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UPDATE 20D

REVISION HISTORY

This document will continue to evolve as existing sections change and new information is added. All updates appear in the following table:

Date	Product	Feature	Notes
30 OCT 2020	Supplier Model	Other Supplier Model Changes in This Update	Updated document. Added section.
28 OCT 2020	Purchasing	Other Purchasing Changes in This Update	Updated document. Reworded content.
28 OCT 2020	Self Service Procurement	Use a Short URL for the Punchout Return	Updated document. Reworded Tips and Considerations.
26 OCT 2020	Supplier Model	Approve Internal Changes on Supplier Profile	Updated document. Revised feature information.
18 SEP 2020			Created initial document.

OVERVIEW

This guide outlines the information you need to know about new or improved functionality in this update, and describes any tasks you might need to perform for the update. Each section includes a brief description of the feature, the steps you need to take to enable or begin using the feature, any tips or considerations that you should keep in mind, and the resources available to help you.

SECURITY AND NEW FEATURES

The Role section of each feature identifies the security privilege and job role required to use the feature. If feature setup is required, then the Application Implementation Consultant job role is required to perform the setup, unless otherwise indicated. (If a feature doesn't include a Role section, then no security changes are required to use the feature.)

If you have created job roles, then you can use this information to add new privileges to those roles as needed. For details about how to compare your configured job roles to predefined job roles and add security artifacts to your configured job roles, see the Security Console and Roles and Role Assignments chapters in the Oracle SCM Cloud: Securing SCM guide on the Oracle Help Center.

GIVE US FEEDBACK

We welcome your comments and suggestions to improve the content. Please send us your feedback at oracle_fusion_applications_help_ww_grp@oracle.com

OPTIONAL UPTAKE OF NEW FEATURES (OPT IN)

Oracle Cloud Applications delivers new updates every quarter. This means every three months you'll receive new functionality to help you efficiently and effectively manage your business. Some features are delivered Enabled meaning they are immediately available to end users. Other features are delivered Disabled meaning you have to take action to make available. Features delivered Disabled can be activated for end users by stepping through the following instructions using the following privileges:

- Review Applications Offering (ASM_REVIEW_APPLICATIONS_OFFERINGS_PRIV)
- Configure Oracle Fusion Applications Offering (ASM_CONFIGURE_OFFERING_PRIV)

Here's how you opt in to new features:

1. Click Navigator > My Enterprise > **New Features**.
2. On the Features Overview page, select your offering to review new features specific to it. Or, you can leave the default selection **All Enabled Offerings** to review new features for all offerings.
3. On the New Features tab, review the new features and check the opt-in status of the feature in the **Enabled** column. If a feature has already been enabled, you will see a check mark. Otherwise, you will see an icon to enable the feature.
4. Click the icon in the **Enabled** column and complete the steps to enable the feature.

In some cases, you might want to opt in to a feature that's not listed in the New Features work area. Here's how to opt in:

1. Click Navigator > My Enterprise > **Offerings**.
2. On the Offerings page, select your offering, and then click **Opt In Features**.
3. On the Opt In page, click the **Edit Features** (pencil) icon for the offering, or for the functional area that includes your feature.
4. On the Edit Features page, complete the steps to enable the feature.

For more information and detailed instructions on opting in to new features for your offering, see Offering Configuration.

Opt In Expiration

Occasionally, features delivered Disabled via Opt In may be enabled automatically in a future update. This is known as an Opt In Expiration. If your cloud service has any Opt In Expirations, you will see a related tab in this document. Click on that tab to see when the feature was originally delivered Disabled, and when the Opt In will expire, potentially automatically enabling the feature. You can also click here to see features with Opt In Expirations across all Oracle Cloud Applications.

FEATURE SUMMARY

Column Definitions:

Features Delivered Enabled

Report = New or modified, Oracle-delivered, ready to run reports.
UI or Process-Based: Small Scale = These UI or process-based features are typically comprised of minor field, validation, or program changes. Therefore, the potential impact to users is minimal.
UI or Process-Based: Larger Scale* = These UI or process-based features have more complex designs. Therefore, the potential impact to users is higher.

Features Delivered Disabled = Action is needed BEFORE these features can be used by END USERS. These features are delivered disabled and you choose if and when to enable them. For example, a) new or expanded BI subject areas need to first be incorporated into reports, b) Integration is required to utilize new web services, or c) features must be assigned to user roles before they can be accessed.

	Ready for Use by End Users (Features Delivered Enabled) Reports plus Small Scale UI or Process-Based new features will have minimal user impact after an update. Therefore, customer acceptance testing should focus on the Larger Scale UI or Process-Based* new features.			Action is Needed BEFORE Use by End Users (Features Delivered Disabled) Not disruptive as action is required to make these features ready to use. As you selectively choose to leverage, you set your test and roll out timing.
Feature	**Report**	**UI or Process-Based: Small Scale**	**UI or Process-Based: Larger Scale***	
Cross-Product Procurement Enhancements				
Integrate and Extend Procurement Using REST Services				✓
Link to Procurement Application Pages Using Deep Links				✓
User Experience				
Enhanced Global Search				✓
Purchasing				
Assign Requisition Lines to the Buyer on the Source Agreement				✓

Feature	Ready for Use by End Users (Features Delivered Enabled) Reports plus Small Scale UI or Process-Based new features will have minimal user impact after an update. Therefore, customer acceptance testing should focus on the Larger Scale UI or Process-Based* new features.			Action is Needed BEFORE Use by End Users (Features Delivered Disabled) Not disruptive as action is required to make these features ready to use. As you selectively choose to leverage, you set your test and roll out timing.
	Report	UI or Process-Based: Small Scale	UI or Process-Based: Larger Scale*	
Assign Buyers to Requisition Lines by Cost Centers				✔
Apply Service Related Tax Rates for Rate Based Services		✔		
Update the Price on Purchase Orders for Items Requested from Punchout Marketplaces				✔
Prevent Cancellation of Partially Received or Invoiced Purchase Orders				✔
Add New Approved Requisitions to Existing Open Purchase Orders				✔
Control Electronic Signature Requirement for Change Orders		✔		
Deliver User-Specific Procurement BI Analysis Content		✔		
Raise a Public Business Event for Outbound B2B Messages			✔	
Receive cXML Advance Shipment Notices from Your Suppliers		✔		
Associate a Master Contract with a Purchasing Document				
Generate Reports on Master Contract Usage Using OTBI				✔
Other Purchasing Changes in This Update				
Self Service Procurement				
Use a Short URL for the Punchout Return		✔		
Display Master Item Packaging String in Shopping Flows				✔

Feature	Ready for Use by End Users (Features Delivered Enabled) Reports plus Small Scale UI or Process-Based new features will have minimal user impact after an update. Therefore, customer acceptance testing should focus on the Larger Scale UI or Process-Based* new features.			Action is Needed BEFORE Use by End Users (Features Delivered Disabled) Not disruptive as action is required to make these features ready to use. As you selectively choose to leverage, you set your test and roll out timing.
	Report	UI or Process-Based: Small Scale	UI or Process-Based: Larger Scale*	
Use Noncatalog Requests to Order Rate-Based Services		✔		
Sourcing				
View Table of Contents for Contract Terms Within Sourcing PDF Documents				✔
Identify Negotiation Team Members Who Aren't Active Employees		✔		
Inactivate Seeded Negotiation Styles		✔		
Apply Internal Cost Factors In Supplier Negotiations				
Define Default Internal Cost Factors for Negotiation Lines				✔
Create Supplier Contracts from Negotiation Award				
Negotiate a Contract with Simplified Terms Template				✔
Supplier Model				
Approve Internal Changes on Supplier Profile				✔
Other Supplier Model Changes in This Update				

CROSS-PRODUCT PROCUREMENT ENHANCEMENTS

INTEGRATE AND EXTEND PROCUREMENT USING REST SERVICES

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

New REST APIs introduced in this update are:

- Public Shopping List Lines
- Requisition Preferences
- Purchase Order List of Values
- Suppliers and Sites List of Values

The following REST APIs are enhanced:

- Purchase Requisitions
    - Use the Create Default Distributions custom action to create a basic distribution comprised of distribution number, quantity, or amount attributes. The distribution will be created for a requisition line, if not already created.
- Draft Purchase Orders
    - POST is supported for **inventory** as the destination type.
    - PATCH is supported for price, quantity, delivery and ship dates, account, project, and descriptive flexfields.
    - POST and PATCH are supported for the **Requires Signature** attribute.
- Purchase Orders
    - GET is supported for descriptive flexfields for purchase order headers, lines, schedules, and distributions.
    - GET is supported for project costing information on purchase order distributions.
- Supplier Negotiations
    - POST, PATCH, and DELETE are supported for attachments to supplier negotiation, requirements, and lines.
    - POST and PATCH are supported for additional attributes that include instruction text fields, synopsis, payment terms, and two-stage evaluation indicator.
    - Default line attributes are applied to lines added using POST action.
- Supplier Initiatives
    - POST is supported to create a draft initiative.
    - Use the Launch custom action to launch an initiative.

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

STEPS TO ENABLE

Review the REST service definition in the REST API guides, available from the Oracle Help Center > *your apps service area of interest* > REST API. If you're new to Oracle's REST services you may want to begin with the Quick Start section.

KEY RESOURCES

- Refer to the *REST API for Oracle Procurement Cloud* documentation, available on the Oracle Help Center.

ROLE INFORMATION

- Refer to the Job Roles and Privileges section in the *REST API for Oracle Procurement Cloud* documentation, available on the Oracle Help Center.

LINK TO PROCUREMENT APPLICATION PAGES USING DEEP LINKS

In this update, Oracle Procurement Cloud delivers new deep links that provide easy navigation directly to application pages without using the menu structure. You can use these links in a variety of ways, such as in business intelligence reports and third-party application pages.

New deep links introduced in this update are:

- View Requisition Lines
- View Requisition Details
- Manage Requisitions
- View Negotiation

When you add deep links to reports or third-party application pages, users can simply click those links to go directly to the application pages they need to use, without any additional clicks or navigation. When a user clicks a deep link, that user's security assignment is honored; that is, users can access application pages only if they're assigned a job role that allows them access.

STEPS TO ENABLE

You can find all of the available deep links in the Deep Links work area. Some deep links, such as those assigned the NONE action, are ready to use as is. Other deep links, such as those assigned the VIEW action, require you to edit the link details before you can add the deep link to a report or third-party application page. Refer to the documentation listed in the Key Resources section for details and instructions.

KEY RESOURCES

For details about how to work with deep links, refer to these books on the Oracle Help Center:

- *Oracle Applications Cloud: Configuring and Extending Applications*
- *Oracle Procurement Cloud: Implementing Procurement*

ROLE INFORMATION

You have a couple of options for giving people access to the Deep Links work area, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned any of these predefined job roles are automatically able to access the Deep Links work area:

- Application Developer (FND_APPLICATION_DEVELOPER_JOB)
- Application Implementation Administrator (ORA_ASM_APPLICATION_IMPLEMENTATION_ABSTRACT)
- Application Implementation Consultant (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB)
- Procurement Application Administrator (ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB)
- Supply Chain Application Administrator (ORA_RCS_SUPPLY_CHAIN_APPLICATION_ADMINISTRATOR_JOB)

Users who are assigned configured job roles that contain this privilege are able to access the Deep Links work area:

- View Administration Link (FND_VIEW_ADMIN_LINK_PRIV)

If you're using deep links specifically for reports, here are the privileges you need:

- For Business Intelligence Publisher:
    - BI Author Role (BIAuthor)
    - BI Consumer Role (BIConsumer)
    - BI Administrator (BIAdministrator)
- For Oracle Transactional Business Intelligence (OTBI):
    - BI Author Role (BIAuthor)
    - BI Consumer Role (BIConsumer)

USER EXPERIENCE

This section provides details about shared a feature that's related to user experience. This features is also available in Oracle Common Technologies and User Experience: What's New in Update 20D

The Enhanced Global Search feature is not applicable to Oracle Sourcing Cloud in update 20D.

ENHANCED GLOBAL SEARCH

You can now enable the search extension framework to enjoy the enhanced experience of real-time global search. With this new framework, you get highly responsive, index-based, and full-text search capabilities. Here are some of the things you can view using this framework.

- List of attributes and their associated set of available values in the search results.
- Action links associated with the searchable objects.
- Recent searches for all the objects enabled in the search.

