

19.1 PRODUCT RELEASE NOTES FOR ALL JAGGAER INDIRECT SOLUTIONS

APRIL 7, 2019 - FINAL VERSION



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Welcome

The **19.1 JAGGAER Product Release** will be available in the production environment starting April 7, 2019. The release includes features related to the **following JAGGAER Indirect** solutions:

- eProcurement
- Accounts Payable
- Supplier Management
- Contract Lifecycle Management
- Sourcing
- Spend Analytics
- Savings Management
- Inventory Management

Objectives

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming release from a scheduling and application standpoint. There are two main goals of this document.

- To provide a list of **key dates** associated with the upcoming release, including release availability in both the test and production environment.
- To provide an overview of **key features** that are planned and committed for delivery with the 19.1 release.

As a reminder, please refer to the Product Release Library at any time for updates and additional information regarding the release:

<https://library.jaggaer.com>

This document will help you:

- Prepare for JAGGAER Indirect version 19.1 – available in your production environment on Sunday, April 7, 2019.
- Understand the impacts of new features on your end-users, approvers, administrators, and other individuals using the system.
- Understand any changes required on your part to enable a feature of the system.
- Provide a starting point of “where to go” to learn more about the features and functionality discussed in this document.

19.1 Scheduling and Training Opportunities

Key Dates

The table below provides a list of key dates for the JAGGAER 19.1 Product Release*.

Event	Date and Time	Description and Details
Release Promotion: Test Sites Unavailable	Beginning March 15, 2019, 8am ET	The 19.1 release will be promoted to the Test (usertest) environment from Friday, March 15, 2019, 8am ET through Sunday, March 17, 2019 12 pm ET. An email will be sent when the promotion is complete.
Release Validation in Test Environment	March 17, 2019 - April 4, 2019 (Three Weeks)	Three weeks prior to General Availability, release enhancements can be viewed and tested in the Test environment. Draft documentation is provided at this time (Release Notes, Online Searchable Help and Handbooks). Recommendation: It is recommended that clients perform testing of functionality critical to your business as soon as possible during this period - ideally during the first week. If any issues are encountered, this will allow time for application adjustments and re-testing.
Production Unavailable (Begin Release Upgrade)	Beginning April 5, 2019, 9pm ET through April 7, 2019, 12pm ET	The 19.1 release will be promoted to the Production environment from Friday, April 5, 2019, 9pm ET through Sunday, April 7, 2019, 12pm ET. An email will be sent out when the promotion is complete.
Release available on Production Sites	Sunday, April 7, 2019	This date indicates when the features and functionality associated with 19.1 will be available on customer Production sites. Final documentation provided at this time (Release Notes, Online Searchable Help and Handbooks).

* Planned deviations to this schedule will be communicated to customers at least two weeks in advance. JAGGAER is not liable for any system or data issues encountered during the recommended period of system unavailability listed above (release promotion period).

Training Opportunities

To help prepare you for the 19.1 release, various educational videos are provided by JAGGAER. Each of these opportunities is detailed below.

Video Name	Description and Details
Preview Webinar (pre-recorded video)	The pre-recorded video will present a preview of all features coming in release 19.1. Available on the Product Release Library during the UIT testing period.
Product Webinars (pre-recorded videos)	Product-specific pre-recorded videos presenting a preview of features coming in release 19.1. Available on the Product Release Library during the UIT testing period.

The Feature Snapshot for 19.1

The product release provides features that directly impact requisitioners, approvers, administrators, and other system users. These features are listed in summary form in the Feature Snapshot below.

Snapshot Key

There are seven columns in the **Feature Snapshot**. Each of these is explained below:

- **Feature Name** –The feature title matches the heading found in the Preview Release Notes (this document). For more information on the feature, locate the feature via the table of contents. The features are listed in the order presented in the document.
- **Related Solutions** – The solution or solutions associated with the enhancement. Use this information to determine if the change impacts your organization. For example, if the change is for Accounts Payable, only those organizations using this product will be affected by the change.
- **Impacted Users**– The user role or roles PRIMARILY affected by the enhancement. For example, if a change is made to the way that a shopper selects a supplier, end user would be listed in this column. For more details, please refer to the feature description. **Note:** This information will be available with the Product Release Notes which will be published prior to the 19.1 release in the Test environment.
- **Integration Impact** - Indicates if the feature may have impact on integration between JAGGAER Indirect and other third-party systems used by your organization. Examples would be changes to import or export files or features developed expressly for integration. We recommend that administrators review all of these features to determine if there is any integration impact. **Note:** This information will be available with the Product Release Notes which will be published prior to the 19.1 release in the Test environment.
- **On by Default**– Indicates that the feature is turned on (enabled) by default and no configuration is required to take advantage of the new functionality. **Note:** This information will be available with the Product Release Notes which will be published prior to the 19.1 release in the Test environment.
- **Requires Setup** – Indicates that some type of setup or configuration is required. In most cases, this is simply enabling one or more configuration options and enabling permissions for the appropriate users. **Note:** This information will be available with the Product Release Notes which will be published prior to the 19.1 release in the Test environment.
- **Contact JAGGAER**– Indicates that someone at JAGGAER (Customer Support, Customer Success Manager, or Sales) must be involved in order to enable and take

