribute is available without opt in. However, to generate reports and inquiries on purchase orders where B2B communication was overridden, you must opt in to the **Override B2B Communication of Purchase Orders** feature.
- If you have previously opted in to the **Override B2B Communication of Purchase Orders** feature, then this feature is automatically enabled.
- After you have opted in to the feature, add the **Override B2B Communication** attribute to existing reports or use them in new reports.

Duty Role Required

Purchase Order Transaction Analysis Duty (FBI_PURCHASE_ORDER_TRANSACTION_ANALYSIS_DUTY)

SELECTED PURCHASING BUG FIXES IN THIS UPDATE

Details

Bypass Location Validation on Changes to Fulfilled Purchase Orders

Before this update, you couldn't make changes to purchase orders with invoicing or receipt activity if the default ship-to location, schedule's ship-to location, or distribution's deliver-to location were inactive. After this update, you can submit changes even if the locations are inactive.

Validate End Date on Purchase Agreements

Before this update, you could update the End Date on a purchase agreement to a past date even if there were purchase orders in the approval hierarchy created after the updated end date. After this update, the purchase agreement change order won't get implemented if approved purchase orders are created after the updated end date.

Use Procurement BU Parameter in the Purge Processed Open Interface Documents Program

Before this update, the Purge Processed Open Interface Documents scheduled job deleted interface records from all procurement BUs irrespective of the value selected when running the job. After this update, the scheduled job will only delete the interface records (including those in other languages) for the Procurement BU selected as the input parameter.

Impact Analysis

Impact Level **LOW**

Need to Enable **NO**

Configuration **NO**

Quick Win **YES**

SELECTED PURCHASING BUG FIXES IN THIS UPDATE

Details

Include Custom Document Styles in Purchase Order Approval Notification Titles

Before this update, you couldn't include user-defined document style names in the purchase order approval notification title. After this update, you can include these additional attributes in the approval notification title: `DocumentStyleDisplayName` and `DocumentTypeDisplayName`. Use the Oracle BPM Worklist to configure the title.

Fix Drill down from Rejected Orders in the Orders Requiring Attention Infolet

When navigating to the **Manage Orders** search results from the count of rejected orders in the **Orders Requiring Attention** infolet, the search results will include closed documents so that the number of results shown on the **Manage Orders** page matches the count shown in the infolet.

Default the Communicate Updates Parameter on the Initiate Retroactive Price Update Scheduled Job

Before this update, when retroactive pricing was initiated using the **Initiate Retroactive Price Update** scheduled job, updated purchase orders weren't communicated to suppliers even when the **Communicate Price Updates** option was selected on the blanket agreement. After this update, the **Communicate Updates** parameter in the scheduled job will default from the agreement control so that price changes are communicated based on the agreement setup. To prevent the updated releases from being communicated to the supplier, uncheck the **Communicate Updates** parameter.

SELECTED PURCHASING BUG FIXES IN THIS UPDATE

Details

View Documents Matching the Range's End Value When Using Date Ranges to Search

Before this update, when you searched for purchase orders and purchase agreements using a condition like Closed Date between 1-Jan-2022 and 31-Jan-2022, documents whose closed date matched the **range's end value, 31-Jan-2022, weren't returned in the search results**. After this update, the search results will include documents matching the range's end value.

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

Details

Next generation supplier self-service registration is a **completely redesigned Based on Red Wood Layout** to enhance the user experience. Some of the Highlights include:

- **Guided process optimized** for easy capture of profile details and other requirements
- **Improved extensibility**, such as customer-defined validations and default logic
- **Geographically responsive data entry**

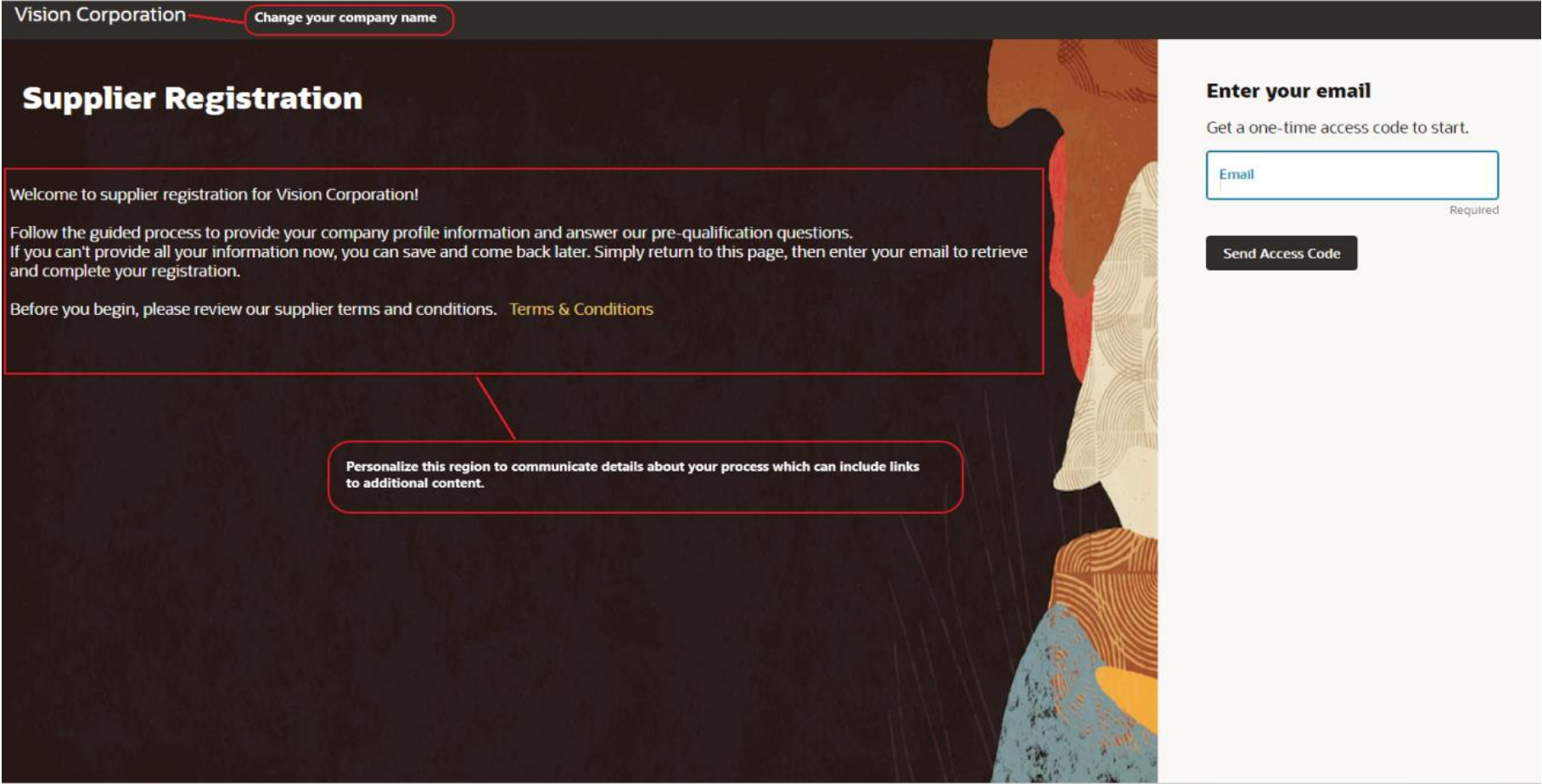
Use the Opt In UI of Offering - Procurement to enable this feature.

The **URLs** to access the next generation supplier registration flow are available on the **Configure Procurement Business Function setup task**. These URLs replace the old self-service registration URLs after opting in for the feature.

Impact Analysis	
Impact Level	MED
Need to Enable	YES
Configuration	NO
Quick Win	NO

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

The requester begins by entering their email to receive a one-time access code which is used to start their supplier registration.



Vision Corporation [Change your company name](#)

Supplier Registration

Welcome to supplier registration for Vision Corporation!

Follow the guided process to provide your company profile information and answer our pre-qualification questions. If you can't provide all your information now, you can save and come back later. Simply return to this page, then enter your email to retrieve and complete your registration.

Before you begin, please review our supplier terms and conditions. [Terms & Conditions](#)

Personalize this region to communicate details about your process which can include links to additional content.

