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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons ? to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- **Community**: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos**: Go to the Oracle Help Center to find guides and videos.

- **Training**: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Introduction

Electronic Signatures and Electronic Records: Overview

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

Critical transactions governed by US Food and Drug Administration’s (FDA) good manufacturing practices (GMPs) 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 Cloud, Oracle Inventory Management Cloud, and Oracle Quality Inspection Management Cloud.

Using E-Signatures and E-Records, you can search for, view, and download e-records that contain information about transactions and signers or approvers. You can also specify the supply chain management transactions types for which e-signatures are required, and set up the approval process flows that must be followed.
Chapter 1

Introduction
2 Electronic Records

Electronic Records Work Area: Overview

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

In the Electronic Records work area, you can:

- Use e-record details to search for e-records in the secure e-record repository and view transaction details.
- View the signature history and comments for the transactions.
- View and print an e-record in the .pdf format. An e-record includes details of the transaction, author, and approvers.

E-Signatures and E-Records Process Flow: Explained

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

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

- Inline approval process: In this process, the approvals must be obtained before a transaction is saved. You cannot save a transaction if the record is rejected.
- Deferred approval process: In this process, transactions are saved in a pending approval status before initiating the e-signature process. The transaction is updated to an approved status after the approvals are obtained.

Inline E-Signature Approval Process

The inline approval process workflow is as follows.
The following figure provides an overview of the inline e-signatures and e-records process, including its integration with the applications requesting approvals using e-signatures.

<table>
<thead>
<tr>
<th>E-Signatures and E-Records Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Fusion Applications</strong></td>
</tr>
<tr>
<td>Inventory Management</td>
</tr>
<tr>
<td>Quality Inspection Management</td>
</tr>
<tr>
<td>Manufacturing</td>
</tr>
<tr>
<td>Shipping</td>
</tr>
<tr>
<td>Receiving</td>
</tr>
<tr>
<td><strong>Supply Chain Management Applications</strong></td>
</tr>
<tr>
<td>Create/Update Transaction</td>
</tr>
<tr>
<td>E-Signature Enabled?</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Save Transaction</td>
</tr>
<tr>
<td>Discard Transaction</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>Generate E-Records</td>
</tr>
<tr>
<td>Initiate Signature Process</td>
</tr>
<tr>
<td>Approved?</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Store E-Record and Signature History</td>
</tr>
<tr>
<td>Get Approvers</td>
</tr>
<tr>
<td>Notify Approvers</td>
</tr>
<tr>
<td>Capture Approvals and E-Signatures</td>
</tr>
</tbody>
</table>

The process illustrated in the previous figure is as described as follows:

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 API is called to determine if 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 the Oracle Applications Cloud, and click the notification to view the approval page.
8. On the approval page, the other approvers read the e-record, enter their e-signature details, 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 status from E-Signatures and E-Records, the user changes the transaction status, and commits the transaction.
Deferred E-Signature Approval Process

The deferred approval process workflow is as follows.

The following figure provides an overview of the deferred e-signatures and e-records process, including its integration with the applications requesting approvals using e-signatures.

The process illustrated in the previous figure is as described as follows:

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 API is called to determine if 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 the pending approval status.
4. Notifications are sent to all approvers through Oracle notifications.
5. The approvers view the Pending Notifications in the Oracle Applications Cloud, and click the notification to view the approval page.
6. On the approval page, the approvers read the e-record, enter their e-signature details, and approve it or reject it.
7. When all required approvals are obtained the transaction is set to the approved status. If the record is rejected, the transaction is set to the draft status.
Using E-Signatures: Explained

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

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 Oracle Applications Cloud 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 the Oracle E-Signatures and E-Records Cloud, 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 the pending notifications on the Oracle Applications Cloud 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 the Oracle E-Signatures and E-Records Cloud, the transaction status is updated as Approved and committed in the application that initiated the approval process. If the process is rejected, the transaction status is updated as Draft.

E-Signature Page

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

<table>
<thead>
<tr>
<th>UI Element</th>
<th>Description</th>
<th>User Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Signature page title</td>
<td>The title constitutes searchable attributes, including transaction number, item number, and inventory organization.</td>
<td>N/A</td>
</tr>
<tr>
<td>Details of the e-record and approvers</td>
<td>The header of the page displays e-record information such as the E-Record Type, source identifier, status, and a link to download the e-record.</td>
<td>N/A</td>
</tr>
<tr>
<td>UI Element</td>
<td>Description</td>
<td>User Action</td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| **Initiator Approval section** | The section displays 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. | If you are the initiator:  
  - Enter the 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. |

The section contains the following UI elements:

- **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.
- **Signer**: 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 once you confirm reading the e-record of a transaction. You can approve or reject the transaction.

| **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. | Click **Refresh** to retrieve the latest approval status.  
Click **Back** to cancel the approval process. |

- **Refresh** button: Refreshes the BPM Approval History region with the approval status for each signer.
- **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 a transaction, derived from Oracle Business Process Management. You can download and view an e-record for a transaction from the Electronic Records work area or from the E-Signature page that displays when the approval process is initiated from applications, such as Oracle Manufacturing Cloud, Oracle Inventory Management Cloud, and Oracle Quality Inspection Management Cloud.