Oracle Fusion Cloud SCM

Using E-Signatures and E-Records

24D

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1 Introduction

Overview of Oracle Electronic Signatures and Electronic Records

You can use Oracle E-Signatures and E-Records to securely capture, store, retrieve, and print e-records and e-signatures.

Critical transactions governed by the US Food and Drug Administration's (FDA) good manufacturing practices requirements have inbuilt validations that necessitate the use of e-signatures and e-records. In E-Signatures and E-Records, the validations are available for critical supply chain management business events for Oracle Manufacturing, Oracle Inventory Management, and Oracle Quality Inspection Management.

Using E-Signatures and E-Records, you can search for, view, and download e-records that contain information about transactions and their e-signature history. You can also specify the supply chain management transaction types for which e-signatures are required, and set up the approval process flows that must be followed.

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2 Electronic Records

Overview of Electronic Records Work Area

The Electronic Records work area displays information about supply chain management transactions for which an approval process is initiated or completed.

To view the Electronic Records work area, select **Electronic Records** in the Navigator.

In the Electronic Records work area:

- Use e-record details to search for e-records in the secure e-record repository and view transaction details.

- View signature history and comments for transactions.

- View and print an e-record as a PDF file. An e-record includes details of transactions, the author, and information about transactions and their e-signature history.

- Auditors can search for Source Identifier, Electronic Record, or Electronic Identifier in the **Electronic Record Content** field.

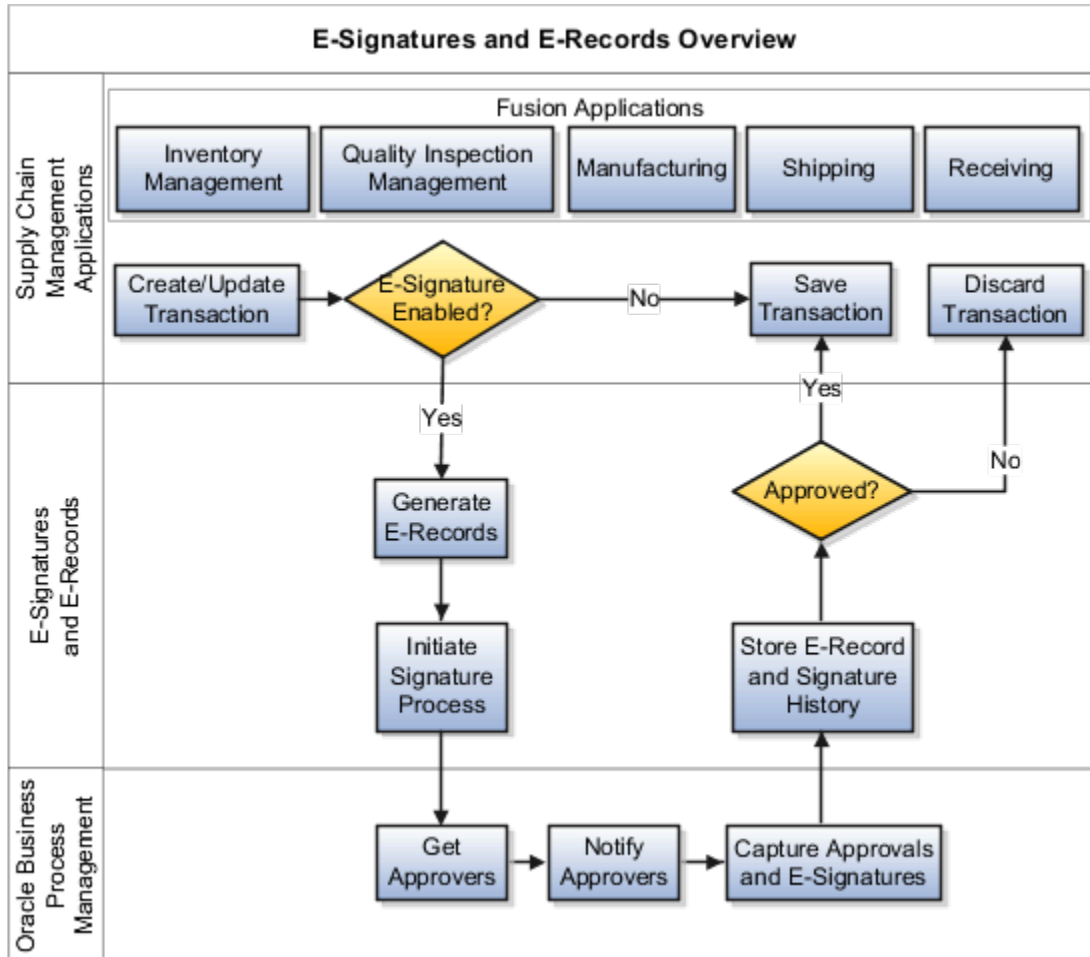## E-Signatures and E-Records Process Flow