advantage of the feature. A new license may be required, workflow changes, etc.
Note: This information will be available with the Product Release Notes which will be published prior to the 19.1 release in the Test environment.


Feature Snapshot

The following table provides a summary of features available starting April 7, 2019.

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
New User Search Interface	All JAGGAER Indirect Solutions	Admins	None			
Ability to Define a Supplier Hierarchy	All JAGGAER Indirect Solutions	End Users, Admins	Medium			
Advanced Supplier Search - Search by Non-English NAICS and Commodity Code Values	All JAGGAER Indirect Solutions	End Users	None			
Ability to Hide NAICS Code Field for All Users	All JAGGAER Indirect Solutions	End Users, Admins	None			
Faster Business Analytics and Reporting with Looker						
Redirecting Port 80 to Port 443						
New Budget Manager Solution	eProcurement	End Users, Admins	None			
Multi-Factor Authentication (MFA) for PR Approval	eProcurement	End Users, Admins	None			
Ability to Add Logo to PO Fax by Bill To Address	eProcurement	Admins	None			
Ability to Override PR Exchange Rates	eProcurement	End Users, Admins	None			
Form Request Enhancements	eProcurement	End Users, Admins	None			
Address Visibility Updated for MBU	eProcurement	End Users, Admins	None			
Ability to View a Sales Order from a Related Purchase Order	eProcurement	End Users, Admins	None			
eProcurement Business Analytics with Looker	eProcurement	Admins	None			
Updates to New Shopping Experience	eProcurement	End Users, Admins	None			

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Business Unit Added to PR Import	eProcurement	Admins	None			
PO Workflow Validation Enhancements	eProcurement	End Users	Low			
Mapping Sets Renamed	eProcurement	Admins	None			
Cardholder Data Purge	eProcurement	None	None			
PCI-Compliant Fax Provider	eProcurement	None	None			
Ability to Provide Translations for Commodity Code Descriptions	eProcurement	End Users, Admins	None			
Global eInvoicing	Accounts Payable	End Users, Admins	Medium			
New Multi-Check Requests	Accounts Payable	End Users, Admins	None			
Supplier Section Updated on Check Requests	Accounts Payable	End Users, Admins	None			
Question Attachments Updated on Check Requests	Accounts Payable	End Users, Admins	None			
Check Request Questions Added to Invoice Workflow	Accounts Payable	Admins	None			
Check Request Form Types Updated in Workflow	Accounts Payable	Admins	None			
New AP Configuration Setting	Accounts Payable	Admins, End Users	None			
Supplier Localization Enhancements: Ability to Translate Standard and Custom List Values for Supplier Registration Profiles	Supplier Management	End Users, Admins	None			
Enhancements to Advanced Sourcing Optimizer Integration with Supplier Management	Supplier Management with Advanced Sourcing Optimizer	End Users	None			

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Send and Receive Messages to and from Supplier Portal	Contract Lifecycle Management	End Users	None			
Total Contract Values	Contract Lifecycle Management, Contract Compliance Tracking	End Users, Admins	Low			
Obligation Enhancements	Contract Lifecycle Management	End Users	None			
Add Ad-Hoc Approvers to Contract Approval Workflow	Contract Lifecycle Management	End Users, Admins	None			
Ability to Complete Contracts Pre-Expiry	Contract Lifecycle Management	End Users	None			
Prevent Deletion of Draft Contracts	Contract Lifecycle Management	End Users, Admins	Low			
Ability to Schedule Contract Terminations in Advance	Contract Lifecycle Management	End Users	Low			
Change or Add eSignature Signers without Repeating Workflow	Contract Lifecycle Management	End Users	None			
Use Latest Custom Contract Field Configurations on Imports	Contract Lifecycle Management	Admins	Medium			
Enhanced Integration of Sourcing, Supplier Management, and eProcurement	Sourcing	End Users	None			
Enhancements to Quick Quotes/Express Bids	Sourcing	Admins, End Users	None			
Adding Favorite Items to Sourcing Requests	Sourcing	End Users	None			
New Advanced Dynamic Workflow (ADW) Rules	Sourcing	Admins, End Users	None			
Sales Order Revisions	Inventory Management	Admins, End Users	None			
Ability to Include Inventory Elements on the Receipt XML Export	Inventory Management	Admins	Medium			
New Inventory Adjustment Integration Point for Inventory Management	Inventory Management	Admins	High			

