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Cloud Enhancement & Managed Services

Live Webinar

24B - SCM (PROCUREMENT & ADVANCE PROCUREMENT

Empowering you for the next update

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CEMS Operations Executive

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Oracle Functional Consultant I

Value Based Delivery | ORACLE Partner | Mastek Glide 4.0

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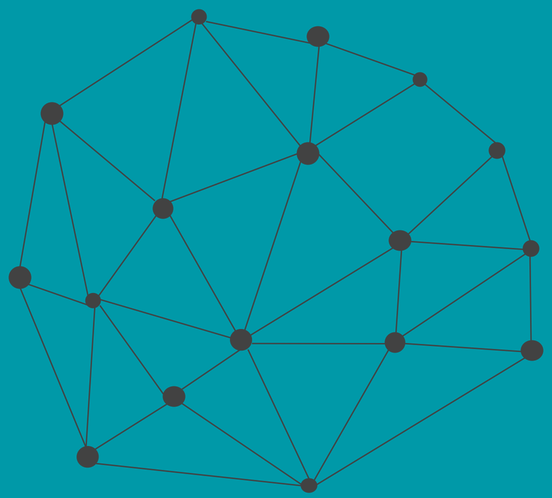

DISCLAIMER

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.

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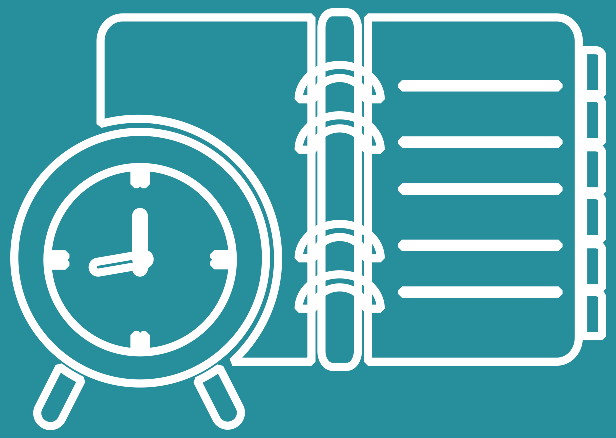
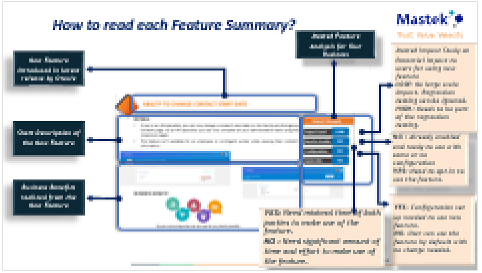
AGENDA



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.*

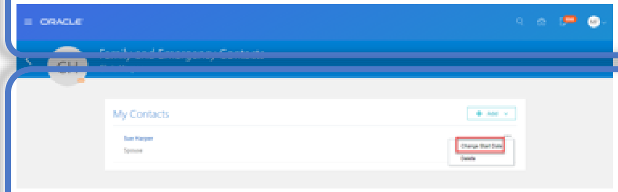
***YES:** Configuration set up needed to use new feature.*
***NO:** User can use the feature by default with no change needed.*

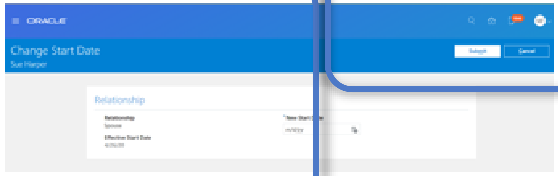
***YES:** Need minimal time of both parties to make use of the feature.*
***NO :** Need significant amount of time and effort to make use of the feature.*

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.

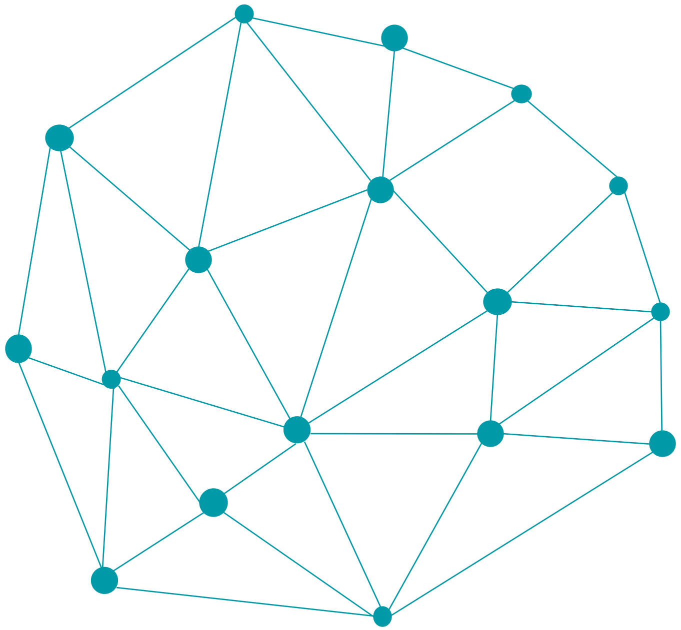




Impact Analysis	
Impact Level	LOW
Need to Enable	NO
Configuration	NO
Quick Win	YES

BUSINESS BENEFIT:

Ensure correct data that can be used for any family benefits



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OUR ANALYSIS OF LATEST RELEASE

NEW FEATURES

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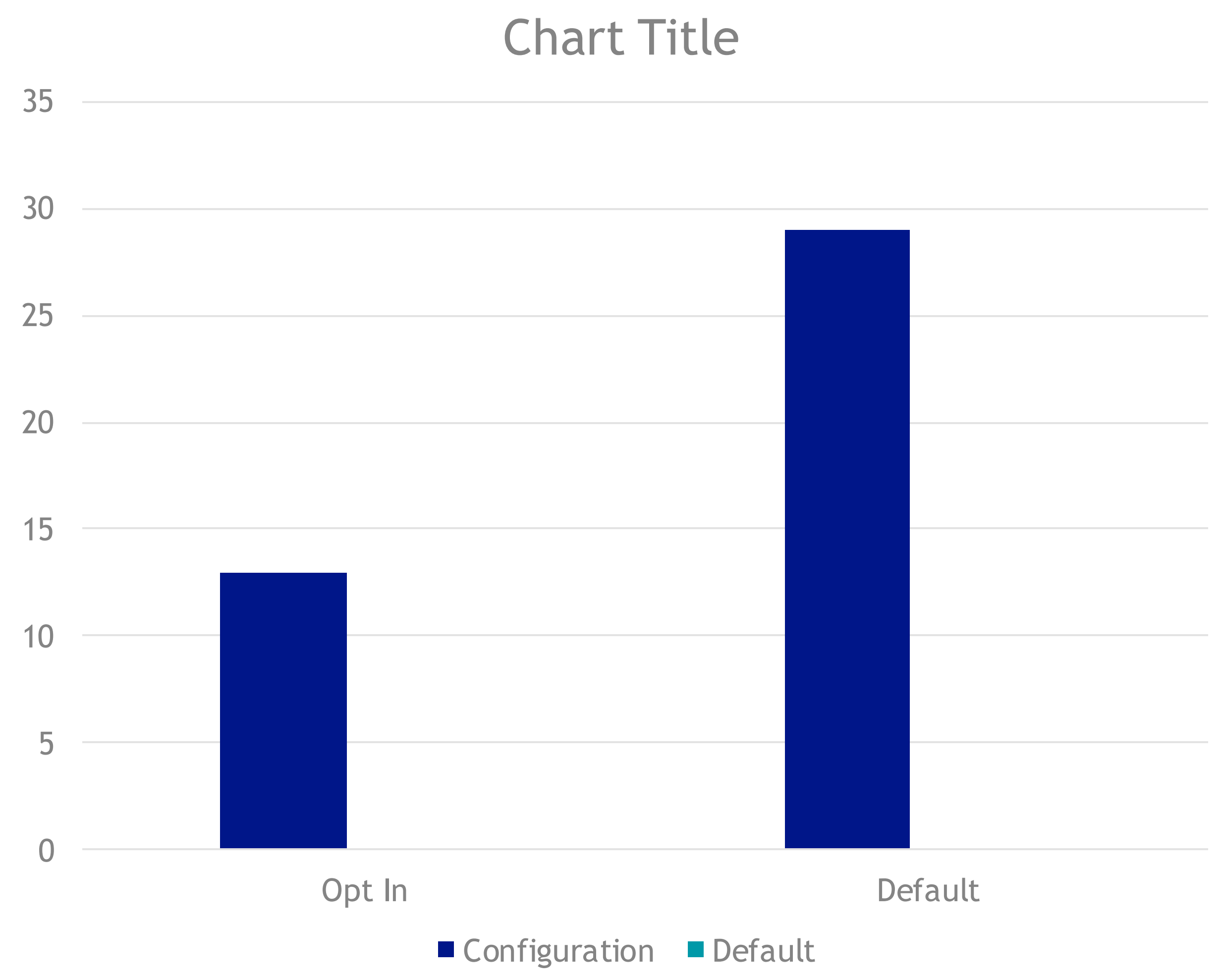
Cloud Enhancement & Managed Services

42

Procurement/ Adv. Proc/RSSP



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Details

Use redesigned pages to view supply requests and their details on your desktop, tablet, or mobile device. You can now use the supply request reference, supply order, supply document, or item to search for your supply requests. Create and save your own default searches.

Filter search results according to the supply's requested date, requested delivery date, request status, and so on. View recommended actions that you need to take to remove exceptions. View the supply documents that Oracle Supply Chain Orchestration created for each request. View details about request lines and take action.

To use this feature, go to the Supply Orchestration work area, click Tasks > Supply Requests, then search for your supply request.

Business Benefit : Improve your efficiency when you search for and view supply requests.

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

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Details

The process for B2B setup has been streamlined for the **Avalara** and **TIE Kinetix** predefined service providers. If you are subscribed to their services, you can connect with your trading partners and exchange messages with greater ease.
The endpoints for these service providers are predefined, and a new simplified process is provided to streamline the B2B setup in the Collaboration Messaging work area.

Business Benefit: Configure the service providers to exchange messages with your trading partners. Associate the trading partners with your customers or suppliers and select the documents you want to exchange

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

TRANSMIT A PURCHASE ORDER AS A PDF FILE

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Details

You can use the **Transmit the PO PDF as an unzipped file when it's the only attachment** check box to send a PO as an uncompressed PDF file by email to your suppliers. This option is applicable when the PO is the only attachment available for the message.

The PO PDF is sent as an uncompressed file if it's the only attachment for the message. If there are additional attachments, all attachments including the PO PDF will be compressed and sent as a ZIP file. If your suppliers can't receive a ZIP file, you can use the **File Extension** field on the email delivery method to set the extension of the file that is sent by email.

Business Benefit: This feature makes it easier for smaller suppliers who don't have automated systems to read the POs they receive.

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

TRANSMIT A PURCHASE ORDER AS A PDF FILE………

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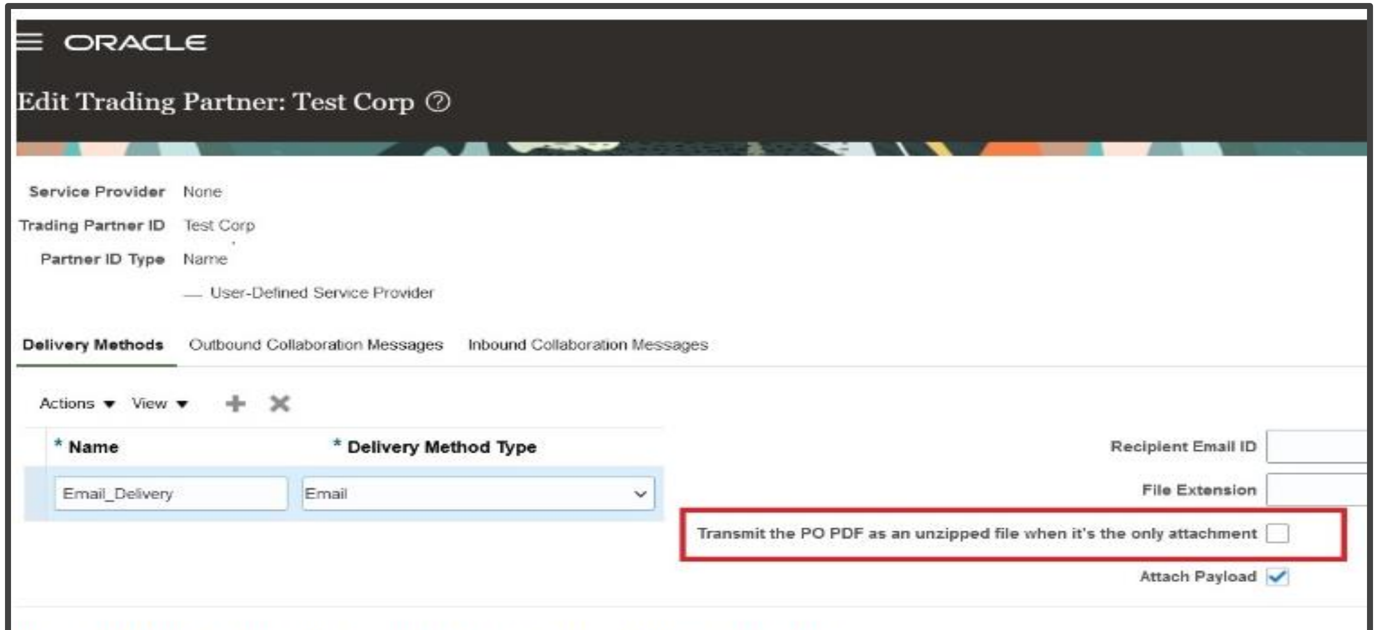
Details

1.Select **Manage Collaboration Messaging Service Providers** from the Tasks panel tab, and search for the service provider you're using to deliver your B2B messages. If you don't use a service provider for sending and receiving messages, select **Manage B2B Trading Partners** from the Tasks panel.

2.Select the **Delivery Methods** tab, and on the email delivery method, select the **Transmit the PO PDF as an unzipped file when it's the only attachment** check box.



Transmit the PO PDF as an Unzipped File When It's the Only Attachment on the Delivery Methods Tab

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

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Details

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

New REST resources introduced in this update are:

a) Purchase Agreements
b) Purchase Agreement Lines
c) Purchase Agreement Import Requests
d) Purchasing Document Import Errors
e) Special Handling Types

The following REST resources were previously available, and have been updated=
a) Requisition Lifecycle details
b) Purchase Requisitions

Business Benefit: simplifies integration with external systems along with updated features for a streamlined procurement process and improved interoperability.

Impact Analysis

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

GENERATE REPORTS ON COMPLIANCE CHECKLISTS USING OTBI

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Details

Generate reports and inquiries on compliance checklists associated with purchasing documents **using OTBI**. You can create a report using these checklist attributes:

- Checklist Title
- Checklist Number
- Checklist Status
- Checklist Owner

The checklist attributes are available under the new Checklist folder in these subject areas:

- Procurement - Purchasing Real Time
- Procurement - Purchasing Agreements Real Time
- Procurement - Pending Change Orders Real Time
- Procurement - Implemented Change Orders Real Time

Business Benefit: OTBI will help you generate quick reports associated with the procurement compliance checklist.

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

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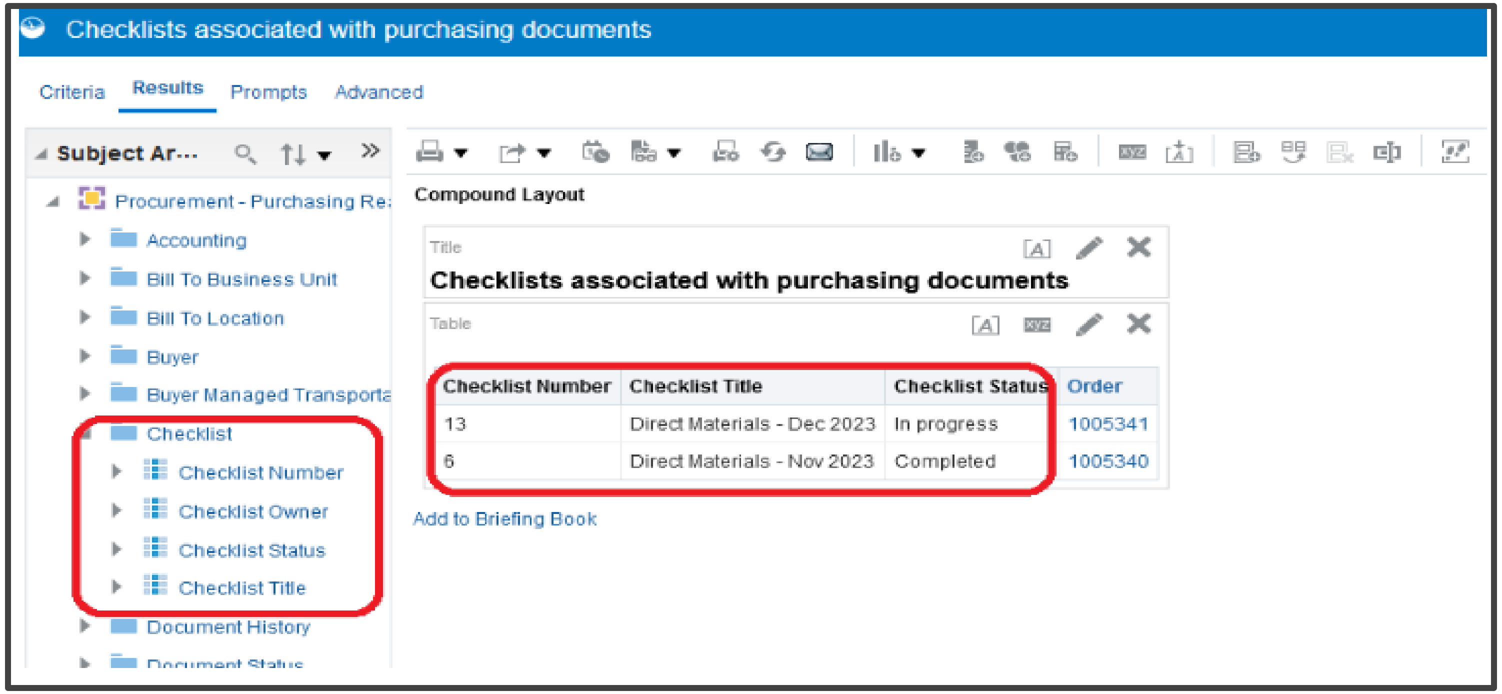
Details

To use this feature, **you must opt in to the Create Compliance Checklists for Purchasing Documents feature.** If you previously opted into the Create Compliance Checklists for Purchasing Documents feature, then this feature is automatically enabled.