Enter your email

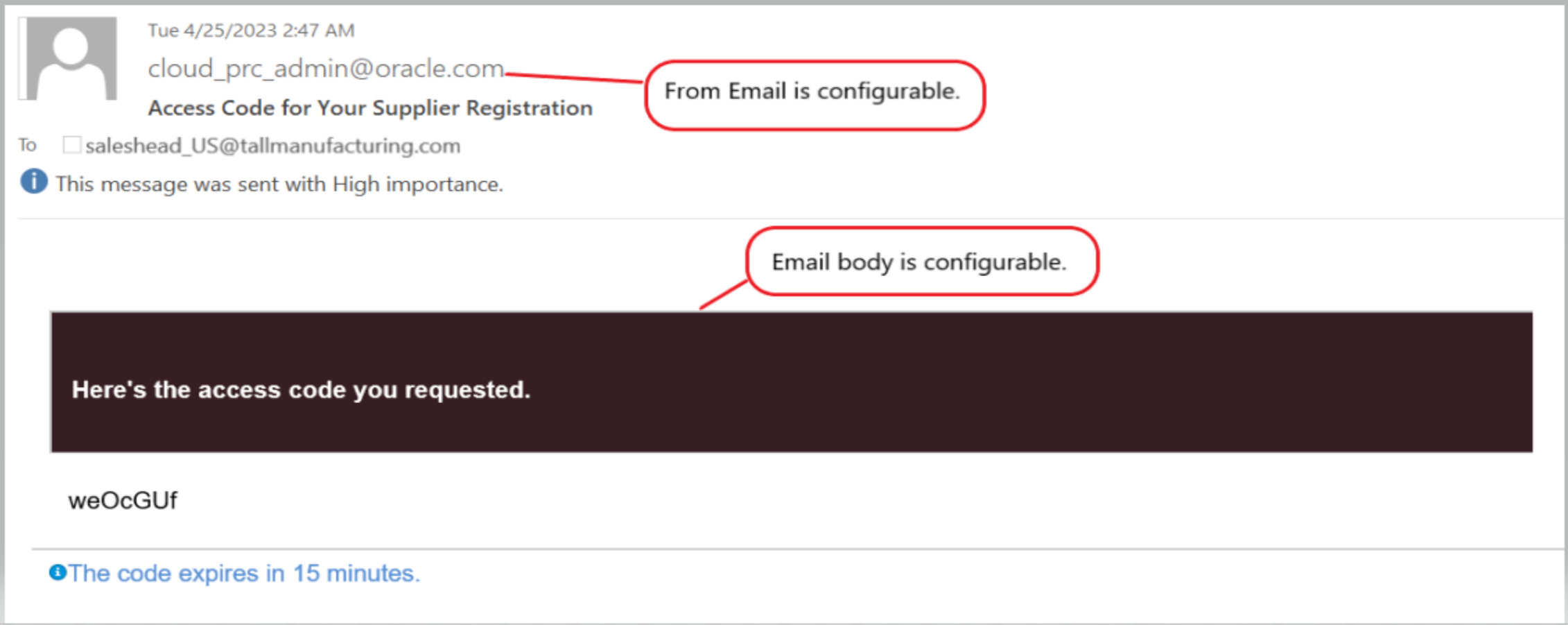
Get a one-time access code to start.

Required

[Send Access Code](#)

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

You can personalize the start page to communicate information about your supplier registration and onboarding process. You can also add information or corporate branding to tailor the email notification that sends the one-time access code.



NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

Registration Start: Enter Access Code

Vision Corporation

Supplier Registration

Welcome to supplier registration for Vision Corporation!

Follow the guided process to provide your company profile information and answer our pre-qualification questions. If you can't provide all your information now, you can save and come back later. Simply return to this page, then enter your email to retrieve and complete your registration.

Before you begin, please review our supplier terms and conditions. [Terms & Conditions](#)

Enter your code

Use the code we've sent to email saleshead_US@tallmanufacturing.com.

The code expires in 15 minutes.

Required

[Continue](#)

[Get a new code](#)

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

After email verification, the requester is then guided to provide company information, contacts, addresses, business classifications, bank accounts, products and services categories, and questionnaire responses. These registration pages are simplified for quick entry and most of them can be configured as hidden, optional or required. Two registration configurations are supported to capture different profile information depending on the intended supplier business relationship. You may wish to capture lighter profile requirements for prospective suppliers used in sourcing, and more detailed information for registration requests of suppliers you are approving for spend.

Company Details

On company details, the country is required to drive defaulting on subsequent pages, which also enables you to configure UI rule conditions based on country. A couple of examples: 1) hide fields, such as tax registration number when the country is USA, and 2) display country-specific attachment instructions to provide guidance on the types of documents you require. Besides country, there are several other attributes that support configurable conditions to enable similar dynamic UI behavior.

Another usability improvement involves tax information, when returning to complete a registration the requester no longer needs to re-enter taxpayer ID and tax registration number.

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

Vision Corporation

Supplier Registration Company Details

<input type="text" value="Company"/> <small>Required</small>	<input type="text" value="Website"/>	<input type="text" value="Country"/> <small>Required</small>
<input type="text" value="Taxpayer ID"/>	<input type="text" value="Tax Registration Number"/>	<input type="text" value="D-U-N-S Number"/>
<input type="text" value="Organization Type"/> <small>Required</small>	<input type="text" value="Supplier Type"/>	
<input type="text" value="Note to Approver"/>		
Additional Information		
<input type="text" value="Legal Business Name"/>	<input type="text" value="Number of Employees"/>	<input type="text" value="Are you ISO 9001 Certified?"/>
Attach the required documents.		
<div style="border: 1px dashed gray; padding: 5px;">Drag and Drop Select or drop files here.</div>		
<input type="text" value="URL"/>	<input type="button" value="Add URL"/>	
<div style="border: 1px solid gray; padding: 5px;">No items to display.</div>		

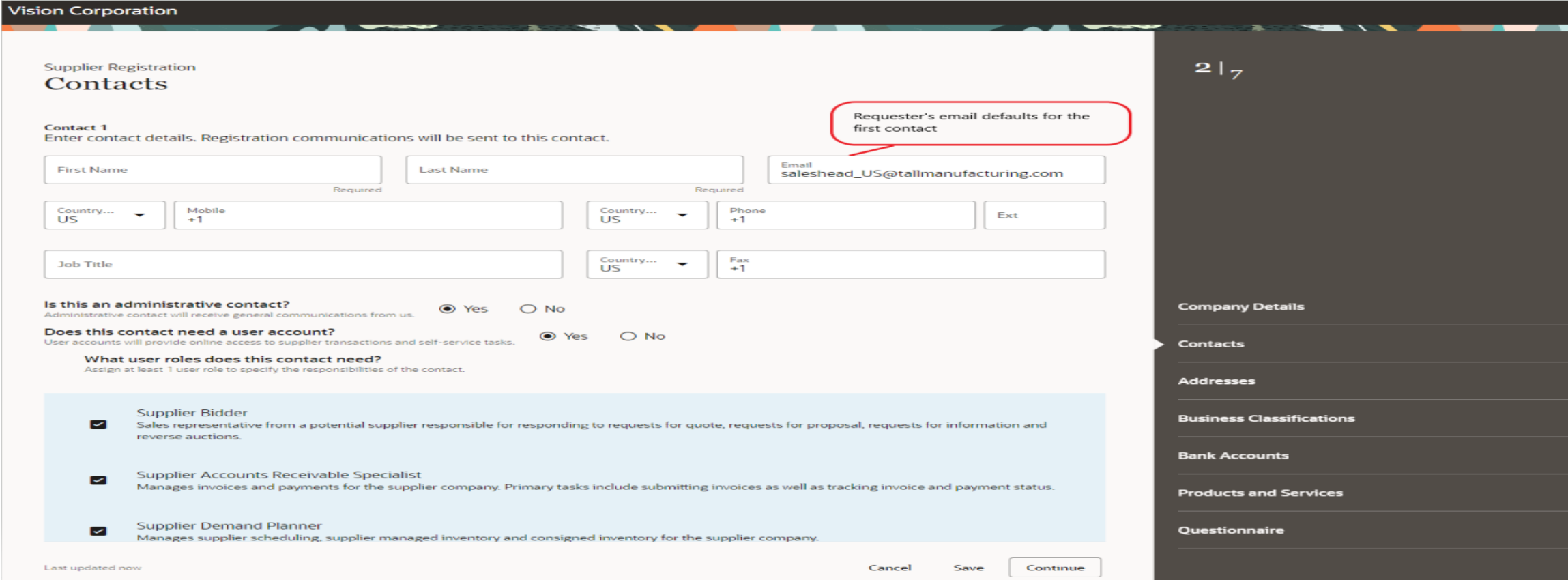
1 | 7

- Company Details**
- Contacts
- Addresses
- Business Classifications
- Bank Accounts
- Products and Services
- Questionnaire

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

Contacts

On Contacts, the verified email is defaulted for the first contact, also the mobile, phone and fax country codes are defaulted based on the country selected on company details. You can also personalize this page to default a selection for requesting a user account.



Supplier Registration
Contacts

Contact 1
Enter contact details. Registration communications will be sent to this contact.

First Name Last Name Email

Country... Mobile Country... Phone Ext

Job Title Country... Fax

Is this an administrative contact?
Administrative contact will receive general communications from us. Yes No

Does this contact need a user account?
User accounts will provide online access to supplier transactions and self-service tasks. Yes No

What user roles does this contact need?
Assign at least 1 user role to specify the responsibilities of the contact.

- Supplier Bidder
Sales representative from a potential supplier responsible for responding to requests for quote, requests for proposal, requests for information and reverse auctions.
- Supplier Accounts Receivable Specialist
Manages invoices and payments for the supplier company. Primary tasks include submitting invoices as well as tracking invoice and payment status.
- Supplier Demand Planner
Manages supplier scheduling, supplier managed inventory and consigned inventory for the supplier company.