You can also manage and configure the indexes after they’re created. You can view them as categories in the global search settings. Currently, only the following categories are predefined:

- Purchase Agreements
- Purchase Orders
- Purchase Requisitions
- Suppliers

This framework enhances search performance, and so it increases your productivity and gives you an enhanced user experience across various devices, such as desktops, tablets, and smartphones.

STEPS TO ENABLE

Enable the search extension framework to create indexes, ingest predefined indexes, and manage search capabilities.

- Set the **Enable/Disable Search Ext Framework** (**ORA_FND_SEARCH_EXT_ENABLED**) profile option to **Yes**. This profile option is set to **No** by default.
- Submit the **ESS job to create index definition and perform initial ingest to OSCS** process for creating indexes and ingesting predefined indexes.

NOTE: The Index Name to Reingest is an optional parameter. If you don't specify any index names while submitting the process, the process will run for all predefined indexes. We recommend you to create indexes related to your product family only.

TIPS AND CONSIDERATIONS

- The predefined categories are always available in the global search settings even if the indexes the categories represent are not created.

- Make sure to submit the process for creating indexes and ingesting predefined indexes for each index before you use it. You can also submit the process if the index is already created and you want to ingest it again. Use the following index names when submitting the process:
  - Purchase Agreements: fa-prc-pa
  - Purchase Orders: fa-prc-po
  - Purchase Requisitions: fa-prc-por
  - Suppliers: fa-prc-suppliers

KEY RESOURCES

- Overview of Search
- Global Search
- Submit Scheduled Processes and Process Sets

ROLE INFORMATION

You must have the Manage Scheduled Job Definition (FND_MANAGE_SCHEDULED_JOB_DEFINITION_PRIV) privilege to run scheduled processes for enabling the search extension framework.

PURCHASING

ASSIGN REQUISITION LINES TO THE BUYER ON THE SOURCE AGREEMENT

Assign requisition lines automatically to the buyer named on the source agreement. You no longer need to create buyer assignment rules for these requisition lines.

This feature is especially useful if the named buyer on the agreement also manages the orders placed against that agreement.

STEPS TO ENABLE

Use the Opt In UI to enable this feature. For instructions, refer to the Optional Uptake of New Features section of this document.

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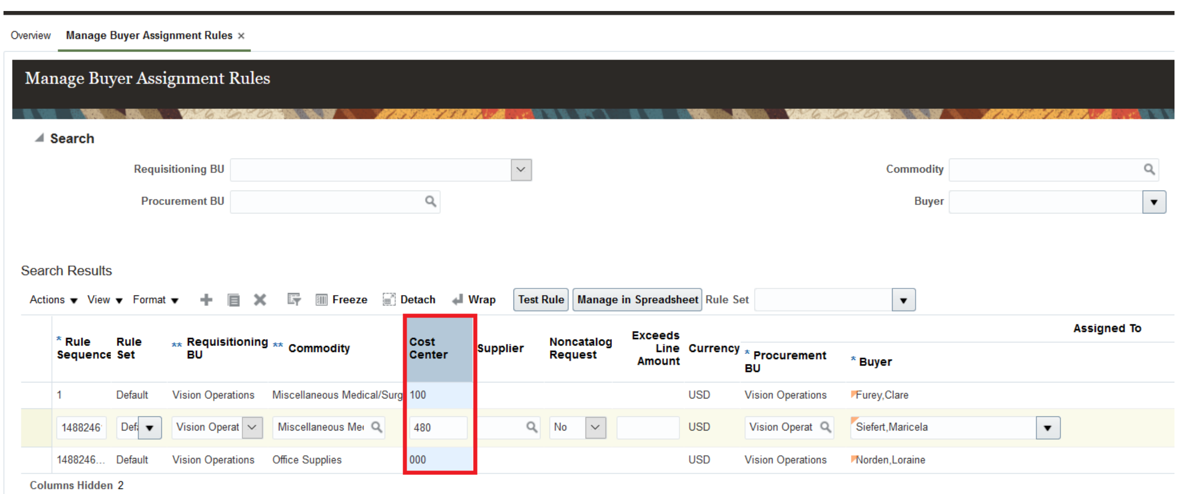
TIPS AND CONSIDERATIONS

Buyer assignment rules aren't evaluated when requisition lines are sourced to an agreement.

ASSIGN BUYERS TO REQUISITION LINES BY COST CENTERS

Assign requisition lines automatically to buyers based on the cost center of the requisition distribution. You can now create assignment rules to identify buyers by cost centers. This feature is especially useful if every department or cost center has dedicated buyers in your organization.

This screen capture illustrates the feature:



Cost Center Based Buyer Assignment Rules

STEPS TO ENABLE

1. Navigate to the Setup and Maintenance work area.
2. Click the Tasks tab, and then click Search.
3. Search for the Manage Buyer Assignment Rules task.
4. Either add a new row to create a new rule based on a cost center or update an existing rule to add a cost center.

TIPS AND CONSIDERATIONS

- In the Manage Buyer Assignment Rules page, you must enter the Requisitioning BU before you can enter a value for Cost Center.
- When a requisition has more than one distribution, the buyer is assigned based on the cost center determined from the first distribution.
- In addition to defining buyer assignment rules in the UI, you can also create cost-center based buyer assignment rules through the import or export process.
- There is no impact to the Use Same Buyer for all Lines in a Requisition profile option that enables

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned any of these predefined job roles are automatically able to access this feature:

- Procurement Manager (ORA_PO_PROCUREMENT_MANAGER_JOB)
- Procurement Application Administrator (ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB)

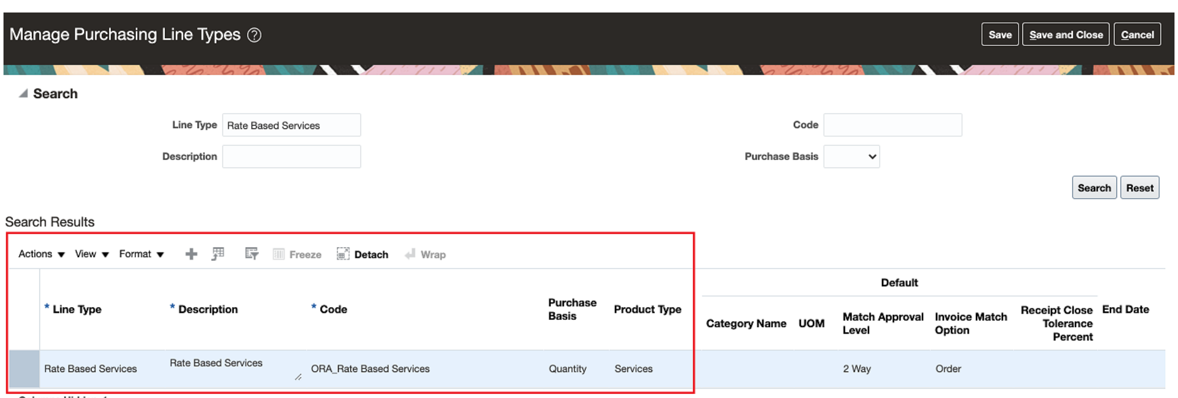
Users who are assigned configured job roles that contain this privilege are able to access this feature:

- Manage Buyer Assignment Rules (PO_MANAGE_BUYER_ASSIGNMENT_RULES_PRIV)

APPLY SERVICE RELATED TAX RATES FOR RATE BASED SERVICES

Order rate-based services, for example, underground cable installation that is priced by the square footage, using the new line type "Rate Based Services." Before this update, to purchase services billed by quantity, you had to use the "Goods" line type and had to manually update the product type to "Services" to treat it as a service purchase for tax purposes. In this update, you can use a new line type called "Rate-Based Services" to purchase rate-based services. Using this line type, you can now enter quantities and rate for the service. When you use this line type, the product type is automatically set to Services, and tax rates applicable for services are used for tax determination.

This screen capture illustrates the feature:



Manage Purchasing Line Types

In addition to adding a new line type, you can add the product type on the Purchasing Line Types page. For this newly created line type, notice that the Purchase Basis is Quantity and the Product Type is Services. To create your line types for rate-based services, set the Purchase Basis to Quantity, and the Product Type to Services.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

TIPS AND CONSIDERATIONS

- The values for purchase basis have been renamed from Goods and Services to Quantity and Amount. This name change is visible in all UIs where purchase basis is available.
- After you update to 20D, the product type automatically populates for all existing line types. The value will either be Goods or Services based on the purchase basis.

ROLE INFORMATION

You have a couple of options for giving people access to set up and use this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

To set up this feature, here's what you need:

Users who are assigned this predefined job role are automatically able to set up this feature:

- Procurement Application Administrator (ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB)

Users who are assigned configured job roles that contain these privileges are able to set up this feature:

- Manage Purchasing Line Type (PO_MANAGE_PURCHASING_LINE_TYPE_PRIV)

To use this feature, here's what you need:

Users who are assigned this predefined job role are automatically able to access this feature:

- Buyer (ORA_PO_BUYER_JOB)

Users who are assigned configured job roles that contain this privilege are able to access this feature:

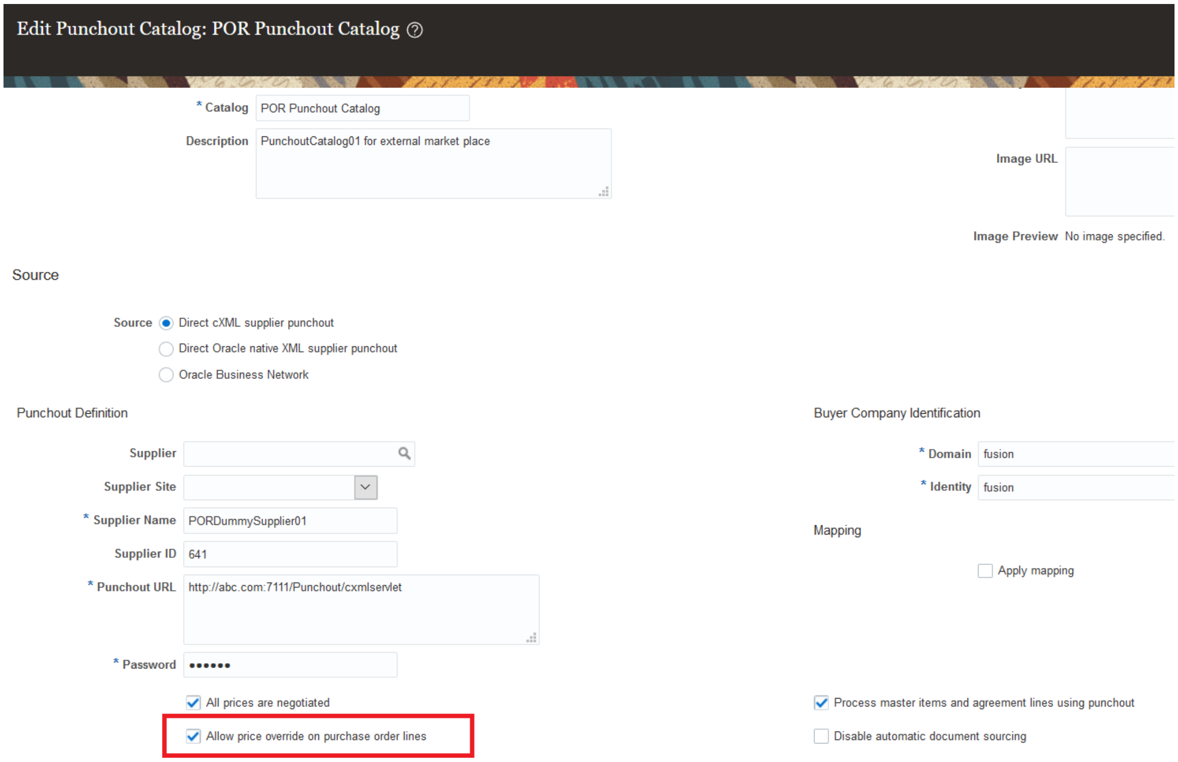
- Create Purchase Order (PO_CREATE_PURCHASE_ORDER_PRIV)
- Change Purchase Order (PO_CHANGE_PURCHASE_ORDER_PRIV)
- Create Purchase Agreement (PO_CREATE_PURCHASE_AGREEMENT_PRIV)
- Change Purchase Agreement (PO_CHANGE_PURCHASE_AGREEMENT_PRIV)

UPDATE THE PRICE ON PURCHASE ORDERS FOR ITEMS REQUESTED FROM PUNCHOUT MARKETPLACES

Update the price on purchase orders for items requested from punchout marketplaces. You can now set up your favorite punchout marketplace as a one-stop-shop for your requesters, where they can also create noncatalog requests. As a buyer, you can then update the purchase order with the negotiated price for such requests.