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Ability to Send Returned or Cancelled Items as a Negative Quantity on the Receipt XML Export	Inventory Management	Admins	Medium			

General Enhancements

The features listed in this section apply across all JAGGAER Indirect Solutions.

New User Search Interface

Over the past several releases, JAGGAER has been making updates to search functionality within the application. In 18.3, customers had the ability to toggle between the traditional User Search interface and a new, updated interface. As of 19.1, the new search interface is active and available and the traditional interface is no longer an option.


Customer Impact

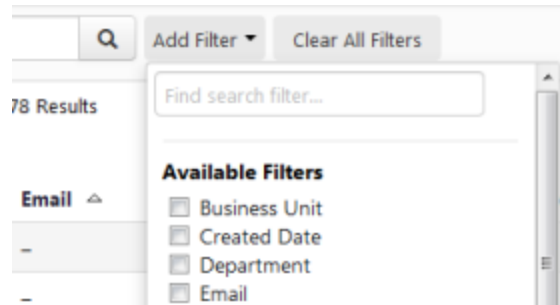
- Related Solutions: All Indirect Solutions.
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this Feature: None
- New Notifications related to this Feature: None


USER IMPACT

- User management is generally an administrator task. Please see **Administrator Impact** below for information about the new user search.

ADMINISTRATOR IMPACT

- Using the new search interface:
 - **Perform a Quick Search**
 1. Enter a keyword or phrase in the **Quick search** field.
 2. Click the search icon . Matching users are returned in the search results.
 - Perform an Advanced Search - Use the filter options to perform a more specific search.
 1. Click the **Add Filter** button (located to the right of the **Quick search** field). A list of available filters displays. **Note:** These filter options are the same options that displays on the current Advanced Search page.



2. You can search for a specific filter by entering a value in the field. The list of filters will be refined and only matching filters display.
3. Click the checkbox for the appropriate filter. Configuration options display. For example, if you choose **Business Unit**, an overlay displays from which you can select the appropriate business unit. **Important:** When there are many options, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in **Suggested** list, enter a value in the search field.
4. When you have made the appropriate configurations to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. Click the  to remove the filter.
5. Repeat the steps above to add additional filters. The search results update to reflect the new filters.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Advanced Supplier Search - Search by Non-English NAICS and Commodity Code Values

NAICS codes and organization Commodity Codes can be associated with suppliers, and are available as criteria in the **Advanced Supplier Search**. Previously, the search term entered by a user would only search for English values. With this release, the **NAICS Code** and **Commodity Code** fields can also search for results based on non-English values entered by the user.

Note: **NAICS** codes appear in the logged-in user's selected language by default. However, **Commodity Code** values are translated by the customer organization. Therefore, only those languages for which the customer has provided a translation will be available for Commodity Code non-English searches.

Customer Impact

- Related Solutions: All JAGGAER Indirect Solutions
- Feature Activation: This feature is **ON** by default
- New Permissions related to this Feature: None
- New Notifications related to this feature: None

USER IMPACT

- When searching for a supplier using **Advanced Search** (Suppliers > Manage Suppliers > Search for a Supplier: Advanced Search):
 - Users can enter non-English values for the **NAICS Code** field (Products and Services section) as search criteria. All languages supported by JAGGAER are available.
 - Users can enter non-English values for the **Commodity Code** field (Products and Services section) as search criteria. Only those Commodity Code values translated in languages configured by the organization will be available.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Ability to Define a Supplier Hierarchy

A Supplier Hierarchy is a way to define relationships between suppliers as part of a larger group or family. With this release, customers have the ability to define a hierarchy of suppliers that can allow for a more effective administration of system objects, such as contracts. For example, a contract could be restricted to only allow Second Parties from within the same supplier hierarchy as that of a parent contract. This would provide the ability to define companies within a conglomerate to be valid participants within a given contract.