Impact Analysis

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

VIEW COMPLIANCE CHECKLISTS USING A DEEP LINK

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Details

As a procurement agent, you can now **view compliance checklists using a deep link**.

Using the feature, you can drill down to the checklist from Oracle Analytics Publisher reports or external applications.

To take advantage of this feature, you must opt into the Create Compliance Checklists for Purchasing Documents feature. If you previously opted in, then this feature is automatically available.

Business Benefit: Convenience in accessing the checklist through deep links.

Impact Analysis

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

CREATE COMPLIANCE CHECKLISTS WITH PREPOPULATED VALUES FOR PROCUREMENT BU AND OWNER

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Details

Save time creating a compliance checklist with prepopulated values for the procurement BU and owner.

When you create a checklist, you are **automatically assigned as the owner**. If you manage compliance checklists for a single procurement BU, that BU is defaulted as the procurement BU of the checklist. If you manage compliance checklists for multiple procurement BUs, the BU set in the Default Procurement Business Unit profile option is defaulted.

To take advantage of this feature, you must opt into the Create Compliance Checklists for Purchasing Documents feature. If you previously opted in, then this feature is automatically available.

Business Benefits: Saves time as the values are prepopulated while creating a new compliance checklist.

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

SECURE CATALOG CONTENT BY INTERNAL DELIVER-TO LOCATIONS FOR SHOPPING

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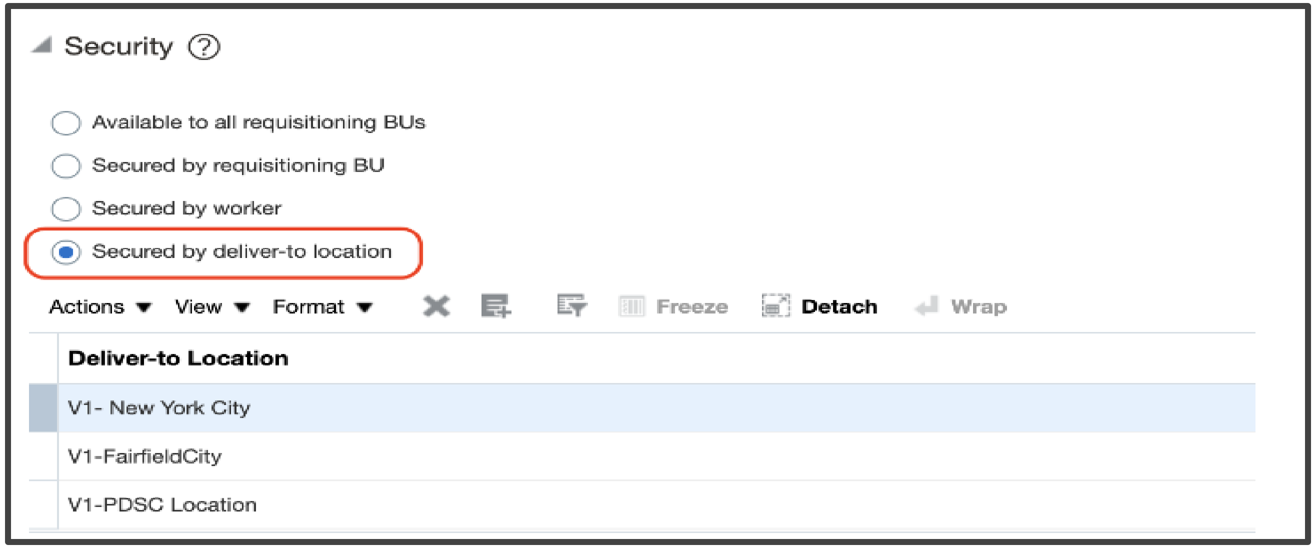
Details

Secure catalog content by internal deliver-to locations when shopping in the Responsive Self-Service Procurement application. Before this update, content zones could be secured only by requisitioning BUs or workers.
If your business needs to provide catalog content access to specific locations such as stores, hospital wards, and buildings, you could only secure workers from those locations.
With this feature, you can secure local catalogs, punchout catalogs, smart forms, and public shopping lists by internal deliver-to locations for requisitioning usage.

Business Benefit: This option gives more flexibility and saves the effort otherwise required to set up and maintain the content zones by workers.



Impact Analysis

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

CREATE MULTIPLE DISTRIBUTIONS ON REQUISITIONS

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Details

You can now create requisition lines with multiple distributions to allocate costs to multiple charge accounts and projects using the Responsive Self-Service Procurement application. You can also use distribution descriptive flexfields (DFF) using the Responsive Self-Service Procurement application.

A new Billing section is available when you edit the line from the Shopping Cart. Before this release, the charge account and project details were shown along with the delivery details because only a single distribution was supported. The Billing section displays distribution information in a read-only mode. It shows the total of all distributions for the line and the details of each distribution.

Business Benefit: Split the Project related cost to multiple cost centers using split distribution functionality.

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

VIEW REQUISITION LIFECYCLE INFORMATION

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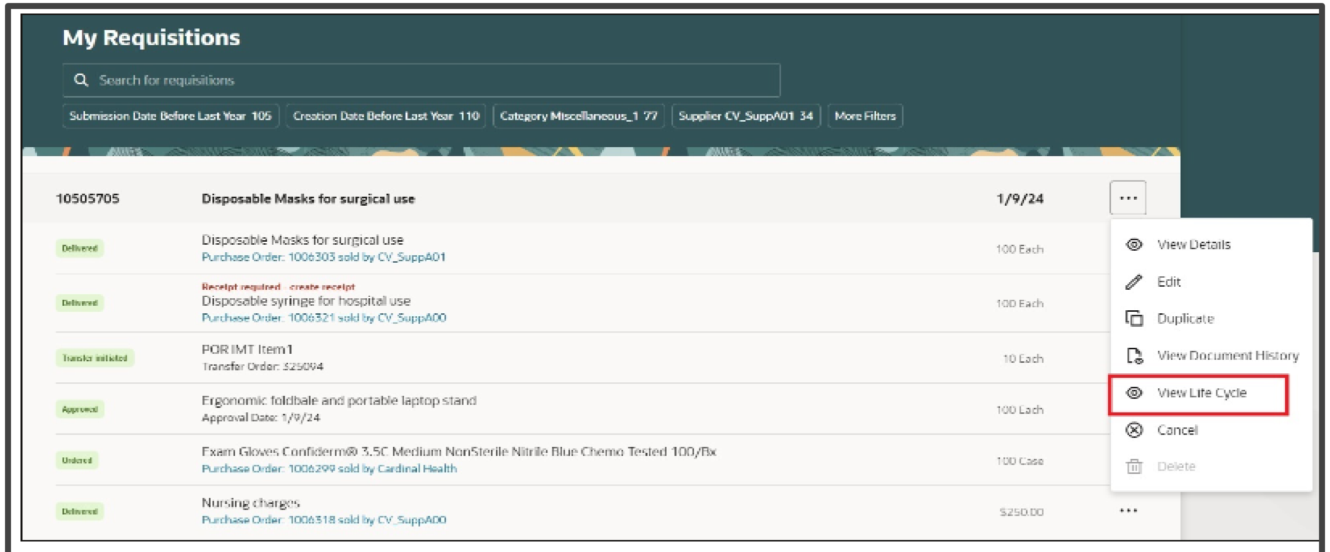
As a Procurement Requester, you can now view lifecycle information for requisitions in the Responsive Self-Service Procurement application. You can review the summarized fulfillment information for each line in the requisition and drill down into downstream documents such as negotiations, purchase orders, shipments, receipts, and invoices.

You can navigate to the Requisition Life Cycle page by selecting the View Life Cycle action from the Actions menu on the My Requisitions page.

Business Benefit : Provided Visual representation of transactions associated with your requisitions.

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



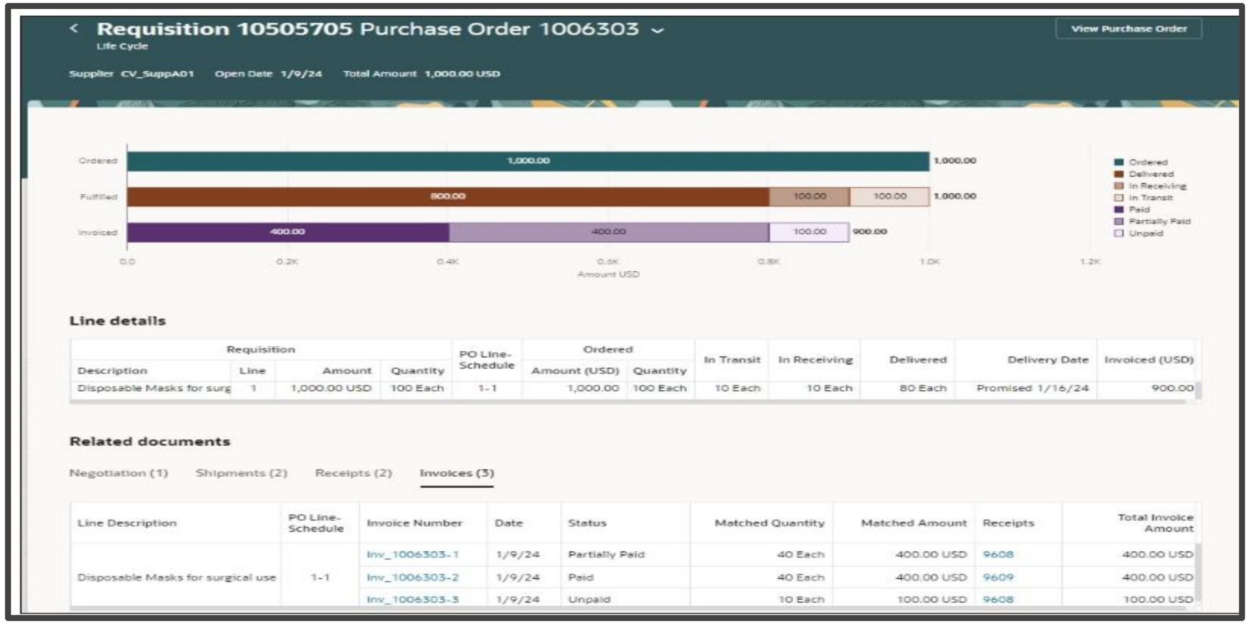
Menu Action to Navigate to the Requisitions Life Cycle Page

VIEW REQUISITION LIFECYCLE INFORMATION……

•You can change the purchase order from the context switcher and review other purchases.
• The bar chart on the Requisition Life Cycle page gives you the visual representation of the Amount that is Ordered, fulfilled (which includes Shipped, Received, and Delivered), and Invoiced. You can also see the payment status of the invoice.
• You can now review the summary of Order line details, like the vital attributes from different business objects (Shipments, Receipts, Invoices), without drilling down into the details.
• To review other related documents, you can click each tab (Negotiations, Shipments, Receipts, and Invoices) and drill down to the details to review the data.
• You can also review the invoice status if it's on hold for any of these reasons:

- Overbilled
- Receipt Required

• Any tab that is not relevant, such as Shipments for Services only Purchase Order, is hidden.



PROCURE GOODS FROM PREFERRED SOURCES DURING CATALOG SHOPPING

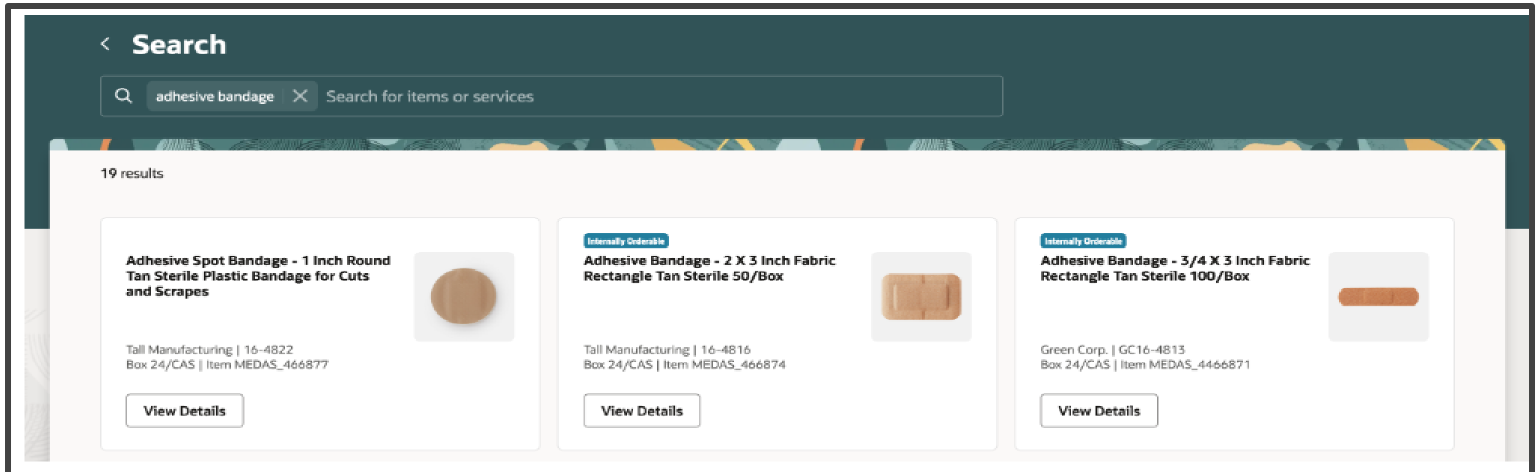
Details

Procure goods from preferred supply sources for items where multiple potential sources are available in the Responsive Self-Service Procurement application. The top preferred source is automatically determined based on:
• The priority specified on the blanket purchase agreement (for supplier-sourced items) or,
• The top-ranked source organization (for internal transfers).

With this feature, you will always be presented with the relevant information of the preferred supplier source or internal source to make an informed buying decision. If you are an advanced user, you can view all available supply sources, including available on-hand quantity for internal sources.

Business Requirement : Select the appropriate source based on your requirements.

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



Search Results Showing the Matching Master Items

PROCURE GOODS FROM PREFERRED SOURCES DURING CATALOG SHOPPING…….