Using this feature, you can apply consistent business practices for managing prices on purchase orders across transactions regardless of whether purchase orders were processed from internal catalogs or catalogs hosted on external marketplaces.

This screen capture illustrates the feature:



Punchout Catalog Configuration to Allow Price Override on Purchase Orders

STEPS TO ENABLE

To use this feature, you must select the Allow price override on purchase order lines check box. Here are the steps to select the check box:

1. In the Procurement work area, select **Catalogs**.
2. On the Catalogs page, click the **Tasks** tab, and then click **Manage Catalogs**.
3. On the Manage Catalogs page, search for your punchout catalog.
4. Select the catalog and click the **Edit** icon.
5. On the Edit Punchout Catalog page, select the **Allow price override on purchase order lines** check box.
6. Click **Save**.

TIPS AND CONSIDERATIONS

- You can update the price on purchase order lines that are sourced to a blanket purchase agreement if the agreement line allows price override in addition to the punchout catalog configuration.·
- You can update the price on purchase orders through a change order regardless of whether the change order was initiated by the buyer, supplier, or requester.
- In addition to updating the price from UI, you can update the price using REST Services, Purchase Order Web Service, and Retroactive Price Update program.
- When you have opted in to the Capture Supplier Discounts on Purchase Order Lines feature, you can update the item's base price and provide a discount instead of updating the unit price.
- You can't update the price on purchase order lines using the Purchase Order Web Service if the lines have a discount.
- You can use the configuration to allow price updates on purchase order lines for all punchout catalog sources such as cXML, Oracle native XML, and Oracle Business Network.

ROLE INFORMATION

You have a couple of options for giving people access to set up and use this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

To set up this feature, here’s what you need:

Users who are assigned this predefined job role are automatically able to set up this feature:

- Procurement Catalog Administrator (ORA_POR_PROCUREMENT_CATALOG_ADMINISTRATOR_ABSTRACT)

Users who are assigned configured job roles that contain this privilege are able to set up this feature:

- Manage Procurement Catalog Content (POR_MANAGE_PROCUREMENT_CATALOG_CONTENT_PRIV)

To use this feature, here’s what you need:

Users who are assigned this predefined job role are automatically able to use this feature:

- Buyer (ORA_PO_BUYER_JOB)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

- Create Purchase Order (PO_CREATE_PURCHASE_ORDER_PRIV)
- Change Purchase Order (PO_CHANGE_PURCHASE_ORDER_PRIV)
- Change Purchase Agreement (PO_CHANGE_PURCHASE_AGREEMENT_PRIV)
- Retroactively Price Purchase Order (PO_RETROACTIVELY_PRICE_PURCHASE_ORDER_PRIV)
- Manage Purchase Order by Web Service (PO_MANAGE_PURCHASE_ORDER_WEB_SERVICE_PRIV)

PREVENT CANCELLATION OF PARTIALLY RECEIVED OR INVOICED PURCHASE ORDERS

Prevent cancellation of purchase orders that are partially received or invoiced.

Using this feature, you ensure received goods are returned, and the invoice is canceled before you cancel the purchase order.

STEPS TO ENABLE

Use the Opt In UI to enable this feature. For instructions, refer to the Optional Uptake of New Features section of this document.

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TIPS AND CONSIDERATIONS

If you no longer want to receive the unfulfilled portion of the purchase order schedule, consider reducing the ordered quantity or amount to match the receipt or invoice value.

ADD NEW APPROVED REQUISITIONS TO EXISTING OPEN PURCHASE ORDERS

Add new approved purchase requisition lines to existing open purchase orders. In update 20A, requisition lines could only be added to existing purchase orders if your application wasn't configured to copy over descriptive flexfields from requisitions to purchase orders. In this update, that restriction is lifted.

Using this feature, you can process requisition demand on an existing purchase order instead of creating a new purchase order when you choose to copy over descriptive flexfields from requisitions to purchase orders.

STEPS TO ENABLE

Use the Opt In UI to enable this feature. For instructions, refer to the Optional Uptake of New Features section of this document.

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TIPS AND CONSIDERATIONS

- Use the Offerings work area to opt in to this feature. If you previously opted in to this feature, you don't have to opt in again.
- When you add a new requisition line to an existing order and your application is configured to copy over requisition line descriptive flexfields to purchase order lines:
    - The requisition line can be added only as a new purchase order line.
    - New requisition lines can't be grouped with existing purchase order lines.
    - The requisition line descriptive flexfields can be copied over only to the new purchase order line.

- When you add a new requisition line to an existing order and your application is configured to copy over requisition header descriptive flexfields to purchase orders, consider these:
    - The requisition header descriptive flexfields can't be copied over to the existing order.
    - The requisition header descriptive flexfields can only be copied over when you create a new purchase order.

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned this predefined job role are automatically able to access this feature:

- Buyer (ORA_PO_BUYER_JOB)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

- Process Requisition Line (POR_PROCESS_REQUISITION_LINE_PRIV)

- Create Purchase Order from Requisitions (PO_CREATE_PURCHASE_ORDER_FROM_REQUISITIONS_PRIV)

CONTROL ELECTRONIC SIGNATURE REQUIREMENT FOR CHANGE ORDERS

Control electronic signature requirement for change orders. You can now explicitly specify whether electronic signatures are required for a change order irrespective of how the requirement was specified on the original document.

You can now require an electronic signature for changes on purchasing documents that were created before enabling the Enable Electronic Signature for Procurement Documents feature.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

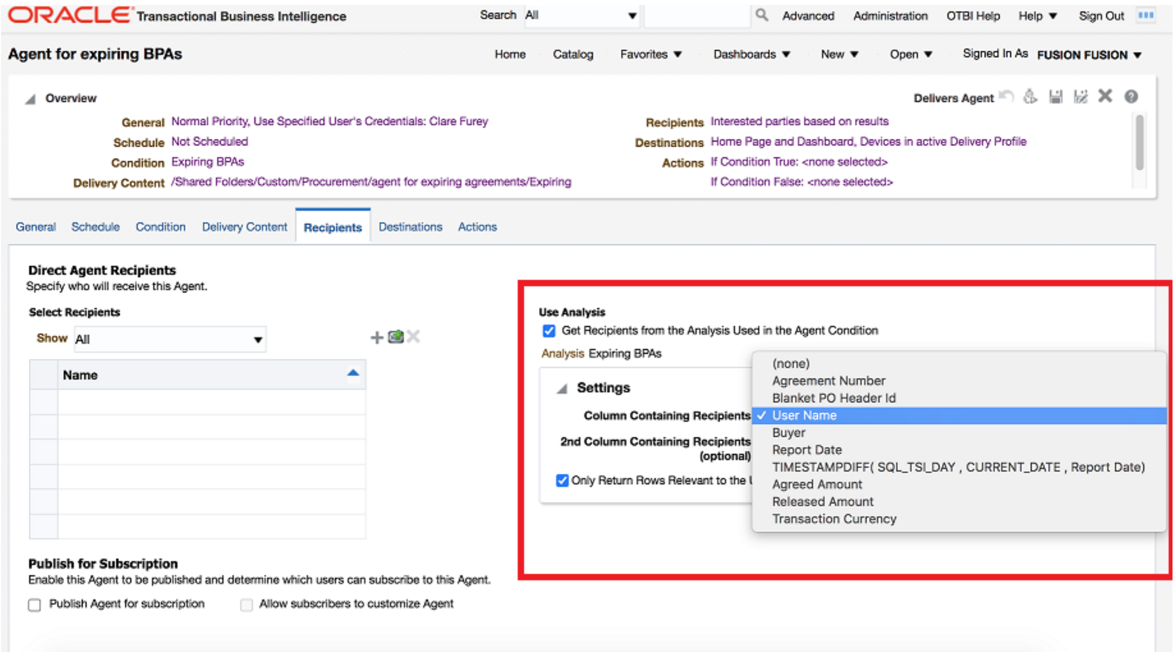
DELIVER USER-SPECIFIC PROCUREMENT BI ANALYSIS CONTENT

Schedule BI agents to deliver user-specific procurement analysis content to a list of recipients derived from the analysis output. To enable this capability, the following attributes have been added to the Oracle Transactional Business Intelligence (OTBI) subject areas:

- Purchasing Real Time
  - Buyer Folder: Username
  - Purchase Order Distribution Detail - Requester Folder: Username
- Purchasing Agreement Real Time
  - Buyer Folder: Username

To use this feature, follow these steps:

1. Create a new OTBI analysis based on the subject area you want to report (Purchasing Real Time or Purchasing Agreements Real Time) and include the User Name column corresponding to the intended alert recipient (Requester or Buyer) in the analysis.
2. Create a new OTBI agent to execute the analysis and deliver content specific to each user retrieved by the analysis periodically. Enter a name for the agent.
3. On the Agent Definition page, on the General tab, set **Run As** to **Specified user** and then select the user who has access to the data on which you want to report.
4. On the Schedule tab, select the frequency on which you want to execute the analysis and send the alerts to the recipients.
5. On the Condition tab, select the **Use a condition** radio button, click **Create...** and then click **Browse...** to search the analysis you created in step 1,
6. On the Create Condition dialog window, to set alerts only when the analysis retrieves records, set True if Row Count is greater than 0.
7. On the Delivery Content tab, in the Content field, select **Condition Analysis** and select the analysis you created in step 1.
8. On the Recipients tab, check the **Get Recipients from the Analysis Used in the Agent Condition** check box.
9. In Column Conditioning Recipients, select **User Name**
10. On the Destinations tab, check the **Devices** check box, then select the **Specific Devices** radio button and check the **Email** check box.



Sample OTBI Agent Recipients Tab

Including the user name attributes in your OTBI analysis enables you to deliver content tailored to each recipient. For example, you can schedule an agent to execute an OTBI analysis to periodically alert individual buyers when their agreements are nearing expiration.

This screen capture illustrate the feature:

Subject: Agent for expiring BPAs
Date: Mon, 14 Sep 2020 19:46:07 +0000
From: Oracle Business Intelligence Reporting <fuscdrmsmc142@slc14ieu.us.oracle.com>

Expiring BPAs

Agreement Number	User Name	Full Name	End Date	Agreed Amount (Transaction Currency)	Currency
1002272	CVBUYER00	Mathew Mancia	12/31/2020	100.00	USD
1002281	CVBUYER00	Mathew Mancia	12/31/2020	500.00	USD
1002322	CVBUYER00	Mathew Mancia	12/31/2020	100.00	USD
1002323	CVBUYER00	Mathew Mancia	12/31/2020	500.00	USD
1002324	CVBUYER00	Mathew Mancia	12/31/2020	1000.00	USD

Sample Email Sent by an OTBI Agent to an Individual Recipient

STEPS TO ENABLE

You don't need to do anything to enable this feature.

KEY RESOURCES

To know more about how to set up an agent, refer to the Configuring and Managing Agents section in the Fusion Middleware System Administrator Guide for Oracle Business Intelligence Enterprise Edition.

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned any of these predefined job roles are automatically able to create OTBI analyses and agents:

- Buyer (ORA_PO_BUYER_JOB)
- Procurement Manager (ORA_PO_PROCUREMENT_MANAGER_JOB)

Users who are assigned configured job roles that contain this duty role are able to create OTBI analyses and agents:

- BI Author Role (BIAuthor)

RAISE A PUBLIC BUSINESS EVENT FOR OUTBOUND B2B MESSAGES

Subscribe to a B2B message event, B2B Message Created, using an Oracle Integration Cloud ERP adapter. Every time a new B2B message is generated an event is raised and the subscription process is immediately notified so that message processing can continue within Oracle Integration.

To enable this, you need to select the **Business Event** delivery method with outbound B2B messages using the **Manage B2B Trading Partners** or the **Manage Collaboration Messaging Service Providers** task.

You can implement real-time processing of outbound B2B messages with Oracle Integration using the B2B message event B2B Message Created.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

KEY RESOURCES

- Oracle Supply Chain Management Cloud: *Configuring and Managing B2B Messaging* guide available on the Oracle Help Center.
- Oracle Integration Cloud: *Using the Oracle ERP Cloud Adapter with Oracle Integration* guide available on the Oracle Help Center.