With this release, customers can identify **Node** suppliers to establish a hierarchy, or grouping, of suppliers. Suppliers that are identified as Nodes will not be considered actual suppliers, and therefore will not be available for shopping, sourcing events, invoices, etc.

By default, Node Suppliers are excluded from Supplier Search results. However, a new option to include Node suppliers in search results is available in Advanced Supplier Search.

This feature utilizes the existing Parent Supplier field in the Supplier Profile to build and expose the hierarchical relationships.

Customer Impact

- Related Solutions: All JAGGAER Indirect Solutions
- Feature Activation: This feature is **ON** by default but must be configured by an administrator
- New Permissions related to this Feature: None
- New Notifications related to this feature: None

USER IMPACT

- When viewing a supplier's **General** profile page (**Suppliers > Manage Suppliers > Search for a Supplier > Supplier Profile : About**):
 - The **Parent Supplier** grouping icon overlay (displayed if the supplier is part of a hierarchy) now includes a star icon to indicate Node supplier instances.
 - A new field for **Is this Supplier Instance an Organizational Node?** displays. The default selection is No.
- By default, supplier search does not include Node Suppliers. The Advanced Supplier Search (**Suppliers > Manage Suppliers > Search for a Supplier**) contains an option to **Include Organizational Nodes** in order to return Node suppliers in search results.
- In supplier search results, the **Include Organizational Nodes** filter can be used to refine results.
- A Node supplier is not available for any activities such as shopping, invoices, sourcing, contracts, etc.

ADMINISTRATOR IMPACT

- Administrators can indicate a supplier record to be a Node supplier.
 - Navigate to the **General** page of the supplier profile (**Suppliers > Manage Suppliers > Search for a Supplier > Supplier Profile : About**).
 - A new field for **Is this Supplier Instance an Organizational Node?** displays.
 - The default selection is **No**, and indicates the supplier is an actual supplier that can be associated with all documents and activities.
 - Select **Yes** to designate the supplier as a Node. The supplier will not be available for shopping, invoices, sourcing, contracts, etc.
- Build the hierarchy by indicating Parent Suppliers in the Parent Supplier field. Begin entering a supplier name to view selections and click the appropriate supplier. Users can also enter the supplier number.
 - The **Parent Supplier** field is OFF by default. The field must be turned on in Field Management to be visible. The Parent Supplier field can be located in Field Management (**Setup > Field Management > Manage Field Names and Help**

Text) by searching on the field name or browsing to Administration > catalog mgt. > Suppliers > Supplier Profile > General > Company Information.

- The Node setting is included in the Supplier Export from search results.

INTEGRATION IMPACT

- There is no impact to integration.

Supplier Impact

This feature does not impact suppliers.

Ability to Hide NAICS Code Field For All Users

NAICS (North American Industry Classification System) is a federal standard used to classify businesses. The **NAICS Code** field is available to associate with supplier profiles, to identify suppliers via supplier search, can be referenced on business documents, and accessed by suppliers via the Branded Portal.

NAICS codes are not useful to organizations who do business only with non-US suppliers. With this release, customers can choose to hide the NAICS code field in their system. This removes the field from display to suppliers as well as internal users, so they do not see a field that has no relevance.

Customer Impact

- Related Solutions: All JAGGAER Indirect Solutions
- Feature Activation: This feature is **OFF** by default but can be configured by an administrator
- New Permissions related to this Feature: None
- New Notifications related to this feature: None

USER IMPACT

- The **NAICS Code** field will not display in the Supplier Profile or Supplier Registration (Proxy) view. The field will also not display as an option for searching in Advanced Supplier Search or as a filter option in search results. The field will also not be included in the Supplier Export from search results.
- For users in organizations with Supplier Management, Accounts Payable, Contract Lifecycle Management or Sourcing, the **NAICS Code** field will not display as an option in the Registration Configuration for suppliers (Entity or Individual), or in the Proxy View of Supplier Registration.

ADMINISTRATOR IMPACT

- A new setting is available under **Setup > General Site Settings > System Settings and Configuration > Configuration** in the **International Settings** section for **Hide NAICS Code Field**. The setting is off by default.
 - To enable, click the **Edit** button, select the checkbox, and click **Save**. A confirmation message displays that the settings were saved.
 - To disable the setting, select the **Edit** button, disable the checkbox, and click **Save**.
- Changes to the setting are captured on the **Configuration History** page (**Setup > General Site Settings > System Settings and Configuration > Configuration**).

INTEGRATION IMPACT

- This feature does not impact integration.