Last updated now

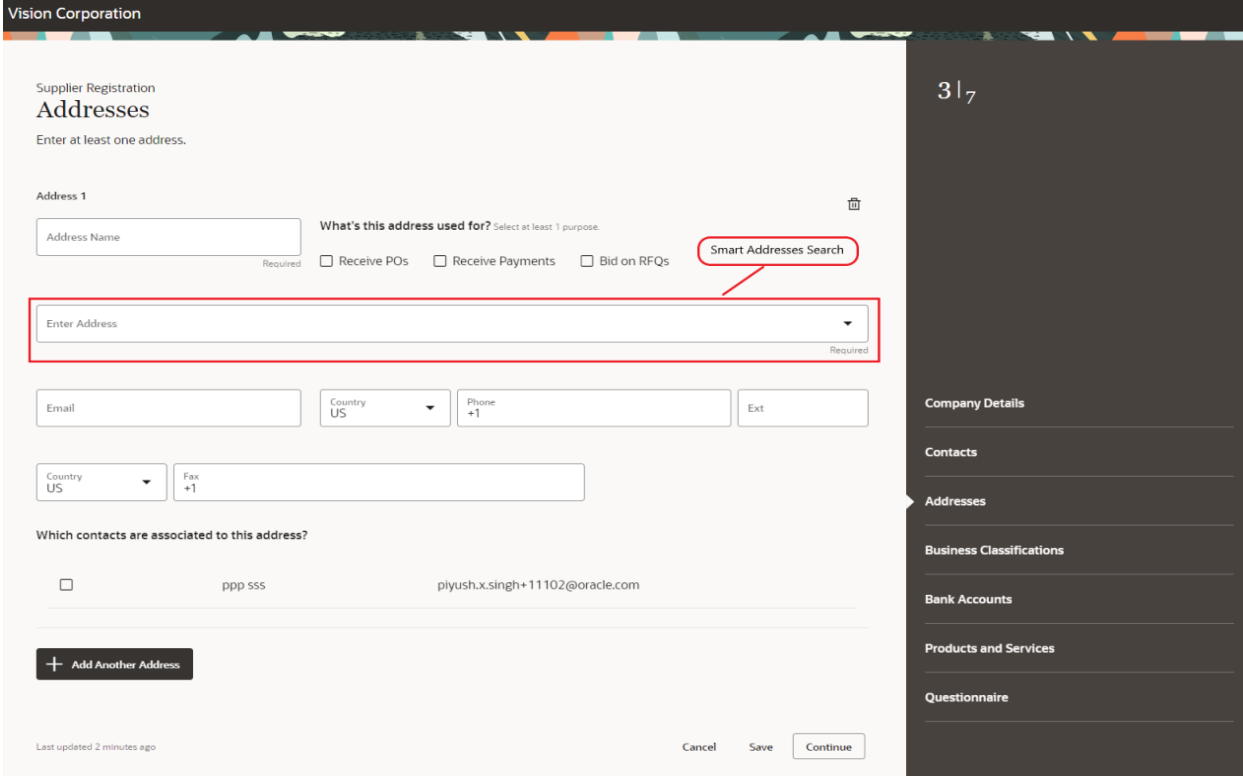
Cancel Save Continue

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

Addresses

On Addresses, the country is used to default the address country as well as the phone and fax country codes. You can also personalize this page to have the address purposes selected by default.

The **Loqate Smart Address service** is another integrated service in registration and is a highly recommended feature to opt-in. The service manages detailed address locations for over 240 countries and provides a superior user experience with an **auto-suggest** address search that eliminates data entry and input errors.



Supplier Registration
Addresses
Enter at least one address.

Address 1

Address Name Required **What's this address used for?** Select at least 1 purpose.
 Receive POs Receive Payments Bid on RFQs **Smart Addresses Search**

Required

Email Country Phone Ext

Country Fax

Which contacts are associated to this address?

ppp sss piyush.x.singh+11102@oracle.com

+ Add Another Address

Last updated 2 minutes ago Cancel Save Continue

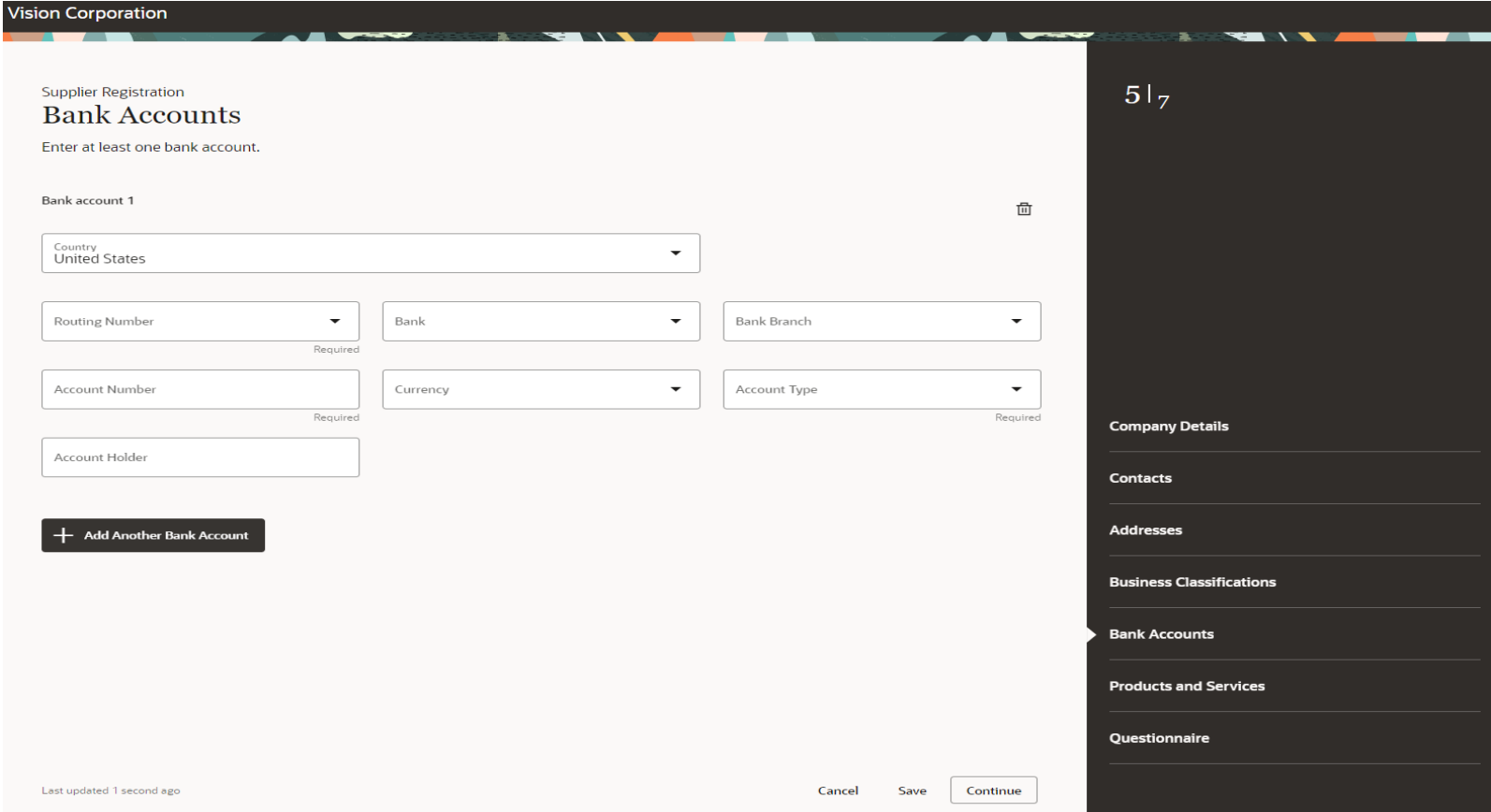
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- Company Details
- Contacts
- Addresses
- Business Classifications
- Bank Accounts
- Products and Services
- Questionnaire

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

Bank Accounts

Capturing a supplier bank account is greatly simplified with **country-driven logic** to help the requester quickly provide bank account details unique to the country. The default country layout presented is based on the country provided earlier. A seeded configuration is delivered for most countries out of the box. For example, the **routing number is presented for a United States bank account**, whereas sort code is used in the United Kingdom layout. You can **modify or add country-specific rules** to show or hide attributes, make them required or relabel them. Country-specific layouts help requesters provide the correct information only for the necessary fields which avoids having to return registrations for correction.



Supplier Registration
Bank Accounts
Enter at least one bank account.

Bank account 1 🗑️

Country
United States

Routing Number Required Bank Bank Branch

Account Number Required Currency Required Account Type Required

Account Holder

+ Add Another Bank Account

Last updated 1 second ago

Cancel Save Continue

517

- Company Details
- Contacts
- Addresses
- Business Classifications
- Bank Accounts**
- Products and Services
- Questionnaire

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

Business Classifications

The Business Classifications page is **streamlined** to help the requester quickly determine if any of the **diversity classifications are applicable to their company**. If yes, the **detailed form** is presented to capture classification and certificate details.

Products and Services

The Products and Services page **presents summarized categories** for selection indicating the **types of goods and services** the supplier can provide. The **category tree is configurable** providing flexibility on the level of detail you wish to track suppliers.