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Here's how the top preferred source is determined for different item types:

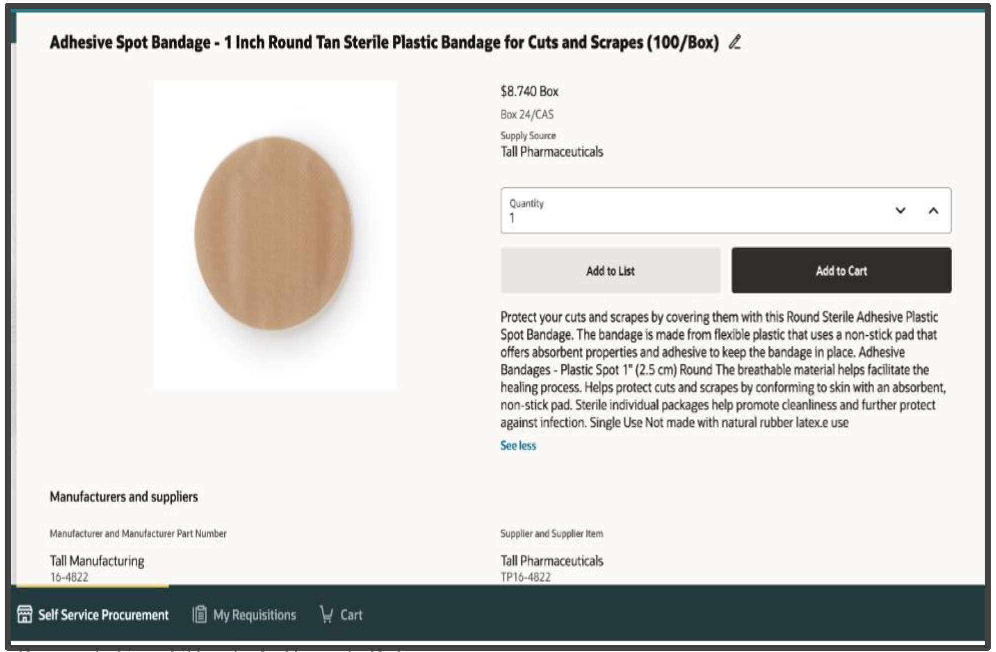
Purchasable only item:

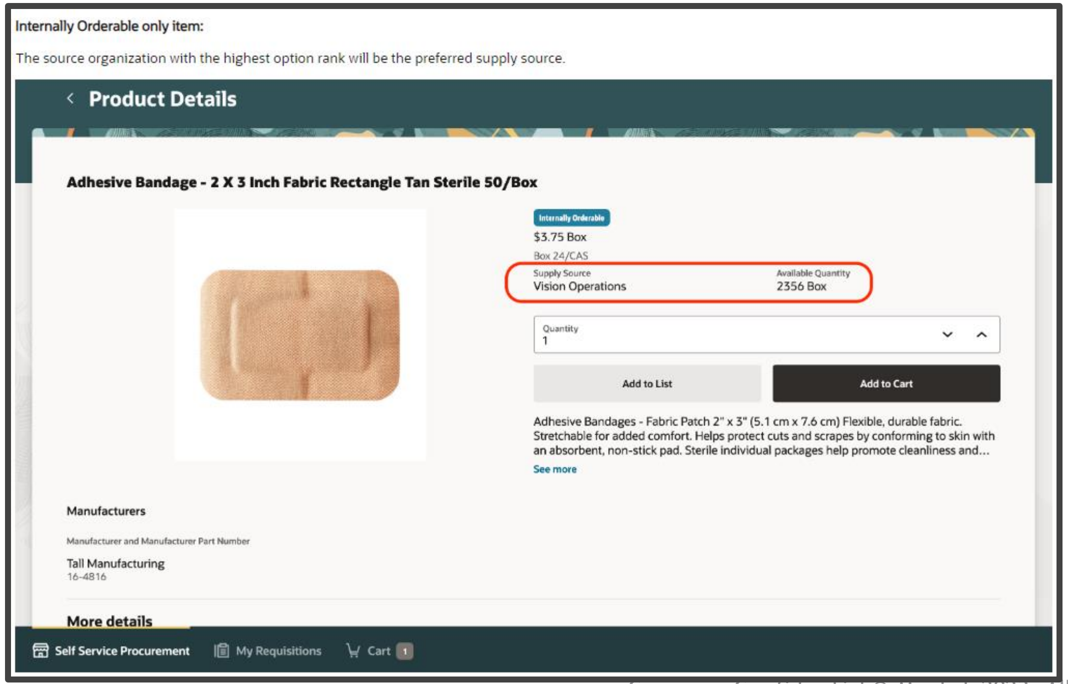
The following hierarchy is applied to determine the top preferred agreement source:

1.Agreement with the highest priority.

2.If multiple agreements contain the same highest priority ranking or no agreements carry a priority, then the agreement with oldest creation date.

3.If multiple agreements have same creation date, then the agreement with the lowest agreement line.





VIEW REQUISITION DOCUMENT HISTORY

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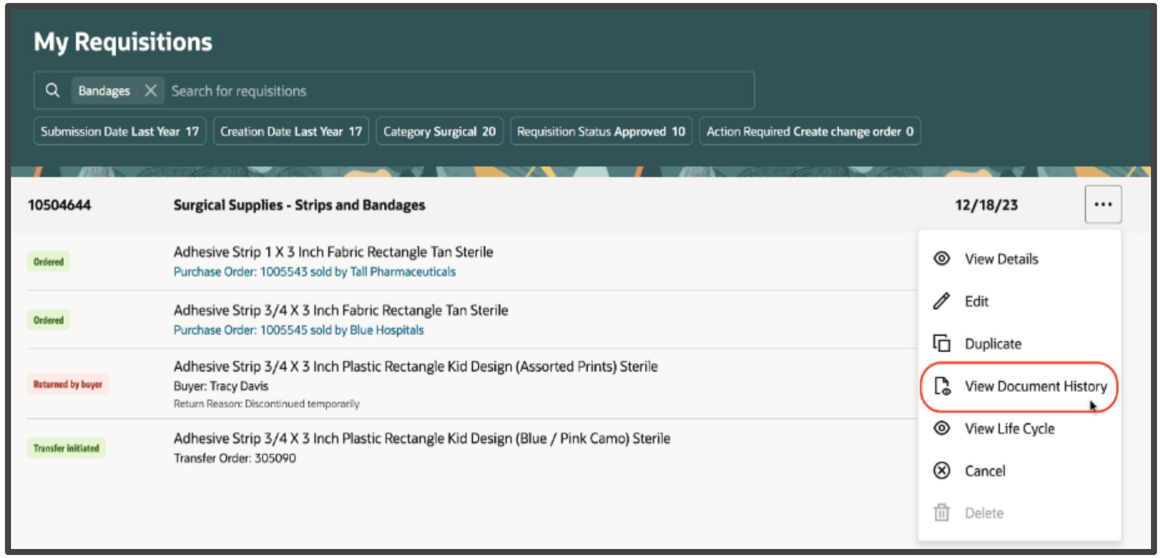
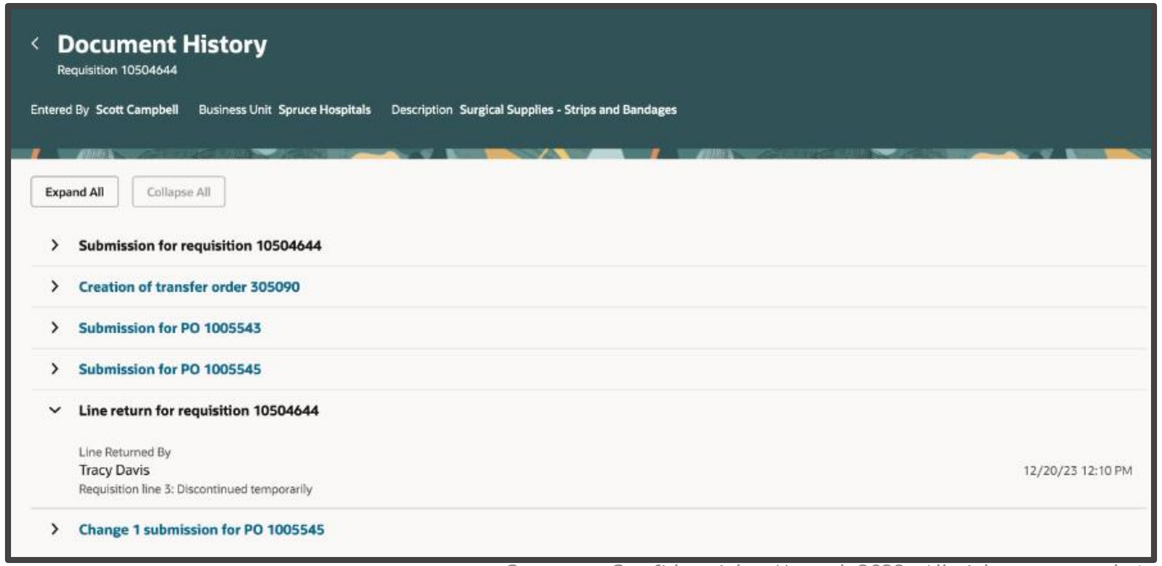
Details

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

You can now view document history for a requisition in the Responsive Self Service Procurement application. You can view a list of actions performed on a requisition, including the type of action and when and by whom they were performed. Document history can include approvals, orders associated with the requisition, any changes processed on the orders, and other actions, including cancellation or returned requisition by the buyer.
You can access this feature using the View Document History option on the My Requisitions page.

Business Benefit :You can also have a compact summary of various lifecycle actions or view details for specific events.





PREVIEW REQUISITION APPROVERS DURING SHOPPING CHECKOUT

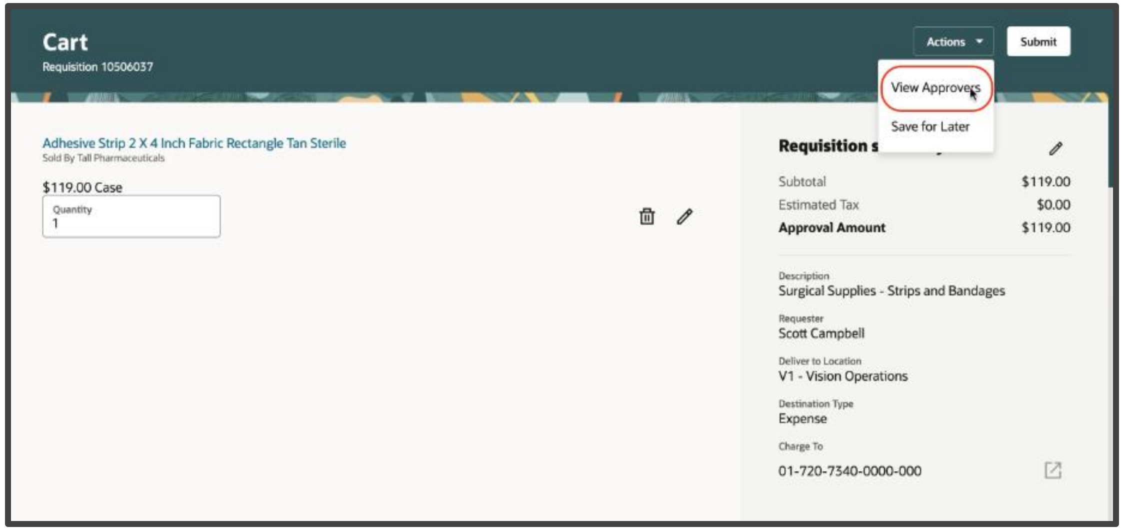
Details

You can now preview a list of approvers during shopping checkout in the Responsive Self Service Procurement application. Before this update, you could only view this information after submitting the requisition for approval.
You can access this feature using the View Approvers option on the Cart page.

Business Benefit: Check approval routing for your requisitions

Impact Analysis

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



ASSIGN ADDITIONAL SUPPLIER CONTACT EMAILS FOR CATALOG ITEM-BASED REQUISITIONS

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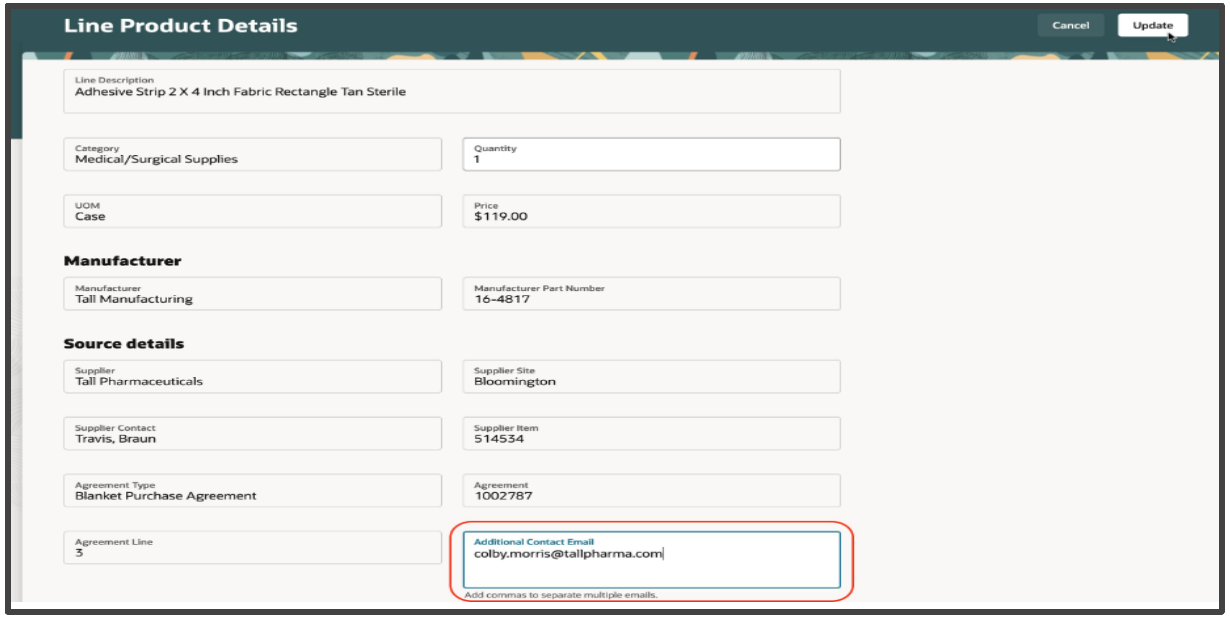
Details

You can now use the Responsive Self-Service Procurement application to assign supplier contacts on requisitions created using master items or agreement lines when these contacts don't exist in the supplier profile directory. You can assign additional contacts using their email IDs. Before this release, you could assign additional supplier contacts only for smart forms or noncatalog request lines.

To access this feature, you need to access the source details of the item using the description link on the Cart page.

Business Benefit: provide alternative contacts for catalog-based requisitions if additional or more appropriate contacts are needed for purchase order communication.

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



REFINE REQUISITION SEARCH USING FILTERS

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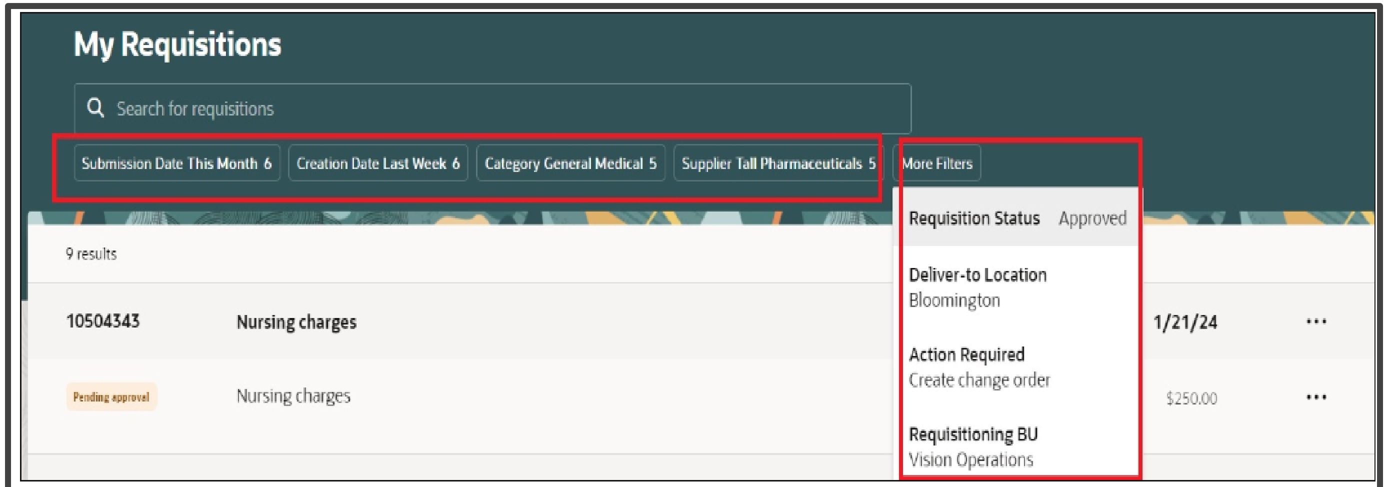
Details

You can now refine your search results using the Filters feature on the My Requisitions page of the Responsive Self Service Procurement application.

These attributes are available as suggested filters:

- Requisitioning BU
- Creation Date
- Submission Date
- Action Required
- Requisition Status
- Supplier
- Category
- Deliver-to Location



Filters on the My Requisitions Page

Note that the value with the highest count is displayed as the default.

Business Benefit : Narrow the results down based on your requirements.

Impact Analysis

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

CHANGE DESCRIPTION FOR AGREEMENT BASED ITEMS DURING SHOPPING

Details

You can now use the Responsive Self-Service Procurement application to change the description for agreement-based items while shopping.

You can modify the description of an item on a blanket purchase agreement line by drilling down to the Product Details page from the search result card for the item. Your updates get copied to the requisition line when you add the item to the shopping cart. Your updates don't affect the underlying description on the blanket purchase agreement line.

Business Benefit : Specify a better (more current) description for goods or services than the possibly dated values in the agreement setup.

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

SEARCH AND SELECT ITEMS AND THEIR ASSOCIATED TRADING PARTNER ITEM REFERENCES WHEN CREATING BLANKET PURCHASE AGREEMENTS

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Details

Search for items and their associated manufacturers, manufacturer part numbers, suppliers, and supplier items, and select specific combinations to populate your agreement lines. **When an item has multiple manufacturer and manufacturer part numbers, you can now select the combination of values you want to return to the agreement line.**

When an item has multiple supplier items, the **application will return the selected supplier item to the agreement line only if its supplier matches the one specified on the agreement.**

From this release, by **enabling the opt-in and setting the Populate Trading Partner Item Details on Agreements profile option to Yes**, the **selected combination from the item search results will populate the supplier item number, manufacturer, and manufacturer part number attributes into the blanket purchase agreement line.**

Business Benefit : ideal for implementations where having multiple supplier and manufacturer trading partner definitions per item master.

Impact Analysis

Impact Level	LOW
Need to Enable	YES
Configuration	YES
Quick Win	YES

SEARCH AND SELECT ITEMS AND THEIR ASSOCIATED TRADING PARTNER ITEM REFERENCES WHEN CREATING BLANKET PURCHASE AGREEMENTS…….

