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Cloud Enhancement Services

Live Webinar

23C - SCM (PROCUREMENT & ADVANCE PROCUREMENT)

Empowering you for the next update

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CES - Operations Executive

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Consultant I

VBD Value Based Delivery | ORACLE Partner | Mastek Glide 4.0

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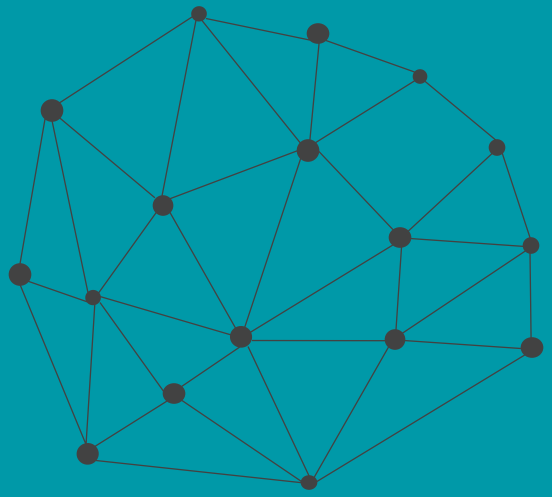
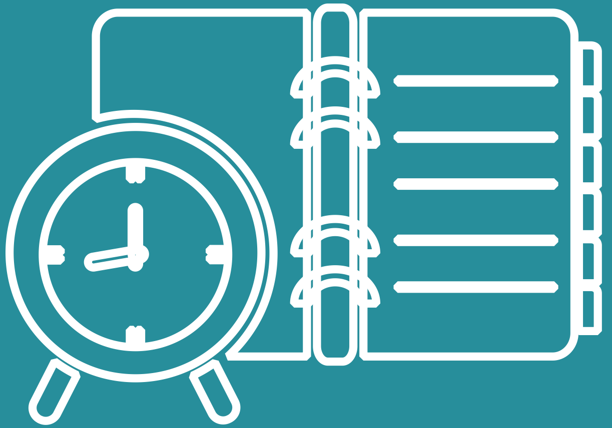


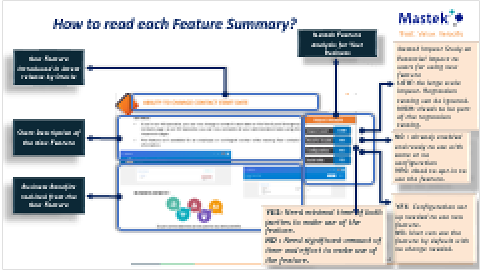
DISCLAIMER

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?

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New Feature Introduced in latest release by Oracle

Short Description of the New Feature

Business Benefits realized from the New Feature

Mastek Feature Analysis for Your Business

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.*

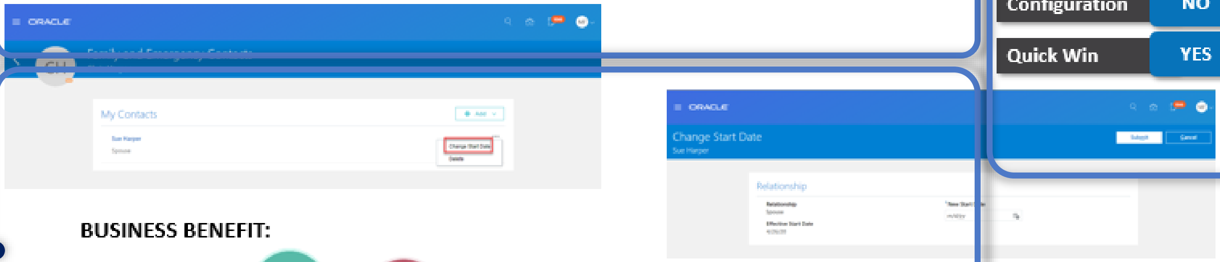
YES: *Configuration set up needed to use new feature.*
NO: *User can use the feature by default with no change needed.*

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.*

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.



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

BUSINESS BENEFIT:

Ensure correct data that can be used for any family benefits

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OUR ANALYSIS OF LATEST RELEASE

NEW FEATURES

ANALYSIS - STATISTICS

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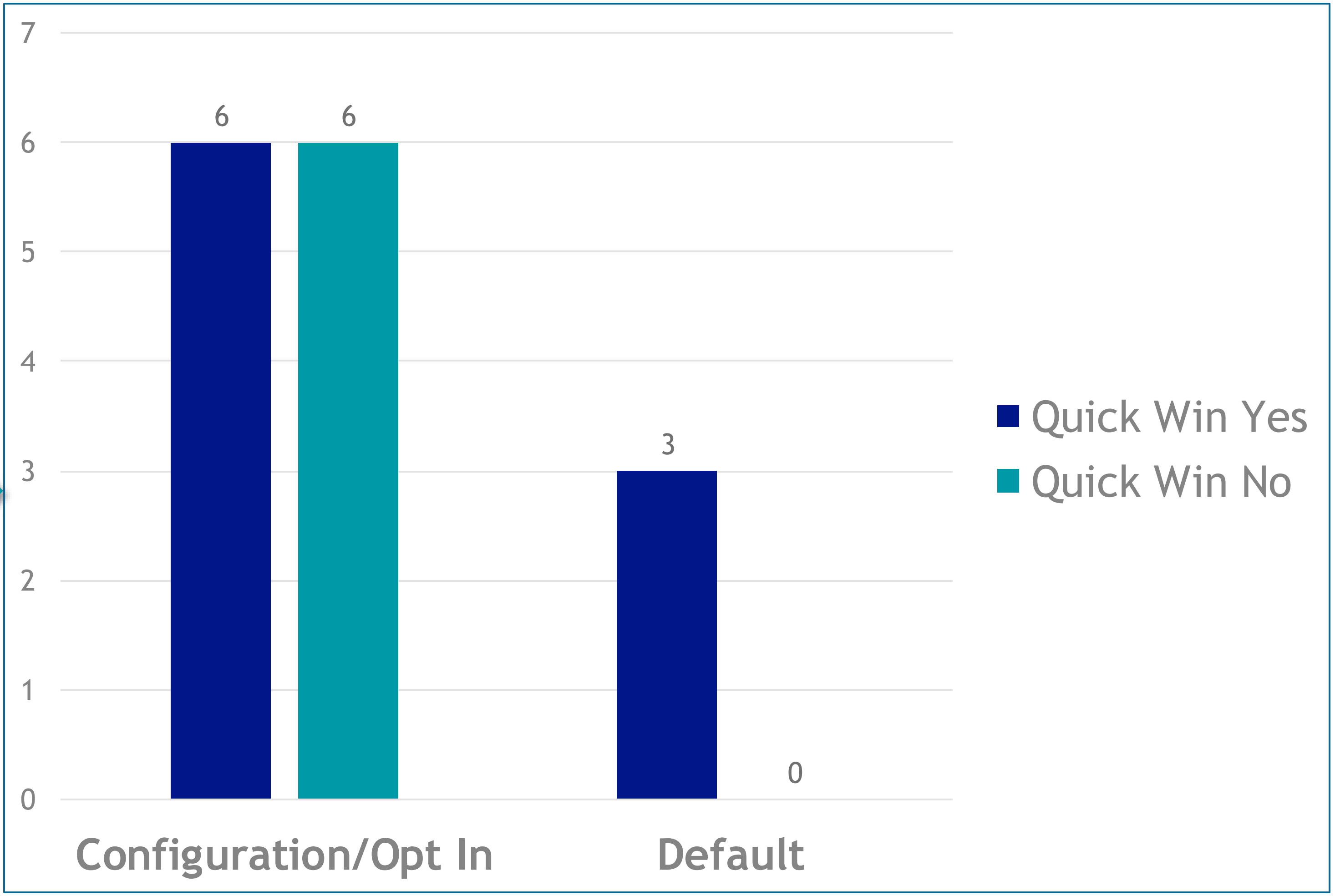
15
Procurement/ Adv. Proc



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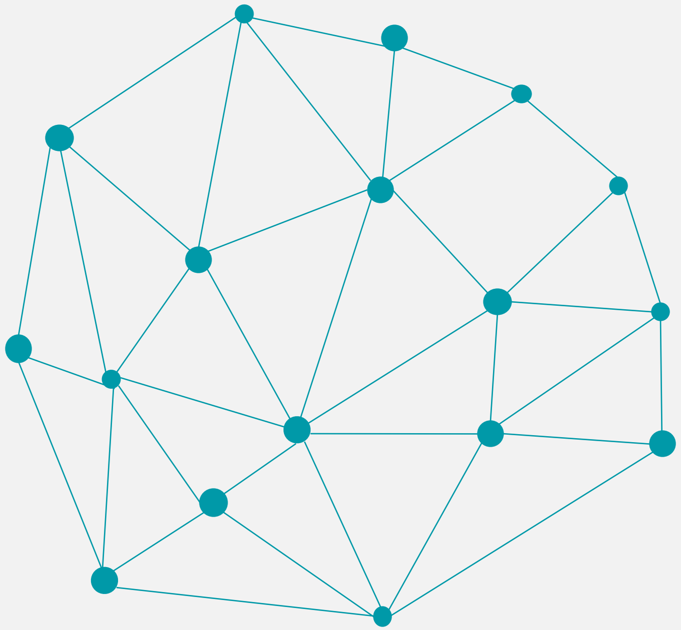

OUR ANALYSIS

Latest Release

INTEGRATE AND EXTEND PROCUREMENT USING REST SERVICES

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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

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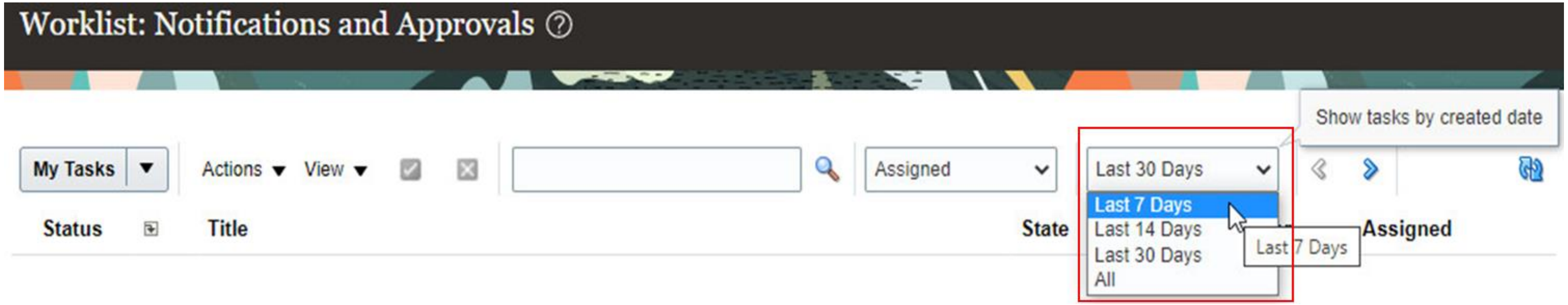
Details

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.



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.