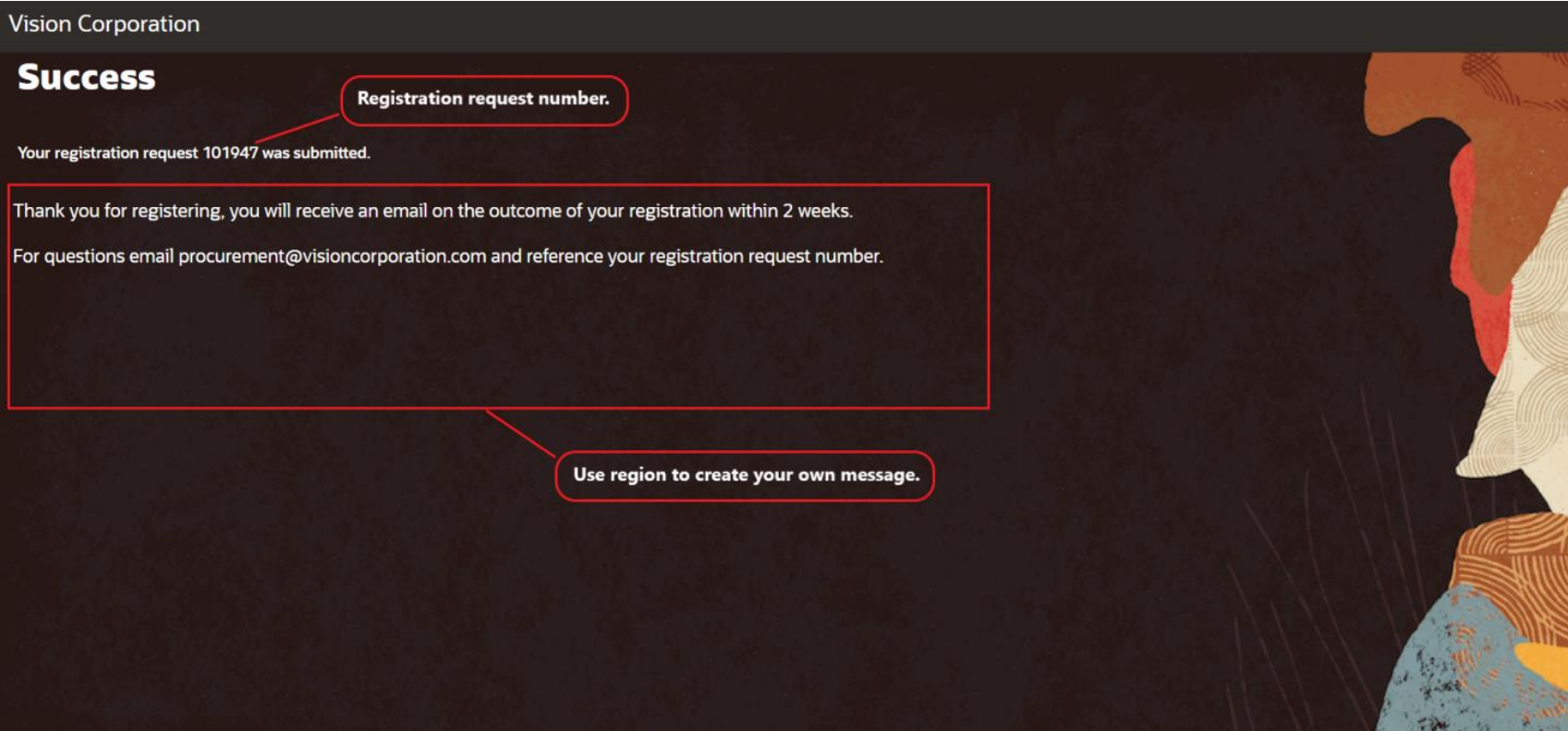
Questionnaire

The Questionnaire page allows you to **collect other requirements and documents unique to your business** to evaluate potential suppliers. It can present conditional questions based on responses and on registration information provided earlier.

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

Confirmation Message

After providing all information, the requester submits the request on the final page. On submission, guidance is provided if any corrections or missing information requires attention, if no, a success confirmation is presented with a registration request number for reference in any follow-up communications. You can personalize this page to include information such as contact details the requester can use for further communication.



Important Considerations

- Currently, this new supplier self-service registration flow **supports only your default language** and will be enhanced to support multiple languages in a future update.
- After you opt-in to this feature, the **old URLs won't work except for saved or returned requests that requesters can still submit** using the URLs sent to them.
- This new registration flow uses the **existing setup task, Configure Supplier Registration and Profile Change Requests**. All settings in this setup task will continue to be followed in the new flow, for example; the configuration to hide business classification or setting attachments in company details as required for both business relationships. **Setups that changes include descriptive flexfields and personalization:**
 - **Descriptive flexfields are hidden by default**, you need to **enable** these using Visual Builder Studio as per your business case.
 - **All personalizations enabled** in your current registration flow that are still required need to be **redone** using Visual Builder Studio.
- After the registration request is submitted, **all the existing functionalities** including request to resubmit action and approvals **remain unchanged**.
- When a **bank account attribute** has both a **country-specific rule** and a **supplier registration rule defined**, the latter is given priority, meaning the **supplier registration rule is considered first**. If a supplier registration rule **doesn't exist**, the **seeded ORA page rule** is considered else the attribute is displayed.

SELECTED SUPPLIER MODEL BUG FIXES IN THIS UPDATE

Details

Import Supplier Records Using FBDI Templates on Mac Computers

You can now download the latest FBDI templates to **import supplier** records from your **Mac**.

Remove Duplicate Search Results for Supplier Addresses with Alternate Names

Before this update, the **supplier address search** returns duplicate records in LOVs for address elements such as city, when **alternate names** are defined in address elements. With this update, you can set the **HZ_ADDRESS_DISABLE_ALT_NAMES** profile option to **Yes** at the site level so that the duplicate search results are removed.

Impact Analysis

Impact Level **LOW**

Need to Enable **YES**

Configuration **NO**

Quick Win **YES**

ADD REQUISITIONS TO AN EXISTING NEGOTIATION

Details

When processing requisitions, you can now **add new requisition lines to either a draft or an active negotiation instead of creating a new negotiation every time**. When adding requisitions to an active negotiation, an amendment is created.

The requisition lines are added to the negotiation with all relevant information such as price, quantity, requested date, and attachments. **Suppliers from the requisition are added to the supplier invitation list as well.**

Use the Opt In UI of Offering - Procurement to enable this feature.

When adding lines to a negotiation using the **document builder** in Oracle Purchasing, you **have the option to group matching requisition lines into a single negotiation line**. When **matches** are found, the **quantity** from the new requisition line is added to the existing negotiation line quantity. If **no matches** are found, then a **new negotiation line** is created for the requisition line.

Business Benefit: Adding new requisition lines to existing negotiations leads to higher savings from better negotiation deals, and saves considerable time with fewer transactions, and automated processing.

Impact Analysis

Impact Level **MED**

Need to Enable **YES**

Configuration **NO**

Quick Win **YES**

ADD REQUISITIONS TO AN EXISTING NEGOTIATION

Add Requisition Lines to Existing Negotiation

Add to Document Builder ✕

Selected Requisition Lines

Actions ▾ View ▾ Format ▾ ✕ Freeze Detach Wrap

Requisitioning BU	Requisition	Line	Line Description	Requester
Vision Operations	10509608	2	Laptop Carrycas...	Fillion,Rosalinda
Vision Operations	10509586	1	Laptop USB Ports	John, Mayer
Vision Operations	10509585	1	Laptop Hard Drive	John, Mayer
Vision Operations	10509585	2	Laptop System ...	John, Mayer

< >

Columns Hidden 1

Add All Selected

Type Existing Negotiation ▾

* Negotiation 41055 ▾

OK Cancel

ADD REQUISITIONS TO AN EXISTING NEGOTIATION

Search and Select Active or Draft Negotiations

Search and Select: Negotiation

Search

** Negotiation

** Negotiation Title

** Status

** Owner

Advanced

** At least one is required

Search Reset

Negotiation	Negotiation Title	Currency	Status	Open Date	Close Date	Owner
41055	Procure Office Supplies	USD	Active	4/28/23 11:39 AM	5/4/23 11:38 AM	Furey,Clare
41054	Procure IT Supplies	USD	Active	4/28/23 11:38 AM	5/4/23 11:37 AM	Furey,Clare

OK Cancel

Process Requisitions

Procurement BU

Vision Operations

Search Results: Requisition

Actions View

Req BU	Negotiation	Quantity
Vision Operations	10509607	2
Vision Operations	10509606	2

Laptop Carrycase Black

Rosalinda Fillion

ADD REQUISITIONS TO AN EXISTING NEGOTIATION

Edit Document Builder for Adding Requisition Lines to Existing Negotiations

Edit Document Builder: Add to Existing Negotiation Add More Lines Create Clear Document Builder

Procurement BU Vision Operations

Negotiation LTC/NA/40264

Negotiation Title Procure IT Supplies

Negotiation Status Active

Negotiation Type RFQ

Negotiation Style Standard Negotiation

Negotiation Template Laptop Template

Buyer Furey,Clare

Outcome Purchase Order

Negotiation Currency USD

Group Requisition Lines Yes ▾

Document Builder Lines

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Requisitioning BU	Requisition	Line	Item	Line Description	Requester	Category Name	Quantity	UOM	Price	Deliver-to Location
Vision Operations	10507546	1	Laptop Stand	Ergonomic foldbale and portable laptop stand	Testing POR PM	Office Supplies	1	Each	56	V1- New York City
Vision Operations	10507537	2	Wireless Charger	Wireless Charger	Olivia Quinn	Laptop Accessory	300	Each	150	V1- New York City
Vision Operations	10507516	1	ADDMAX Power Cable	ADDMAX Power Cable Desc	Tania Mervis	Power Cables	1,400	Each	450	V1- New York City
Total										

Columns Hidden 27

ADD REQUISITIONS TO AN EXISTING NEGOTIATION

Important Considerations

- The **Group Requisition Lines** option value is defaulted from the **Configure Procurement Business Function** setup page.
- For **purchase order outcome**, requisition lines are grouped if these criteria match:
 - Line type
 - Item, Item revision, and Item description
 - Category
 - Unit of measure (UOM)
 - Requisitioning business unit
 - Ship-to location
- For **agreement outcome**, requisition lines are grouped if these criteria match:
 - Line type
 - Item, item revision, and item description
 - Category
 - Unit of measure (UOM)
- If different **Requested delivery dates** are specified for multiple requisition lines, which are grouped, then the **earliest date is stamped** on the negotiation line.
- If two or more existing negotiation lines match the requisition line, then it's added to the negotiation line with the **highest line number**.