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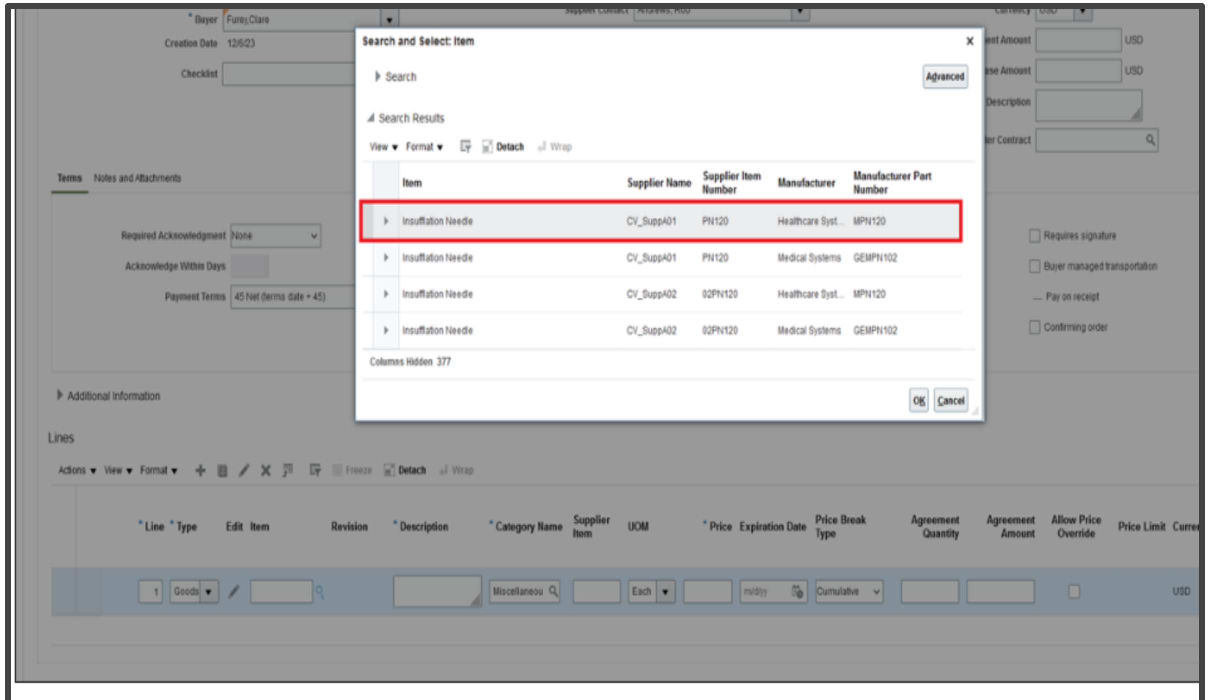
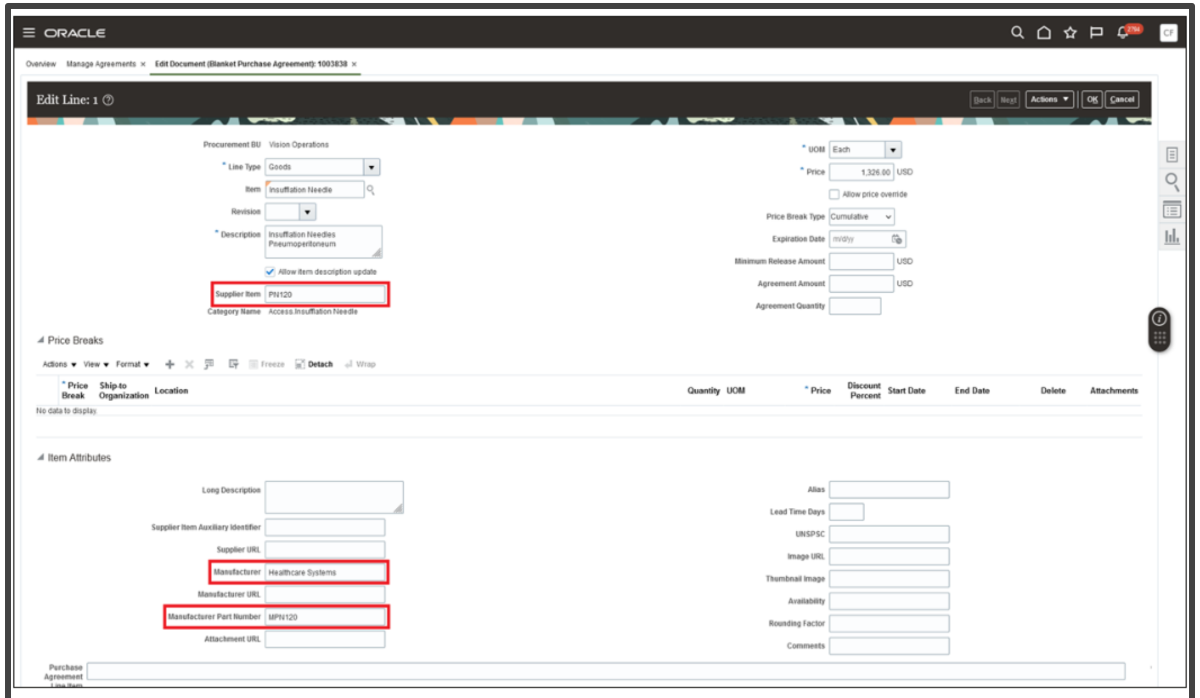


Search and Select the Item on the Blanket Purchase Agreement Line



Blanket Purchase Agreement Line Details

When the opt in is enabled and the profile option is set to Yes: If you enter an item on a BPA line without choosing a specific combination of item, supplier number, or manufacturer part number from search results, the application will automatically default those fields into the blanket purchase agreement line based on the item master definition, as long as the defaulting conditions are met

CREATE MASTER ITEMS WITH TRADING PARTNER ITEM ASSOCIATIONS FROM THE BLANKET PURCHASE AGREEMENT IMPORT

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Details

Create master items with trading partner item associations, leveraging Product Information Management functionality to automatically **derive item class, item number, and primary unit of measure from the blanket purchase agreement (BPA) import**.

Before this update, Purchasing Cloud already supported the creation of items in Product Information Management from imported BPA lines. However, it didn't support the creation of trading partner items (supplier items and manufacturer part numbers) from the import.

The value added is twofold:

- Seamless integration between Purchasing and Product Information Management by eliminating the need for manual trading partner item creation when BPAs are created or updated in bulk.
- Maintain Product Information Management as the single source of truth for master items, trading partner items, and their relationships.

Business Benefit : the BPA import will support the creation of trading partner items and their relationships to master items as well.

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

CREATE REQUISITIONS AND PURCHASE ORDERS REQUIRING SPECIAL HANDLING

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Details

Create requisitions and purchase orders requiring special handling by your suppliers. **Capture handling details in special handling descriptive flex fields on the document header and lines**. For example, create bill-only documents that include details such as the physician's name and the item's lot and serial number.

When you generate an order from a special handling requisition, **any details you capture on the requisition will be copied to the order.** You can now require buyer review, override B2B communication, and automatically create receipts for your special handling orders. Use the Manage Special Handling Types task to define new special handling types or change existing types. The Bill Only type is seeded and can be changed.

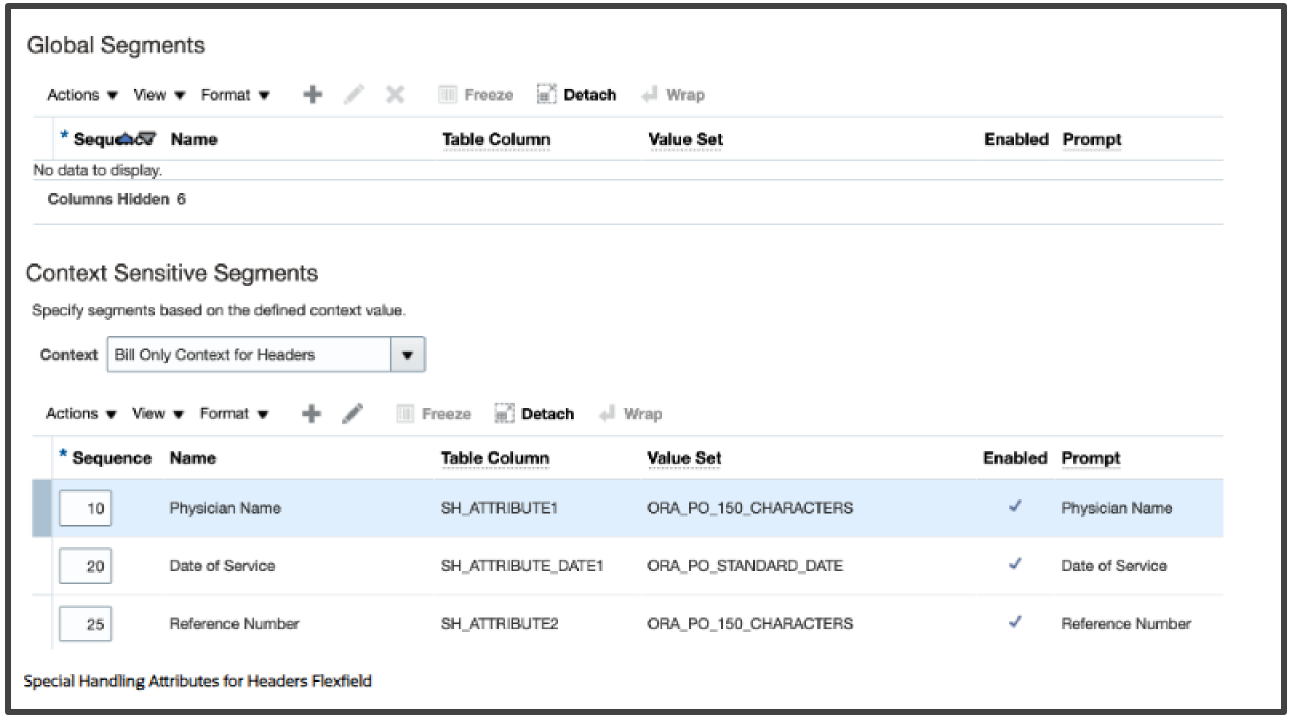
Create special handling requisitions in the Responsive Self-Service Procurement application.

Business Benefit : Create standalone special handling orders.

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

CREATE REQUISITIONS AND PURCHASE ORDERS REQUIRING SPECIAL HANDLING……

Setting	Explanation
Special Handling Type	The name of the special handling type.
Description	Description of the special handling type.
Code	Code to be used internally by the application or integrating services.
Header Context	The associated context to be used at the document header from the Special Handling Attributes for Headers flexfield. Context segments from this context will display on the document header.
Line Context	The associated context to be used at the document line from the Special Handling Attributes for Lines flexfield. Context segments from this context will display on the document line.
Requires Buyer Review	When enabled, the application will no longer submit purchase orders that are created automatically from requisitions. The order will remain in Incomplete status. This setting overrides other settings that control automatic submission of orders.
Negotiated	When enabled, the application will set the Negotiated field when creating special handling requisitions and orders.
Automatically Create Receipt	When enabled, the application will automatically create a receipt for any new schedules when the order or change order is implemented. Changes to existing schedules will not correct an existing receipt, and you will have to correct the receipt manually.
Enabled	When enabled, requesters and buyers will be able to create documents using the special handling type. When disabled, the special handling type will no longer visible as a choice when creating the document.



Configure DFFs for Creating requisitions for Special handling type.

CREATE REQUISITIONS AND PURCHASE ORDERS REQUIRING SPECIAL HANDLING…….

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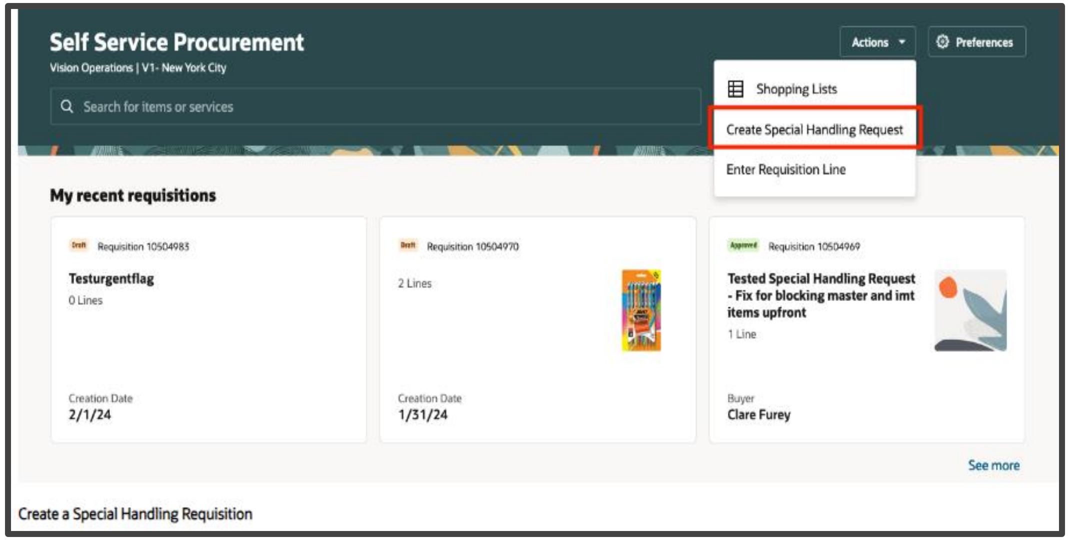

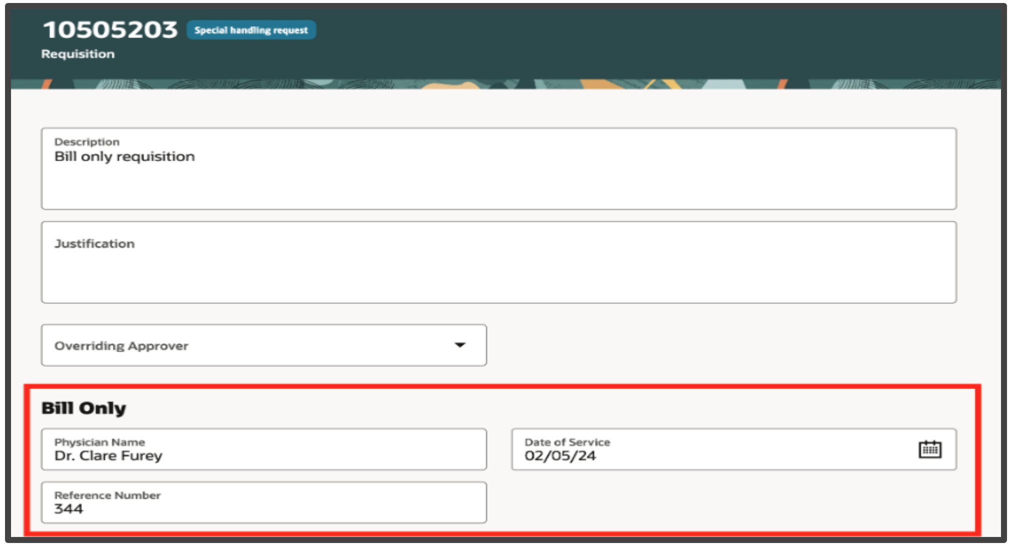

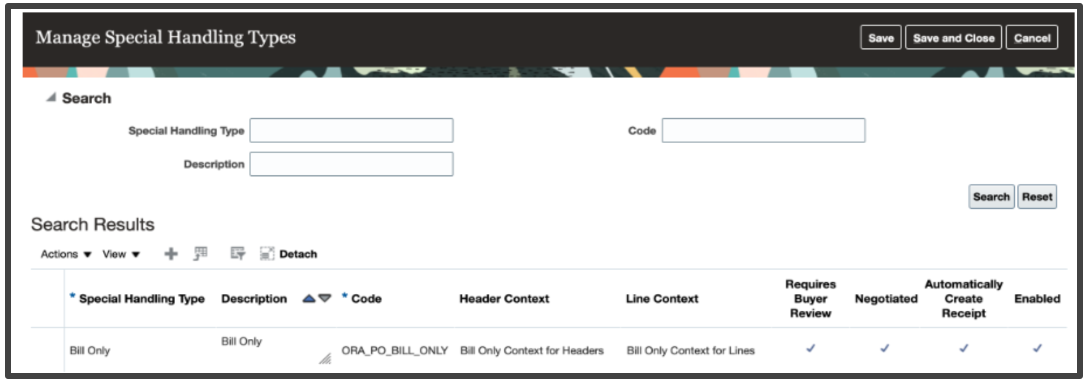

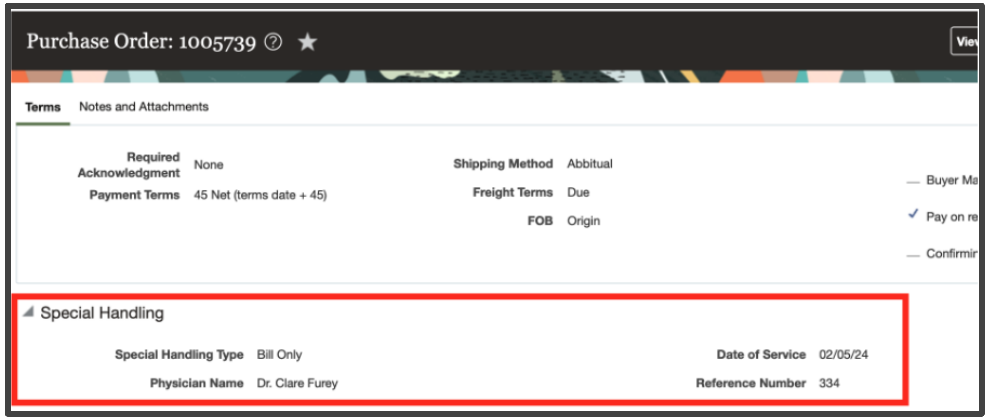

CREATE BILL-ONLY REQUISITIONS AND PURCHASE ORDERS

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Details

Create bill-only requisitions and purchase orders for purchases that don't follow the standard procurement process by using the Bill Only special handling type. For example, in the healthcare industry, bill-only items such as implant devices are only ordered when they have already been used. **You can capture details such as the physician's name and the product serial number onto the document**. You can now require buyer review, override B2B communication, and automatically create receipts for your bill-only orders.
The Bill Only special handling type is available in the Manage Special Handling Types task.