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

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

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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

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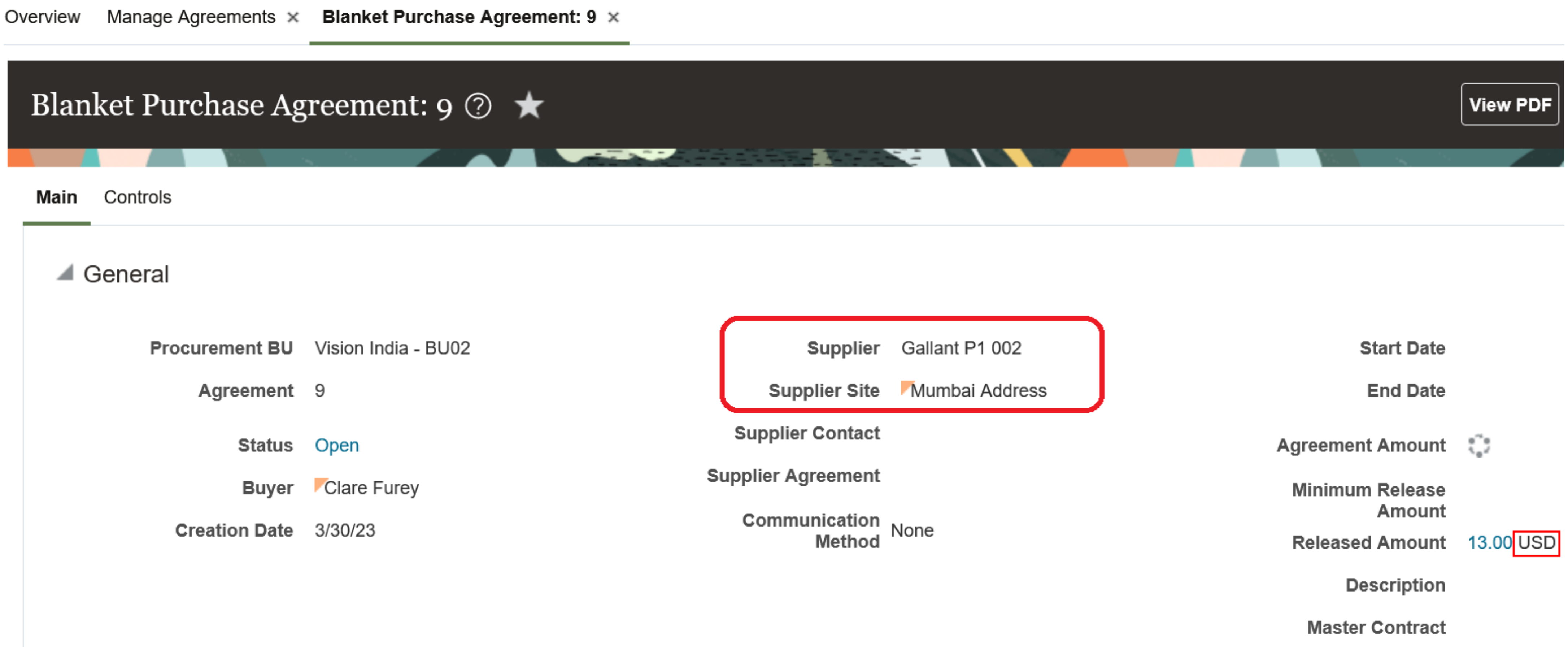
Blanket agreement is created with the supplier site as Mumbai, and the price is negotiated in Foreign Currency i.e. US dollars.



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

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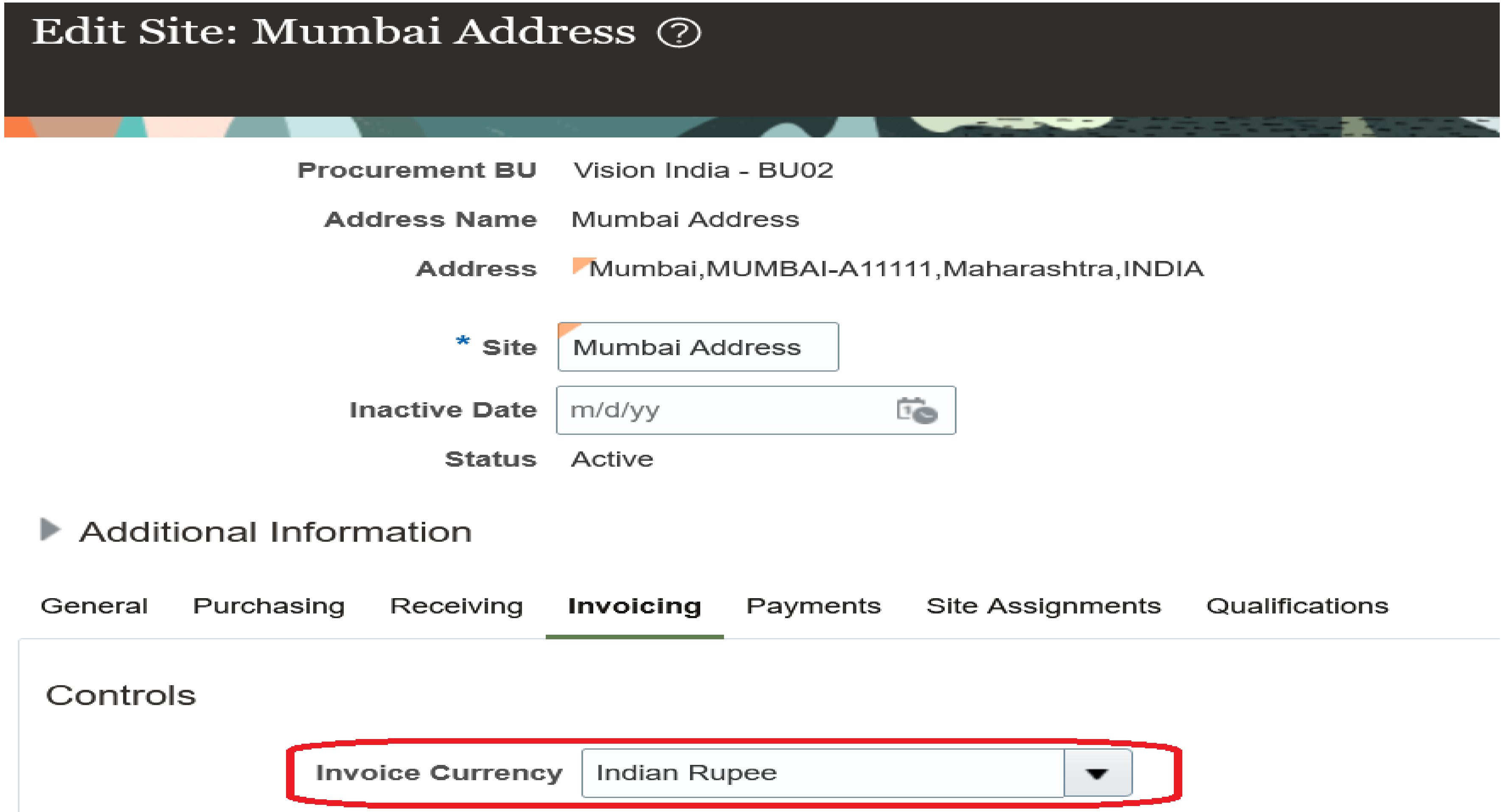
The local invoice currency of the supplier site Mumbai is Indian Rupees.



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

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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

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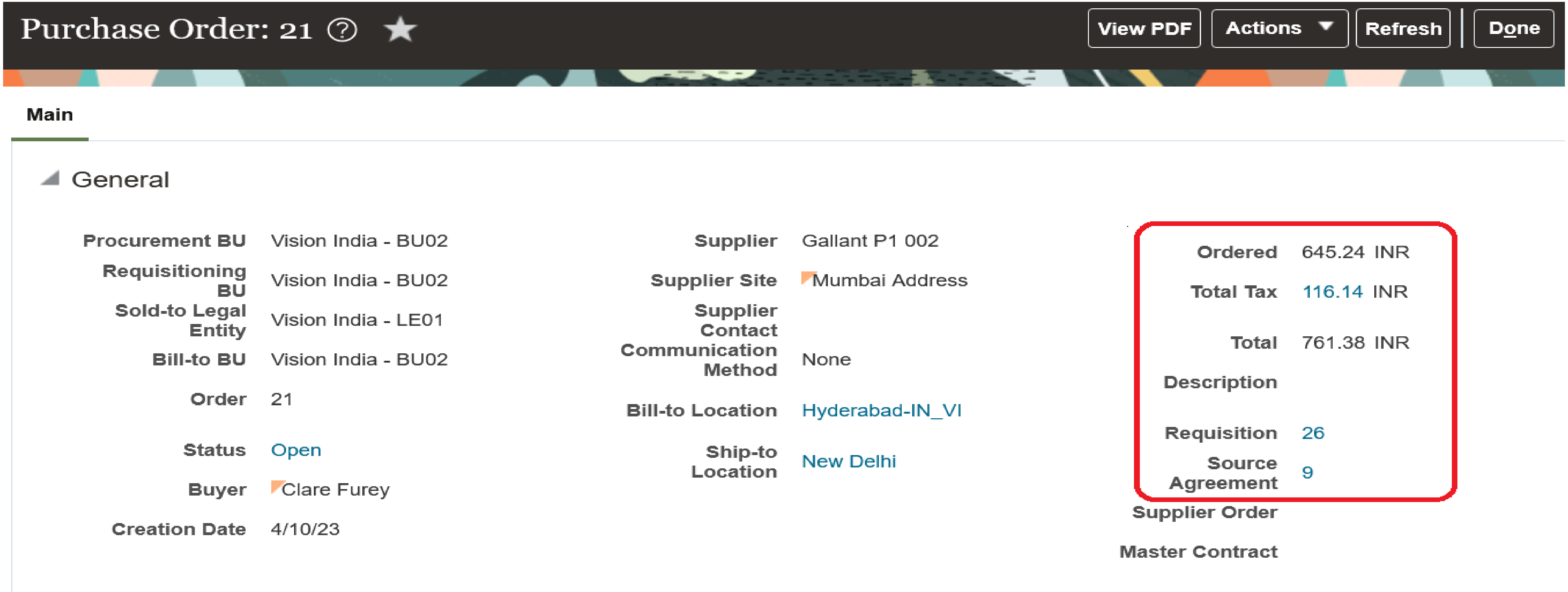
When the requisition is processed into a purchase order, it's created in Indian Rupees, which is the local currency of the Vision India business unit.



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

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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

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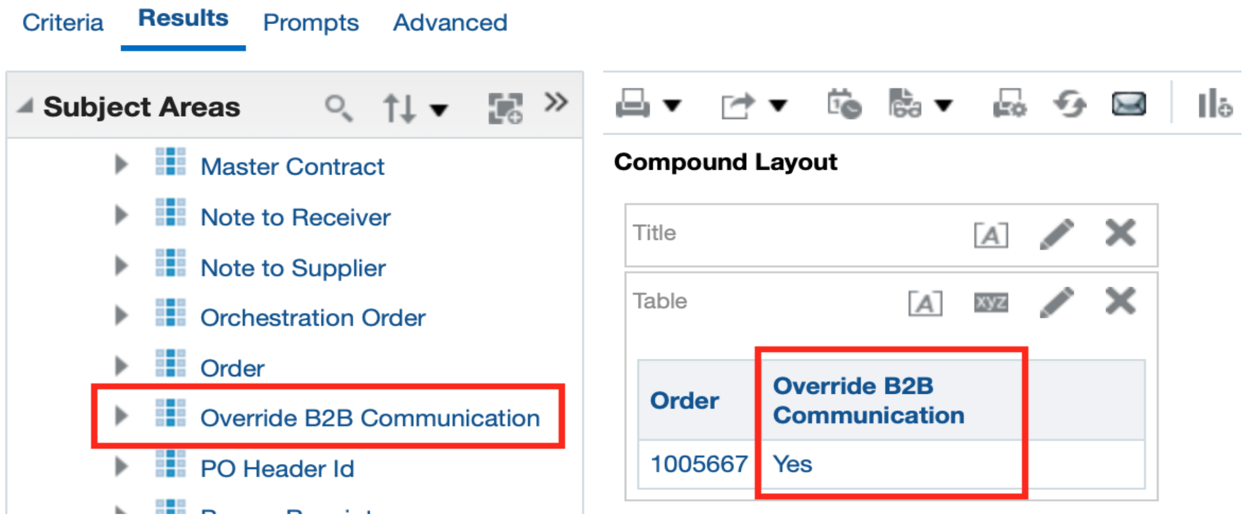
Details

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

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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

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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

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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

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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

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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