ADDITIONAL KEY POINTS ABOUT THE FEATURE

- If the setting is enabled for a supplier with existing NAICS Code values, the values are retained in the database. If the setting is disabled so that the field is again showing, the values saved at the time the field was hidden will display.

Supplier Impact

For customers that have enabled this feature, suppliers will not see the NAICS code as an available field in the Customer Branded Portal Registration Profile.

Redirecting Port 80 to Port 443

Traffic over port 80 (HTTP) is not secure and will no longer be accepted by JAGGAER Indirect. Instead, we will automatically redirect all attempts to connect using port 80 to a secure HTTPS connection over port 443.

In addition, all DTDs and schemas are now using HTTPS. If your organization has been using HTTP for DTDs and schemas, you must switch to HTTPS.

Faster Business Analytics and Reporting with Looker

As part of our ongoing efforts to enhance the customer experience, we are upgrading our back-end infrastructure. As a result, you should notice much faster data refresh times and a dramatic improvement in performance when you run business analytics and reporting with Looker.

Supplier Management

This section focuses on updates to the Advanced Supplier Management solution. Features in this section do NOT apply to the general supplier management that is bundled with other solutions.

Please note that additional features explained in other sections of this document also impact Supplier Management.

Supplier Portal Localization Enhancements: Ability to Translate Standard and Custom List Values for Supplier Registration Profiles

Previously, customers could translate Standard and Custom List fields in the Supplier Registration configuration, but did not have the ability to translate list values provided for selection within those fields. This meant that while a supplier user could see the actual custom question in their logged-in language, the possible responses (for list type questions such as drop-down values and multi-select options) would still display in the organization's default language.

With this release, customers now have the ability to provide translations in the organization-supported languages for custom field list values in Entity and Individual Registration configuration. Custom List value translations can also be imported and exported.

Suppliers will see translated custom list values per their language setting, if that language is configured by the customer.

Note: Custom questions/list values can appear on different pages of the supplier profile, as configured by the organization.

Customer Impact

- Related Solutions: JAGGAER Indirect Supplier Management
- Feature Activation: This feature is **ON** by default but must be configured by the customer
- New Permissions related to this Feature: None
- New Notifications related to this feature: None

USER IMPACT

- If configured by the customer, list values associated with Custom Questions on a Supplier Profile or supplier search results now display in the logged-in user's language

associated to the user's profile. The translated values also display in the Supplier Registration (Proxy) view.

ADMINISTRATOR IMPACT

- When configuring a custom profile question in Supplier Registration, list values can now be translated into languages supported by the organization.
- The following types of **Custom Profile Fields** have List Values associated: Dropdown List, Radio Button Group, Multi Select.
- To configure translations for list values on **individual fields**:
 - Navigate to **Suppliers > Configuration Settings > Registration Configuration**, and select **Entity Registration** or **Individual Registration**.
 - Expand a section where the **Custom Profile Field** question is to be created or managed. (See **Custom Profile Fields** in the **Supplier Management Handbook** or online searchable help for additional information about managing custom fields in general.)
 - Select a Custom Profile Field and click the **Edit Translations** button in the **List Values** section (for Dropdown List, Radio Button Group, and Multi Select fields only).
 - In the **Edit Custom Element List Values** overlay, select the Languages for which you will provide translated content. A section for each language displays the list with an **Entry** text box to enter the translated value. When finished, click **Save** to close the overlay.
 - Select **Preview Translations** in the List Values area to see the current languages and translations configured for the list.
- The custom list values and translations can be **managed in bulk** via export and import from the **Manage Translations** page (**Suppliers > Configuration Settings > Registration Configuration**).
 - When users select **Export** from the **Actions** dropdown, a new **Custom Element List Values** option is available and is selected by default. When selected, the export includes a spreadsheet for **Custom Element List Values** fields and translations.
 - When users select **Import** from the **Actions** dropdown, selecting **Custom Element List Values** also imports the **Custom Element List Values** fields and translations.
 - **Note:** The actual custom list values do not display in the UI for editing on this page. To manage translations from this page, you must export first, make changes, then import the updates.
- See **Manage Translations for Instructional Text and Custom Profile Registration Fields** in the **Supplier Management Handbook** or online searchable help.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

If configured, suppliers viewing custom questions in the Customer Branded Portal will see a list of possible responses in the language associated with their user profile. If the customer does not configure a translation for the user's logged in language, the value and description will display in the customer's default language.