The Bill Only special handling type is associated with the Bill Only Context for Headers and Bill Only Context for Lines.

The Bill Only Context for Headers context includes these context-sensitive segments:

- Physician Name
- Date of Service
- Reference Number

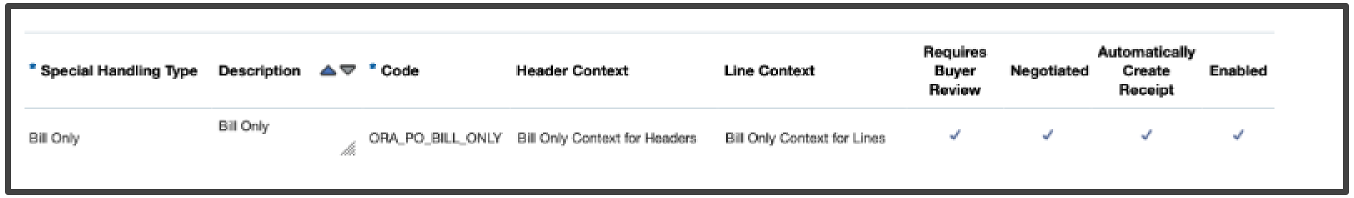
The Bill Only Context for Lines context includes these context-sensitive segments:

- Lot
- Serial Number

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

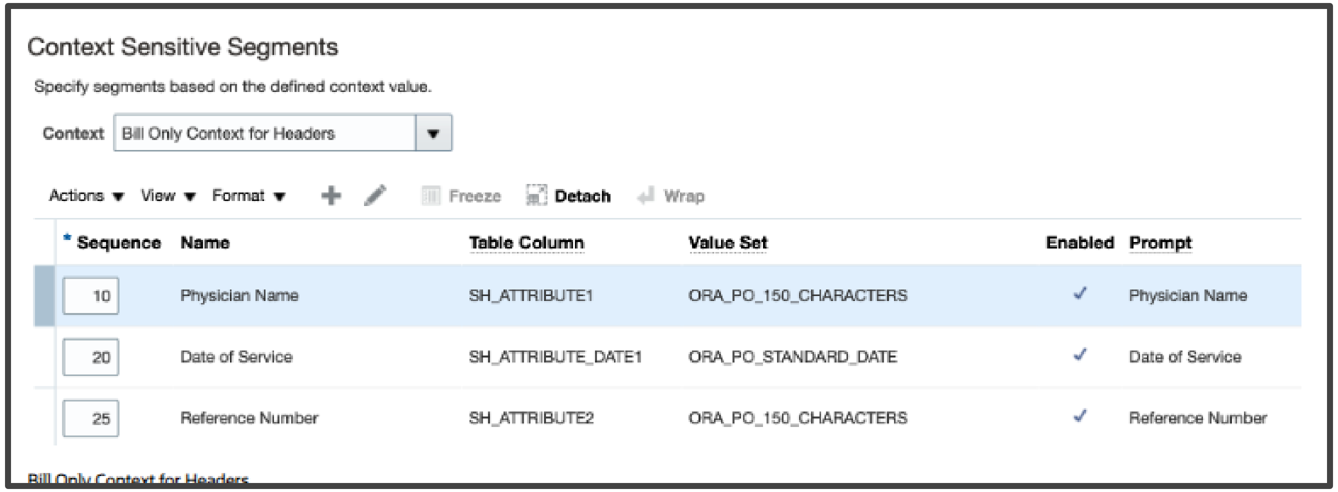
CREATE BILL-ONLY REQUISITIONS AND PURCHASE ORDERS……..

To create bill-only requisitions and purchase orders, enable the Create Requisitions and Purchase Orders Requiring Special Handling feature. The Bill Only special handling type is available as part of that feature.



* Special Handling Type	Description	* Code	Header Context	Line Context	Requires Buyer Review	Negotiated	Automatically Create Receipt	Enabled
Bill Only	Bill Only	ORA_PO_BILL_ONLY	Bill Only Context for Headers	Bill Only Context for Lines	✓	✓	✓	✓

The Bill Only special handling type is available in the Manage Special Handling Types task.



Context Sensitive Segments

Specify segments based on the defined context value.

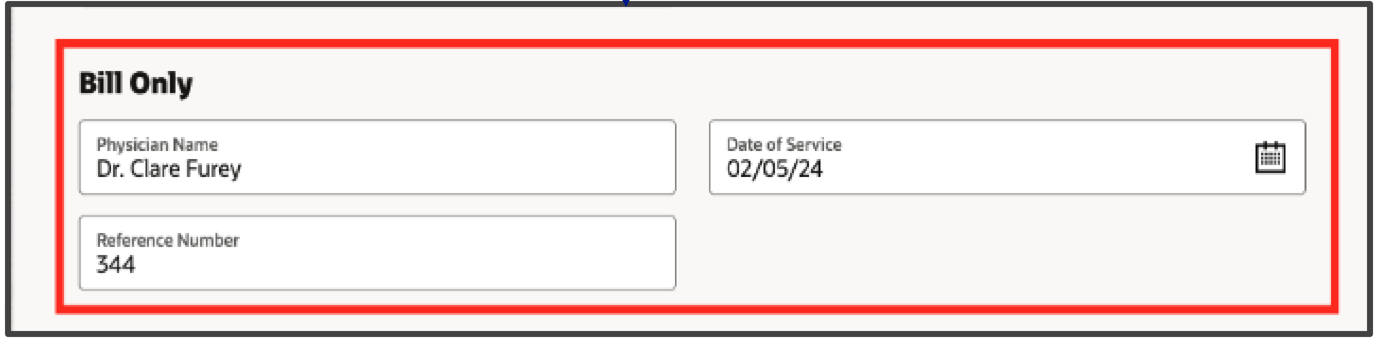
Context: Bill Only Context for Headers

Actions View Format Freeze Detach Wrap

* Sequence	Name	Table Column	Value Set	Enabled	Prompt
10	Physician Name	SH_ATTRIBUTE1	ORA_PO_150_CHARACTERS	✓	Physician Name
20	Date of Service	SH_ATTRIBUTE_DATE1	ORA_PO_STANDARD_DATE	✓	Date of Service
25	Reference Number	SH_ATTRIBUTE2	ORA_PO_150_CHARACTERS	✓	Reference Number

Bill Only Context for Headers

Deploy the Context specific DFF as per your requirements.



You can create bill-only requisitions using the Responsive Self Service Procurement application.

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Details

Specify additional supplier contacts by providing their email IDs **while creating purchase orders using file-based import and REST resources**. In update 24A, you could add additional supplier contacts only for incomplete purchase orders created online. With this update, you can also change these additional contact email IDs on approved purchase orders if these contacts are no longer applicable. Changes are supported through the user interface and the REST resource.

You can also perform these tasks using additional contact emails:

• Generate OTBI reports and inquiries using the Additional Contact Email attribute in the Purchasing Real Time OTBI subject area.
• Author contract terms for purchase orders using the newly added Additional Contact Email system variable.

To use this feature, you must opt in to the Assign Additional Supplier Contact Emails for Requisitions and Purchase Orders feature. If you previously opted in to the Assign Additional Supplier Contact Emails for Requisitions and Purchase Orders feature, then this feature is automatically enabled.

Business Benefit : Additional Supplier contact can be specified using the import through FBDI as well.

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

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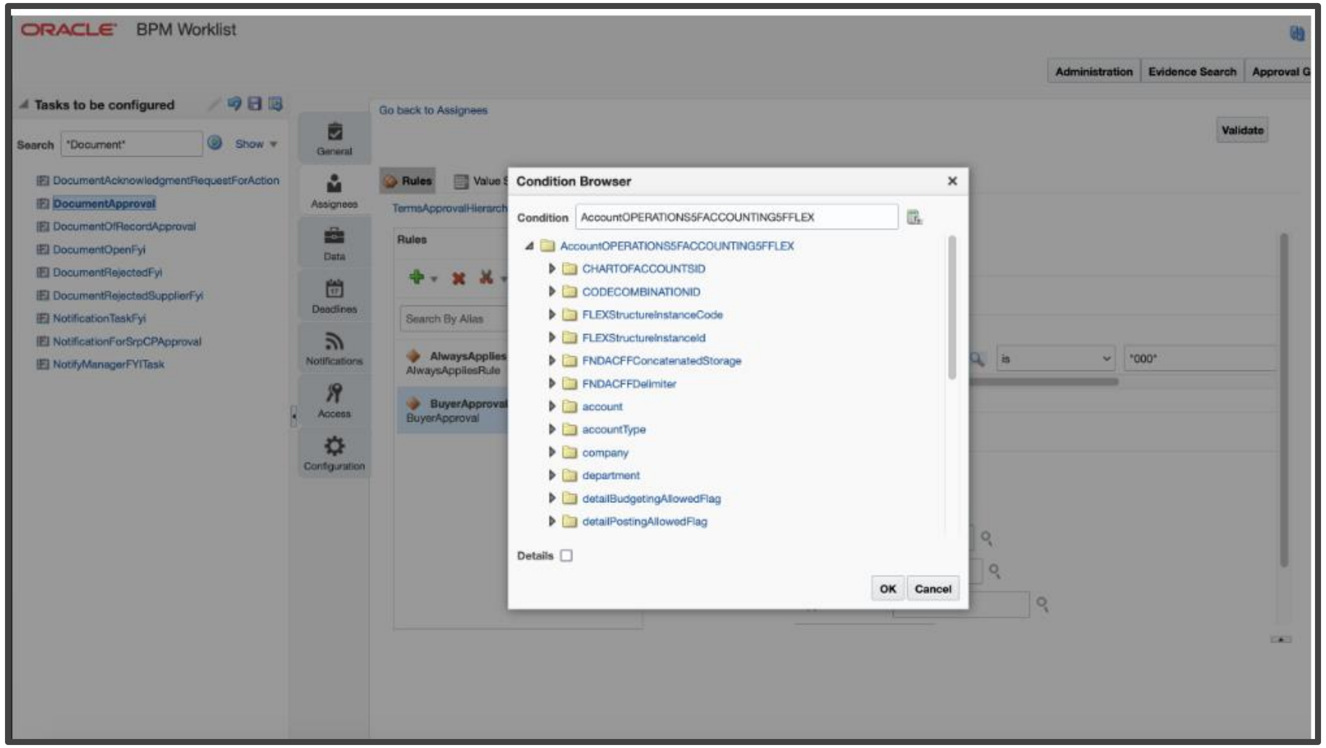
Details

Route purchase orders and change orders for approval based on the value of any chart of accounts segment, including those without a segment label such as natural account or cost center assigned to them.



Impact Analysis

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

ROUTE PURCHASE ORDERS FOR APPROVAL BASED ON ANY CHART OF ACCOUNTS SEGMENT

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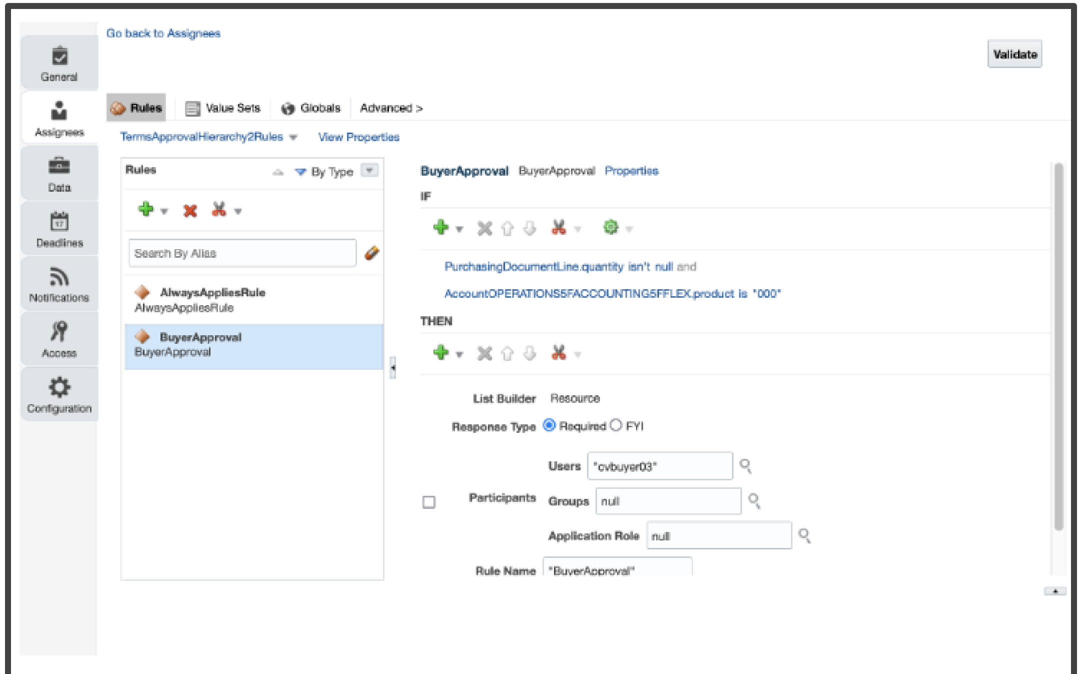
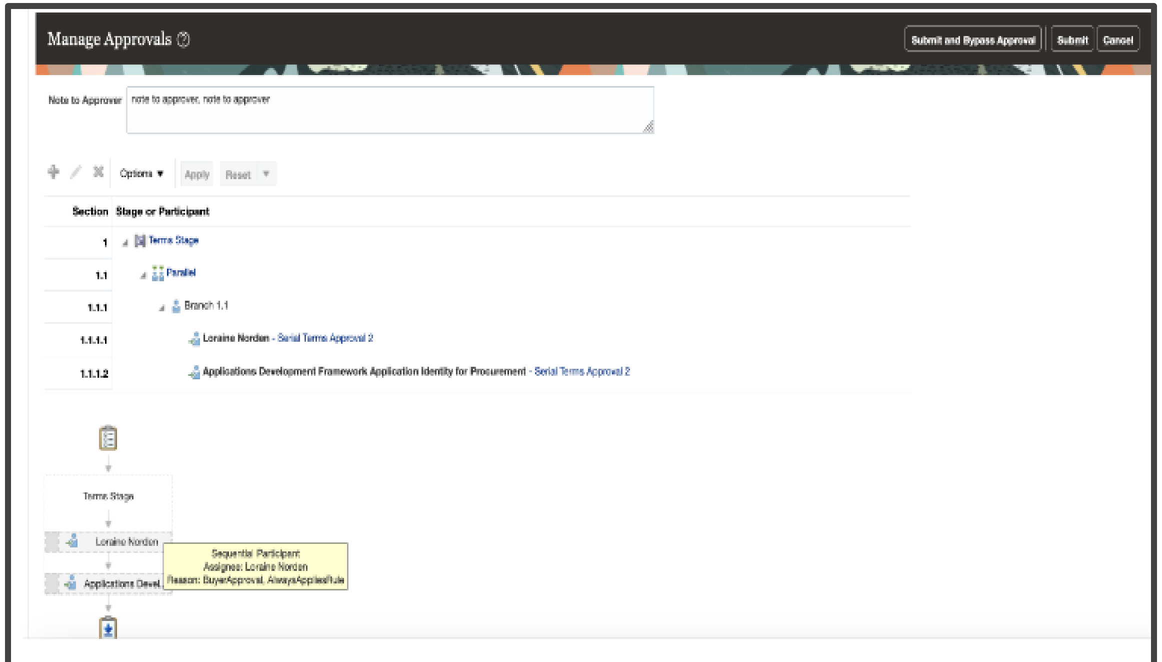


Approval Rule Using Unlabelled Chart of Accounts Segment



Manage Approvals Page Showing the Rule Assignee

In this example, purchase orders with distributions using charge accounts with the Product segment equal to 000 are routed for approval to the user CVBUYER03.

Business Benefit : COA segments can be used for routing specific type of orders for approvals based on the segment value.

UPDATE ATTRIBUTES ON SPLIT ORDER LINES FOR PARTIAL DROP SHIPMENTS

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Details

Update attributes on a split order line that Oracle Order Management creates when a supplier ships part of an order line in a drop shipment flow. **If only some of the quantity on the order line is currently available on the requested date, then your drop ship supplier might ship that quantity, and Order Management will split the order line for the remaining quantity**. Starting with update 24B, you can update attributes on the split fulfillment line.

