Oracle SCM Cloud

Using E-Signatures and E-Records

20A
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Preface

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

Using Oracle 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 the Oracle Help Center to find guides and videos.

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

You can also read about it instead.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- **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>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</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

Overview of Electronic Signatures and Electronic Records

You can use the Oracle Fusion 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 Fusion Manufacturing, Oracle Fusion Inventory Management, and Oracle Fusion 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.
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

Oracle Fusion E-Signatures and E-Records facilitates secure transactions for business events in Oracle Fusion Manufacturing, Oracle Fusion Inventory Management, and Oracle Fusion 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

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.

The following 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 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.
How the Deferred E-Signature Approval Process Works

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.

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The following 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.
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 the Oracle 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 Oracle Fusion Manufacturing, Oracle Fusion Inventory Management, and Oracle Fusion 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 Oracle 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 Oracle Fusion 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 Oracle 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 Oracle Fusion 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.

<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 includes transaction information.</td>
<td>Not applicable</td>
</tr>
<tr>
<td>Source Identifier</td>
<td>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.</td>
<td>Not applicable</td>
</tr>
<tr>
<td>UI Element</td>
<td>Description</td>
<td>User Action</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Status</td>
<td>Specifies the approval status: Awaiting approval, Approved, or Rejected.</td>
<td>Not applicable</td>
</tr>
</tbody>
</table>
| 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. |
| Approver 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.  
- **Back button**: Cancels the e-signature approval process. No record of the canceled approval instance is saved. You must |  
- **Click Refresh** to retrieve the latest approval status.  
- **Click Back** to cancel the approval process. |
What's an electronic record?

E-records contain information about transactions derived from Oracle Business Process Management. 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 Oracle Fusion Manufacturing, Oracle Fusion Inventory Management, or Oracle Fusion 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.