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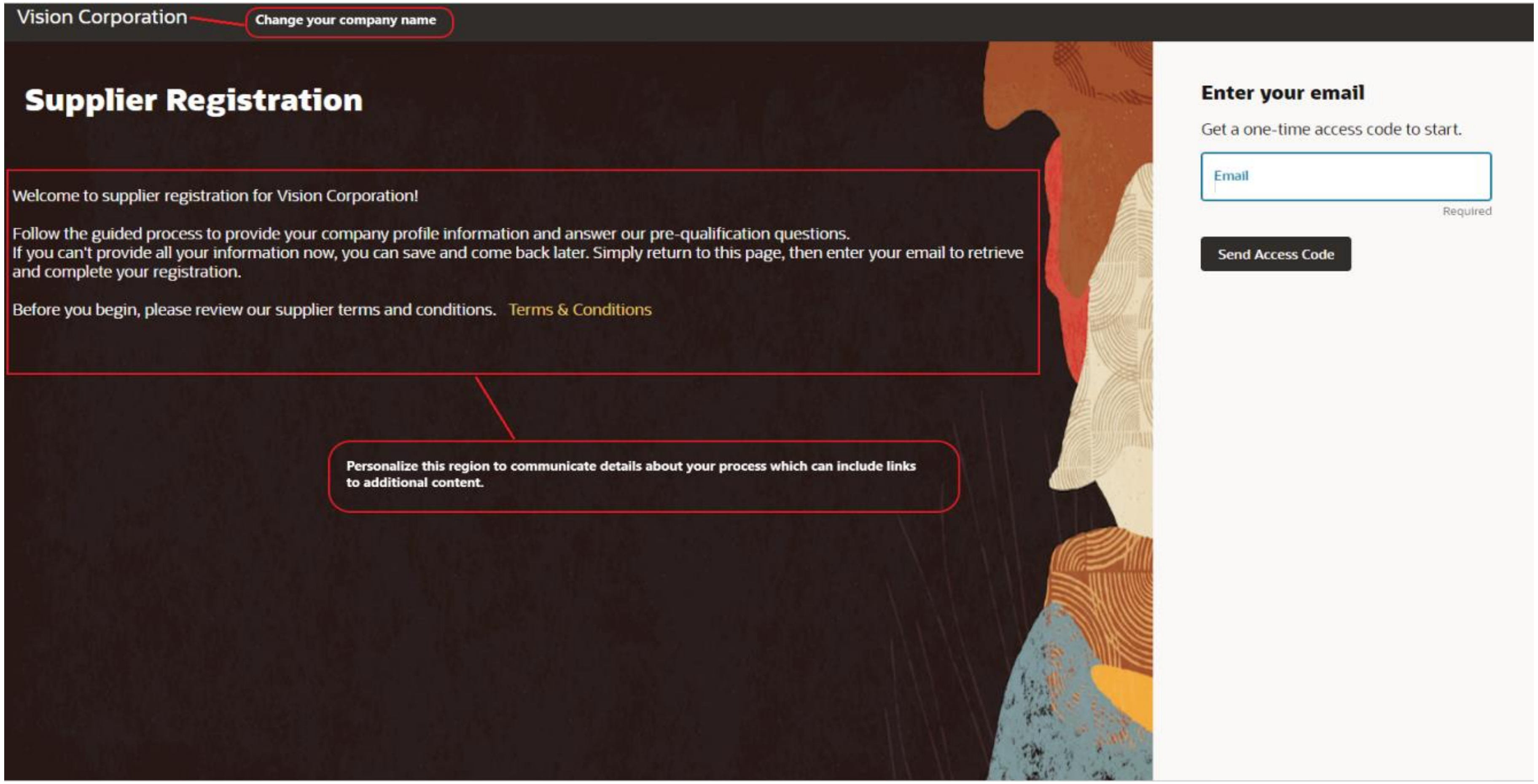
The requester begins by entering their email to receive a one-time access code which is used to start their supplier registration.



NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

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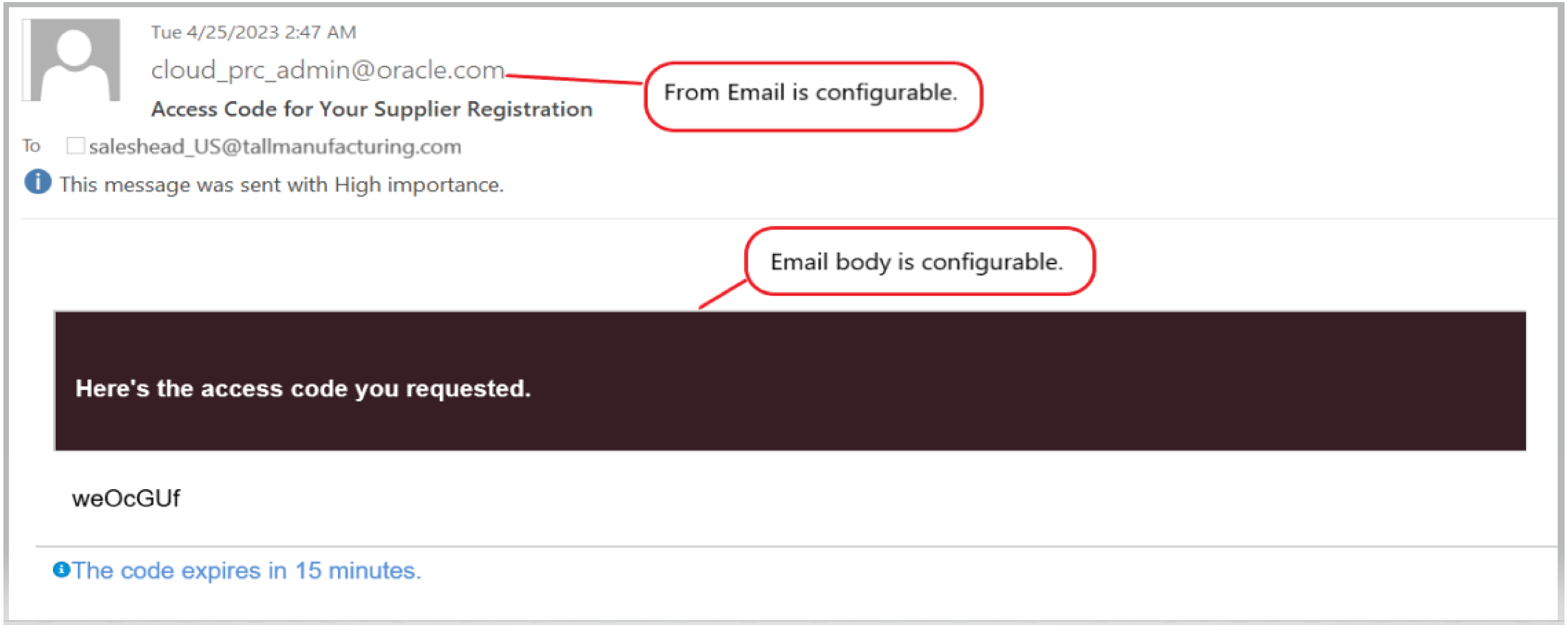
You can personalize the start page to communicate information about your supplier registration and onboarding processYou can also add information or corporate branding to tailor the email notification that sends the one-time access code..



NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

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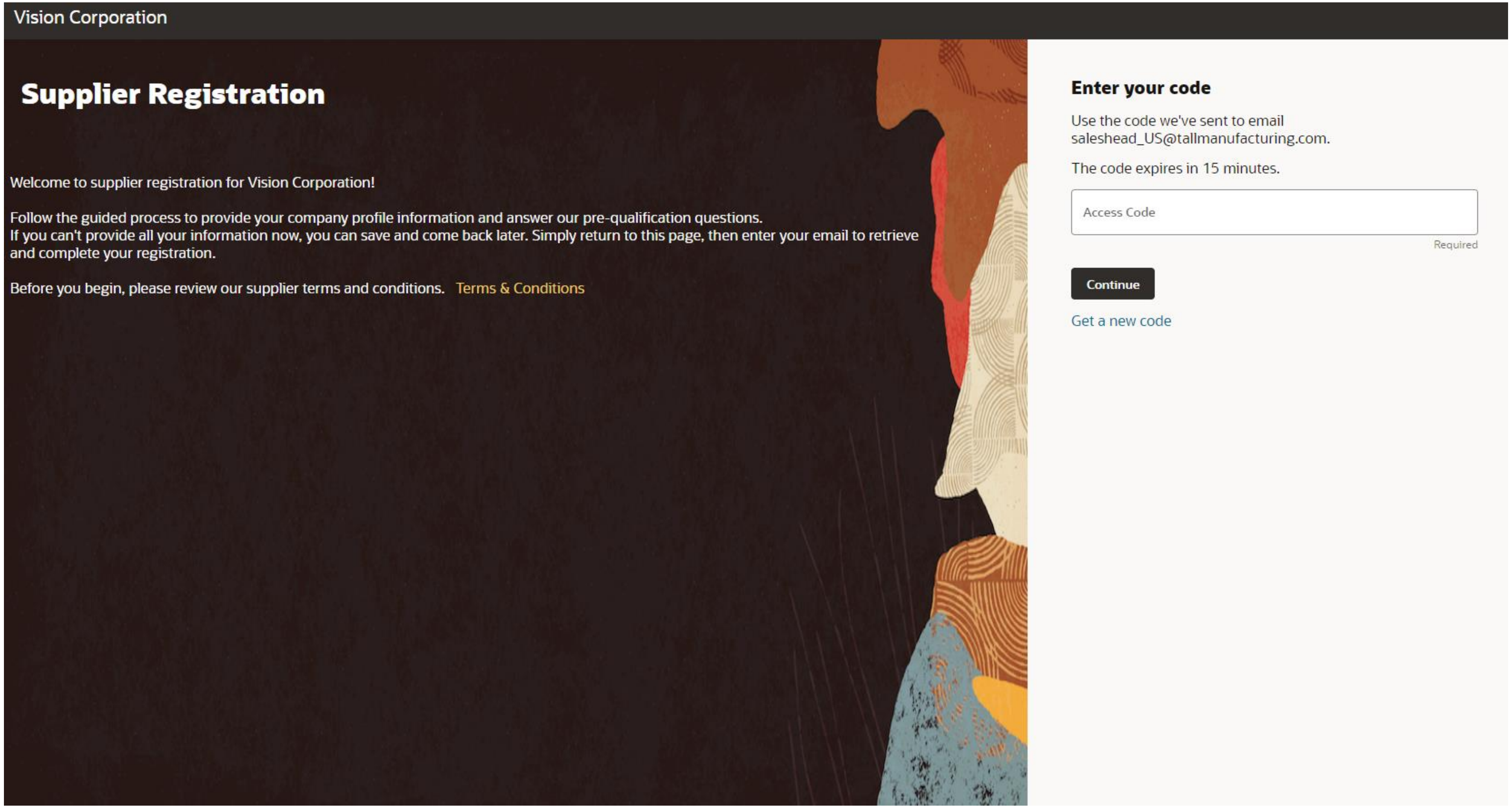
Registration Start: Enter Access Code



NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

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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