Use this feature so **you can update attributes on a split order line that Order Management creates when Oracle Procurement ships part of an order line in a drop shipment flow**.
All the following usages described in this document involve split lines that you ship in a drop shipment.

Scenario
A supplier can ship part of a fulfillment line that you drop ship to help meet customer demand. If only some of the quantity on the order line is currently available on the requested date, then the supplier ships the quantity that's available to ship, and Order Management will create a split order line for the remaining quantity. You now have a new fulfillment line that has the remaining quantity that the supplier still needs to ship.
You might need to update attributes on the new split line in Order Management after the supplier ships part of the order line.

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

UPDATE ATTRIBUTES ON SPLIT ORDER LINES FOR PARTIAL DROP SHIPMENTS….

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Update Attributes on Split Order Lines

- Modify the quantity, scheduled date, shipping location, shipping method, supplier, or supplier site.
- Modify the price of a purchase order line, through an extensible flexfield on the order line.
- Unschedule the line or substitute the item.
- Schedule or split the line when it's in Manual Scheduling Required status.

You can update an attribute's value on a split line in Order Management, and then use that value to:

- Reprice and recalculate tax.
- Fulfill, recognize revenue, and bill the split lines.
- Cost the transaction and recognize the cost of goods sold for the split lines in Oracle Cost Management.
- Orchestrate financial details and process the transaction in Oracle Supply Chain Financial Orchestration for the split lines.

Update Attributes on Purchase Orders

You can update attributes on a purchase order's partially shipped line:

- Modify the promised dates, shipping method or quantity.
- Split the schedule on the line.
- Cancel a line on the purchase order.

Business Benefits : Updating the PO line during drop shipments will provide greater flexibility to buyers.

SELECTED PURCHASING BUG FIXES IN THIS UPDATE

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Details

Query by Example to Filter Search Results by Project and Task Returns Unpredictable Results

Before this update, if you used query by example to filter search results by projects or tasks on the View Requisition Lines or Manage Orders page, the results wouldn't match the filter, meaning the application wouldn't filter out any records that didn't match the value you entered. With this update, query by example for projects and tasks is disabled on these pages. If you want to narrow down your search results to a specific project and task, use the search attributes.

Oracle reference: 35891273

SEARCH FOR PURCHASE AGREEMENTS USING A REDWOOD PAGE

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Details

Search **for purchase agreements using an elastic-based smart search that supports searchable attributes across agreement headers and lines with built-in fuzzy matching and progressively narrows down the search results by using additional keywords.** The search results are displayed using a Redwood page to improve the overall search experience.
A new task is now available under the Purchase Agreements and Purchase Orders work area to access the new Purchase Agreements page.

Business Benefit : Access to new UI based on the Redwood interface providing smart search capabilities.

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

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Details

Supplier Registration can have unique requirements based on factors like country and industry. If the information requested in the registration flow isn't tailored to the supplier based on these types of factors, it can be confusing and result in higher support costs with lower registration success rates. **Tailor a seamless experience for your suppliers in the next-generation supplier registration by using Business Rules from Oracle's Visual Builder Studio. Business Rules allow you to easily configure company details and now contacts and addresses pages**; Offering a user-friendly interface to extend registration pages to make fields required or optional, read-only or editable, and shown or hidden. These properties can also be applied conditionally based on specific criteria such as country. With Business Rules, you can efficiently deliver a tailored registration experience for suppliers with lower support costs.

You can now **configure individual attributes, including descriptive flex fields, on contacts and addresses pages** and add conditions in business rules using country, organization type, supplier type, and business relationship attributes. The following example shows a configured rule with conditions: **if the supplier is Prospective and in the United States, then a phone is required for a contact, User Roles are read-only, and the Receive Payments address purpose is hidden.**

Business Benefit: Use VB rules to modify or deploy DFF and make changes to contacts and address pages.

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

EXTENDING NEXT GENERATION SUPPLIER SELF-SERVICE REGISTRATION ……

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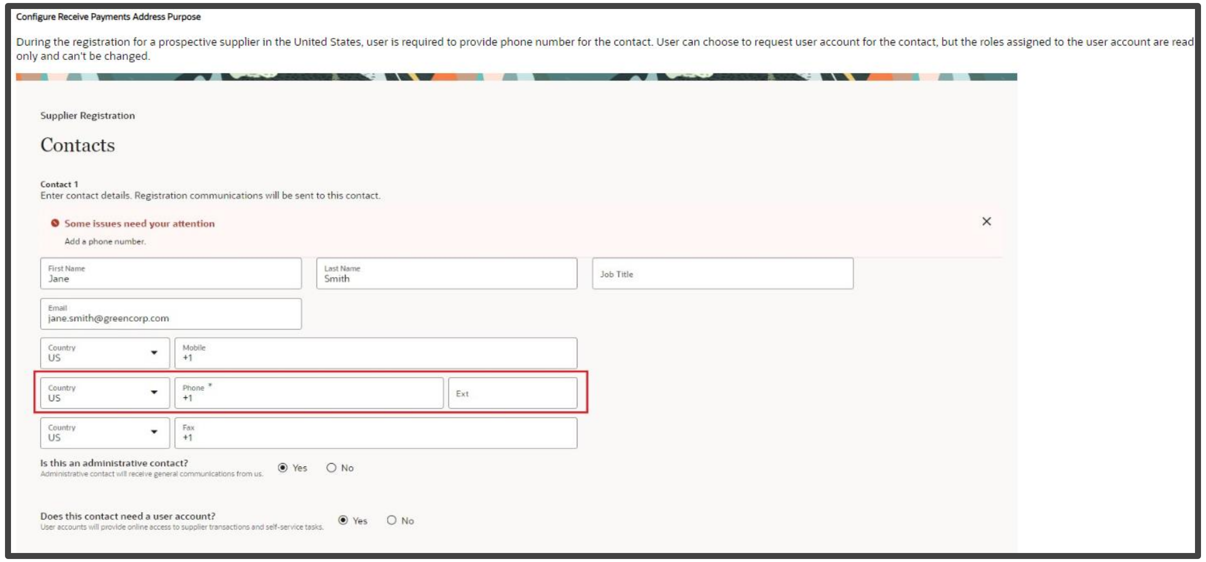
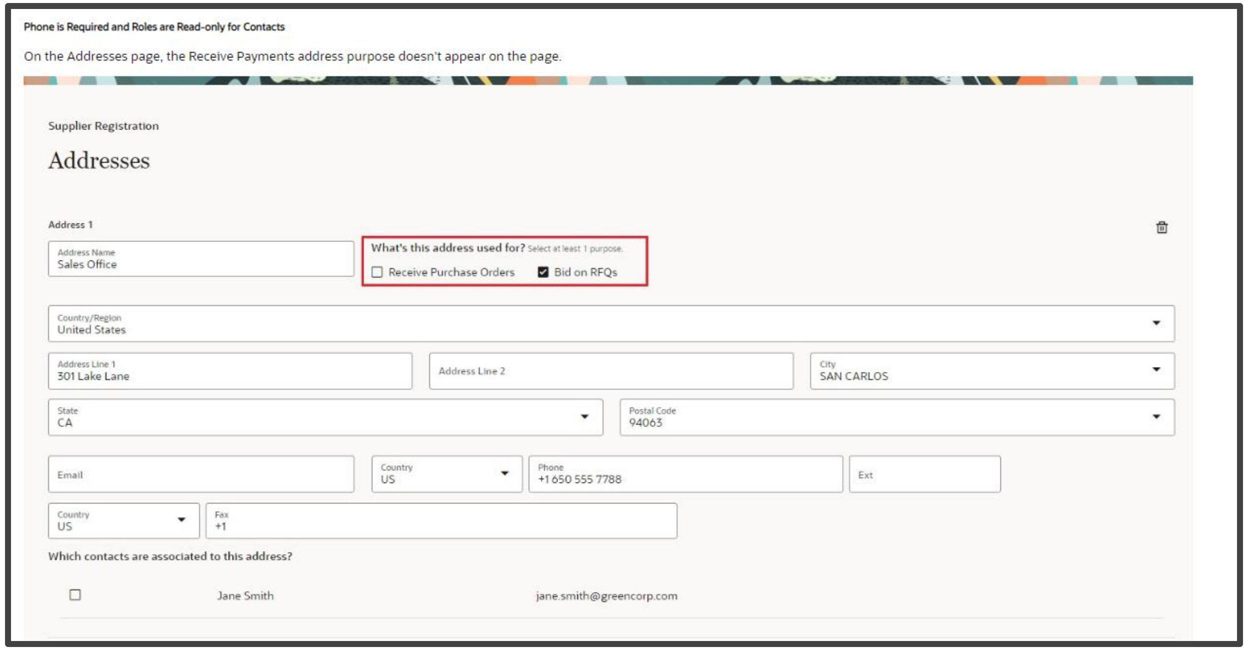


You must opt in to the Next Generation User Experience for Supplier Self-Service Registration feature under Suppliers and perform all the setup steps.



CREATE NEGOTIATION COVER PAGE WITH GENERATIVE AI

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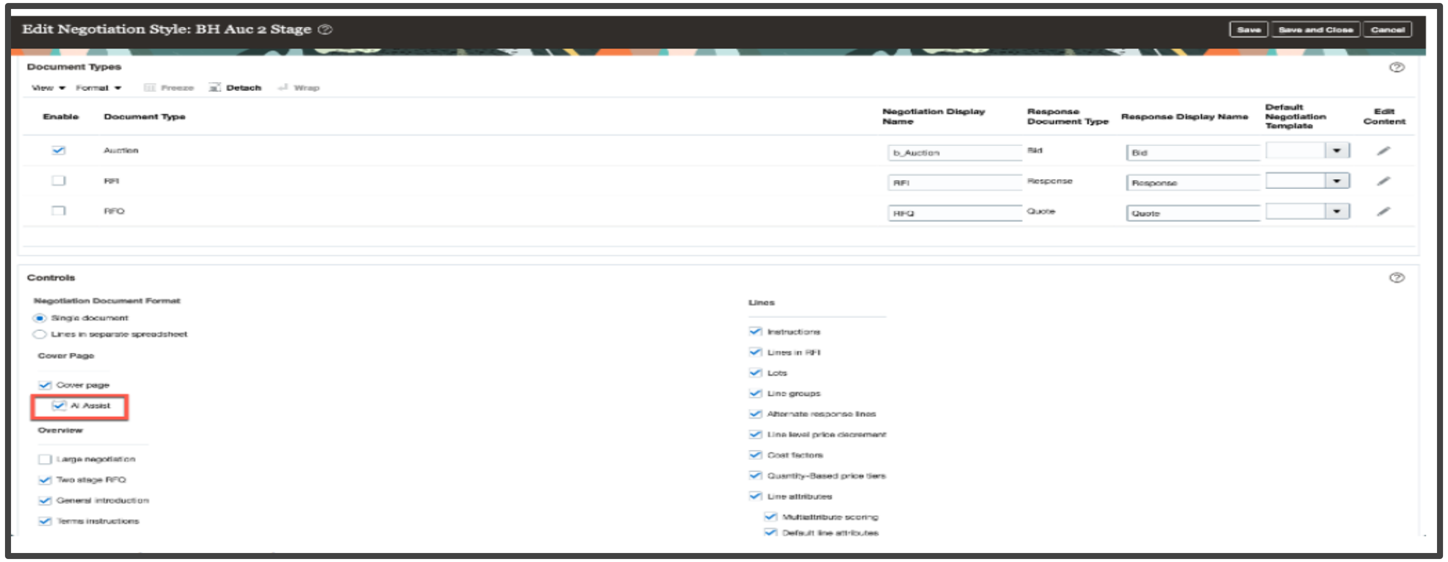
Details

Leverage generative Artificial Intelligence (AI) to author the cover page text for your negotiation. Enter key details like the title, synopsis, item categories, and significant dates, and then use the **AI Assist** to generate the cover page text. **AI will use the information from the draft negotiation and suggest content to include for you to get started**. If you like a suggestion, you can review and accept it. If not, you can always edit it before or after accepting it. You also have to option to regenerate and explore different contents and formats until you find the one that fits your needs. Select and edit one of your existing negotiation styles on the Manage Negotiation Styles page, or create a new one. In the Controls section, under the Cover Page, select the **AI Assist** check box.

Business Benefits : AI Assist will help users in drafting a polished cover page.



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

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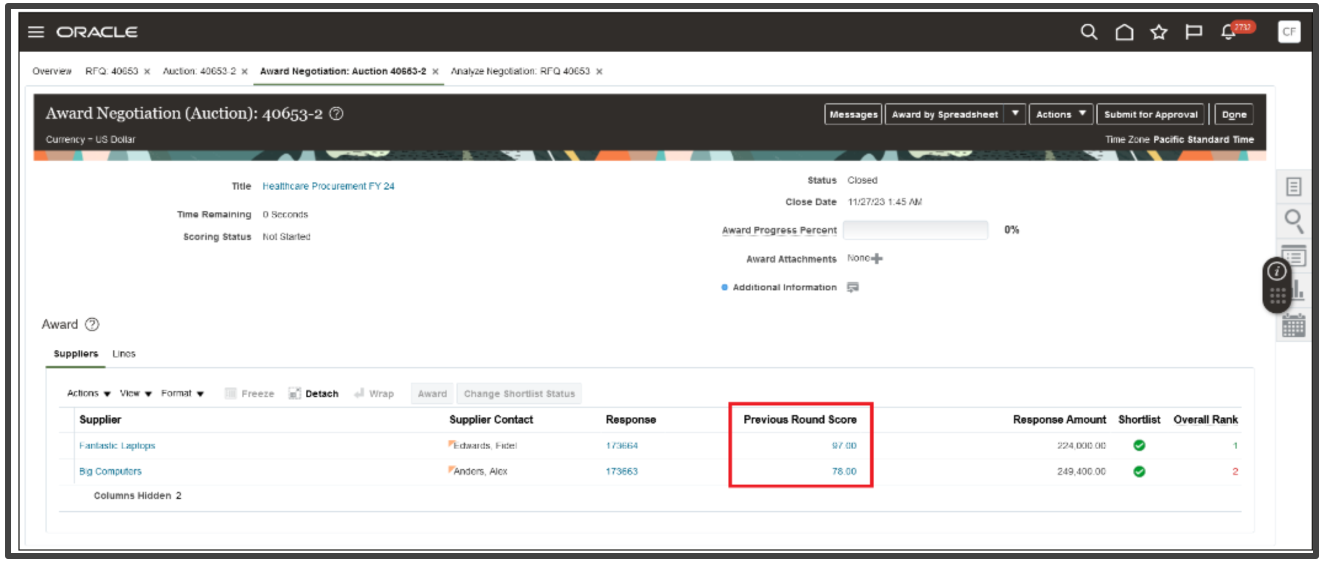
Details

When executing multiple-round negotiations, access to past scoring information is important throughout the process. For example, in a 2-stage negotiation suppliers are typically evaluated for technical and commercial requirements and then shortlisted for a new pricing-only commercial round to provide a best and final offer. Evaluators and approvers need to have access to scores from the prior round when finalizing the award.
With this feature, you can now view the previous round's requirement scores of the suppliers during award analysis and approval.

Business Benefits : Make an informed award decision based on scores and new round pricing.

Impact Analysis

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



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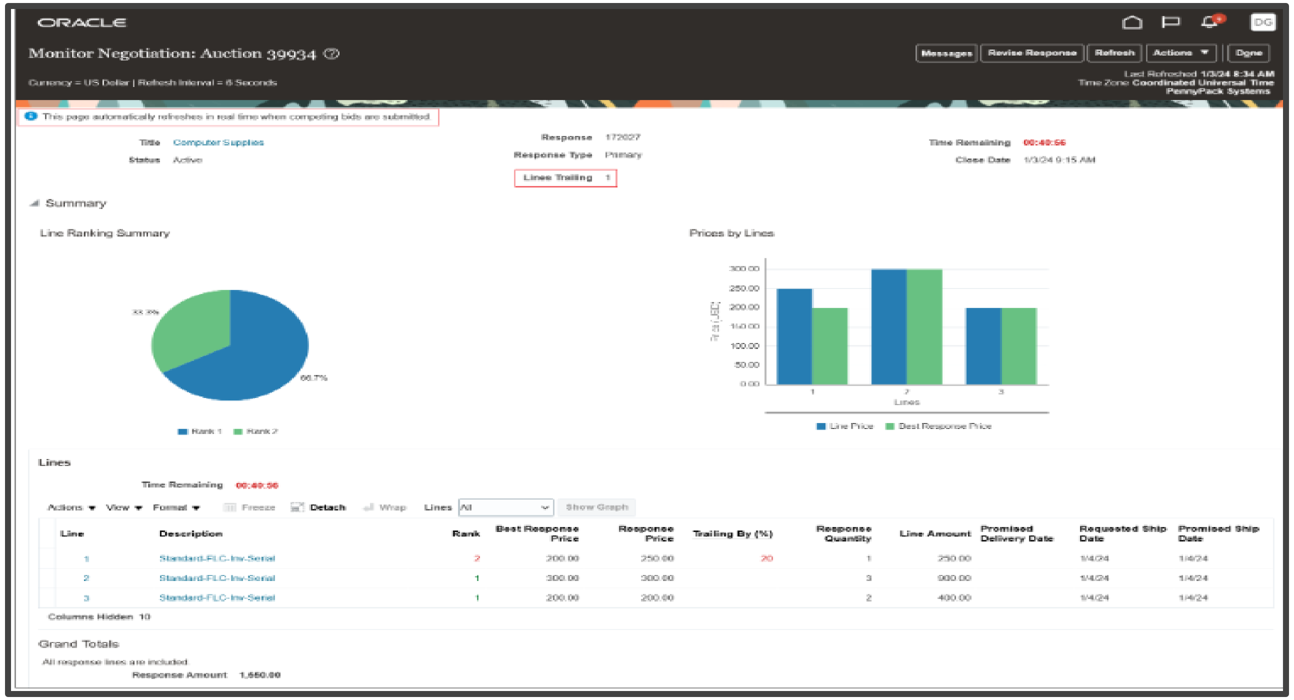
Details

The Monitor Auction page for suppliers is now automatically refreshed during the last hour of the auction when new bids are submitted, or existing bids are revised, disqualified, or both. On refresh, suppliers will see the count of lines they are trailing on to help them decide whether to revise their bid.