ADD REQUISITIONS TO AN EXISTING NEGOTIATION

Important Considerations

- If the requisition line has a **suggested supplier**, then it's added to the negotiation invitation list, **only if the supplier and supplier site combination doesn't already exist in the draft negotiation**. For negotiations in the **Active** status, this isn't **supported**, since amendments currently don't support updating the supplier invitation list.
- Both requisition header and line level **attachments** are copied to the negotiation line.
- Only requisition attachments with **these categories** are copied to the negotiation line: **To Buyer, To Supplier, and Miscellaneous**.
- If you have **approvals set up**, the **amendment process will trigger approval** of the changes made to the negotiation from adding the new requisition lines.

CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION



Details

You can now create purchasing documents for large negotiations in Oracle Purchasing using background processes. After update 23C, for all ongoing large negotiations, the Create Purchasing Documents action will be automatically available.

Once award is completed, click the Create Purchasing Documents action to trigger a background process. You will be notified once this process completes.

Impact Analysis

- Impact Level: MED
- Need to Enable: YES
- Configuration: YES
- Quick Win: NO

Analyze Negotiation (RFQ): 40419

Currency = US Dollar

Messages | Analyze Lines by Spreadsheet | Actions | Done

View Negotiation
Create Purchasing Documents
 Cancel Purchasing Document Creation
 Share Award Decision
 Monitor Processes

Additional Information

Title: Procure Computer Supplies
 Award Complete Date: 4/5/23 11:22 AM
 Total Award Amount: 990,000,000.00
 Savings: 210,000,000.00
 Savings: 17.50%

Total Lines: 10000
 Awarded Lines: 10000
 Lines with No Award: 0
 Lines Pending Award: 0
 Lines with No Responses: 0
 First Line Number: 10
 Last Line Number: 100000

Analyze

Supplier	Supplier Site	Supplier Contact	Awarded	Awarded Lines	Will Participate	Response	Response Type	Total Amount		Shortlist
								Response	Award	
Big Computers	Main Office	Anders, Alex	✓	10,000	Yes	173933	Primary	990,000,000.00	198,000,000.00	✓
Blue Semiconductor	Philadelphia	Mierot, Francois	✓	10,000	Yes	173941	Primary	990,000,000.00	198,000,000.00	✓
Fantastic Laptops	Main Office	Edwards, Fidel	✓	10,000	Yes	173943	Primary	990,000,000.00	198,000,000.00	✓
First Software	NC Office	Schweizer, Eric	✓	10,000	Yes	173944	Primary	990,000,000.00	198,000,000.00	✓
PennyPack Systems	Corporate	Grayson, Daniel	✓	10,000	Yes	173945	Primary	990,000,000.00	198,000,000.00	✓
Total								990,000,000.00		

CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION



Next, click the Review and Submit Purchasing Documents action to navigate to the page where you can review the purchasing documents.

Analyze Negotiation (RFQ): 40419 ?
Messages
Analyze Lines by Spreadsheet ▼
Actions ▼
Done

Currency = US Dollar
Universal Time

Title Procure Computer Supplies

Award Complete Date 4/5/23 11:22 AM

Total Award Amount 990,000,000.00

Savings 210,000,000.00

Savings 17.50%

Total Lines 10000

Awarded Lines 10000

Lines with No Award 0

Lines Pending Award 0

Lines with No Responses 0

First Line Number 10

Last Line Number 100000

●
Additional Information 📄

- View Negotiation
- Review and Submit Purchasing Documents
- Cancel Purchasing Document Creation
- Share Award Decision
- Monitor Processes

Analyze ?

Suppliers Lines

Actions ▼
View ▼
Format ▼
Freeze 📄
Detach 📄
Wrap ↩
Analyze

Supplier	Supplier Site	Supplier Contact	Awarded	Awarded Lines	Will Participate	Response	Response Type	Total Amount		Shortlist
								Response	Award	
Big Computers	Main Office	Anders, Alex	✔	10,000	Yes	173933	Primary	990,000,000.00	198,000,000.00	✔
Blue Semiconductor	Philadelphia	Mierot, Francois	✔	10,000	Yes	173941	Primary	990,000,000.00	198,000,000.00	✔
Fantastic Laptops	Main Office	Edwards, Fidel	✔	10,000	Yes	173943	Primary	990,000,000.00	198,000,000.00	✔
First Software	NC Office	Schweizer, Eric	✔	10,000	Yes	173944	Primary	990,000,000.00	198,000,000.00	✔
PennyPack Systems	Corporate	Grayson, Daniel	✔	10,000	Yes	173945	Primary	990,000,000.00	198,000,000.00	✔
Total								990,000,000.00		

CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION



You now have the ability to search the lines in each purchasing document using multiple filtering criteria. You also have the option to retrigger purchasing document creation by clicking the Reset Purchasing Documents button.

Review and Submit Purchasing Documents (RFQ 40419) ? Reset Purchasing Documents Save Submit Cancel

Currency = US Dollar

Procurement BU Vision Operations Outcome Purchase Order
Total Award Amount 990,000,000.00 Awarded Responses 5

View Format Freeze Detach Wrap

Requisitioning BU	Supplier	Supplier Site	Supplier Contact	* Sold-to Legal Entity	* Bill-to BU	* Bill-to Location	* Buyer	Required Acknowledgment	Acknowledge Within Days	Total Lines	Initiate Approval
Vision Operations	Big Computers	Main Office	Anders, Alex	Vision Operations	Vision Operations	V1- New Yor...	Furey,Clare	Document	10	10000	<input checked="" type="checkbox"/>
Vision Operations	Blue Semiconductor	Philadelphia	Mierot, Francois	Vision Operations	Vision Operations	V1- New Yor...	Furey,Clare	Document and \$	10	10000	<input checked="" type="checkbox"/>
Vision Operations	Fantastic Laptops	Main Office	Edwards, Fidel	Vision Operations	Vision Operations	V1- New Yor...	Furey,Clare	Document	10	10000	<input checked="" type="checkbox"/>
Vision Operations	First Software	NC Office	Schweizer, Eric	Vision Operations	Vision Operations	V1- New Yor...	Furey,Clare	Document and \$	10	10000	<input checked="" type="checkbox"/>
Vision Operations	PennyPack Systems	Corporate	Grayson, Daniel	Vision Operations	Vision Operations	V1- New Yor...	Furey,Clare	Document	10	10000	<input checked="" type="checkbox"/>

Columns Hidden 4

Blue Semiconductor: Awarded Lines

Search Line Description Hide Filters

Filters Reset

** At least one is required

** Description

** Line -

** Category Name

Line	Description	Category Name	Order Quantity	UOM Name	Line Price
10	Item10	Finished Goods_91	20	Each	990.00
20	Item20	Finished Goods_91	20	Each	990.00
30	Item30	Finished Goods_91	20	Each	990.00
40	Item40	Finished Goods_91	20	Each	990.00
50	Item50	Finished Goods_91	20	Each	990.00
60	Item60	Finished Goods_91	20	Each	990.00

CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION



After review, you can click Submit. This action triggers the Submit Purchasing Documents background process, which creates the purchasing documents in Purchasing. Once the process is successfully completed, you will be notified.