ROLE INFORMATION

Users who are assigned this predefined job role are automatically able to access this feature:

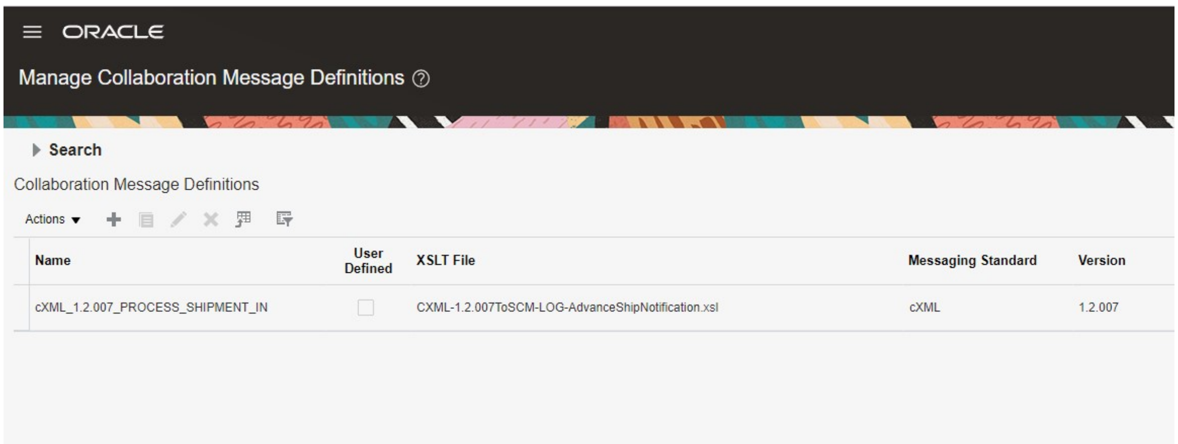
- B2B Administrator (ORA_CMK_B2B_ADMINISTRATOR_ABSTRACT)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

- Manage Service Provider (CMK_MANAGE_SERVICE_PROVIDER_PRIV)
- Manage B2B Trading Partners (CMK_B2B_TRADING_PARTNERS_PRIV)
- Manage B2B Supplier Trading Partners (CMK_B2B_SUPPLIER_TRADING_PARTNERS_PRIV)

RECEIVE CXML ADVANCE SHIPMENT NOTICES FROM YOUR SUPPLIERS

You can use the message definition cXML_1.2.007_PROCESS_SHIPMENT_IN on the Manage Collaboration Message Definitions page to receive cXML advance shipment notices.



Message Definition for Receiving cXML Advance Shipment Notices

To use this message definition you need to set up your service providers on the Manage Collaboration Messaging Service Providers page or your trading partners on the Manage B2B Trading Partners page with an inbound collaboration message using the message definition.

You also have to associate the service provider or trading partner with the specific suppliers on the Manage Supplier B2B Configuration page and select the PROCESS_SHIPMENT_IN document in the Document Setup section.

You can view received shipment messages on the Manage Collaboration Messaging History page.

You can receive cXML advance shipment notices from your trading partners.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

KEY RESOURCES

- Oracle Supply Chain Management Cloud: *Configuring and Managing B2B Messaging* guide available on the Oracle Help Center.
- Oracle Supply Chain Management Cloud: *Using Receiving* guide on the Oracle Help Center.

ROLE INFORMATION

Users who are assigned this predefined job role are automatically able to access this feature:

- B2B Administrator (ORA_CMK_B2B_ADMINISTRATOR_ABSTRACT)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

- Manage Service Provider (CMK_MANAGE_SERVICE_PROVIDER_PRIV)
- Manage B2B Trading Partners (CMK_B2B_TRADING_PARTNERS_PRIV)
- Manage B2B Supplier Trading Partners (CMK_B2B_SUPPLIER_TRADING_PARTNERS_PRIV)
- Manage Collaboration Messaging History (CMK_COLLAB_MESG_HISTORY_PRIV)

ASSOCIATE A MASTER CONTRACT WITH A PURCHASING DOCUMENT

Associate a master contract with a purchasing document. Associate a master contract with a purchasing document. The master contract sets the overall terms and conditions between parties. This feature was originally introduced in 20B. In this update, additional functionality is added. After you opt in to the feature named Associate a Master Contract with a Purchasing Document, you can use the feature described in this section.

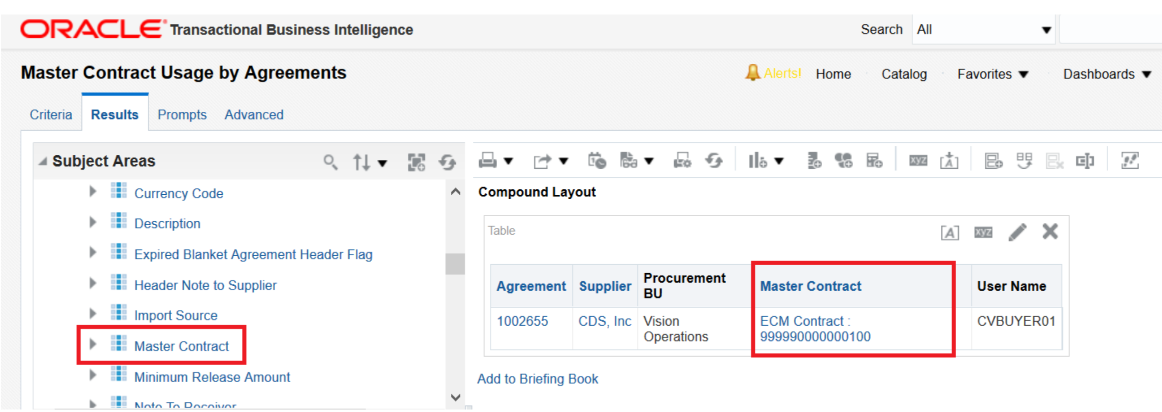
GENERATE REPORTS ON MASTER CONTRACT USAGE USING OTBI

Generate reports and inquiries using master contract relationships on purchasing transactions. The Master Contract attribute is now available in these subject areas and folders:

- Procurement - Purchasing Agreements Real-Time
    - Blanket Agreement Header Detail
    - Contract Agreement Header Detail
- Procurement - Purchasing Real-Time
    - Purchase Order Header Detail
- Procurement - Procure To Pay Real-Time
    - Purchase Order Additional Attributes

Using this feature, you can report on master contract information to improve visibility into contract relationships and monitor utilization of your negotiated governing terms and conditions.

This screen capture illustrates the feature:



OTBI Report for Master Contract Usage

STEPS TO ENABLE

Use the Opt In UI to enable this feature. For instructions, refer to the Optional Uptake of New Features section of this document.

Offering: *Procurement*

- Opt in to the parent feature named: Associate a Master Contract with a Purchasing Document. If you previously opted in to the Associate a Master Contract with a Purchasing Document feature, then this feature is automatically available to you.
- After you have opted in to the feature, add attributes to existing reports or use them in new reports. To learn more about how to create and edit reports, see the Creating and Administering Analytics and Reports guide.

TIPS AND CONSIDERATIONS

- Subject area attributes including master contract are available without opt in, however, to generate reports and inquires using master contract details, you must opt in to the Associate a Master Contract with a Purchasing Document feature.

- If you previously opted in to the Associate a Master Contract with a Purchasing Document feature, this feature is automatically enabled.

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned any of these predefined job roles are automatically able to access the Procurement - Purchasing Agreements Real-Time subject area:

- Buyer (ORA_PO_BUYER_JOB)
- Procurement Manager (ORA_PO_PROCUREMENT_MANAGER_JOB)
- Procurement Contract Administrator (ORA_PO_PROCUREMENT_CONTRACT_ADMIN_JOB)

Users who are assigned configured job roles that contain this duty role are able to access the Procurement - Purchasing Agreements Real-Time subject area:

- Agreement Transaction Analysis Duty (FBI_AGREEMENT_TRANSACTION_ANALYSIS_DUTY)

Users who are assigned any of these predefined job roles are automatically able to access the Procurement - Purchasing Real-Time subject area:

- Buyer (ORA_PO_BUYER_JOB)
- Purchase Analysis (ORA_PO_PURCHASE_ANALYSIS_ABSTRACT)
- Procurement Manager (ORA_PO_PROCUREMENT_MANAGER_JOB)
- Procurement Contract Administrator (ORA_PO_PROCUREMENT_CONTRACT_ADMIN_JOB)

Users who are assigned configured job roles that contain this duty role are able to access the Procurement - Purchasing Real-Time subject area:

- Purchase Order Transaction Analysis Duty (FBI_PURCHASE_ORDER_TRANSACTION_ANALYSIS_DUTY)

Users who are assigned any of these predefined job roles are automatically able to access the Procurement - Procure To Pay Real-Time subject area:

- Buyer (ORA_PO_BUYER_JOB)
- Purchase Analysis (ORA_PO_PURCHASE_ANALYSIS_ABSTRACT)
- Procurement Manager (ORA_PO_PROCUREMENT_MANAGER_JOB)

Users who are assigned configured job roles that contain this duty role are able to access the Procurement - Procure To Pay Real-Time subject area:

- Spend Transaction Analysis Duty Role (FBI_SPEND_TRANSACTION_ANALYSIS_DUTY)

OTHER PURCHASING CHANGES IN THIS UPDATE

This section includes details about additional changes in this update that can change the way Oracle Purchasing Cloud works.

Collapse Approval Details in Notifications

To address performance issues, a Hide/Show action has been added to both online and email approval notifications that controls whether or not the approval hierarchy is shown. If you are experiencing performance issues when viewing these notifications, you can set the profile option ORA_PO_BIP_NOTIFICATION_HISTORYMODE to **Yes** to hide these details. By default, this profile option is set to **No**, which preserves the existing behavior and shows the details. In the Setup and Maintenance work area, use the Manage Administrator Profile Values task to set the profile option.

Bug reference: 31175734

Evaluate All Blanket Purchase Agreement Lines During Change Order Approval

If you define approval rules based on line-level attributes, but update only the blanket purchase agreement header as part of a change order, then your approval rules may fail. To remedy this, set the profile option ORA_BPA_CHANGE_APPROVAL_INCLUDE_ALL_LINES to **Y**. This will ensure that all active blanket lines are evaluated for approval rules and routed accordingly. By default, this profile option is set to **N,** which preserves the existing behavior (to send only changed blanket lines to the approvals engine). In the Setup and Maintenance work area, use the Manage Administrator Profile Values task to set the profile option.

Bug reference: 31255353

Recent Activities Infolet in the Purchase Orders Work Area Shows Data from Last 14 Days

To address performance issues, the Recent Activities infolet will show data from the last 14 days only. You can adjust this time frame by setting the ORA_PO_RECENT_ACTIVITY_DAYS profile option, but keep in mind that increasing this value could adversely affect the time required for users to access the Purchase Orders work area. In the Setup and Maintenance work area, use the Manage Administrator Profile Values task to set the profile option.

Bug reference: 29478977

Performance Improvements to Manage Buyer Assignment Rules Page

To address performance issues, the following two changes have been made to this page:

- Search results are not automatically displayed when you first navigate to the Manage Buyer Assignment Rules page in the Purchase Orders and Purchase Agreements work areas. You need to manually execute a search to see the assignments.
- When creating a rule based on commodity, the list of values will not automatically display all the commodities. You need to manually execute a search to see all the commodities.

NOTE: This fix was also made available in the September monthly updates for 20B and 20C.

Bug references: 31377906, 30813903

SELF SERVICE PROCUREMENT

USE A SHORT URL FOR THE PUNCHOUT RETURN

The punchout process now uses a short URL for return navigation from external supplier sites. With this change, you can avoid the limitations of lengthy URLs and navigate to the right requisition page without any interruption.