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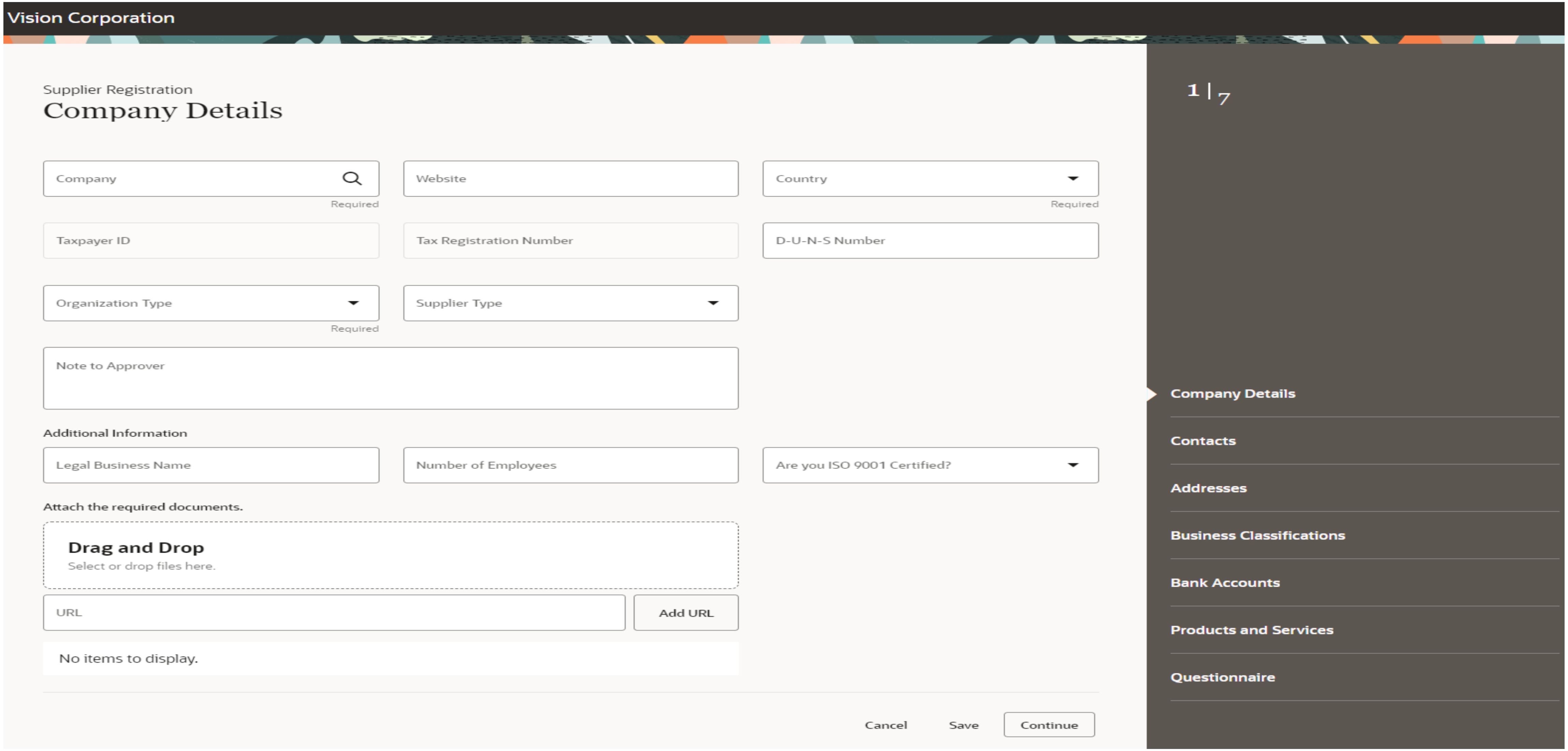

NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

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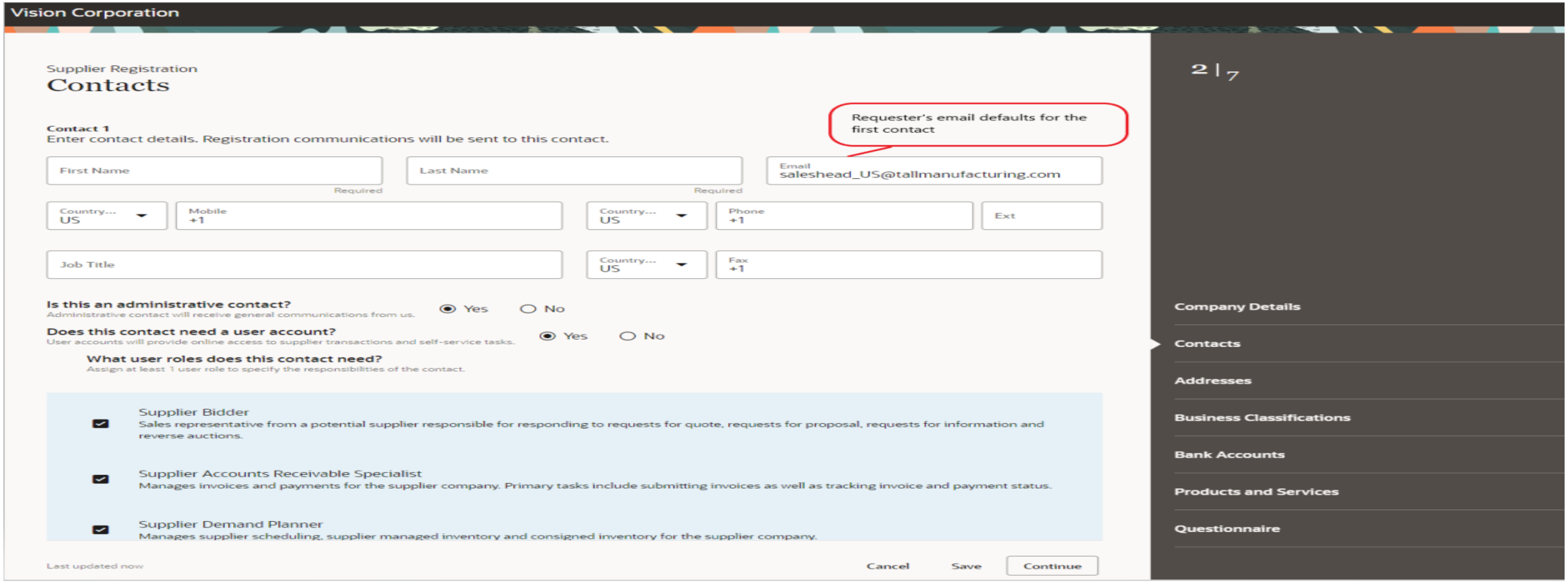
Contacts

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**.



NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

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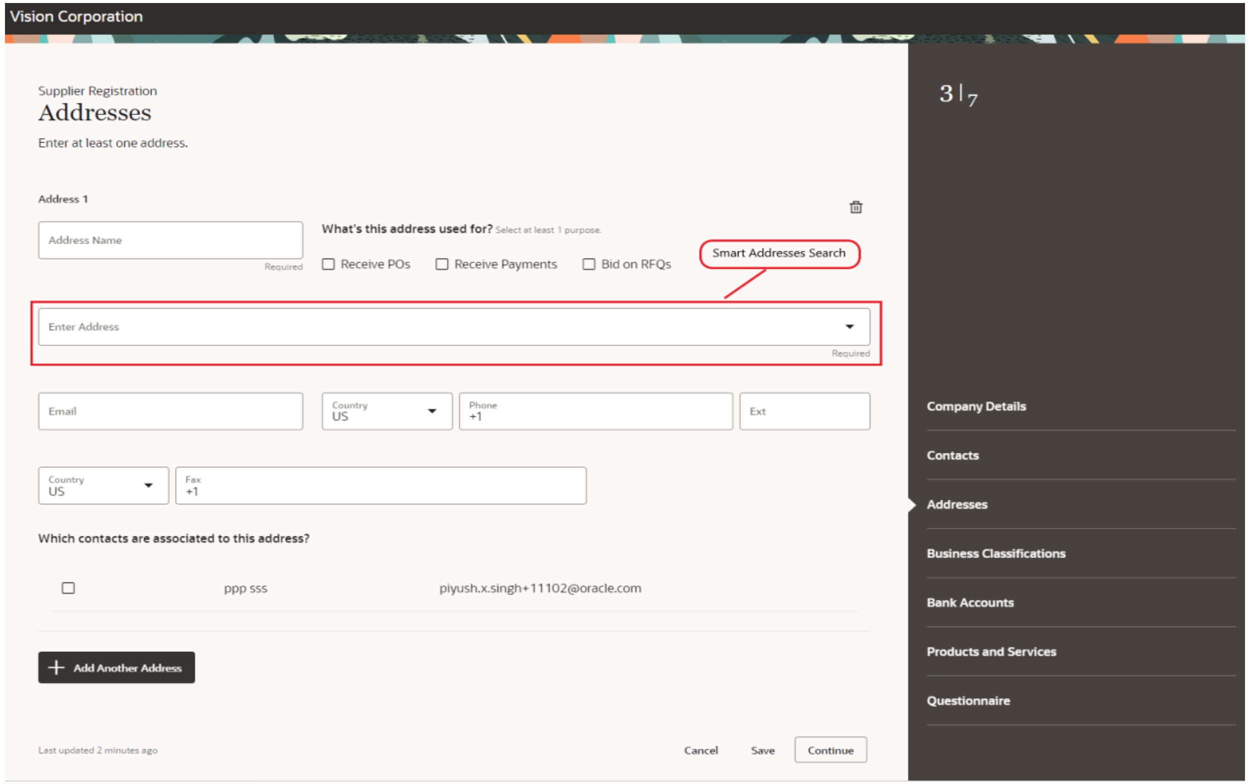
Addresses

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.**



NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

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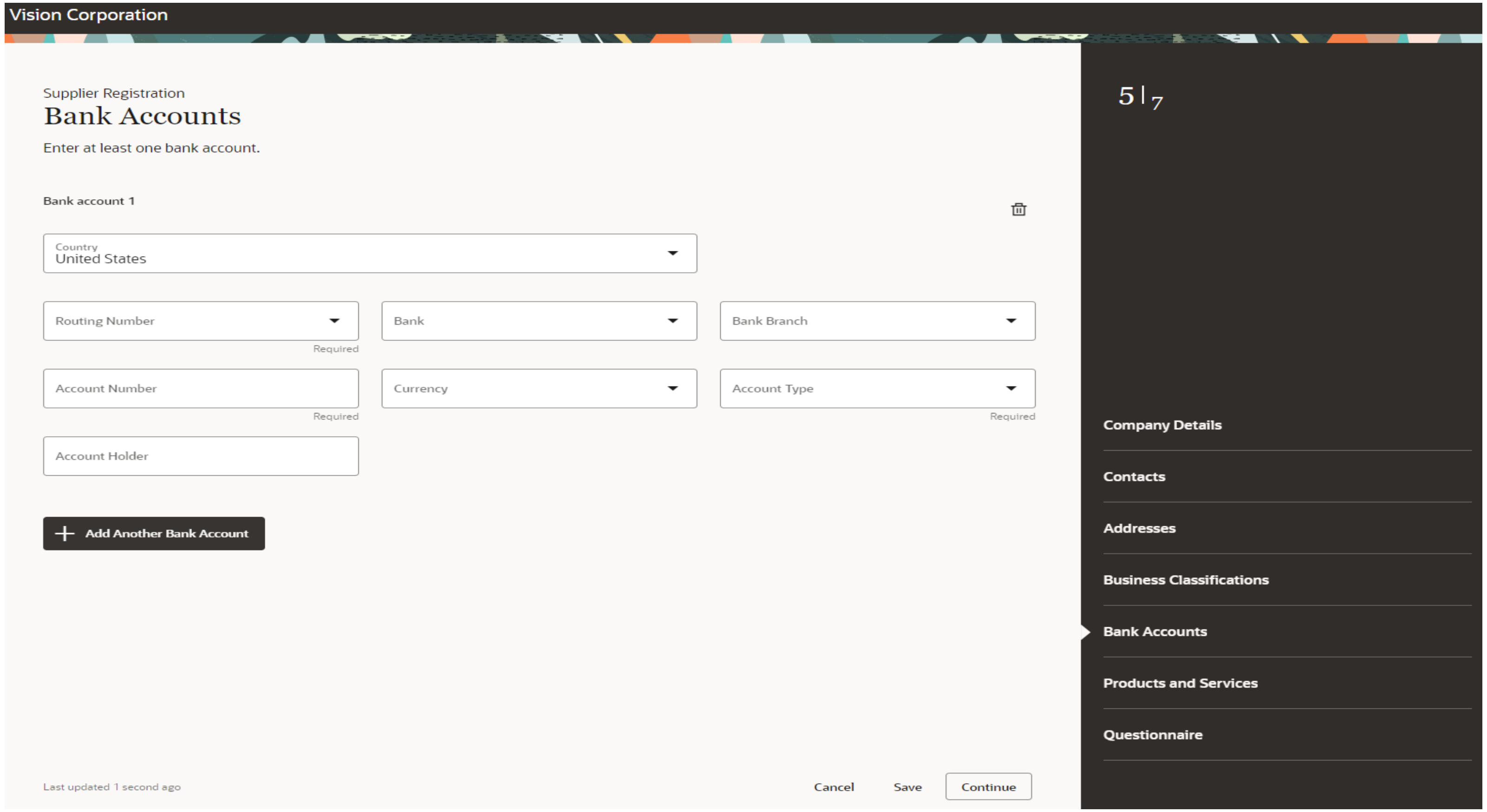
Bank Accounts

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.