Monitor Processes (RFQ 40118) Done

Actions ▾ View ▾ Format ▾ Freeze Detach Wrap

Process ID	Process	Process Status	Submitted By	Output	Start Time	Completion Time
88261	Submit Purchasing Documents	Succeeded	Furey,Clare	88261.log	3/29/23 4:23 PM	3/29/23 5:31 PM
88236	Create Purchasing Documents	Succeeded	Furey,Clare	88236.log	3/29/23 4:13 PM	3/29/23 4:22 PM
88212	Import Award Lines	Succeeded	Furey,Clare	88212.log	3/29/23 4:02 PM	3/29/23 4:05 PM
88176	Export Award Lines	Succeeded	Furey,Clare	RFQ40118-AwardLines.zip	3/29/23 3:54 PM	3/29/23 3:55 PM
87364	Submit Response	Succeeded	Furey,Clare	87364.log	3/29/23 11:52 AM	3/29/23 11:55 AM
87360	Submit Response	Succeeded	Furey,Clare	87360.log	3/29/23 11:51 AM	3/29/23 11:54 AM
87354	Submit Response	Succeeded	Furey,Clare	87354.log	3/29/23 11:50 AM	3/29/23 11:53 AM
87349	Submit Response	Succeeded	Furey,Clare	87349.log	3/29/23 11:50 AM	3/29/23 11:52 AM
87346	Submit Response	Succeeded	Furey,Clare	87346.log	3/29/23 11:49 AM	3/29/23 11:51 AM
87339	Import Response Lines	Succeeded	Furey,Clare	87339.log	3/29/23 11:47 AM	3/29/23 11:48 AM
87336	Import Response Lines	Succeeded	Furey,Clare	87336.log	3/29/23 11:46 AM	3/29/23 11:48 AM
87329	Import Response Lines	Succeeded	Furey,Clare	87329.log	3/29/23 11:45 AM	3/29/23 11:47 AM
87322	Import Response Lines	Succeeded	Furey,Clare	87322.log	3/29/23 11:44 AM	3/29/23 11:45 AM
87302	Import Response Lines	Succeeded	Furey,Clare	87302.log	3/29/23 11:37 AM	3/29/23 11:38 AM
87286	Export Response Lines	Succeeded	Furey,Clare	RFQ40118-Quote173398-Response...	3/29/23 11:32 AM	3/29/23 11:33 AM

CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION



Now you can view the purchasing documents created from the negotiation and can even drill down to the purchasing documents to view their details.

Purchasing Documents (RFQ 40419) Done

Currency = US Dollar

Title Procure Computer Supplies

Procurement BU Vision Operations

Total Award Amount 990,000,000.00

Status Completed, purchasing document created

Outcome Purchase Order

Awarded Responses 5

View ▾ Format ▾ Freeze Detach Wrap

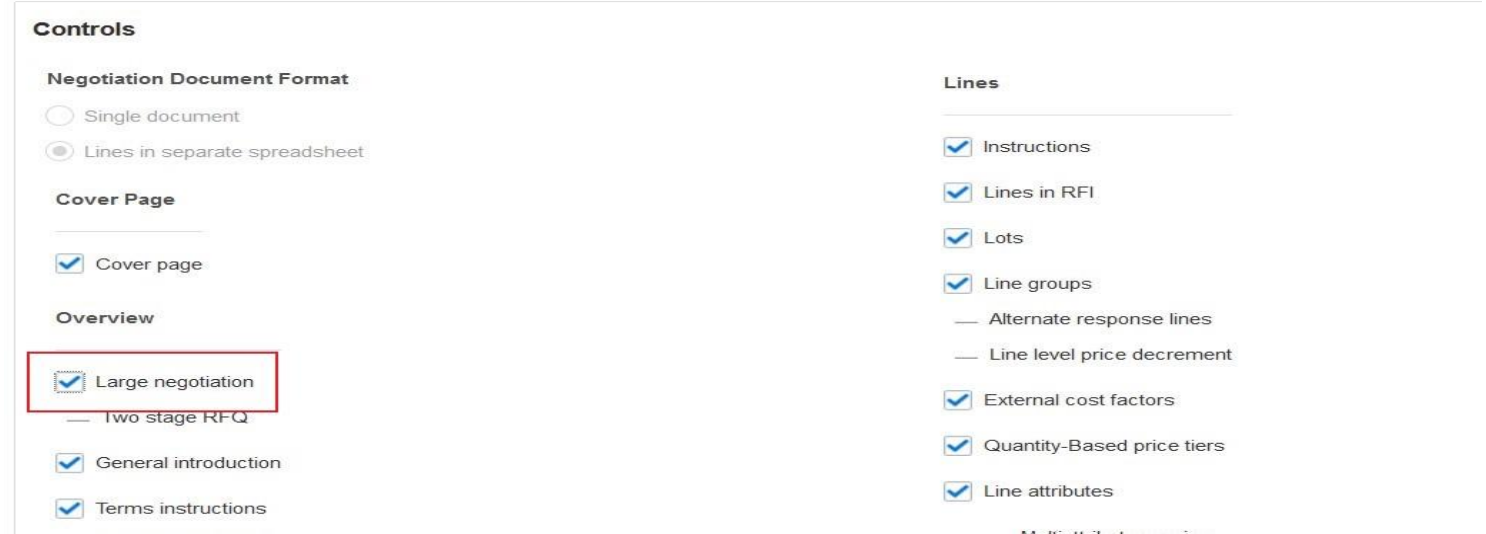
Purchasing Document	Requisitioning BU	Sold-to Legal Entity	Supplier	Supplier Site	Supplier Contact	Response	Total Lines	Ordered Amount	Status
1006620	Vision Operations	Vision Operations	Big Computers	Main Office	Anders, Alex	173933	10000	198,000,000.00	Incomplete
1006632	Vision Operations	Vision Operations	Blue Semiconductor	Philadelphia	Mierot, Francois	173941	10000	198,000,000.00	Incomplete
1006642	Vision Operations	Vision Operations	Fantastic Laptops	Main Office	Edwards, Fidel	173943	10000	198,000,000.00	Incomplete
1006650	Vision Operations	Vision Operations	First Software	NC Office	Schweizer, Eric	173944	10000	198,000,000.00	Incomplete
1006659	Vision Operations	Vision Operations	PennyPack Systems	Corporate	Grayson, Daniel	173945	10000	198,000,000.00	Incomplete

Columns Hidden 2

CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION

Steps to Enable 1: Setup of Negotiation Style

- In the Setup and Maintenance work area, go to..
 - Offering: Procurement
 - Functional area: Sourcing
 - Task: Manage Negotiation Styles
- On the **Manage Negotiation Styles page**, select and edit one of your existing negotiation styles, or create a new negotiation style. (You can't edit a predefined negotiation style.)
- In the Controls section, under the **Overview group**, select the **Large negotiation** check box.



The screenshot shows the 'Controls' section of the 'Manage Negotiation Styles' page. It is divided into two columns: 'Negotiation Document Format' and 'Lines'. Under 'Negotiation Document Format', 'Lines in separate spreadsheet' is selected. Under 'Cover Page', 'Cover page' is checked. Under 'Overview', 'Large negotiation' is checked and highlighted with a red box. Other checked options include 'General introduction' and 'Terms instructions'. Under 'Lines', several options are checked, including 'Instructions', 'Lines in RFI', 'Lots', 'Line groups', 'External cost factors', 'Quantity-Based price tiers', and 'Line attributes'. Unchecked options include 'Single document', 'Cover page', 'Alternate response lines', 'Line level price decrement', and 'Two stage RFQ'.

CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION

Steps to Enable 2: Setup of Profile Option

- A new profile option **ORA_PON_CREATE_PO_MAX_LINES_LIMIT** (Maximum Lines in a Large Negotiation Outcome Document) is introduced, which sets the upper limit for lines in a purchasing document created from the large negotiation award. If this limit is reached, another purchasing document is created for additional lines. The profile option value must not exceed 10,000.

Manage Administrator Profile Values ? Save Save and Close Cancel

▶ Search : Profile Option

Search Results


▲ Search Results : Profile Options

View ▼

Profile Option Code	Profile Display Name	Application	Start Date	Description
ORA_PON_CREATE_PO_MAX_LINES_LIMIT	Maximum Lines in a Large Negotiation Outcome Document	Sourcing	12/5/22	Value must not exceed 10,000. It is the upper limit for lines in a purchasing docu...

Columns Hidden 2

▲ ORA_PON_CREATE_PO_MAX_LINES_LIMIT: Profile Values

Actions ▼ View ▼ + × 

* Profile Level	Product Name	User Name	Profile Value
Site			10000

CAPTURE NEW SUPPLIER ITEMS IN NEGOTIATIONS

Details

Supplier bidders can provide new supplier items when creating responses to both inventory and description-based line items. The new supplier items are copied to the purchasing documents generated after award.

In scenarios where there's no supplier item for the inventory item, the new supplier item is automatically added to item relationships in Product Information Management (PIM) if enabled in BU configuration.

Impact Analysis

Impact Level **MED**

Need to Enable **YES**

Configuration **YES**

Quick Win **NO**

Time Remaining 22 Days 23 Hours Close Date 4/27/23 9:30 AM

Line	Description	* Alternate Line Description	Category Name	Supplier Item	New Supplier Item	Manufacturer	Manufacturer Part Number	Start Price	Response Price	Response Quantity	UOM	Line Amount	Promised Delivery Date
1	Eco friendly battery		Miscellaneous_1		ZJ-109S	A1 Quality	A1Q9900000100	225.00	220.00	100	Each	22,000.00	4/30/23
2	High capacity battery		Miscellaneous_1	9404119		ALLIED MEDICAL	AF88S28	245.00	240.00	150	Each	36,000.00	4/30/23

Rows Selected 1 Columns Hidden 10

Grand Totals
All response lines except alternate lines are included.
Response Amount 58,000.00

CAPTURE NEW SUPPLIER ITEMS IN NEGOTIATIONS

Steps to Enable 1: Setup of Configure Procurement Business Function

- To automatically add new supplier items (captured in negotiation responses) to item relationships in PIM, go to the Configure Procurement Business Function page, and select the Automatically add new supplier items to item relationships check box.