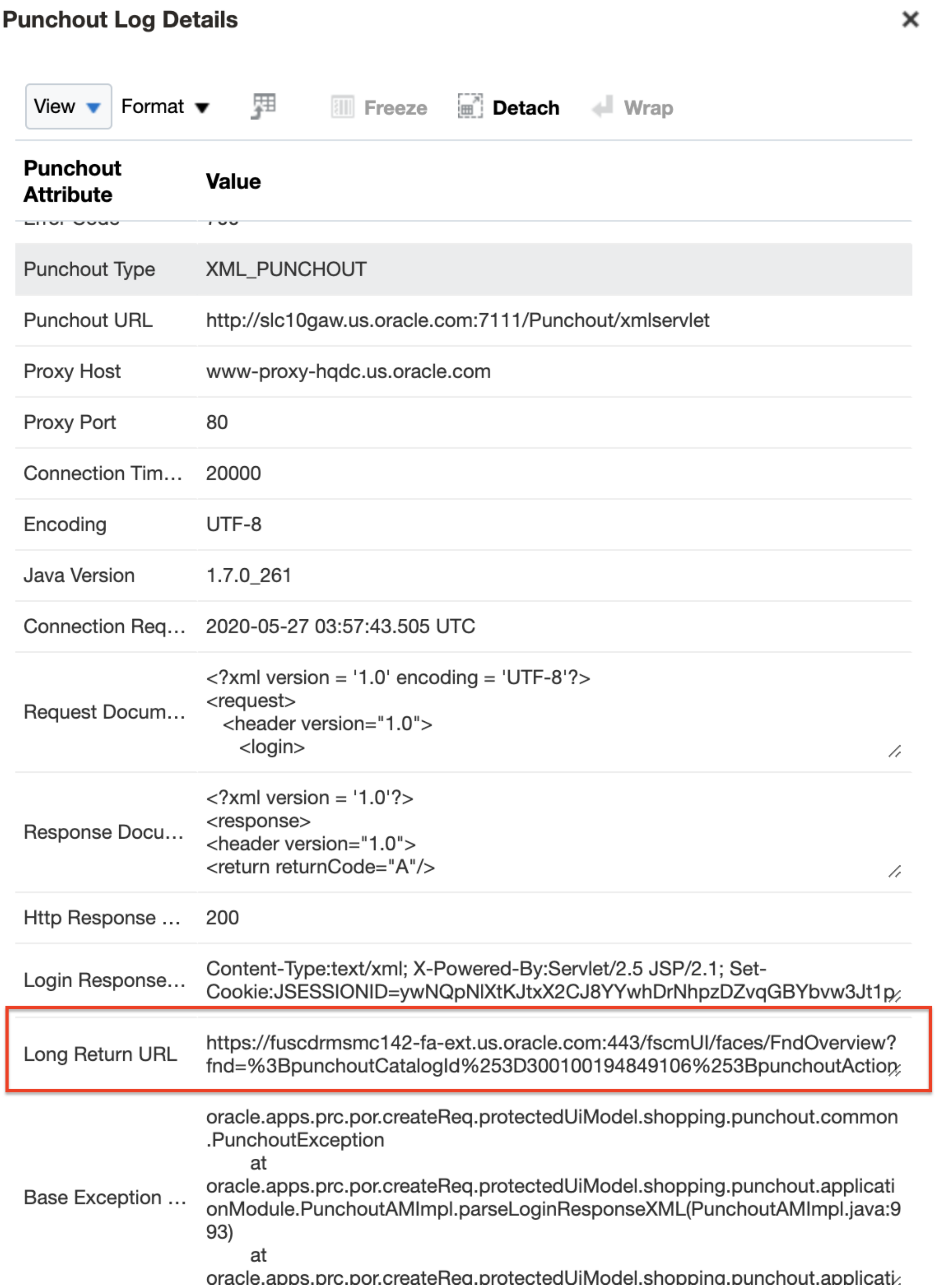
With short URL, there will be no misdirected or invalid URL returns from external supplier punchout sites minimizing time and costs associated with customer triage on such issues.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

TIPS AND CONSIDERATIONS

- This feature is available to all Self Service Procurement users across all punchout catalogs.
- To opt out from using a short URL for punchout return, disable the ORA_POR_SHORT_RETURN_URL_FOR_PUNCHOUT (Short URL for Punchout Return Enabled) profile option. To find the profile option, in the Setup and Maintenance work area, go to the Manage Administrator Profile Values task.
- You can view the original 'Long Return URL' as a punchout attribute in punchout log details when the punchout encounters an error in the shopping flows.



Punchout Log Details

Punchout Attribute	Value
Punchout Type	XML_PUNCHOUT
Punchout URL	http://slc10gaw.us.oracle.com:7111/Punchout/xmlservlet
Proxy Host	www-proxy-hqdc.us.oracle.com
Proxy Port	80
Connection Tim…	20000
Encoding	UTF-8
Java Version	1.7.0_261
Connection Req…	2020-05-27 03:57:43.505 UTC
Request Docum…	<?xml version = '1.0' encoding = 'UTF-8'?> <request> <header version="1.0"> <login>
Response Docu…	<?xml version = '1.0'?> <response> <header version="1.0"> <return returnCode="A"/>
Http Response …	200
Login Response…	Content-Type:text/xml; X-Powered-By:Servlet/2.5 JSP/2.1; Set-Cookie:JSESSIONID=ywNQpNlXtKJtxX2CJ8YYwhDrNhpzDZvqGBYbvw3Jt1p
Long Return URL	https://fuscdrmsmc142-fa-ext.us.oracle.com:443/fscmUI/faces/FndOverview?fnd=%3BpunchoutCatalogId%253D300100194849106%253BpunchoutAction
Base Exception …	oracle.apps.prc.por.createReq.protectedUiModel.shopping.punchout.common.PunchoutException at oracle.apps.prc.por.createReq.protectedUiModel.shopping.punchout.applicationModule.PunchoutAMImpl.parseLoginResponseXML(PunchoutAMImpl.java:993) at oracle.apps.prc.por.createReq.protectedUiModel.shopping.punchout.applicati

Long Return URL in Punchout Log Details

DISPLAY MASTER ITEM PACKAGING STRING IN SHOPPING FLOWS

Display master item's packaging string with UOM conversion information to users while they are shopping. The feature lets users know the exact quantity of items they are purchasing, especially when the UOM displayed on the search results page is different from the user's consumption UOM. It also tells users about any other UOMs that the item can be purchased in.

Comprehensive support of packaging string detail capture and display for all items - Master Items and Agreement-Based Lines during shopping.

STEPS TO ENABLE

Use the Opt In UI to enable this feature. For instructions, refer to the Optional Uptake of New Features section of this document.

Offering: *Procurement*

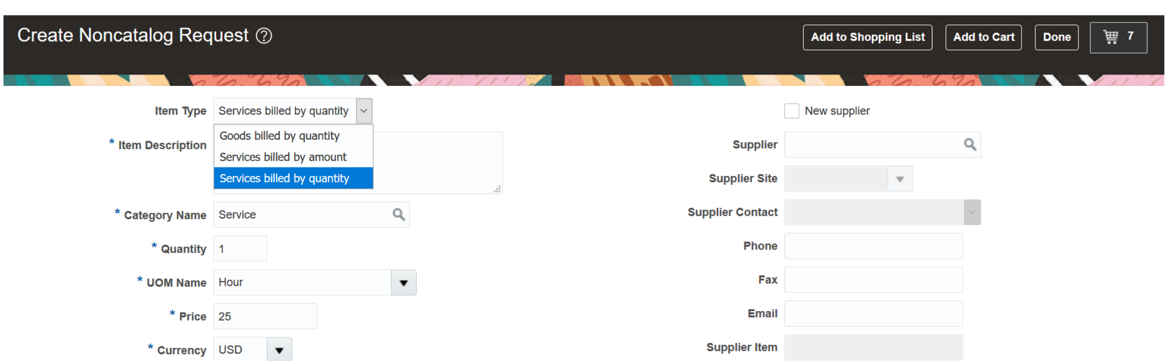
TIPS AND CONSIDERATIONS

- To use this feature, you must opt in to the Display Product Packaging String feature. If you previously opted in to the Display Product Packaging String feature, then this feature is automatically available to you.
- To view master item's packaging string in the procurement catalog, your product manager must select the packaging string in the master item definition.
- The product packaging string is also displayed for master items that are on a blanket purchase agreement.

USE NONCATALOG REQUESTS TO ORDER RATE-BASED SERVICES

Use noncatalog requests to order rate-based services using the new item type "Services billed by quantity". The product type tax determinant is set to Services when you use the new item type "Services billed by quantity".

This screen capture illustrates the feature:



Noncatalog Request

Using this feature, you ensure tax rates applicable for services are used for tax determination of rate-based services.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

TIPS AND CONSIDERATIONS

- The new item type Services billed by quantity is associated with the new seeded line type Rate Based Services.

- The existing item types are renamed to show a better association between the item and line types. Here are the renamed item types:
  - Goods billed by quantity is associated with the seeded line type Goods.
  - Services billed by amount is associated with the seeded line type Fixed Price Services.
- On the Configure Requisitioning Business Function page, control which item type is used by default by selecting the default line type.

KEY RESOURCES

- For details about the new line type, refer to the **Apply Service Related Tax Rates for Rate Based Services** feature, available in the *Oracle Procurement Cloud What's New*, update 20D.

ROLE INFORMATION

You have a couple of options for giving access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

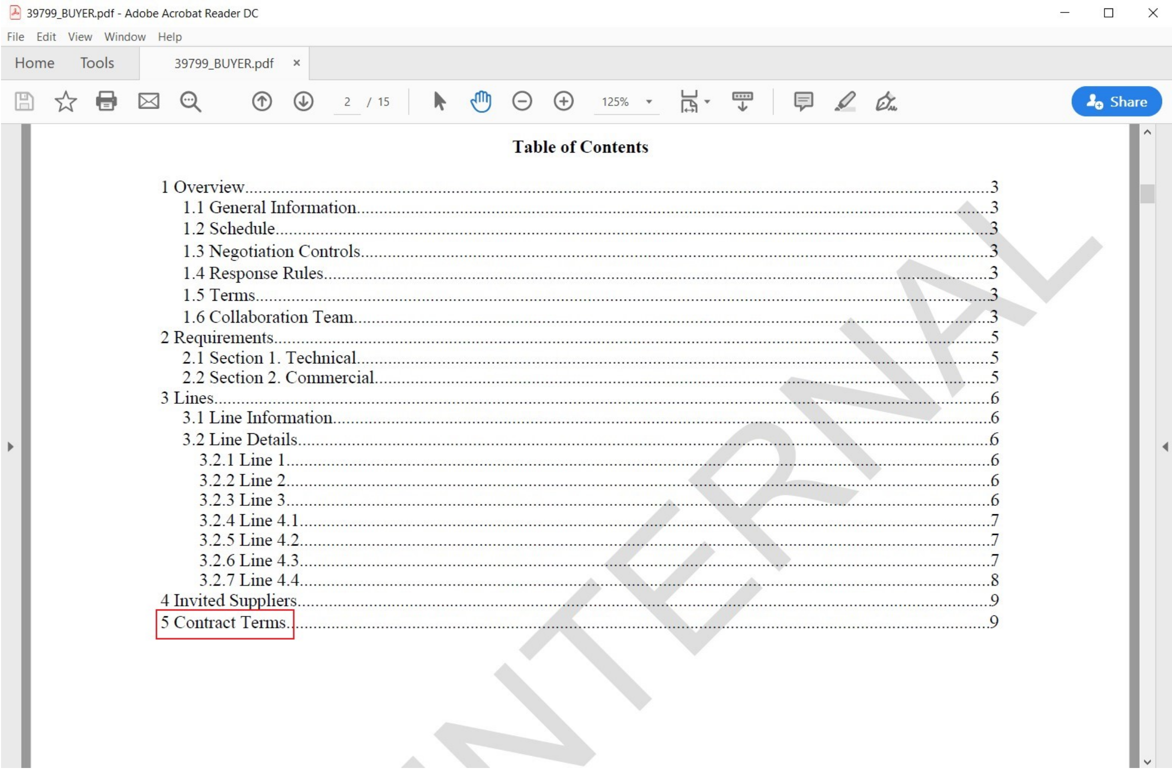
Users who are assigned any of these predefined job roles are automatically able to access this feature:

- Requisition Self Service User (ORA_POR_REQUISITION_SELF_SERVICE_USER_DUTY)