NEXT GENERATION USER EXPERIENCE FOR SUPPLIER SELF-SERVICE REGISTRATION

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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

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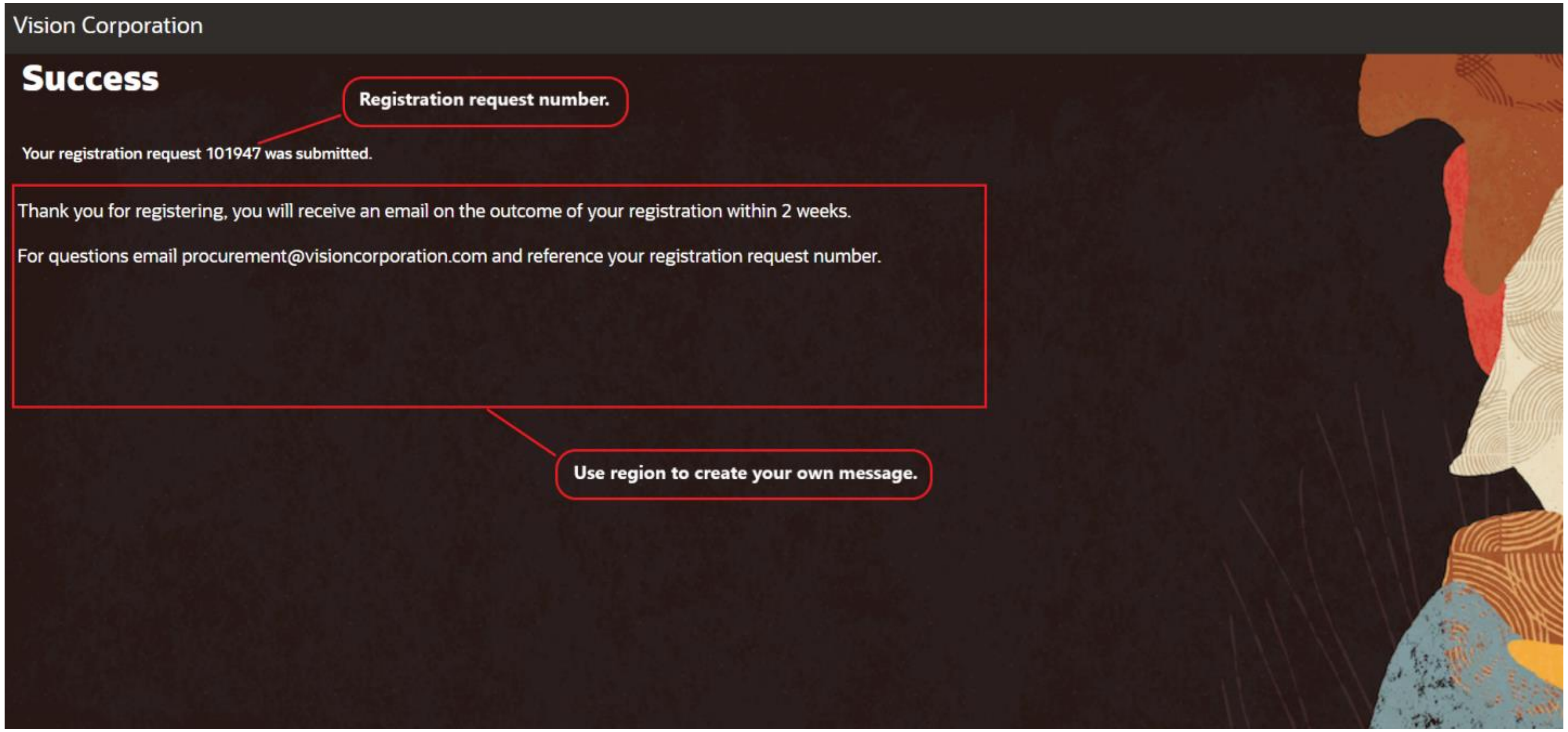
Confirmation Message

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

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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

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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

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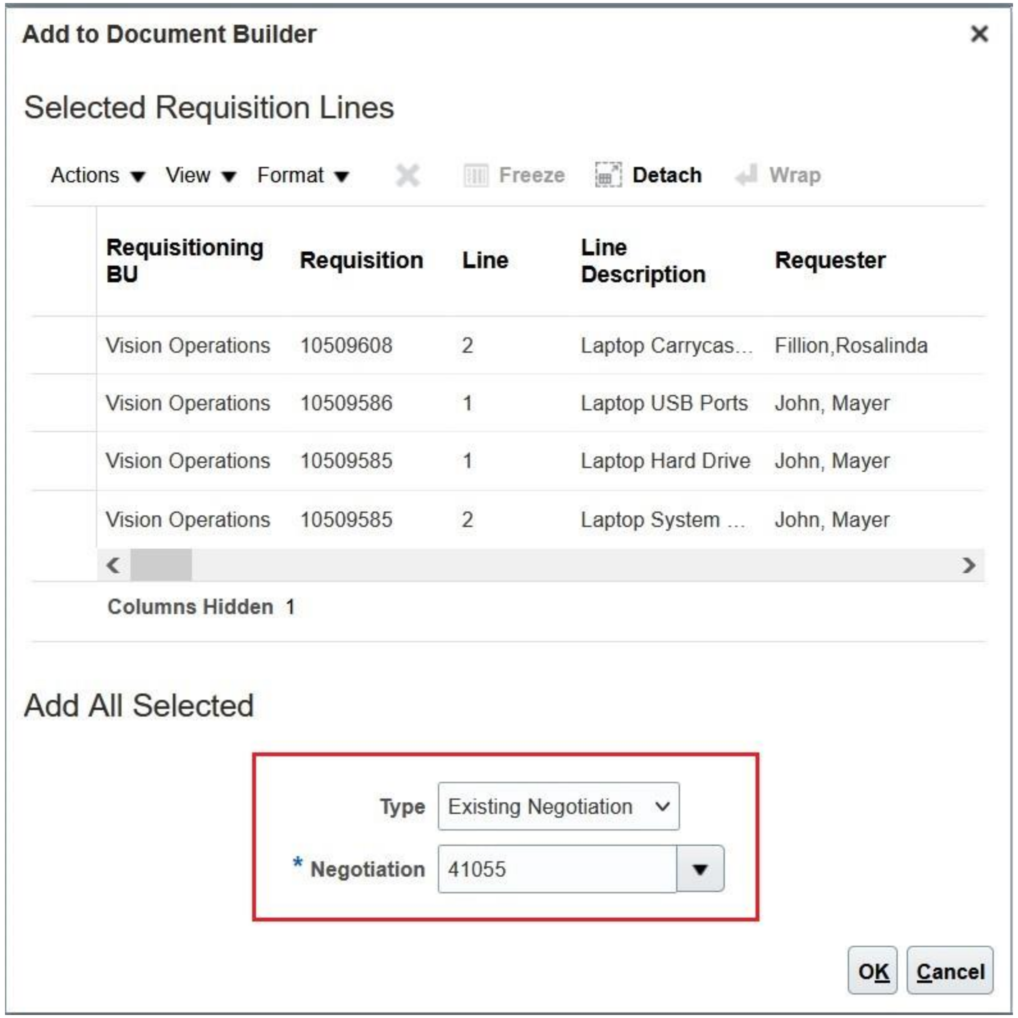
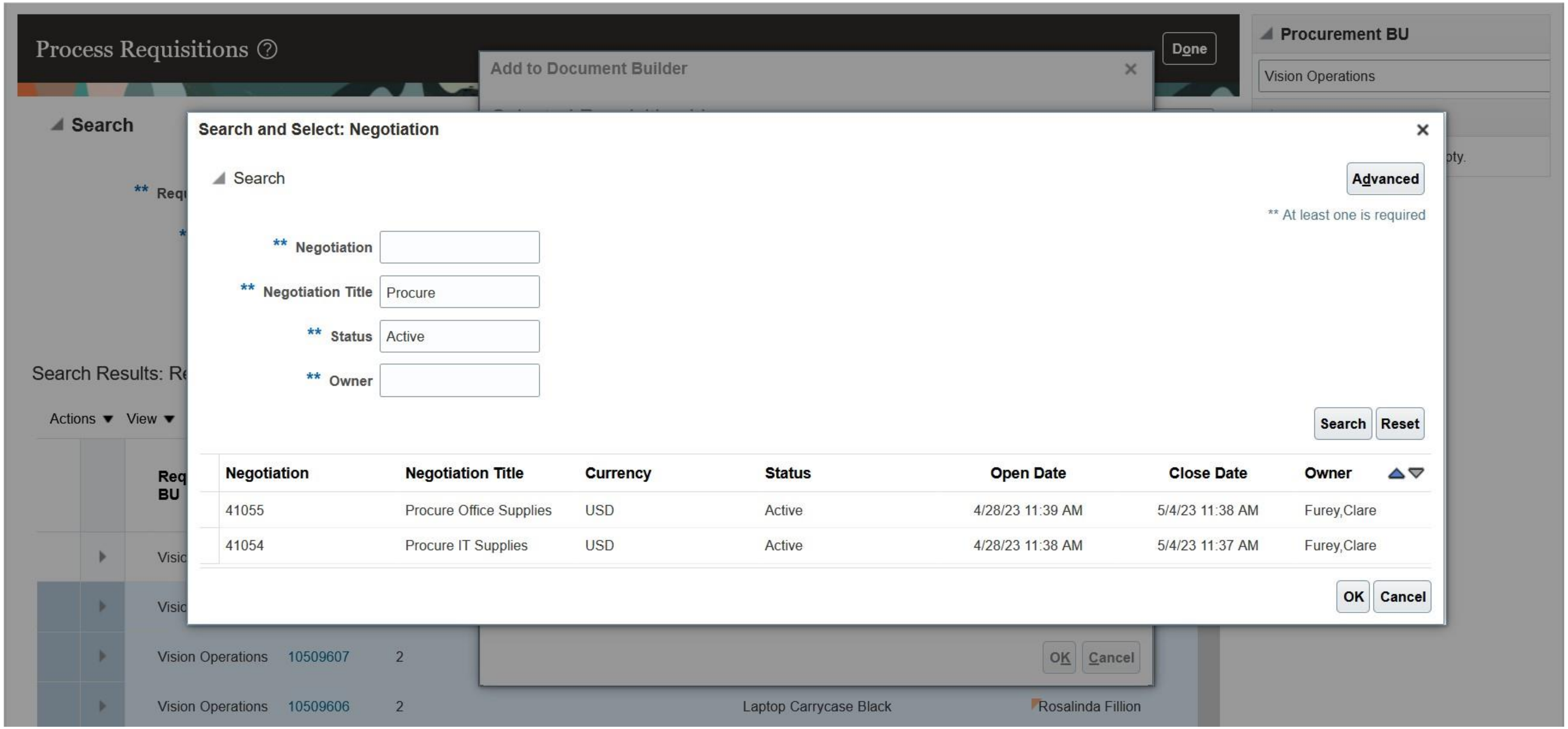
Add Requisition Lines to Existing Negotiation



ADD REQUISITIONS TO AN EXISTING NEGOTIATION

Search and Select Active or Draft Negotiations



ADD REQUISITIONS TO AN EXISTING NEGOTIATION

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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

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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

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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