► Consignment Terms

▲ Sourcing ?

Negotiation Type RFQ ▼
Negotiation Style Standard Negotiation ▼
 Negotiation template required
Rank Indicator 1,2,3... ▼
Maximum Requirement Score
Purchasing Documents Create in Oracle Fusion Purchasing ▼
 Initiate approval
 Automatically add new supplier items to item relationships

Configure Abstract Listing

Define Terms and Conditions

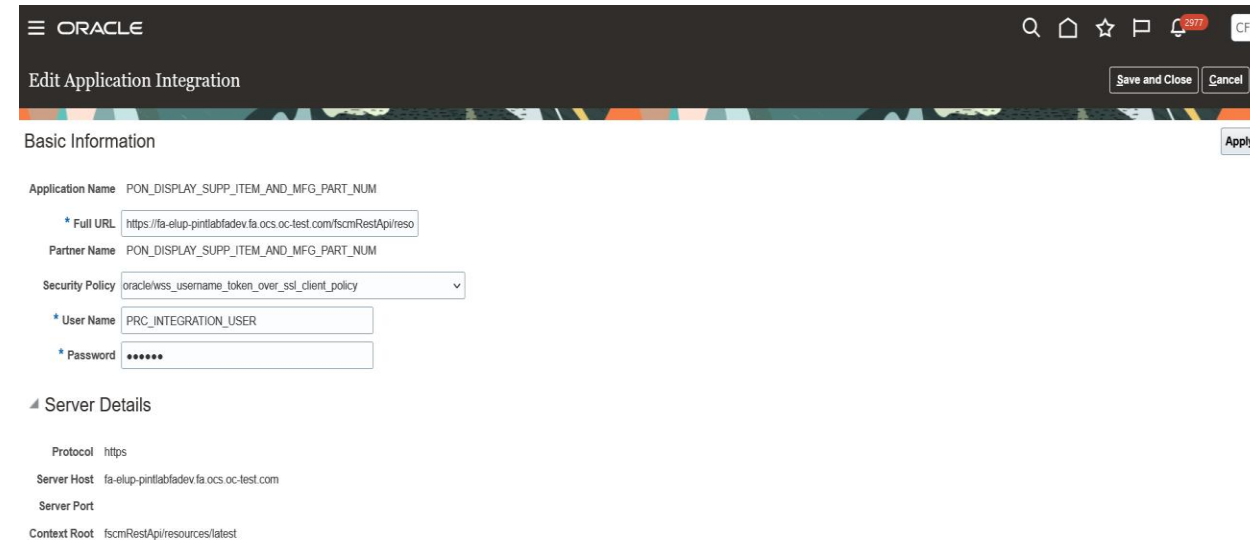
- Enable weights in requirements
- Display requirement scoring criteria to suppliers
- Automatically populate responses to predefined questions
- Display rank in blind negotiations
- Display best price in blind negotiations
- Enforce supplier's previous round price as start price
- Enable negotiation approval
- Enable award approval

CAPTURE NEW SUPPLIER ITEMS IN NEGOTIATIONS

Steps to Enable 2: Setup of integration

To facilitate seamless interaction between the Sourcing work area and Product Information Management (PIM) work area, an integration setup is required.

- Navigate to the **Setup and Maintenance** work area.
- Click **Manage Setup Content**.
- In Topology Definition, click **Manage Integration of Additional Applications**.
- Create a new integration setup.
- Fill the details as follows:
 - Application Name: PON_DISPLAY_SUPP_ITEM_AND_MFG_PART_NUM
 - Full URL: <customer_POD_URL>/fscmRestApi/resources/latest
 - Partner Name: PON_DISPLAY_SUPP_ITEM_AND_MFG_PART_NUM
 - Security Policy: oracle/wss_username_token_over_ssl_client_policy
 - Username: <user name>
 - Password: <As applicable>
- Click **Apply** and then click **Save and Close**.



The screenshot shows the 'Edit Application Integration' form in Oracle. The form is titled 'Edit Application Integration' and has 'Save and Close' and 'Cancel' buttons. The 'Basic Information' section is expanded, showing the following fields:

- Application Name: PON_DISPLAY_SUPP_ITEM_AND_MFG_PART_NUM
- * Full URL: https://fa-elup-pintlabfdev.fa.ocs.oc-test.com/fscmRestApi/reso
- Partner Name: PON_DISPLAY_SUPP_ITEM_AND_MFG_PART_NUM
- Security Policy: oracle/wss_username_token_over_ssl_client_policy
- * User Name: PRC_INTEGRATION_USER
- * Password: *****

The 'Server Details' section is also expanded, showing the following information:

- Protocol: https
- Server Host: fa-elup-pintlabfdev.fa.ocs.oc-test.com
- Server Port: (empty)
- Context Root: fscmRestApi/resources/latest

CAPTURE NEW SUPPLIER ITEMS IN NEGOTIATIONS

Important Considerations

- Consider these when you're working with supplier item, manufacturer, and manufacturer part numbers:
 - The new supplier item is **updated** in item relationships in PIM **only when there is no existing supplier item already associated with the item.**
 - Capturing and updating the manufacturer or manufacturer part number isn't supported yet.

Privileges Required for an integration user

- Manage Trading Partner Item Rest (EGI_MANAGE_TPI_REST)
- Manage Trading Partner Item Relationships Rest (EGI_MANAGE_TPI_REL_REST)

ALLOW SCORING ONLY MEMBERS TO MESSAGE SUPPLIERS

Details

With this feature, you can control which **scoring-only members can see the supplier names and send an online message to suppliers**. A new control, **Supplier Messages** is available when defining a collaboration team. Here you can select if the member with scoring-only access can send and receive supplier messages, only receive messages from suppliers, or be restricted from any messaging with suppliers.

Prerequisite:

- You must use a negotiation style in which team scoring is enabled.
- You must also enable team scoring in the negotiation.

Business Benefit:

- Visibility of supplier information to scoring-only members promotes efficient evaluation of supplier responses.
- Direct communication between suppliers and scoring-only members enables faster resolution of supplier queries.

Impact Analysis

Impact Level **MED**

Need to Enable **YES**

Configuration **NO**

Quick Win **YES**

ALLOW SCORING ONLY MEMBERS TO MESSAGE SUPPLIERS

General Terms **Collaboration Team** Project Tasks

Actions ▾ View ▾ Format ▾ + × Freeze Detach Wrap Manage Scoring Send Notification ?

* Team Member	Job	Access	Price Visibility	Supplier Messages	Task	Target Date	Scoring Teams	Last Notified
Ayon, Benita		View only	✓	Receive only	Monitor the negotiation	6/23/23		
Dapolito, Cody		Full	✓	Send and receive	Analyze the negotiation	6/23/23	Business Team, Legal Team	
Furey, Clare		Full	✓	Send and receive	Award the negotiation to the best supplier	6/23/23	Legal Team	
Gorelick, Dona		Scoring only	✓	No access	Complete your scoring assignment before the deadline	6/13/23	Legal Team	
Norden, Loraine		Scoring only ▾	✓	Send and receive ▾	Complete your scoring assignment before the deadline	6/13/23	Legal Team	
Rossin, Javier		Full	✓	Send and receive	Monitor the supplier's activities	7/20/23	Business Team	
Thurgoood, Tyrone		Scoring only	✓	Receive only	Complete your scoring assignment before the deadline	6/13/23	Business Team	
Zier, Hillary		View only	✓	Receive only	Analyze supplier responses	6/23/23		

COPY REQUISITION HEADER ATTACHMENTS TO THE NEGOTIATION HEADER

Details

With this feature, the attachments from the requisition header are copied to the negotiation header **instead of each negotiation line**. When purchase orders are generated after award, the **negotiation header attachments are copied to the PO header**.

Use the Opt In UI of Offering - Procurement to enable this feature.

Important Considerations

- **Attachments with categories: To Buyer, To Supplier, and Miscellaneous** are copied from Requisitions to Negotiations.
- Recommend opting into the feature **if you have also opted** into the Purchasing feature: Copy Requisition Header Attachments to the Purchase Order Header.
- If your negotiation is awarded to multiple suppliers, then the attachments of the category 'To Supplier' that are specific to suppliers will be copied over to all the purchasing documents. This would result in suppliers receiving attachments that are not applicable to them. In such cases, the buyer must remove 'To Supplier' attachments from the negotiation header before creating the purchasing documents.