Business Benefits: an improved opportunity to win the bid as suppliers can see their rank in real time.



Impact Analysis

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

ALLOW ZERO RESPONSE PRICE IN LARGE NEGOTIATIONS

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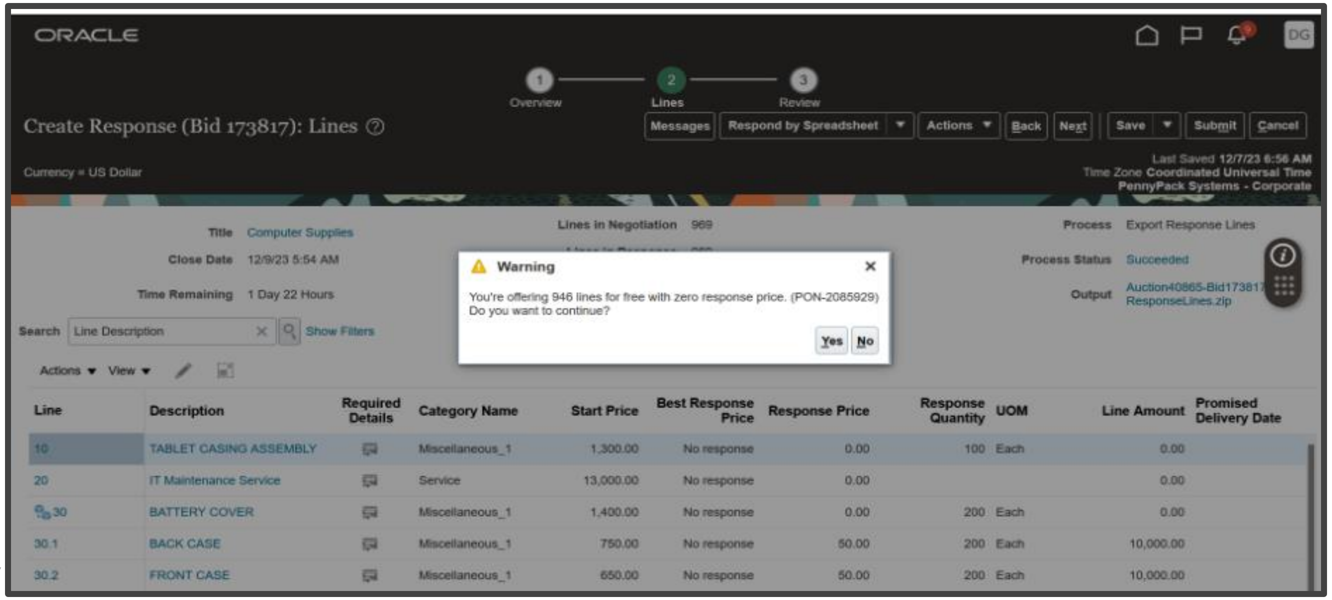
Details

Large negotiations are negotiations with very high volumes. With this update, suppliers can enter a zero price when responding to large negotiations. This allows suppliers to offer items for free or offer services for products that are still under warranty.

• If you previously opted into the feature **Allow Suppliers to Enter Zero Response Price**, you don't have to opt in again.

Business Benefit : Buyers can take advantage of free offerings from suppliers and improve their savings

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



ADD REQUISITIONS TO LARGE NEGOTIATIONS

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Details

Using the Large Negotiation feature, you can now process requisitions with thousands of lines. The awarded lines are automatically allocated to purchasing documents and requisitions fulfilled using background processing.
To use the feature:

•Provide the requisition number and requisition line number backing each negotiation line in the lines import template (.XLSM) and import using the file-based data import process (FBDI).

•Supplier responses are captured, analyzed, and awarded using the background processes.

•Make an award decision, the award quantity is then automatically allocated to satisfy the requisition demand when the Create Purchasing Documents background process is run.

•Review the requisition line quantity allocations in the view line allocations UI, before creating purchasing documents in Purchasing.

•Submit the Purchasing Documents background process, this creates the purchasing documents, which fulfills the requisition demand. Any unallocated requisition line quantity is returned back to the process requisitions pool.

Instead of conducting multiple negotiations, you can now process a large volume of requisition lines in a single negotiation, saving considerable time and effort.

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

EXPORT SEARCH RESULTS TO EXCEL IN SUPPLIER PORTAL

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Details

Suppliers can now export their negotiation search results and response data to the Microsoft Excel Spreadsheet Software from Supplier Portal.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Negotiation	Title	Negotiation Type	Buyer	Supplier	Supplier Site	Time Remaining	Close Date	All Responses	Your Responses	Will Participate	Unread Messages
2	39907	Computer Supplies	RFQ	Norden, Loraine	PennyPack Systems		3 Days 19 Hours	2-9-24 6:36 AM	Blind	1.	Yes	0
3	39907	Telecommunications Upgrade	RFQ	Dapolito, Cody	Big Computers		5 Days 19 Hours	2-11-24 12:00 PM	Blind	1.	Yes	1
4	39906	Network Equipment	RFQ	Dapolito, Cody	Big Computers		6 Days 19 Hours	2-12-24 12:00 PM	Blind	1.	Yes	0
5	39906	Network Equipment	RFQ	Dapolito, Cody	PennyPack Systems		5 Days 19 Hours	2-11-24 12:00 PM	Blind	1.	Yes	0
6	39905	Telecommunications Upgrade	RFQ	Dapolito, Cody	Big Computers		8 Days 19 Hours	2-14-24 12:00 PM	Blind	1.	Yes	0
7	39905	Telecommunications Upgrade	RFQ	Dapolito, Cody	PennyPack Systems		9 Days 19 Hours	2-15-24 12:00 PM	Blind	1.	Yes	0
8	39819	Network Equipment	Auction	Furey,Clare	PennyPack Systems		1 Day 2 Hours	2-7-24 9:00 PM	2	1.	Yes	0
9	39819	Server Maintenance	Auction	Furey,Clare	Big Computers		23 Hours 30 Minutes	2-6-24 12:00 PM	2	1.	Yes	0
10	39814	Server Maintenance	Auction	Furey,Clare	PennyPack Systems	FRESNO	23 Hours 15 Minutes	2-6-24 11:45 AM	0	1.	Yes	0
11	39814	Computer Supplies	Auction	Furey,Clare	Big Computers		1 Day 1 Hour	2-7-24 8:00 PM	0	1.	Yes	1
12	39800	Computer Supplies	Auction	Furey,Clare	PennyPack Systems		58 Minutes	2-5-24 12:00 PM	1	1.	Yes	0
13	39800	Computer Supplies	Auction	Furey,Clare	Big Computers	New Jersey	23 Hours 15 Minutes	2-6-24 11:45 AM	1	1.	Yes	0
14	39799	Computer Supplies	Auction	Furey,Clare	Big Computers		1 Day 2 Hours	2-7-24 9:00 PM	0	1.	Yes	0
15	39799	Broadband Internet	Auction	Furey,Clare	PennyPack Systems		23 Hours 15 Minutes	2-6-24 11:45 AM	0	1.	Yes	0
16	39798	Audio Equipment	Auction	Furey,Clare	PennyPack Systems		23 Hours 15 Minutes	2-6-24 11:45 AM	0	1.	Yes	0
17	39798	Audio Equipment	Auction	Furey,Clare	Big Computers		1 Days 2 Hours	2-7-24 9:00 PM	0	1.	Yes	0
18	39765	Satellite Communication Equipment	Auction	Furey,Clare	PennyPack Systems		23 Hours 15 Minutes	2-6-24 11:45 AM	0	1.	Yes	0
19	39765	Laptops and Netbooks	Auction	Furey,Clare	Big Computers		23 Hours 15 Minutes	2-6-24 11:45 AM	0	1.	Yes	0
20	39741	Broadband Internet	Auction	Furey,Clare	PennyPack Systems		1 Days 2 Hours	2-7-24 9:00 PM	0	1.	Yes	2
21	39741	Broadband Internet	Auction	Furey,Clare	Big Computers		23 Hours 15 Minutes	2-6-24 11:45 AM	0	1.	Yes	0
22	39740	Laptops and Netbooks	Auction	Furey,Clare	PennyPack Systems		23 Hours 15 Minutes	2-6-24 11:45 AM	0	1.	Yes	0
23	39740	Audio Equipment	Auction	Furey,Clare	Big Computers	Texas	1 Days 2 Hours	2-7-24 9:00 PM	0	1.	Yes	0
24	39735	Broadband Internet	Auction	Furey,Clare	PennyPack Systems		23 Hours 15 Minutes	2-6-24 11:45 AM	0	1.	Yes	1
25	39735	Computer Hardware and Peripheral Equipment	Auction	Furey,Clare	Big Computers		23 Hours 15 Minutes	2-6-24 11:45 AM	0	1.	Yes	0
26	39714	Satellite Communication Equipment	Auction	Furey,Clare	Big Computers		1 Days 2 Hours	2-7-24 9:00 PM	0	1.	Yes	0
27	39714	Broadband Internet	Auction	Furey,Clare	PennyPack Systems		58 Minutes	2-5-24 12:00 PM	0	1.	Yes	0

Exported

Impact Analysis

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

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Details

You can now export all online messages in a negotiation into Microsoft Excel to review them offline, or add as an attachment when submitting the negotiation or award for approval.

Subject	Status	From	From Company	To	Date	Message	Attachments
Scoring Criteria							
Scoring Criteria	Read	Furey,Clare	Vision Corporation Enterprise	All members	08-Jan-2024 9:30 AM	Evaluate supplier responses considering this criteria: 1. Experience and number of years the Supplier has been in the business of providing the required types of products/services. 2. Financial stability of the Supplier's organization 3. Demonstrated understanding of the goals and objectives of the project and a logical plan for providing the products/services within the required time frames 4. Agreement to standard contract terms 5. Competitive pricing 6. References from the Supplier's clients	No
Resolve Internal Queries							
Resolve Internal Queries	Read	Furey,Clare	Vision Corporation Enterprise	Dapolito,Cody	08-Jan-2024 9:29 AM	Hi Cody, Please clarify any questions on the requirements that members have during scoring the supplier responses. Thanks, Clare Furey	No
Clarification on pricing of line items							
Re: Clarification on pricing of line items	Unread	Grayson, Daniel	PennyPack Systems	Vision Corporation Enterprise	08-Jan-2024 8:58 AM	Dear Vision Corporation Enterprise, Thank you for being a valued customer. We constantly look for new ways to improve our customer value and satisfaction. This includes periodically reviewing our price lists. Attaching our revised prices for all the items in our inventory. Thanks, PennyPack Systems On 1/8/24 8:55 AM UTC, Vision Corporation Enterprise wrote Hi, We are looking upgrading our space and are looking at mid-range pricing for all our items. Also, provide us your alternate items along with pricing details. Request you to go through the attached BID requirements before sending in any quotes. Thanks, Vision Corporation Enterprise	Yes
Clarification on pricing of line items	Read	Furey,Clare	Vision Corporation Enterprise	All participants	08-Jan-2024 8:55 AM	Hi, We are looking upgrading our space and are looking at mid-range pricing for all our items. Also, provide us your alternate items along with pricing details. Request you to go through the attached BID requirements before sending in any quotes. Thanks, Vision Corporation Enterprise	Yes

Impact Analysis

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

DEFAULT TEAM MEMBER SCORES FROM PREVIOUS ROUND

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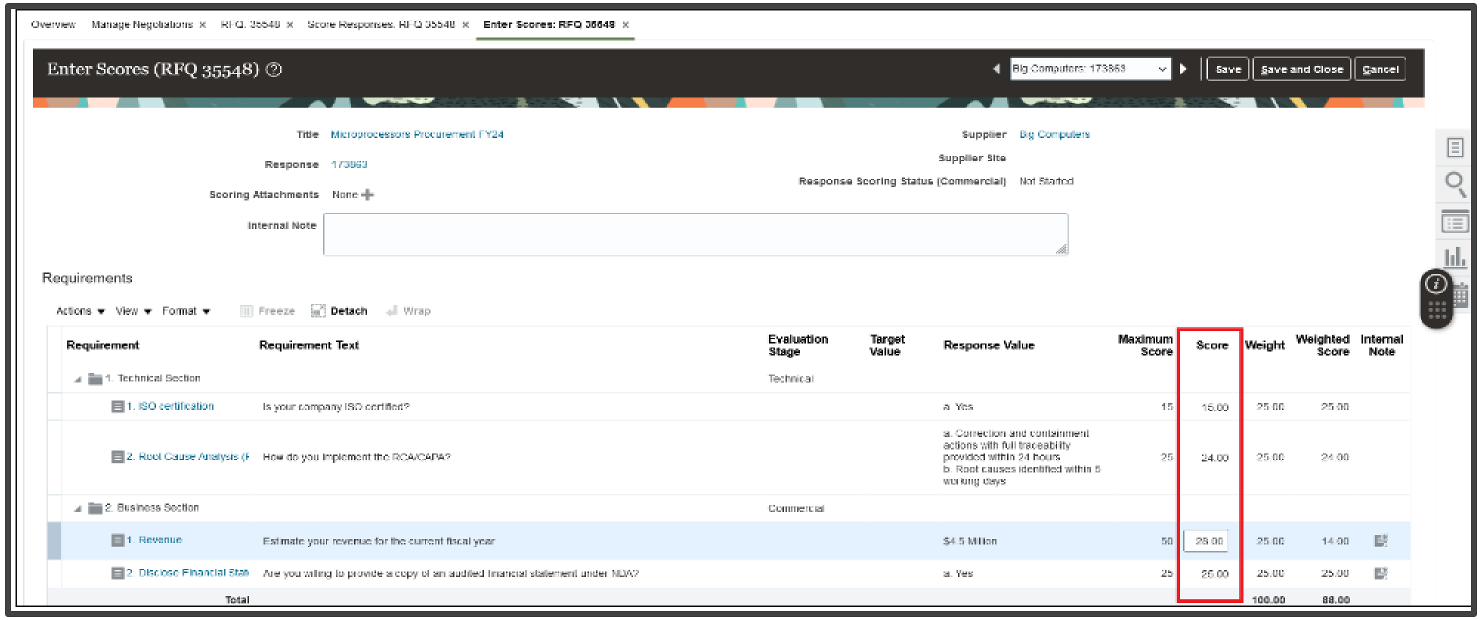
Details

When a new round is created, all team member scores from the previous round are now copied over if the requirement remains unchanged. The scores are editable and can be updated in the current round if required. In negotiations that use composite scoring, technical and commercial round scores are now automatically defaulted in the new round for the best and final offer. This allows for the new round composite score to be calculated using requirement scores from the previous round, and pricing from the current round.

Business Benefits : saves time for evaluators, epecially when there are a large number of requirements

Impact Analysis

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



SEND AUTOMATIC QUESTIONNAIRE REMINDERS FOR INITIATIVES

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Details

You can now leverage the same automated questionnaire reminders on standard initiatives as supported for survey initiatives. **Automatic reminders extend *touchless* qualification capabilities, helping you increase response rates without additional work**. Set response reminders and past-due notifications according to a predetermined schedule based on the due date. **When using automatic requalification, the reminder schedule is carried over in each cycle, further reducing the need for your intervention.**

To enable automatic reminders, first set a response due date then schedule up to three automatic reminders for responders. **The first two reminders can be sent on or before the due date and the final reminder is sent after the due date**. These automatic reminder notifications are optional.