E-Signatures and E-Records facilitates secure transactions for business events in Manufacturing, Inventory Management, and Quality Inspection Management.

The e-signatures and e-records approval processes can be of the following types:

- Inline approval process: In this process, approvals must be obtained before a transaction is saved. You can't save a transaction if the record is rejected.

- Deferred approval process: In this process, transactions are saved in Pending Approval status before initiating the e-signature process. The transaction is updated to Approved status after the approvals are obtained.

How the Inline E-Signature Approval Process Works

Here's the inline approval process workflow. It provides an overview of the inline e-signatures and e-records process, including its integration with the applications requesting approvals using e-signatures.

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E-Signatures and E-Records Overview

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┌─────────────────────────────────────────────────────────────────────────┐
│  Fusion Applications                                                       │
│  ┌──────────┐ ┌──────────┐ ┌──────────┐ ┌──────────┐ ┌──────────┐        │
│  │Inventory │ │Quality   │ │Manufactur│ │Shipping  │ │Receiving │        │
│  │Management│ │Inspection│ │ing       │ │          │ │          │        │
│  │          │ │Management│ │          │ │          │ │          │        │
│  └──────────┘ └──────────┘ └──────────┘ └──────────┘ └──────────┘        │
└─────────────────────────────────────────────────────────────────────────┘
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Supply Chain Management Applications:
- Create/Update Transaction → E-Signature Enabled? — No → Save Transaction
- Discard Transaction

E-Signatures and E-Records:
- Yes → Generate E-Records → Initiate Signature Process
- Approved? — Yes → Save Transaction; No → Discard Transaction
- Store E-Record and Signature History

Oracle Business Process Management:
- Get Approvers → Notify Approvers → Capture Approvals and E-Signatures

These steps provide an overview of the inline e-signatures and e-records process:

1. A user initiates the approval process for a transaction from one of the integrated supply chain management applications.
2. The E-Signatures and E-Records process is used to determine if an e-signature is required.
3. If an e-signature is required, the Oracle BPM approval task flow is invoked with a task payload.
4. The E-Signature page opens and displays the e-record details and status.
5. If the user is also an initiator, the user enters the e-signature details and approves the e-record.
6. A notification is sent to other approvers through Oracle notifications.
7. Other approvers view the Pending Notifications in Oracle Fusion Cloud Applications, and click the notification to open and approve the E-Signature page.
8. On the E-Signature page, the other approvers read the e-record, enter their user ID and password, and approve it. Approvers can refresh the E-Signature page to update the e-record status displayed on the page.
9. On receiving the approval from E-Signatures and E-Records, the user changes the transaction status, and commits the transaction.
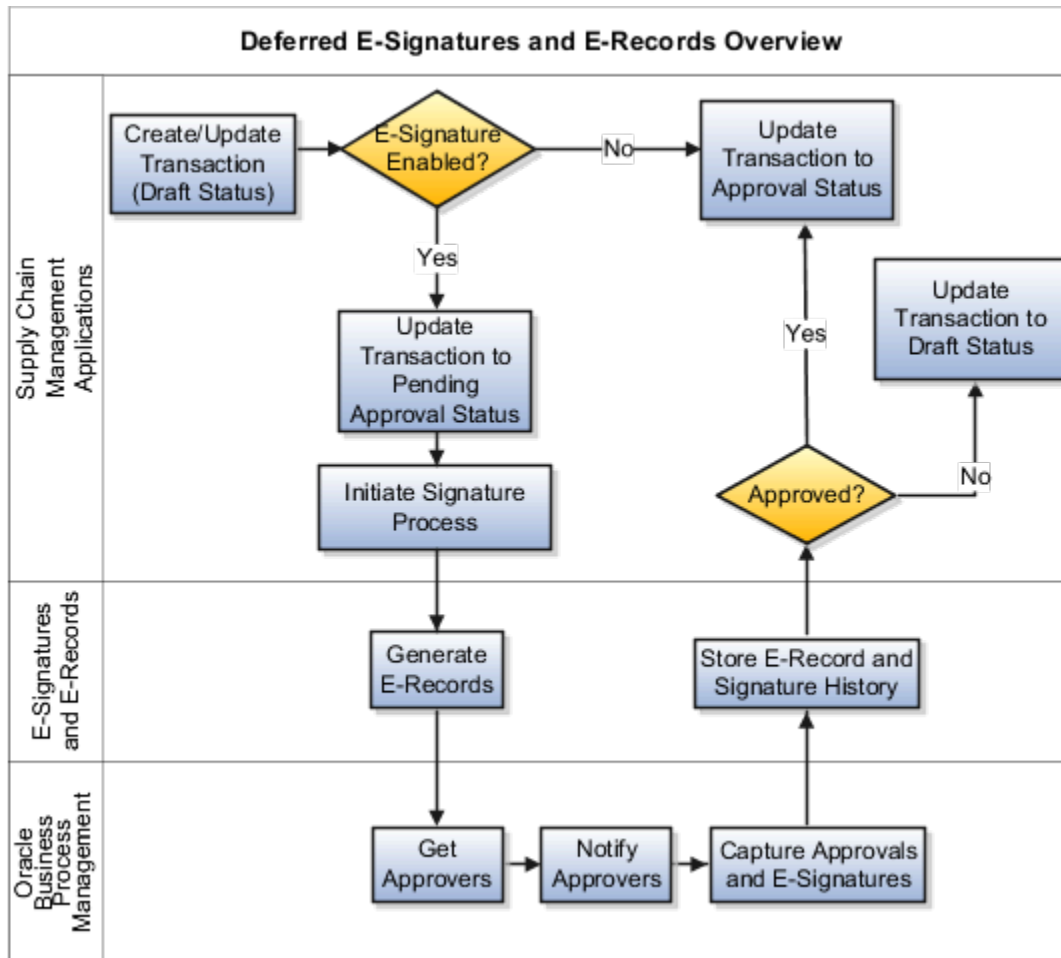
Transactions That Support Inline Approval

- Inventory Lot Update
- Inventory Serial Update
- Manufacturing Standard Operation Management

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- Miscellaneous Transaction
- Orderless Transaction
- Put Away
- Quality Inspection Disposition
- Receipt
- Receiving Transaction Correction
- Ship Confirm
- Work Order Material Transaction
- Work Order Operation Transaction
- Work Order Output Transaction

How the Deferred E-Signature Approval Process Works

Here's the deferred approval process workflow. It provides an overview of the deferred e-signatures and e-records process, including its integration with the applications requesting approvals using e-signatures.

These steps provide an overview of the deferred e-signatures and e-records process:

1. A user initiates the approval process for a transaction from one of the integrated supply chain management applications.

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2. The E-Signatures and E-Records API is called to determine if an e-signature is required.

3. If an e-signature is required, the Oracle BPM approval task flow is invoked with a task payload and the transaction is set to Pending Approval status.

4. Notifications are sent to all approvers through Oracle notifications.

5. The approvers view the Pending Notifications in Fusion Applications, and click the notification to view the approval page.

6. On the approval page, the approvers read the e-record, enter their user ID and password, and approve it or reject it.

7. When all required approvals are obtained the transaction is set to Approved status. If the record is rejected, the transaction is set to Draft status.

How You Use E-Signatures

You can use e-signatures to verify supply chain transactions in Manufacturing, Inventory Management, and Quality Inspection Management.

Inline E-Signature Approval Process

When you initiate an inline approval process from an application, the following two actions happen in parallel:

- Business process management (BPM) notifications are sent to all approvers, including the initiators if they are also approvers. These notifications can be viewed under Pending Notifications on the Fusion Applications dashboard. The approvers view the Pending Notifications, click the notification to view the e-record approval page, read the e-record, and approve it.

- The E-Signature page opens and displays e-record and status information. You can refresh the page to retrieve and view the latest status. You can also provide your own approval, if you initiated the approval process. An initiator uses the inline signature region to provide approval without navigating away to the BPM notifications.