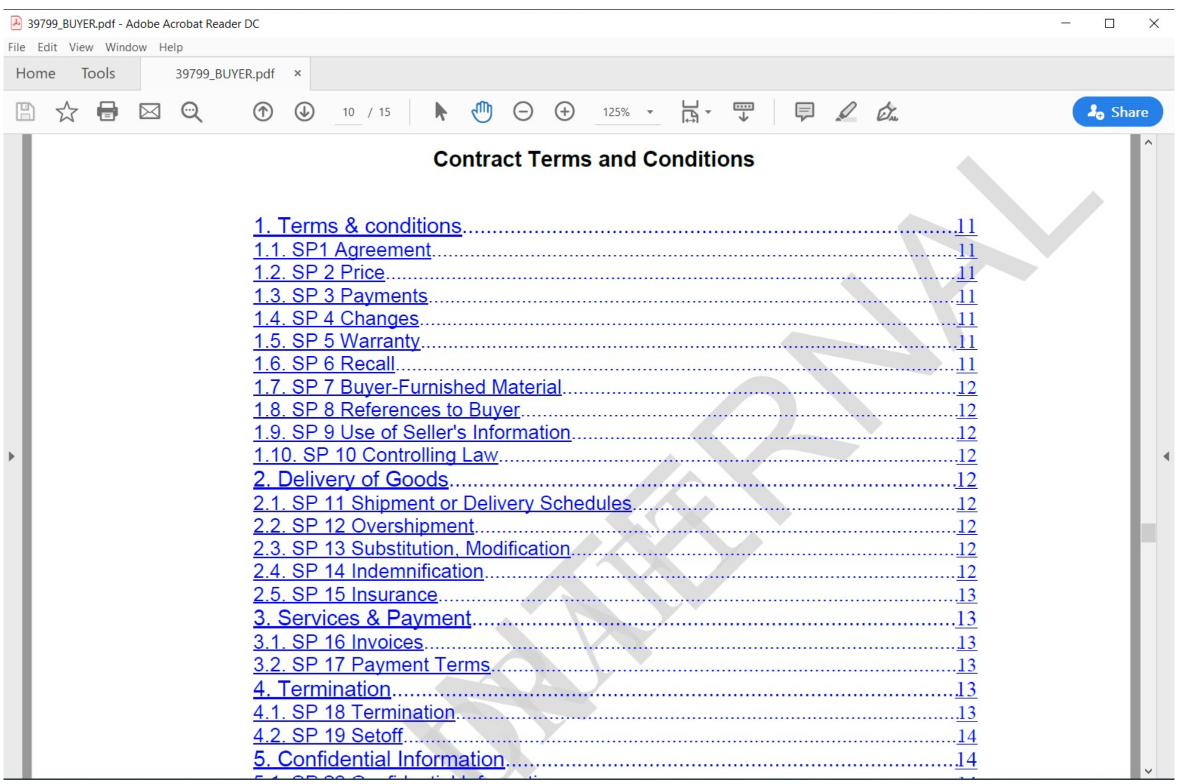
SOURCING

VIEW TABLE OF CONTENTS FOR CONTRACT TERMS WITHIN SOURCING PDF DOCUMENTS

Navigate to the table of contents for contract terms within the negotiation and response PDF documents.



PDF Table of Contents



Contract Terms Table of Contents

Easily navigate to the Procurement Contracts section from the Table of Contents in the Negotiation PDF. Leverage the new contracts Table of Contents for easy content search and review to save time for category managers and suppliers.

STEPS TO ENABLE

Use the Opt In UI to enable this feature. For instructions, refer to the Optional Uptake of New Features section of this document.

Offering: *Enterprise Contracts*

TIPS AND CONSIDERATIONS

To use this feature, you must opt in to the feature named: **Add Table of Contents to Contract Terms**. Use the Offerings work area to opt in to this feature in the Enterprise Contracts offering. If you previously opted in to the Add Table of Contents to Contract Terms feature, then this feature is automatically available to you.

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned any of these predefined job roles are automatically able to access this feature:

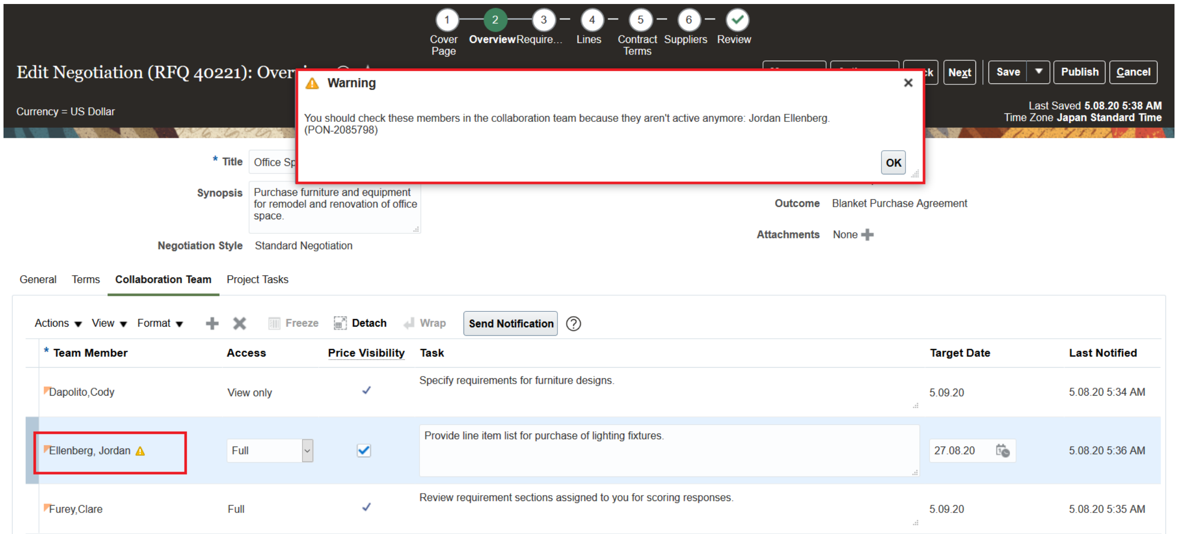
- Category Manager (ORA_PON_CATEGORY_MANAGER)
- Sourcing Project Collaborator (ORA_PON_SOURCING_PROJECT_COLLABORATOR)
- Supplier Bidder (ORA_PON_SUPPLIER_BIDDER_ABSTRACT)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

- View Supplier Negotiation (ORA_PON_VIEW_SUPPLIER_NEGOTIATION_PRIV)
- View Supplier Negotiation as Supplier (ORA_PON_VIEW_SUPPLIER_NEGOTIATION_SUPPLIER_FACING_PRIV)

IDENTIFY NEGOTIATION TEAM MEMBERS WHO AREN'T ACTIVE EMPLOYEES

You can now quickly see if a negotiation team member has become inactive due to termination or a change in job assignment. Before publishing a draft negotiation, you will see a warning if any members in the collaboration team are inactive . You have the option to remove or replace them, or leave them in the team as a reference if they have completed assigned tasks.



Collaboration Team

Use this feature to gain better negotiation collaboration by ensuring the right team members are participating throughout the process.

Note: This feature was also made available in a monthly update of 20C.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned any of these predefined job roles will have access to this feature:

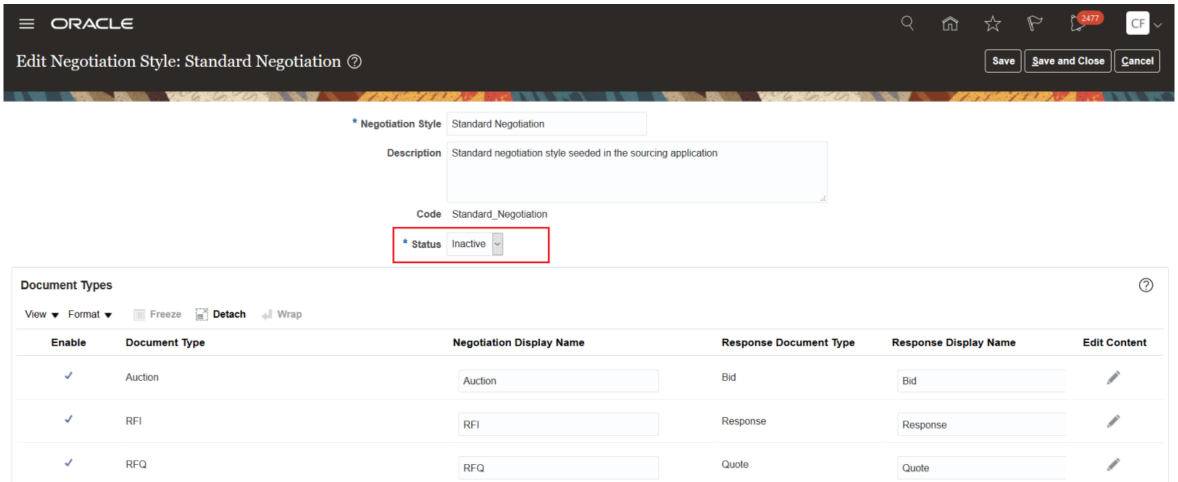
- Category Manager (ORA_PON_CATEGORY_MANAGER)
- Sourcing Project Collaborator (ORA_PON_SOURCING_PROJECT_COLLABORATOR)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

- View Supplier Negotiation (PON_VIEW_SUPPLIER_NEGOTIATION_PRIV)

INACTIVATE SEEDED NEGOTIATION STYLES

The seeded standard, simple and two-stage negotiation styles in the application can't be edited. These styles are always available for selection when creating a negotiation. Many companies create new negotiation styles tailored to their business needs and want their category managers apply only these styles for compliance to organizational processes. Procurement administrators can now make these seeded standard negotiation styles inactive. Inactive styles are not available to category managers when creating negotiations.



Negotiation Style

Ensure negotiations are created only using styles that are tailored to your business needs and get better compliance.

STEPS TO ENABLE

You don't need to do anything to enable this feature.

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

- Procurement Application Administrator (ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

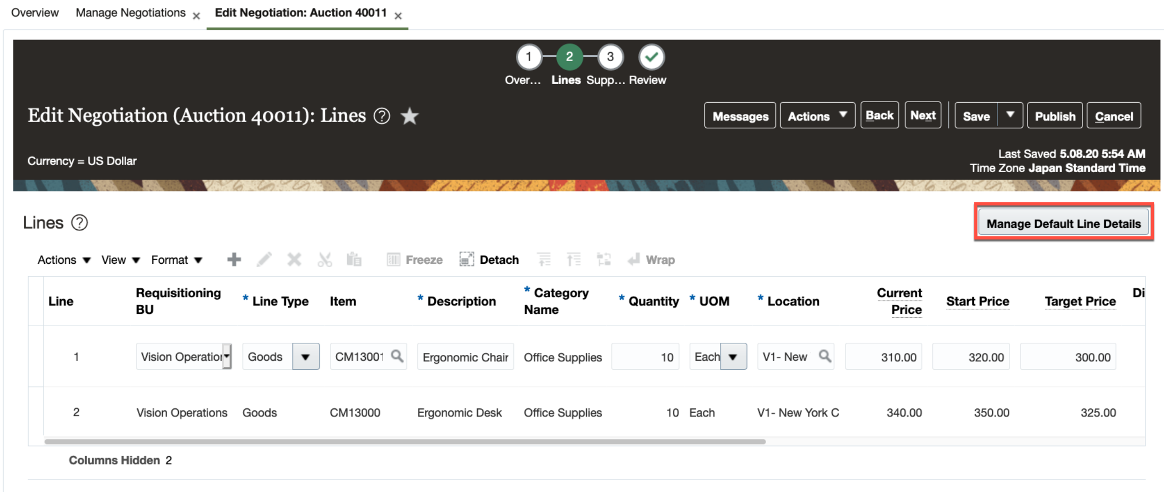
- Manage Supplier Negotiation Style (PON_MANAGE_SUPPLIER_NEGOTIATION_STYLE_PRIV)

APPLY INTERNAL COST FACTORS IN SUPPLIER NEGOTIATIONS

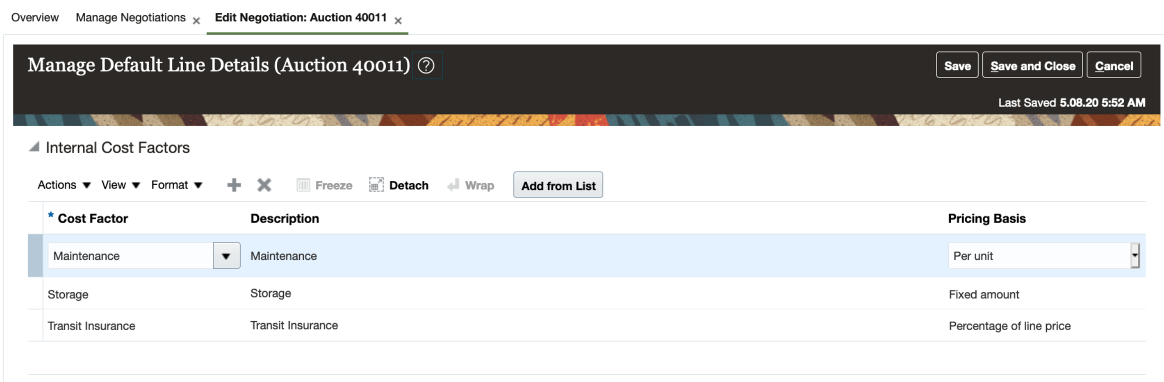
Use internal cost factors in supplier negotiations to track and analyze the overall cost of doing business. Hidden costs such as past performance issues, vendor switching costs, and additional project management needs, can be quantified and added to the supplier's bid as internal costs. After you opt in to the feature named Apply Internal Cost Factors in Supplier Negotiations, you can use the feature described in this section.