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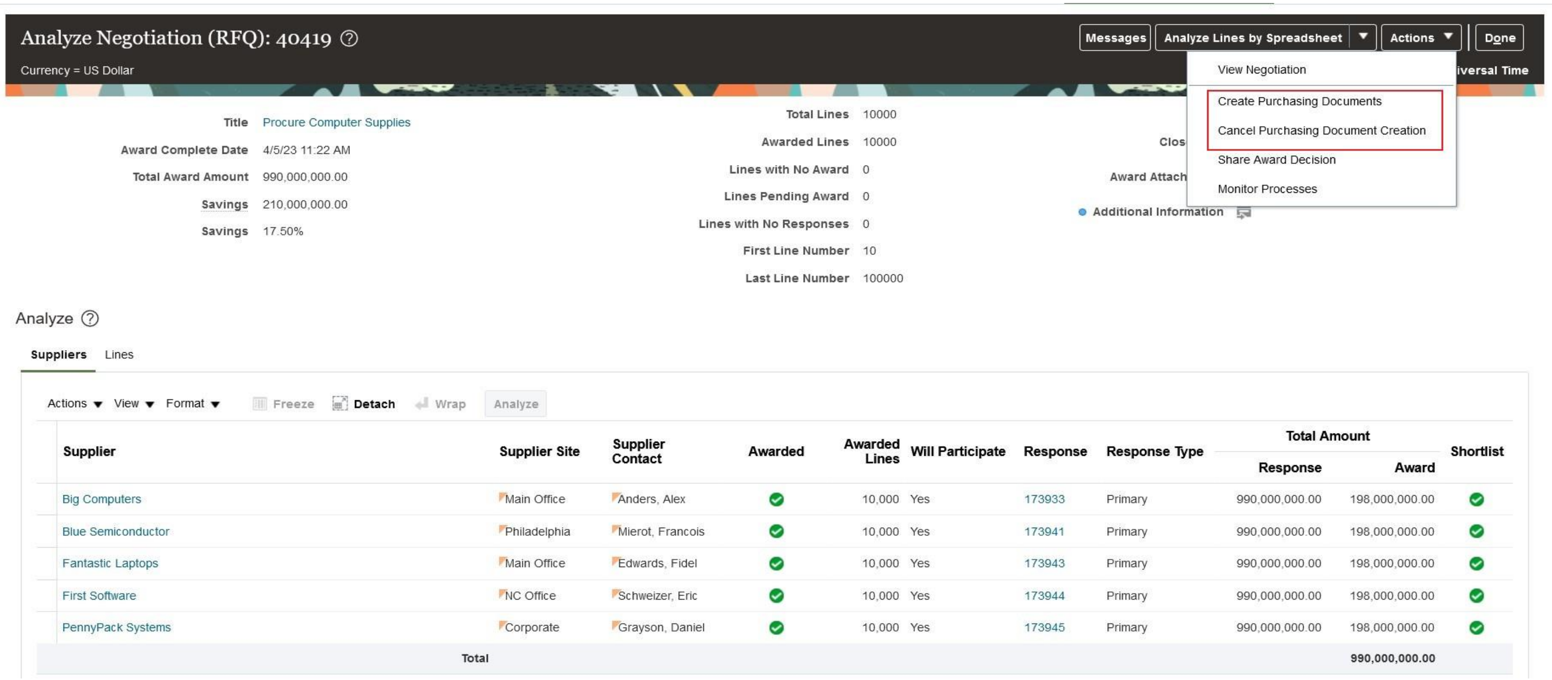
Details

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

CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION

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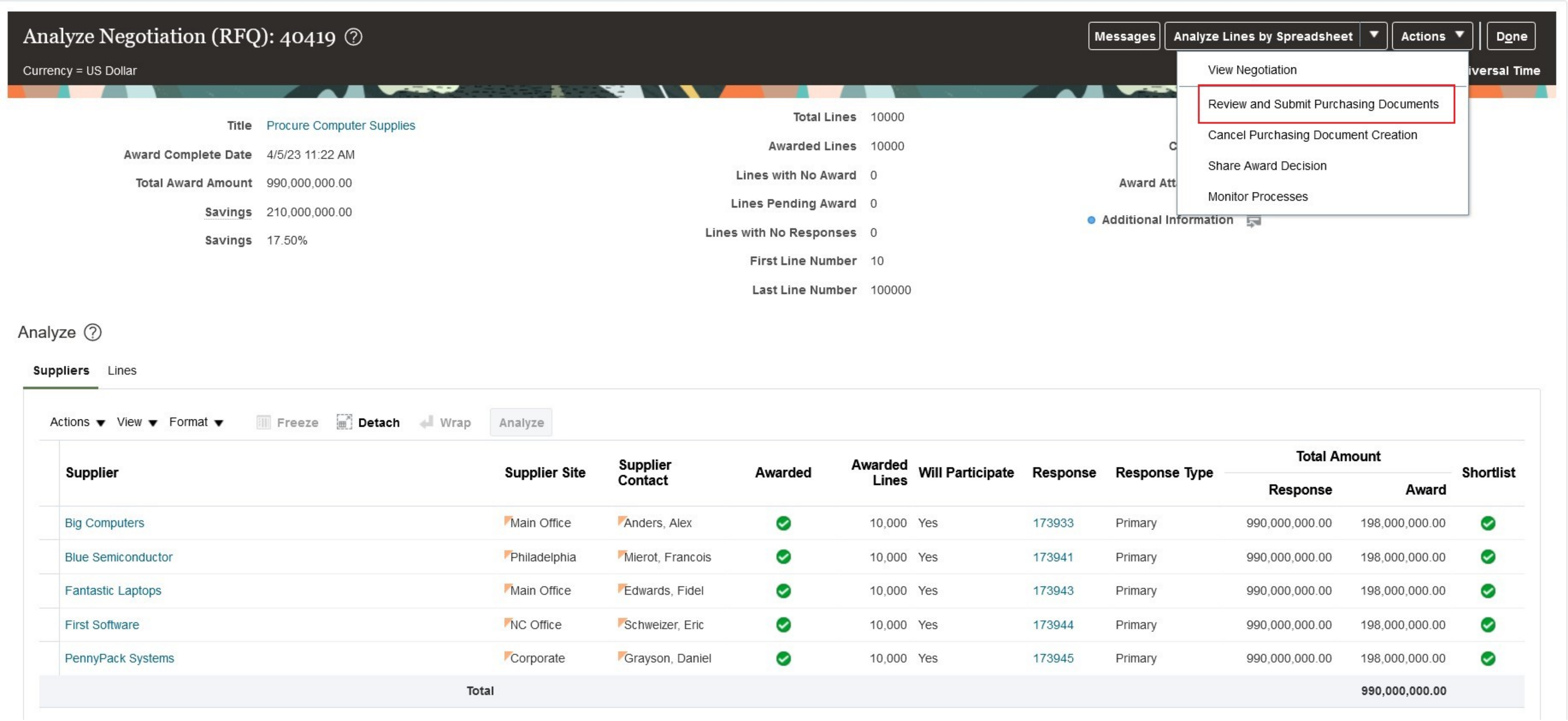
Next, click the Review and Submit Purchasing Documents action to navigate to the page where you can review the purchasing documents.



CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION

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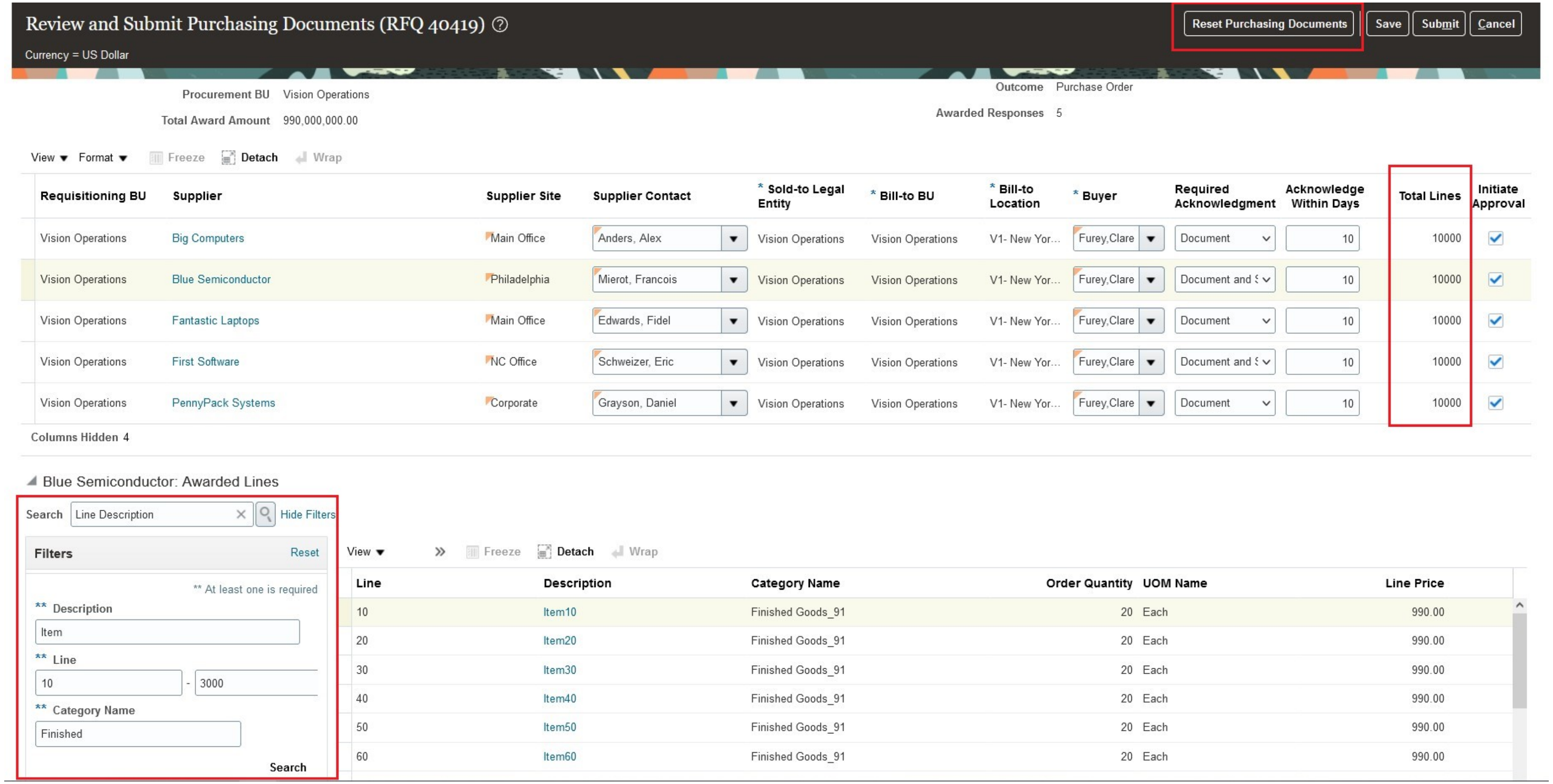
You now have the ability to search the lines in each purchasing document using multiple filtering criteria. You also have the option to retrigger purchasing document creation by clicking the Reset Purchasing Documents button.



CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION

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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 Cancel

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

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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)

Currency = US Dollar

Done

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

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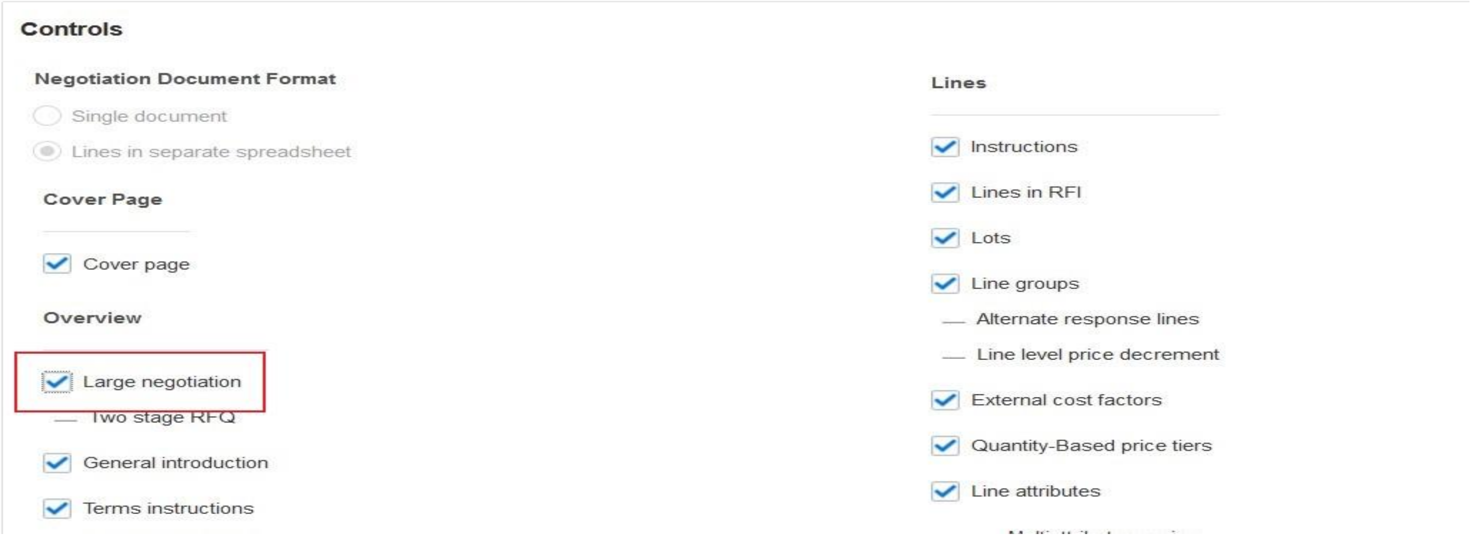
Steps to Enable 1: Setup of Negotiation Style

- 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.**



CREATE PURCHASING DOCUMENTS FROM A LARGE NEGOTIATION

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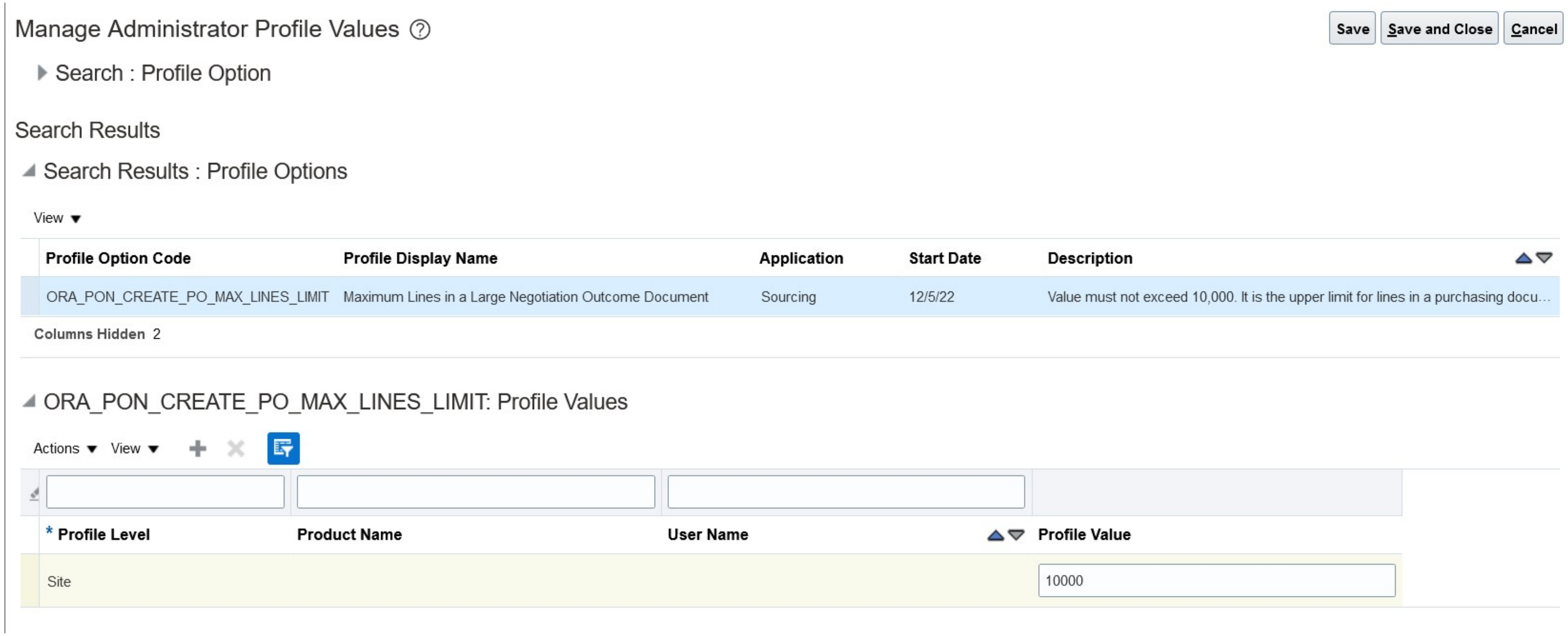
Steps to Enable 2: Setup of Profile Option

- 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.**



CAPTURE NEW SUPPLIER ITEMS IN NEGOTIATIONS

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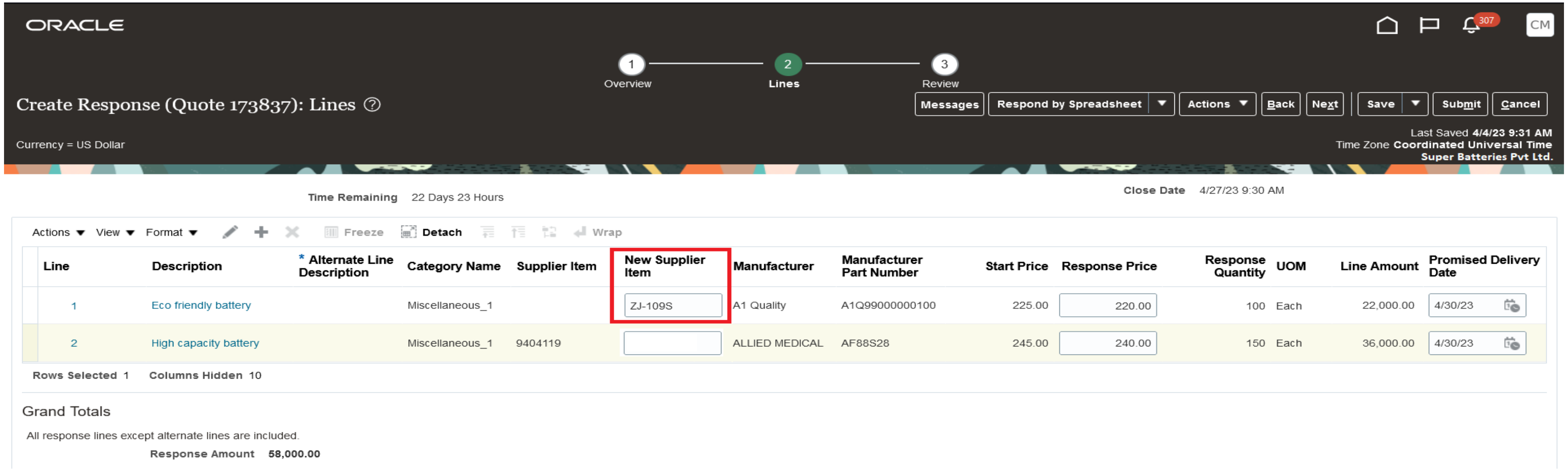
Details

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

CAPTURE NEW SUPPLIER ITEMS IN NEGOTIATIONS

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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.

CAPTURE NEW SUPPLIER ITEMS IN NEGOTIATIONS

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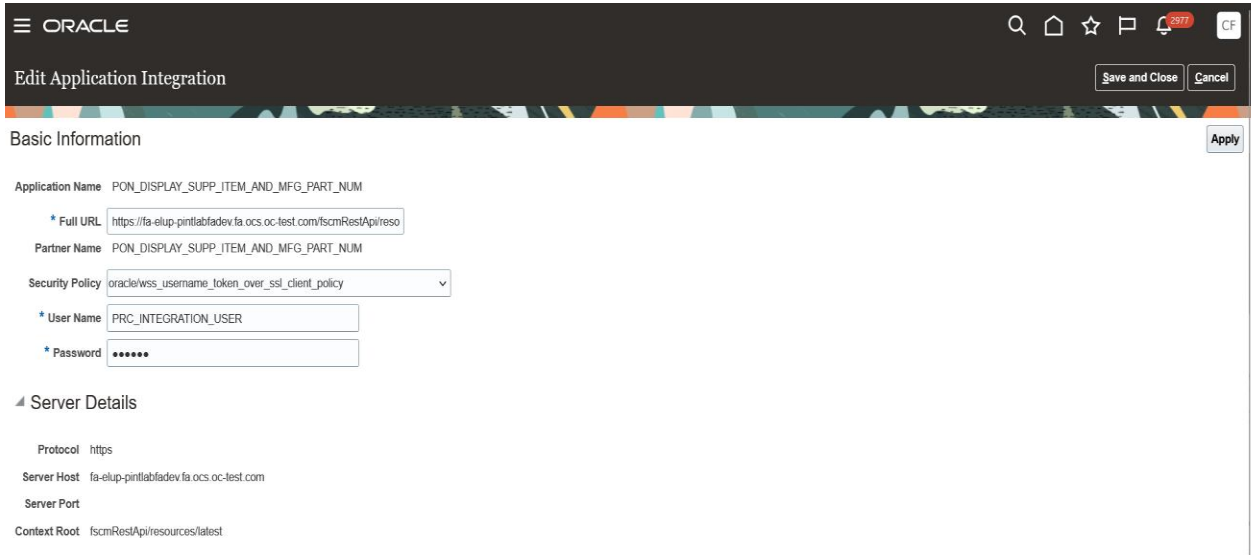
Steps to Enable 2: Setup of integration

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.

CAPTURE NEW SUPPLIER ITEMS IN NEGOTIATIONS

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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

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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

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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	
Thurgood,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

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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

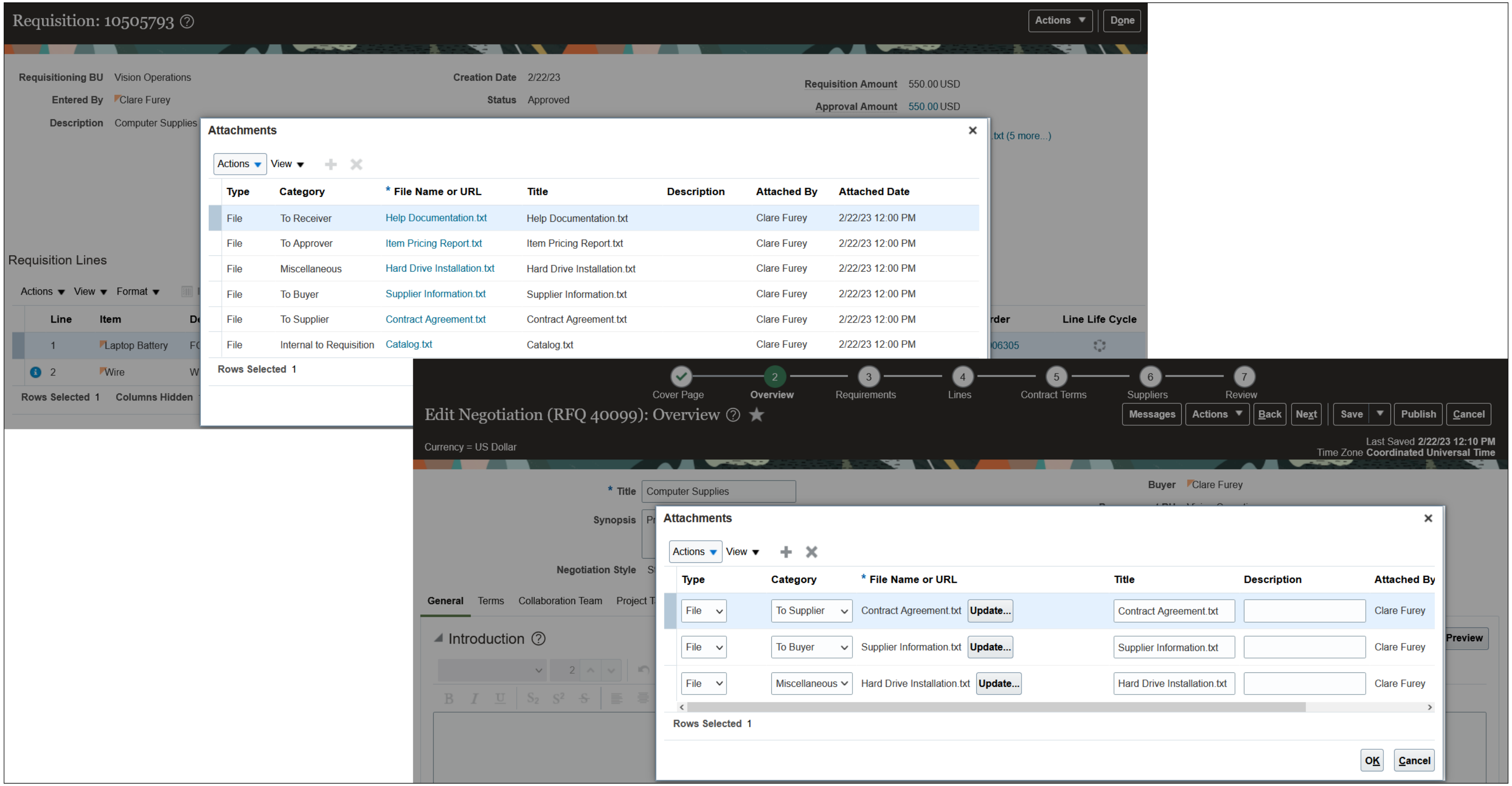
- **Attachments with categories: To Buyer, To Supplier, and Miscellaneous** are copied from Requisitions to Negotiations.
- Recommend opting into the feature **if you have also opted** into the Purchasing feature: Copy Requisition Header Attachments to the Purchase Order Header.
- If your negotiation 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