If the process is approved, then on receipt of the approval status from E-Signatures and E-Records, the transaction status is updated and committed in the application that initiated the approval process.

Deferred E-Signature Approval Process

When you initiate a deferred approval process from an application, the following process is initiated:

1. The transaction is set to Pending Approval status and BPM notifications are sent to all approvers. The notifications can be viewed under Pending Notifications on the Fusion Applications dashboard.

2. The approvers view the Pending Notifications, click the notification to view the e-record approval page, read the e-record, and approve it.

3. If the process is approved, then on receipt of the approval status from E-Signatures and E-Records, the transaction status is updated to Approved and committed in the application that initiated the approval process. If the process is rejected, the transaction status is updated to Draft.

E-Signature Page

The following table provides the information and actions available on the E-Signature page.

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UI Element	Description	User Action
E-Signature page title	The title includes transaction information.	Not applicable
Source Identifier	Identifies the source of the record with the abbreviation of the product that creates the record, the electronic record ID, the transaction type, and number.	Not applicable
Status	Specifies the approval status: Awaiting approval, Approved, or Rejected.	Not applicable
Initiator Approval section	The section appears if the user initiating the transaction is also an approver for the transaction. If other users in the task flow must approve the transaction first, this section is displayed only when the user becomes eligible to approve the transaction in accordance with the task flow. The section contains the following UI elements: • **Signer**: Name of the approver. • **Signature Meaning**: Select the purpose of the e-signature. Values include: Authorship, Approval, Review, and Responsibility. If no value is specified, the meaning is set as Authorship by default. • **Comments**: Enter comments if any. • **User Name**: Captures the user name of the approver. • **Password**: It is required to verify a transaction. • **I have read the electronic record**: Review the e-record of a transaction, and select the check box to enable the Approve and Reject buttons. • **Approve** and **Reject** buttons: Enabled after you confirm reading the e-record of a transaction. You can approve or reject the transaction.	If you are the initiator: • Enter the User Name and Password, select the check box to confirm that you read the e-record, and click **Approve** or **Reject**. After a user approves or rejects an e-record, the information specified by the user is saved and not available for editing.
Approvers section	The section displays BPM information about the transaction tasks and subtasks. It also displays the signers and the e-signature status. When an approval process is initiated from an application, BPM notifications are sent to all signers. The list of signers who are required to provide e-signatures can be viewed in the BPM Approval History region in the inline signature UI. • **Refresh** button: Refreshes the BPM Approval History region with the approval status for each signer.	• Click **Refresh** to retrieve the latest approval status. • Click **Back** to cancel the approval process.

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UI Element	Description	User Action
	• **Back** button: Cancels the e-signature approval process. No record of the canceled approval instance is saved. You must reinitiate the approval process afresh.	

What's an electronic record?

E-records contain information about transactions derived from the Oracle Business Process Management suite. They also track history of signatures and approvals.

You can download and view an e-record for a transaction from the Electronic Records work area or from the E-Signature page that appears when the approval process is initiated from Manufacturing, Inventory Management, or Quality Inspection Management.

FAQs for E-Signatures

Who can approve a transaction that requires an e-signature?

Approvers for transactions that require an e-signature are defined using the Manage Task Configurations for Supply Chain Management setup task in Setup and Maintenance.

A user can be both an initiator and an approver of an e-signature.

Where can someone approve a transaction that requires an e-signature?

If users initiating a transaction are also approvers for the transaction, they see the Initiator Approval section on the E-Signature page where they can approve e-signatures.

If other users in the task flow must approve the transaction first, this section appears only when a user becomes eligible to approve the transaction in accordance with the task flow. Other approvers can approve the transactions through the notifications in the BPM worklist page or from the notifications on the home page of their application.

Where can I find the e-signature history of an electronic record?

You can search for the e-signature history of an electronic record from the Electronic Record section.

Where can I see the list of signers of an e-signature?

You can view the list of signers required to approve an e-signature and e-signature status in the Approvers section of the E-Signature page.

The section displays BPM information about the transaction tasks and subtasks. When an approval process is initiated from an application, BPM notifications are sent to all signers. Refresh the page for viewing the latest information.

Who can view an electronic record?

You need to have the View Electronic Records and Signatures (EDR_VIEW_RECORDS_ESIGNATURES_PRIV) privilege to view an electronic record.

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