DEFINE DEFAULT INTERNAL COST FACTORS FOR NEGOTIATION LINES

Provide a default set of internal cost factors for negotiation lots and lines either in the negotiation template or directly in the negotiation. When default internal cost factors are set, any new lines added to the negotiation online, using lines import spreadsheet, or REST API will have these internal cost factors automatically applied.



Edit Negotiation Lines



Manage Default Line Details

Improve operational efficiency and reduce data entry by applying default internal cost factors across a large volume of lots and lines in a negotiation. When creating negotiations you can also leverage templates to streamline the process of populating default internal cost factors.

STEPS TO ENABLE

Use the Opt In UI to enable this feature. For instructions, refer to the Optional Uptake of New Features section of this document.

Offering: *Procurement*

To use this feature, you must opt in to the feature named: Apply Internal Cost Factors in Supplier Negotiations. If you previously opted in to the Apply Internal Cost Factors in Supplier Negotiations feature, then this feature is automatically available to you.

After opting in, perform these additional steps in the Setup and Maintenance work area, using the Procurement offering:

1. Define internal cost factors using the Manage Cost Factors setup task.
2. If you have common sets of cost factors, you can create a cost factor list using the Manage Cost Factor List setup task.
3. Enable internal cost factors on negotiation styles using the Manage Negotiation Styles setup task.

TIPS AND CONSIDERATIONS

When creating a negotiation, you can apply a negotiation template to copy the default internal cost factors.

KEY RESOURCES

- Refer to the What's New for the Apply Internal Cost Factors in Supplier Negotiations feature, available in update 19D.
- Refer to the Oracle Cloud Readiness site, readiness training for the Apply Internal Cost Factors in Supplier Negotiations feature, available in update 19D.
- Refer to the What's New for the Apply Internal Cost Factors to Negotiations Lines feature, available in update 20C.

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned any of these predefined job roles will have access to this feature:

- Category Manager (ORA_PON_CATEGORY_MANAGER)
- Sourcing Project Collaborator (ORA_PON_SOURCING_PROJECT_COLLABORATOR)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

- Manage Negotiation Line Default (PON_MANAGE_LINE_DEFAULT_PRIV)

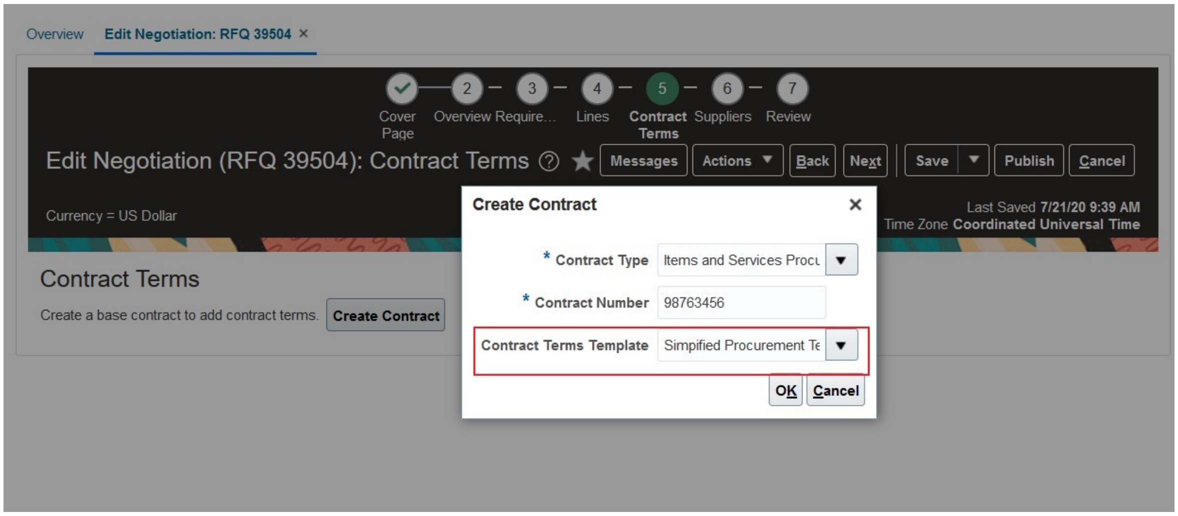
CREATE SUPPLIER CONTRACTS FROM NEGOTIATION AWARD

After you opt in to the feature named Create Supplier Contracts from Negotiation Award, you can use the feature described in this section.

NEGOTIATE A CONTRACT WITH SIMPLIFIED TERMS TEMPLATE

Use a simplified terms template when negotiating a contract with suppliers. When you are creating a base contract, you can apply a contract terms template derived from a simplified terms template. In the simplified terms template, the contract terms are created by adding all the information in a word document and uploading this document as an attachment in the DOCX format. This template enables you to create contract terms quickly and easily by simply uploading an existing legal terms document without enforcing application driven segmentation, formatting, or style required by a structured terms template.

Suppliers can now view and download the contract based on simplified terms template from the negotiation.



Simplified Contract Terms Template

Leverage a simple terms template to quickly and easily attach contract language on your negotiations, reducing authoring time and increasing productivity.

STEPS TO ENABLE

Use the Opt In UI to enable this feature. For instructions, refer to the Optional Uptake of New Features section of this document.

Offering: *Procurement*

TIPS AND CONSIDERATIONS

To use this feature, you must opt in to the feature named Create Supplier Contracts from Negotiation Award. Opting in to the Create Supplier Contracts from Negotiation Award feature also enables the feature described here. If you previously opted in to the Create Supplier Contracts from Negotiation Award feature and performed the additional setup steps, then the Negotiate a Contract with Simplified Terms Template feature is automatically available to you.

If you haven't opted in yet, then after you opt in, refer to Oracle Procurement Cloud What's New, update 19D for details of the steps to perform to enable the feature.

KEY RESOURCES

Review these resources for Procurement on Oracle Cloud Readiness page

- Review update 19D readiness training and What's New for the Oracle Sourcing Cloud feature named **Create Supplier Contracts from Negotiation**.
- Review update 20C What's New for the Oracle Sourcing Cloud feature named **Create Supplier Contracts for Agreement Contract Types from a Negotiation** for more details.

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned any of these predefined job roles are automatically able to access this feature.

- Category Manager (ORA_PON_CATEGORY_MANAGER)
- Supplier Bidder (ORA_PON_SUPPLIER_BIDDER_ABSTRACT)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

- Create Contract (OKC_CREATE_CONTRACT_PRIV)
- Edit Contract (OKC_EDIT_CONTRACT_PRIV)
- Manage Contract Work Area (OKC_MANAGE_CONTRACT_WORK_AREA_PRIV)
- View Contract Terms (OKC_VIEW_CONTRACT_TERMS_AND_CONDITIONS_PRIV)
- Enable Buy Intent (OKC_MANAGE_CONTRACT_BUY_PRIV)
- Author Standard Contract Terms and Conditions (OKC_AUTHOR_CONTRACT_TERMS_AND_CONDITIONS_TEMPLATE_PRIV)

In addition, this data security policy is assigned to the Category Manager job role to access contracts data:

- Policy Name - Grant on Contract
    - Policy Description: Category manager can manage contract for the business units for which they are authorized
    - Data Resource: Contract Header for Table OKC_K_HEADERS_ALL_B
    - Privilege: Read; Update; Delete; Manage Contract;
    - Condition: Access the contract for table OKC_K_HEADERS_ALL_B for the business units for which they are authorized

In addition, this data security policy is assigned to the Supplier Bidder job role to access contracts data:

- Policy Name - Grant on Contract
    - Policy Description: Supplier bidder can view contract for the business units for which they are authorized
    - Data Resource: Contract Header for Table OKC_K_HEADERS_ALL_B
    - Privilege: Read; View Contract;
    - Condition: Access the contract for table OKC_K_HEADERS_ALL_B for the business units for which they are authorized

Additional security assignments and set up tasks in Enterprise Contracts Cloud are required to create and edit contracts. Refer to Enterprise Contracts setup documentation on the Oracle Help Center.

SUPPLIER MODEL

APPROVE INTERNAL CHANGES ON SUPPLIER PROFILE

Audit compliance and fraud prevention are our top priorities, which make it critical to maintain the integrity of key supplier information. While monitoring changes to sensitive profile data is important, reviewing changes only after they have been completed limits your ability to be proactive in preventing fraud and improving compliance.

This feature enables change control and approval routing for all actions taken on organization details, income tax data, and bank accounts; including create and edit. Updating any of this supplier profile information can be configured to require approvals before changes take effect. Approval requirements are defined using flexible approval routing rules. With change control enabled, you are assured that important supplier information is captured correctly, is not fraudulent, and your supplier data management processes meet audit compliance requirements.

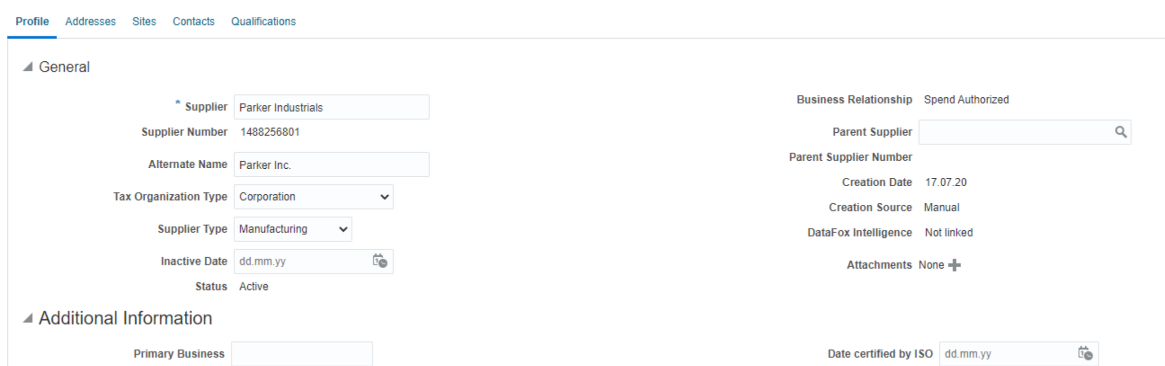
Watch a Demo

This feature, along with the existing supplier self-service profile management solution and supplier profile audit capabilities, continues to extend the strength of supplier profile change management.

NOTE: Internal change control on supplier bank accounts has been available since update 18A.