Trust. Value. Velocity



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

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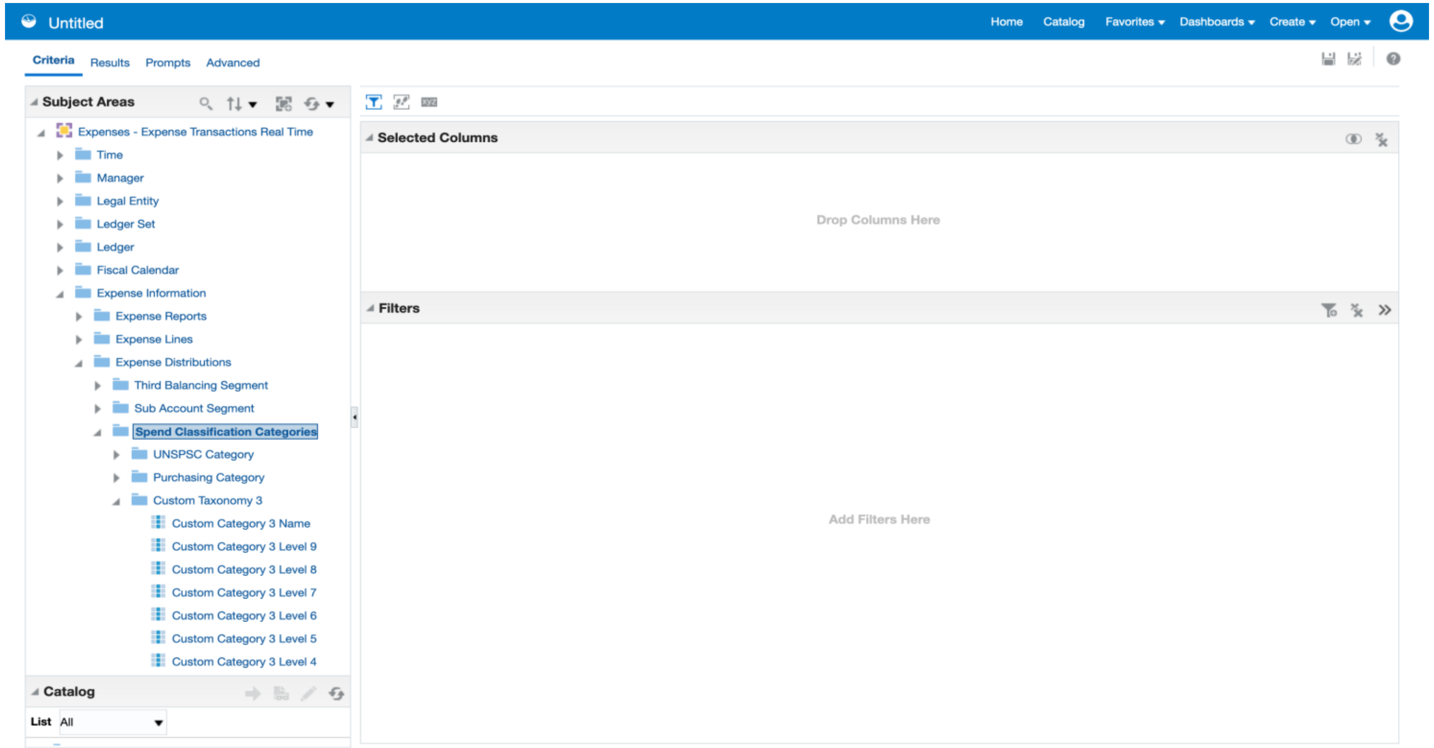
Details

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

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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.**

Contract: SRV-37552

Vision

Contract Terms and Conditions

1. General Terms

1.1. Term of Agreement

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 ORACLE CONTENT MANAGEMENT COLLABORATION

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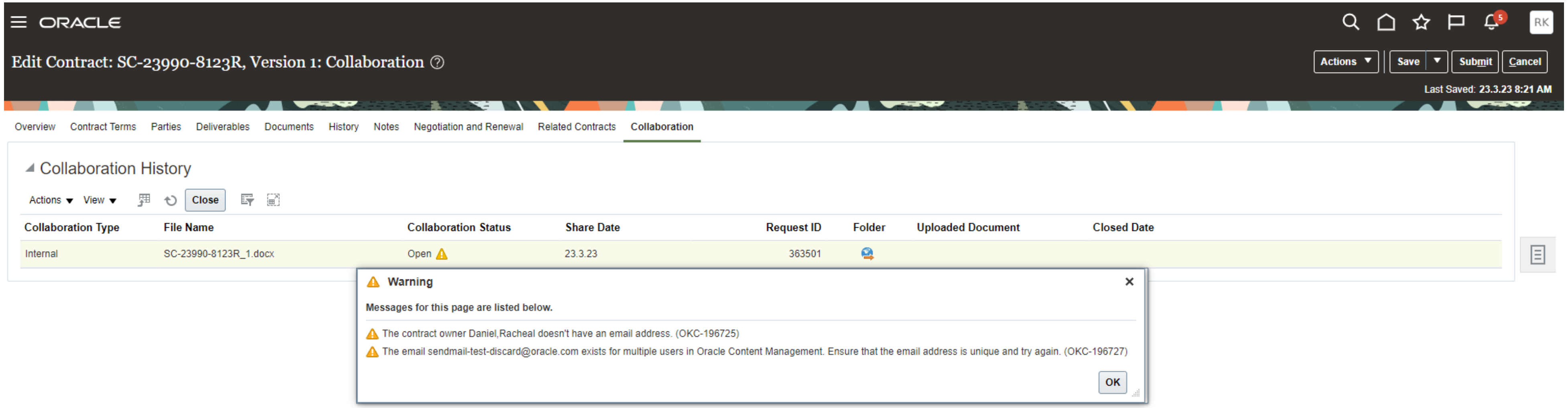
Details

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

IMPROVED USABILITY FOR ORACLE CONTENT MANAGEMENT COLLABORATION

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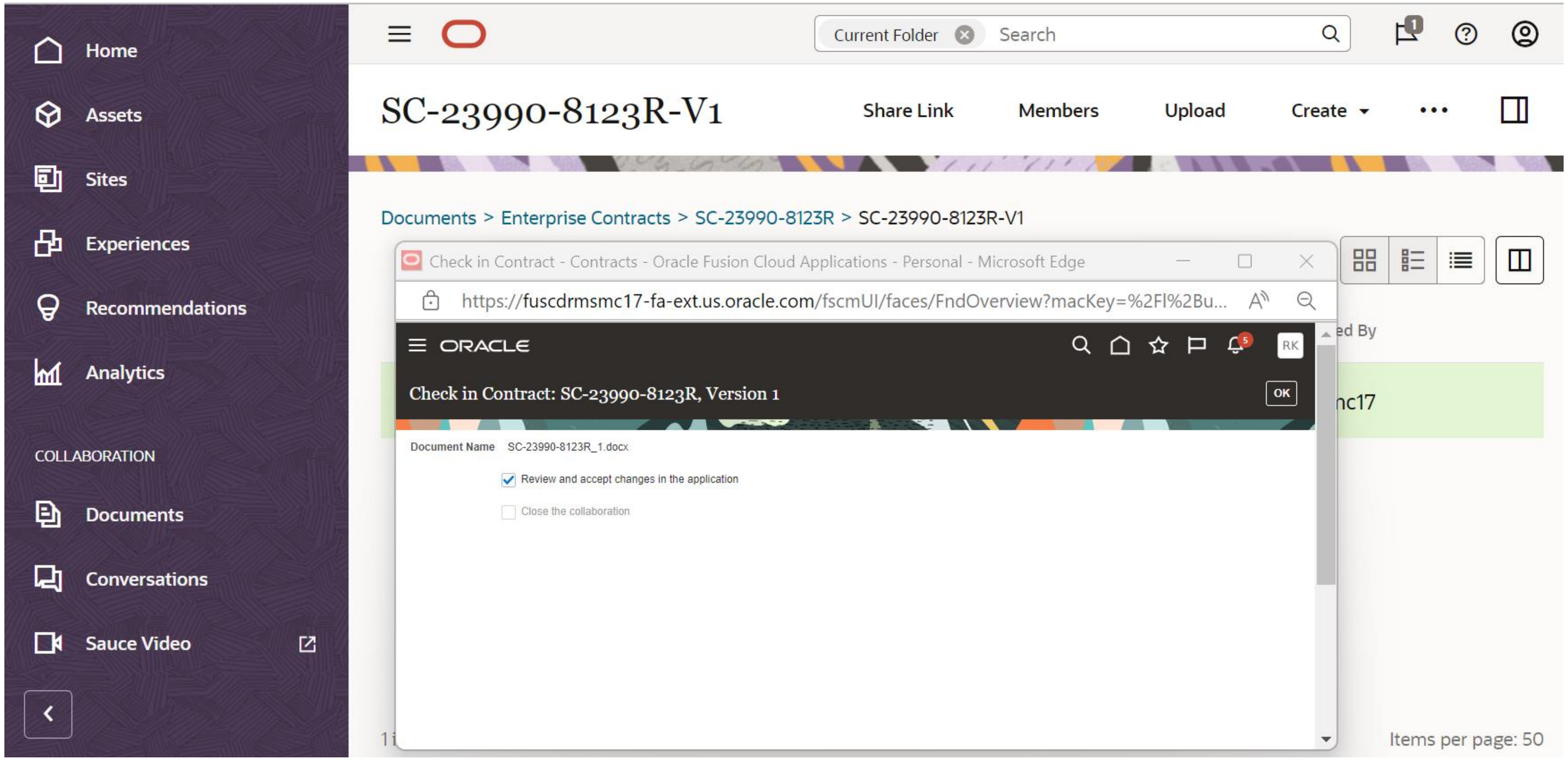
Option to Review and Accept Changes When Checking In

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.



Closing Q&A

CLOUD ENHANCEMENT SERVICES

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	

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is here to help you!

CLOUD ENHANCEMENT SERVICES

THANK YOU