Impact Analysis	
Impact Level	MED
Need to Enable	YES
Configuration	YES
Quick Win	YES

COPY REQUISITION HEADER ATTACHMENTS TO THE NEGOTIATION HEADER

Requisition: 10505793

Requisitioning BU: Vision Operations
Entered By: Clare Furey
Description: Computer Supplies

Creation Date: 2/22/23
Status: Approved
Requisition Amount: 550.00 USD
Approval Amount: 550.00 USD

Attachments

Type	Category	* File Name or URL	Title	Description	Attached By	Attached Date
File	To Receiver	Help Documentation.txt	Help Documentation.txt		Clare Furey	2/22/23 12:00 PM
File	To Approver	Item Pricing Report.txt	Item Pricing Report.txt		Clare Furey	2/22/23 12:00 PM
File	Miscellaneous	Hard Drive Installation.txt	Hard Drive Installation.txt		Clare Furey	2/22/23 12:00 PM
File	To Buyer	Supplier Information.txt	Supplier Information.txt		Clare Furey	2/22/23 12:00 PM
File	To Supplier	Contract Agreement.txt	Contract Agreement.txt		Clare Furey	2/22/23 12:00 PM
File	Internal to Requisition	Catalog.txt	Catalog.txt		Clare Furey	2/22/23 12:00 PM

Rows Selected 1

2 Overview

Edit Negotiation (RFQ 40099): Overview

Currency = US Dollar

Buyer: Clare Furey

Attachments

Type	Category	* File Name or URL	Title	Description	Attached By
File	To Supplier	Contract Agreement.txt	Contract Agreement.txt		Clare Furey
File	To Buyer	Supplier Information.txt	Supplier Information.txt		Clare Furey
File	Miscellaneous	Hard Drive Installation.txt	Hard Drive Installation.txt		Clare Furey

Rows Selected 1

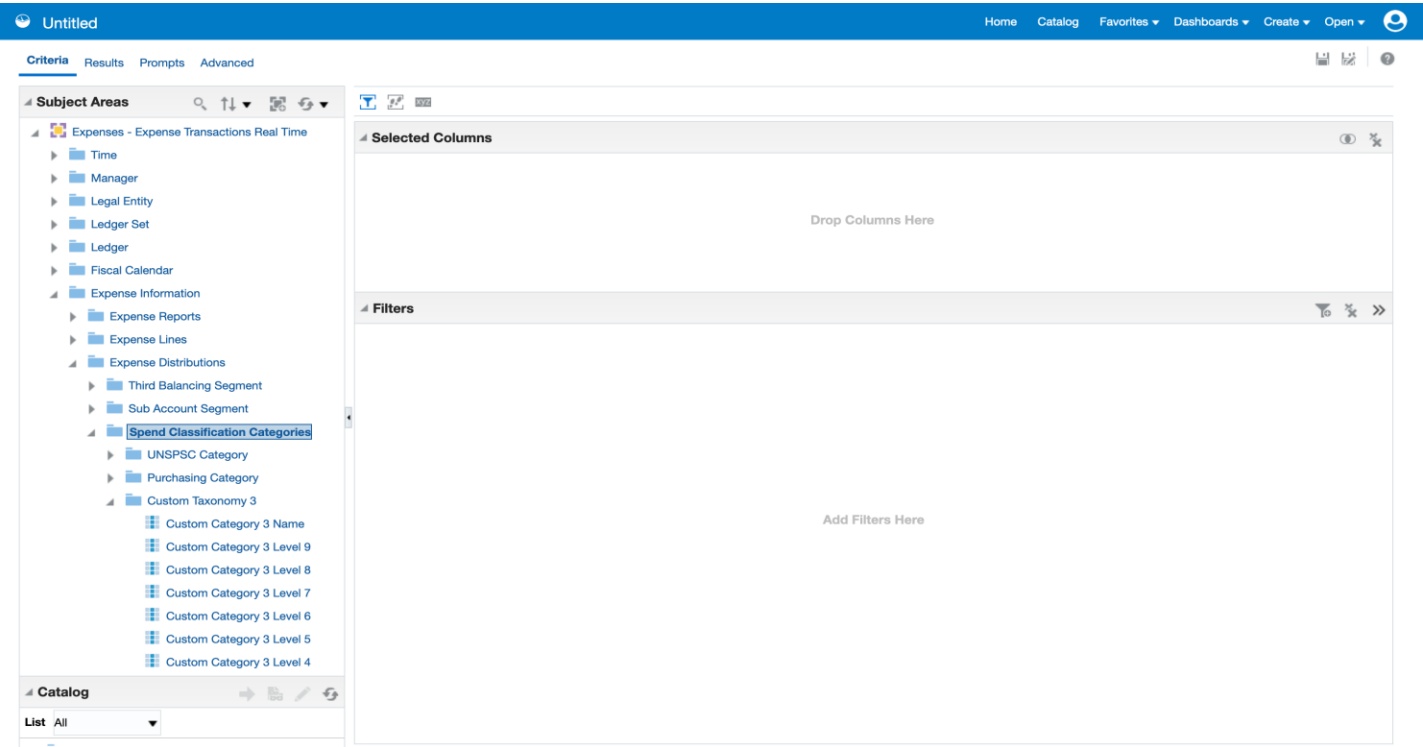
OK Cancel

CREATE REPORTS IN OTBI WITH DATA FROM EXPENSES AND ORACLE SPEND CLASSIFICATION

Details

Use real-time recategorized expense transaction data from Spend Classification within your Oracle Transactional Business Intelligence dashboards. Create new reports or update your existing reports by adding approved expense line category predictions from Spend Classification to further your analysis and improve your reporting.

After you've classified expenses in Spend Classification, you can unlock new insights into your spend through reports in OTBI that use your spend classification data.



Impact Analysis

Impact Level	LOW
Need to Enable	NO
Configuration	YES
Quick Win	YES

DISPLAY HEADER AND FOOTER ON DOWNLOADED WORD DOCUMENT

Details

You can add images, logos, and contract attributes such as the contract number, contract type, party name and so on, to the header or footer of your layout template. Content you've added to the header and footer is displayed when you download the contract to Microsoft Word in DOCX format.

Use the Opt In UI of Offering - Enterprise Contracts to enable this feature.

Important Considerations

- This feature aims to improve consistency across the contract formats, so bear in mind that any new content that you choose to add to the header or footer layout to be displayed in the downloaded Word document will also be reflected in the PDF preview since they use the same layout template.



The screenshot shows a contract document header with the 'Vision' logo and the contract number 'SRV-37552'. Below the header, the 'Contract Terms and Conditions' section is visible, starting with '1. General Terms' and '1.1. Term of Agreement'. The text under 1.1 states: 'The Effective Date of this Agreement is 12/1/22 and upon signature by both parties Vision Operations and Computer Service and Rentals. The term commences beginning with the first full billing cycle following product installation. This Agreement is valid until 11/30/23 unless otherwise terminated or extended.'

Impact Analysis

Impact Level	MED
Need to Enable	YES
Configuration	YES
Quick Win	NO

IMPROVED USABILITY FOR MANAGEMENT COLLABORATION

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Details

View Error and Warning Messages in the Collaboration Tab

You can view the error and warning messages related to sharing a contract in Oracle Content Management (OCM) in the Collaboration tab of a contract. Click on the Error or Warning icon in the Collaboration Status column to view the details.

Impact Analysis

- Impact Level **LOW**
- Need to Enable **NO**
- Configuration **NO**
- Quick Win **YES**

The screenshot shows the Oracle Content Management interface. At the top, it says 'Edit Contract: SC-23990-8123R, Version 1: Collaboration'. Below this is a navigation bar with tabs: Overview, Contract Terms, Parties, Deliverables, Documents, History, Notes, Negotiation and Renewal, Related Contracts, and Collaboration (which is selected). The main content area is titled 'Collaboration History' and contains a table with the following data:

Collaboration Type	File Name	Collaboration Status	Share Date	Request ID	Folder	Uploaded Document	Closed Date
Internal	SC-23990-8123R_1.docx	Open	23.3.23	363501			

A warning dialog box is open over the table, containing the following text:

Warning

Messages for this page are listed below.

- The contract owner Daniel,Racheal doesn't have an email address. (OKC-196725)
- The email sendmail-test-discard@oracle.com exists for multiple users in Oracle Content Management. Ensure that the email address is unique and try again. (OKC-196727)

There is an 'OK' button at the bottom right of the dialog box.

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CONTENT



Option to Review and Accept Changes When Checking In

When you check in a structured terms document from OCM, you can choose to review and accept the changes in the contract application before overriding the contract terms with the document you're uploading.

The screenshot displays the Oracle Fusion Cloud Applications interface. On the left is a dark navigation sidebar with icons and labels for Home, Assets, Sites, Experiences, Recommendations, Analytics, and a COLLABORATION section containing Documents, Conversations, and Sauce Video. The main content area shows a document titled 'SC-23990-8123R-V1' with options for Share Link, Members, Upload, and Create. A modal dialog box titled 'Check in Contract: SC-23990-8123R, Version 1' is open, showing a document name 'SC-23990-8123R_1.docx' and two options: 'Review and accept changes in the application' (checked) and 'Close the collaboration' (unchecked). The dialog has an 'OK' button. The background shows a document overview page with a search bar and navigation icons.

Closing Q&A

CLOSING NOTE

1. What happens next?
 1. Presentation
 2. Session Recording
2. Speak with your CES Support Manager or CES Service Manager
 1. for additional services around quarterly updates
 2. Learn more about Innovation
3. Next Sessions ?

Talent Management	19-Jul-2023	60 minutes	3:00 PM GMT 4:00 PM CEST 10:00 AM EST
HR Helpdesk and ORC	20-Jul-2023	60 minutes	3:00 PM GMT 4:00 PM CEST 10:00 AM EST
SCM (Inventory & Order Management)	20-July-2023	60 minutes	4:30 PM GMT 5:30 PM CEST 11:30 AM EST

MASTEK
is here to
help you!



THANK YOU