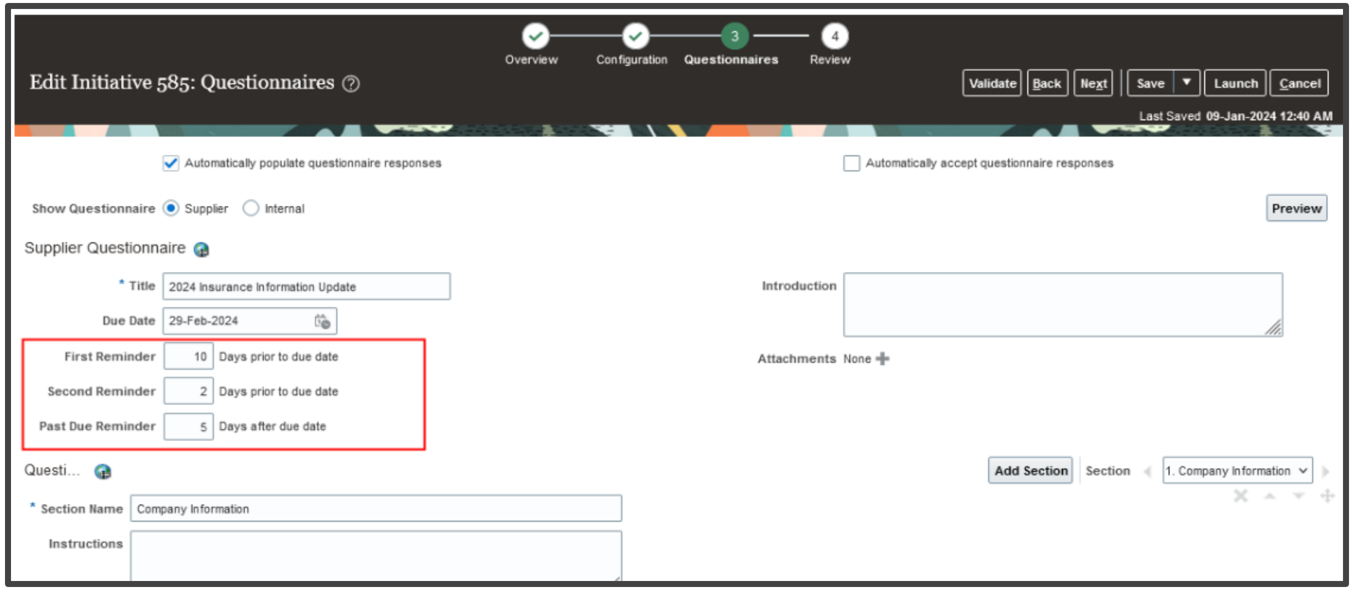
In the following example, the response due date for the supplier questionnaires is 29-Feb-2024. Three automatic reminders are then set for; 10 days before the due date, 2 days before the due date, and 5 days after the due date. If the example initiative includes internal questions, then another set of reminder fields would display to allow you to set up a different reminder schedule for the internal questionnaire.

Business Benefits: You can set reminders for questionnaires which will help you increase the response rate from suppliers.

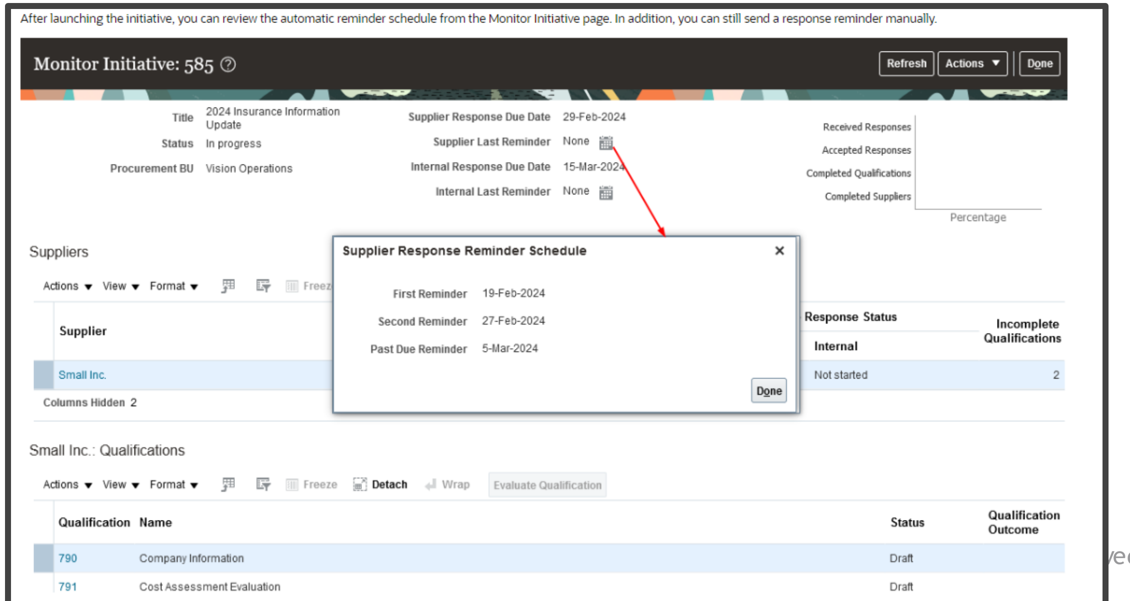
Impact Analysis

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

SEND AUTOMATIC QUESTIONNAIRE REMINDERS FOR INITIATIVES……



After launching the initiative, you can review the automatic reminder schedule from the Monitor Initiative page. In addition, you can still send a response reminder manually.



SUPPORT ADDITIONAL SCORING PRECISION

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Details

Calculate scores with two decimals of precision for each question response. Enhanced scoring precision provides more accuracy when aggregating scores from multiple survey responses and comparing qualification and assessment results. **Since the qualification outcome is derived by a total score which is rounded, it can be challenging to compare suppliers. For example, two suppliers may have the same outcome of Qualified with the same score. Now you can use the non-rounded score with two-decimal precision to compare and rank suppliers with improved trend analysis.**

When you evaluate survey qualifications, you can now see the aggregate score with two decimal places. You can also enter aggregate scores with the same precision for manually scored questions.

When you finalize the qualification, you can override the qualification score and enter the override score with two decimal places. However, the overall qualification score on the qualification overview page will continue to be rounded and displayed without decimals as it's used to derive the qualification outcome based on the setup. In OTBI, the qualification score, qualification original score, assessment score, and response score are shown in decimal format for reporting and comparison.

Business Benefits: Better compare suppliers especially when they share the same response value or qualification outcome.

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

CREATE SUPPLIER CONTACTS FROM CONTRACT

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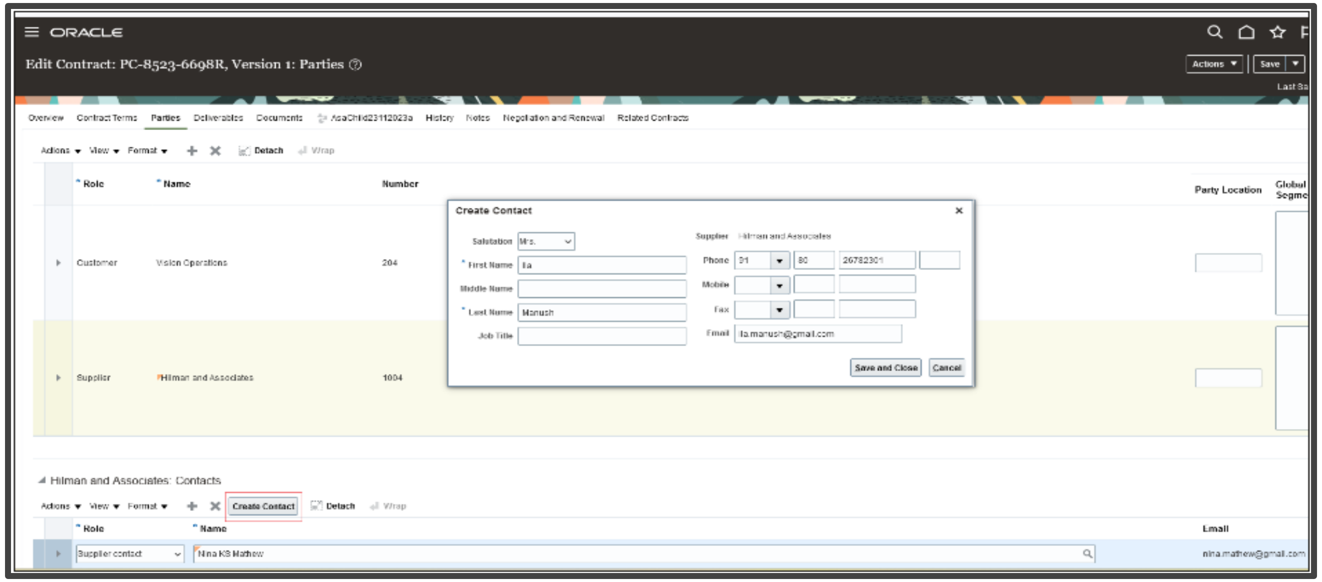
You can now create supplier contacts in the Parties tab of the contract. The ability to create the contract while authoring a contract accelerates the contract creation process. The Create Contact button is enabled for supplier and other third-party roles of a procurement contract.

Contract managers don't need to rely on the supplier manager to create a supplier contact. Being able to create the contract within the contract UI enhances the efficiency of the contract authoring process and shortens the lead time for contract creation.

Business Benefit: Automates contact creation process, reduces dependencies on supplier managers.

Impact Analysis

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



APPLY EXPIRY AND REMINDER SETTINGS IN CONTRACT ENVELOPES FROM DOCUSIGN ACCOUNT

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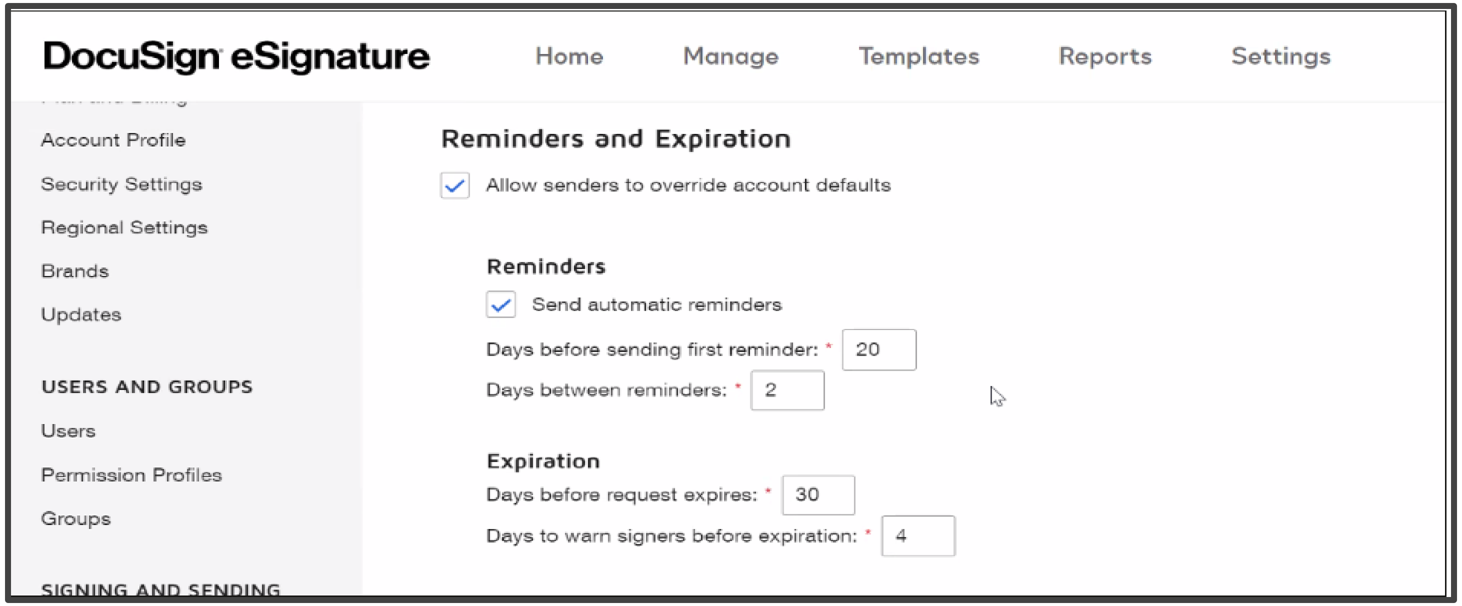
Details

If DocuSign is your e-signature provider, you have the option to default the expiry and notifications settings in the contract envelopes from the DocuSign account. If the **Apply account level reminders and expiration settings** check box is selected in the **Manage Electronic Signature** UI, the contract documents that are sent for signature will have the values defaulted. The check box is deselected by default.

You don't need to enter the expiry and reminder settings for every contract document because the values are already defaulted from the DocuSign account.



Impact Analysis

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

APPLY EXPIRY AND REMINDER SETTINGS IN CONTRACT ENVELOPES FROM DOCUSIGN ACCOUNT…..

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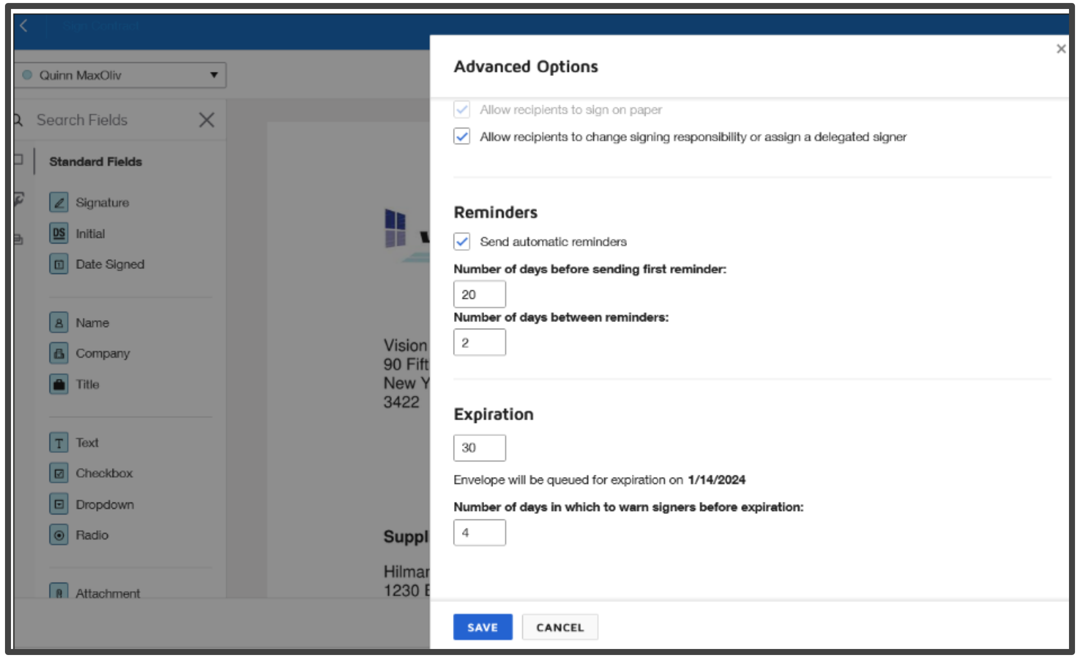

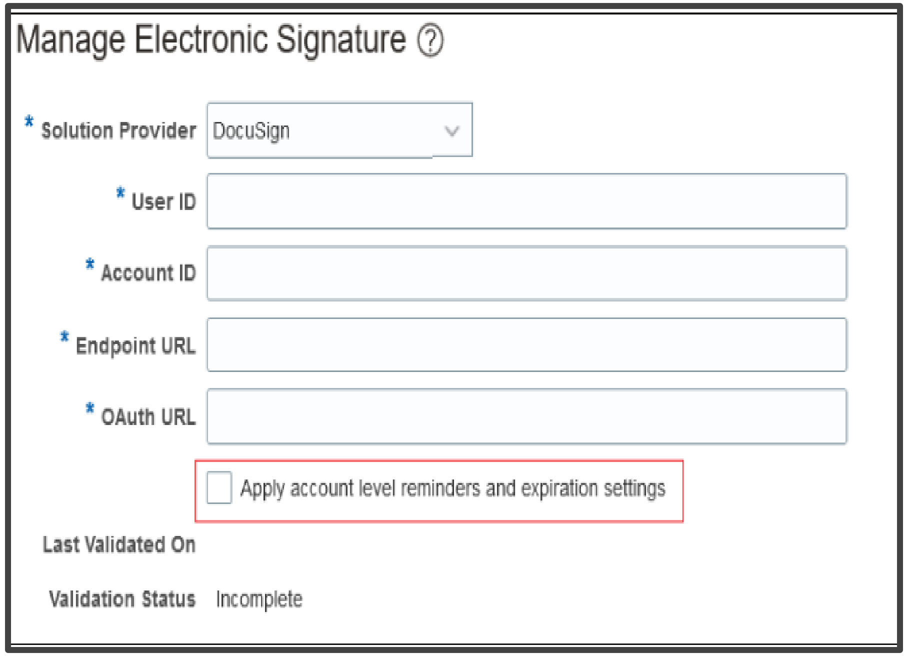

Business Benefits: Enable reminders to initiate docu sign on contracts from the docu sign account.

Check the **Apply account level reminders and expiration** checkbox in the Manage Electronic Signature UI for the solution provider DocuSign to automatically default the account level reminder and expiry settings in the contract document.

Closing Q&A

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CLOSING NOTE

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

HR Helpdesk & ORC Oracle Quarterly Updates 24B	11-Apr-24	3:00 PM GMT / 4:00 PM CEST / 10:00 AM EST
Talent & OLC Oracle Quarterly Updates 24B	11-Apr-24	4:30 PM GMT / 5:30 PM CEST / 11:30 AM EST
SCM (Inventory & Order Management) Oracle Quarterly Updates 24B	16-Apr-24	3:00 PM GMT / 4:00 PM CEST / 10:00 AM EST
Benefits & Compensation Oracle Quarterly Updates 24B	16-Apr-24	4:30 PM GMT / 5:30 PM CEST / 11:30 AM EST

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THANK YOU

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