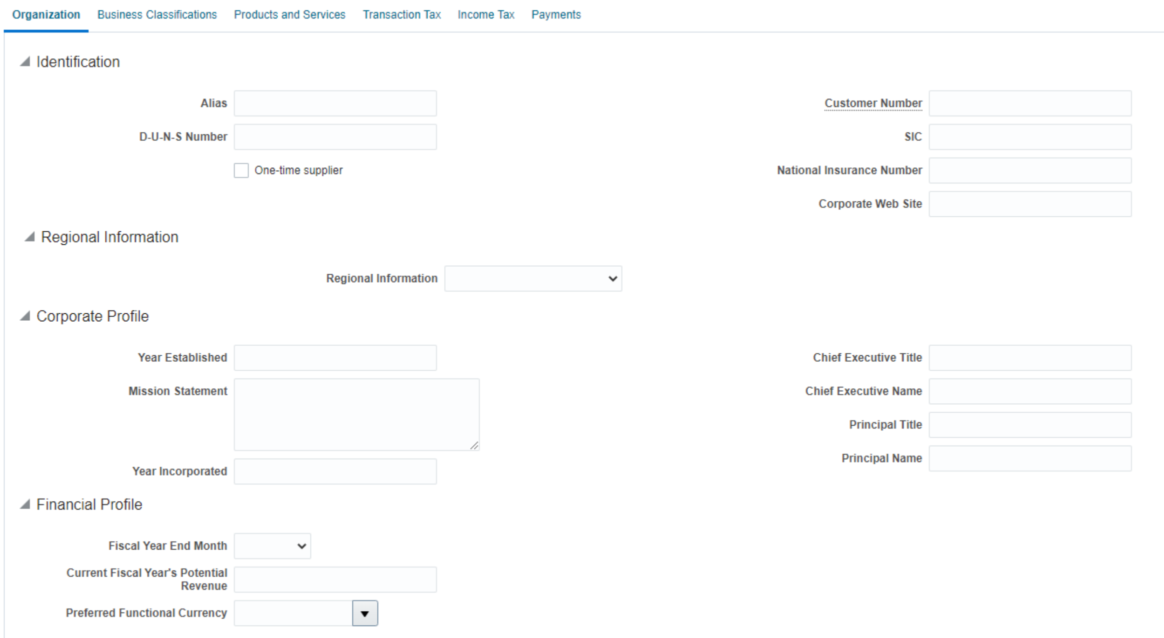
These screens illustrate the feature:

All editable attributes under the Profile tab are available for internal change control and approval routing. This includes the supplier descriptive flexfields (additional information) and supplier header attachments.



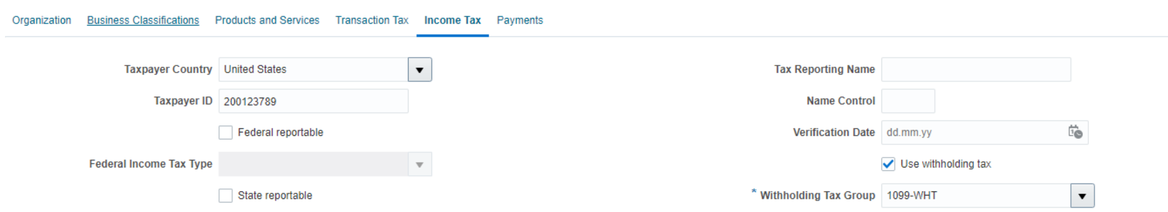
Profile Attributes Available for Change Control Including Descriptive Flexfields and Attachments

All editable attributes under the Organization tab are available for internal change control and approval routing:

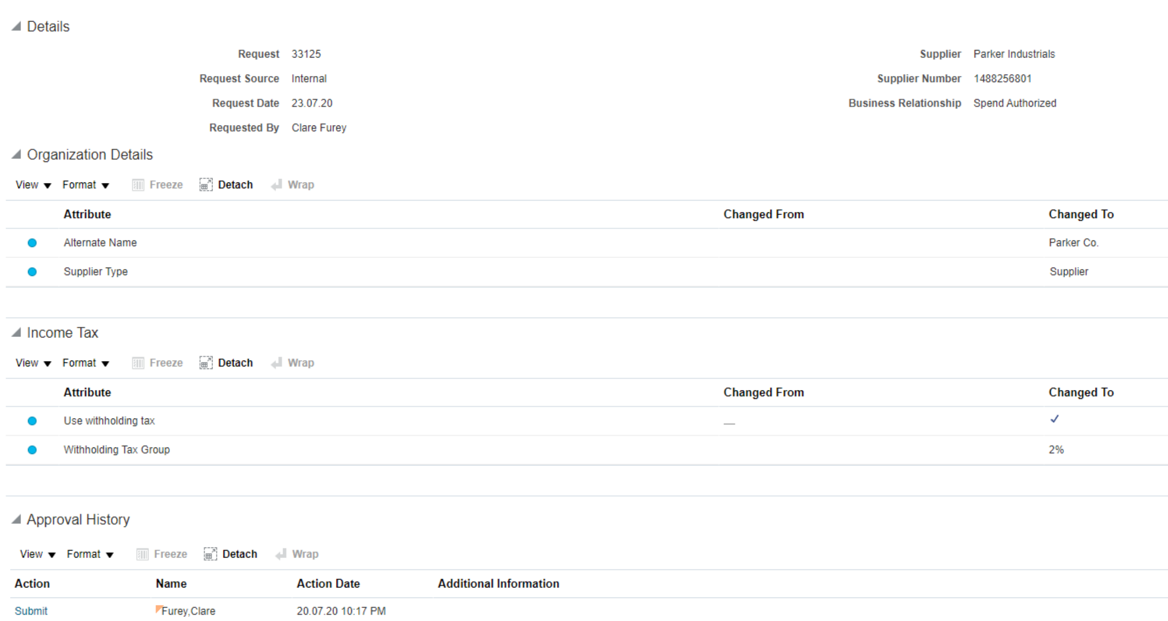


Organization Attributes Available for Change Control

All editable attributes under the Income Tax tab are available for internal change control and approval routing:



Income Tax Attributes Available for Change Control



Changes Highlighted for Approver on Profile Change Request

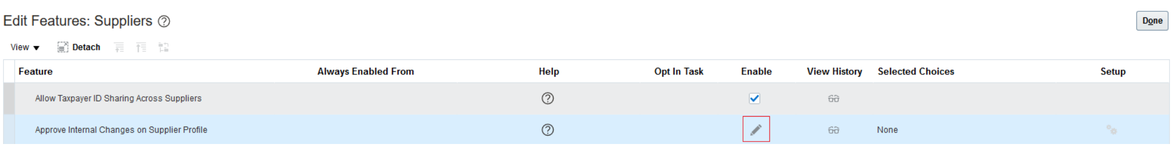
STEPS TO ENABLE

Use the Opt In UI to enable this feature. For instructions, refer to the Optional Uptake of New Features section of this document.

Offering: *Procurement*

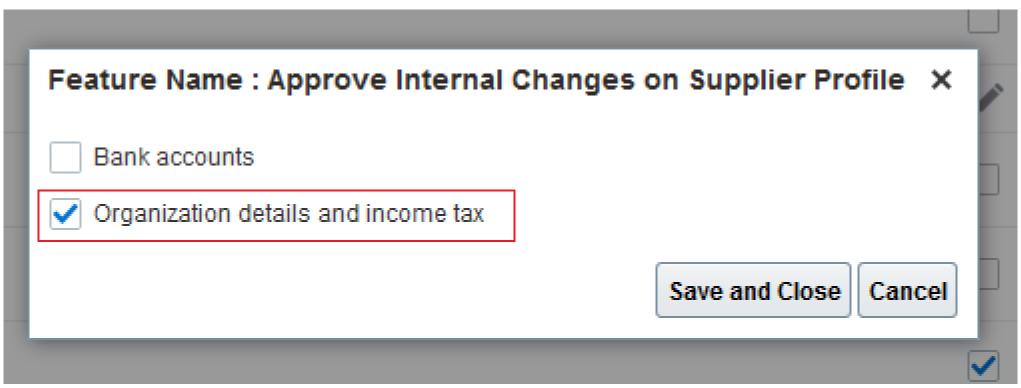
When you opt in, perform these steps:

1. In the Offerings work area, select the **Procurement** offering, and then click **Opt In Features**.
2. On the Opt In: Procurement page, click the **Features** icon for the Suppliers functional area.
3. On the Edit Features page, click the **Enable** icon for this feature.



Suppliers Features

4. Select the feature choice: **Organization details and income tax**. Click **Save and Close**.



Feature Choices

NOTE: The existing feature Approve Internal Changes on Supplier Bank Accounts will be obsolete starting in update 20D. If you have already opted in to this existing feature, you don't need to do anything. Bank accounts will be automatically selected when you upgrade to 20D.

5. In the Setup and Maintenance work area, go to the following:
   - Offering: Procurement
   - Functional area: Approval Management
   - Task: Manage Internal Supplier Profile Change Approvals
6. Complete the Manage Internal Supplier Profile Change Approvals as appropriate for your enterprise.

TIPS AND CONSIDERATIONS

- Enable choices under this feature when you require any changes made to bank accounts, organization details and income tax, or both, to be submitted for approval. Changes made to other parts of the supplier profile that aren't change controlled will be saved and applied right away.

- When feature choice Organization details and income tax is enabled, user can modify supplier profile changes pending approval by taking the Edit action on the supplier profile. This will withdraw the change request from approval workflow. The workflow will be launched again when you resubmit the changes for approval.

- If you have been using internal change control for bank accounts and look into adding organization details and income tax, assess your existing approval routing and use the approval setup task to add additional routing rules for new change controlled profile attributes.
- Supplier profile changes can come from both internal and external users. For each supplier, there can only be one pending profile change request at a given time.
- Creating and updating supplier organization details and income tax from FBDI import, SOAP web service, and application to application integration using REST APIs will not raise any internal profile change request.

In Update 20D, if you enable the feature choice **Organization details and income tax** under feature **Approve Internal Changes on Supplier Profile**, here are a few important points to consider related to function security and privileges.

- The existing supplier profile change management framework consolidates profile changes across different change controlled areas onto single profile change request. When you enable both feature choices including bank accounts under this feature, changes made to bank accounts and organization details and income tax or both will be saved onto one profile change request. When viewing changes, through either Review Changes or View Change Request action, all changes that have been saved onto the request are displayed. User needs to have privilege View Supplier Profile Change Request (POZ_VIEW_SUPPLIER_PROFILE_CHANGE_REQUEST_PRIV) to see full change details.
- Maintain Supplier privilege (POZ_MAINTAIN_SUPPLIER_PRIV) is essential in order to manage supplier profile and make changes. It's the key privilege to gain the access to the flow to edit supplier profile. This is also the privilege to have in order to be able to take header action on profile change request, such as Submit Changes and Cancel Change Request.
- Both Maintain Supplier privilege (POZ_MAINTAIN_SUPPLIER_PRIV) and View Supplier Profile Change Request privilege (POZ_VIEW_SUPPLIER_PROFILE_CHANGE_REQUEST_PRIV) are assigned to Supplier Administrator and Supplier Manager roles by default. If you have defined custom job roles for users who have limited profile management ability, these users can view all the change request details and cancel change request once they are granted the View Supplier Profile Change Request privilege and Maintain Supplier privilege respectively.

KEY RESOURCES

- Watch Approve Internal Changes on Supplier Profile – Organization Details and Income Tax Readiness Training
- Refer to the Setting up Document Approvals - Oracle Fusion Procurement whitepaper for approval setup details and list of approval attributes. (Doc ID 2264952.1)

ROLE INFORMATION

You have a couple of options for giving people access to this feature, depending on whether you're assigning them predefined job roles or your own configured job roles.

Users who are assigned any of these predefined job roles are automatically able to access this feature:

- Supplier Administrator (ORA_POZ_SUPPLIER_ADMINISTRATOR_ABSTRACT)
- Supplier Manager (ORA_POZ_SUPPLIER_MANAGER_ABSTRACT)

Users who are assigned configured job roles that contain these privileges are able to access this feature:

- Maintain Supplier (POZ_MAINTAIN_SUPPLIER_PRIV)
- Maintain Supplier Income Tax (POZ_MAINTAIN_SUPPLIER_INCOME_TAX_PRIV)
- Maintain Supplier Attachment (POZ_MAINTAIN_SUPPLIER_ATTACHMENT_PRIV)

OTHER SUPPLIER MODEL CHANGES IN THIS UPDATE

This section includes details about an additional change in this update that can change the way Oracle Supplier Model Cloud works.

Function Security for Supplier Site Assignments

To maintain supplier site assignments, users must be assigned the Maintain Supplier Site and Maintain Supplier Site Assignment privileges, in addition to the Maintain Supplier privilege, which is required to edit the supplier profile.

Prior to update 20D, users who were assigned the Maintain Supplier Site privilege, but not the Maintain Supplier Site Assignment privilege, could incorrectly maintain supplier site assignments. This is fixed in update 20D, and users must be assigned both the Maintain Supplier Site Assignment privilege and the Maintain Supplier Site privilege to maintain supplier site assignments.

The predefined Supplier Profile Management duty includes both of these privileges, so users who are assigned that duty aren’t affected. The predefined Supplier Administrator and Supplier Manager job roles also include both privileges.

Refer to the *Oracle Procurement Cloud: What's New, Update 20C* for more information related to supplier profile functional security.

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