Enhancements to Advanced Sourcing Optimizer Integration with Supplier Management

This integration allows ASO buyers to leverage the Indirect Supplier Management capabilities by allowing them to efficiently find and invite targeted suppliers to participate in ASO events.

With this release, enhancements to this integration include a more stream-lined user experience that allows the supplier selection and integration process to begin and end within an ASO event. Also, a new menu option is available from the Sourcing menu to navigate to Advanced Sourcing Optimizer.

Note: Enhancements to the ASO-Supplier Integration feature are available only to users with linked accounts (between Indirect and ASO). Contact your site administrator if you have questions about your ability to utilize the new features.

Customer Impact

- Related Solutions: JAGGAER Indirect Supplier Management, Advanced Sourcing Optimizer
- Feature Activation: This feature is **OFF** by default and you must contact JAGGAER to enable.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- As an **ASO User** with a linked Indirect account: When a user initiates the supplier-add process from within an ASO event, they will be navigated to their Indirect Supplier Management instance. After the user performs a supplier search and selects to add the appropriate supplier(s) to the event:
 - The initial step of the **Add Suppliers to ASO Event** wizard is to confirm the contacts to receive the event invitation. Since the supplier was added from the context of the ASO event, no event selection step is necessary. You can manage the contacts to receive the event invitation per current functionality.
 - Step two allows confirmation of the event name and contacts. Click the **Go to ASO Event** button to proceed. You are then navigated back to the ASO event. You

also have the option of returning to the previous step, or canceling and returning to the ASO event without adding suppliers.

- **Note:** If the user begins in Indirect Supplier Management by selecting suppliers to add to an ASO Event, there is no change to current functionality. In such cases, the wizard will contain the step to select the event manually.
- The **Sourcing** menu now contains a new **Advanced Sourcing Optimizer** selection to navigate to the **ASO Home Page** and **ASO Supplier Integration Status** :
 - Selecting the **ASO Home Page** navigates the user to the ASO Home Page. If they are not logged in to the ASO solution, they must first log in before being navigated to the home page.
 - Selecting **ASO Supplier Integration Status** navigates the user to the **Sourcing > Advanced Sourcing Optimizer > ASO Supplier Integration Status** page.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact existing integrations, as it is a new integration point.

Supplier Impact

This feature does not impact suppliers.

eProcurement

The following eProcurement features will be added or updated with 19.1.

Shopping and Ordering

New Budget Manager Solution

This release introduces a new **Budget Manager** solution for eProcurement. It has been created to provide a robust budget management solution to help customers track spend. Designed for maximum flexibility and ease of use, the new solution can track spend on any PRs, POs and invoices that use account codes.

The features included in the new Budget Manager solution allows organizations to:

- Track spend on any PRs, POs, and invoices by account code strings.
- Track budgets by time period (annually, monthly, quarterly as well as by custom date ranges).
- Approve budgets through a new budget approval workflow.
- Send notifications when budget spend approaches the budget limit.
- Import and export budget data to facilitate the management and reporting of budget information.

Budget Manager supports multi-business unit configuration. Organizations using the Budget Tracker feature can replace it with Budget Manager.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **OFF** by default. Contact JAGGAER for licensing information and to enable this feature. System administrator setup also required.
- New Permissions related to this feature: A new **Budget Manager** option is displayed under Permission Settings if the license is enabled.

Permission Settings > Budget Manager:

- **View Budgets** - Users with this permission can view and export budget information.
- **Create/Edit Budgets** - Users with this permission can create and change their own budgets and export budget information.
- **Manage Budgets** - Users with this permission have administrative control for the Budget Manager solution. They have full control over their own budgets, and

can edit anyone's budget. They can both export and import budget information. They also have access to the Administration area.

Permission Settings > Approvals > Budget Manager Approvals:


- **Approve/Return Budget** - Gives a user permission to approve or return a budget.
 - **Expedite Budget Approval Workflow** - Gives a user permission to expedite a budget through any pending budget approval workflow steps that permit expediting. It allows users to "pull" a budget through the budget approval workflow.
 - **Expedite Budget Approval Workflow Through all Steps** - Gives a user permission to expedite all workflow steps, including the End step which completes workflow. In addition, the user will be able to expedite past any workflow steps configured as "do not allow by-pass". All steps skipped as part of the expedite will be recorded as part of the Budget's audit trail.
- New Notifications related to this feature: A new **Budget Manager** option is displayed under Notification Preferences if the license is enabled.

Notification Preferences > Budget Manager:

- **Budget Pending Workflow Approval** - Notifies a user that a budget is waiting for their approval.
- **Budget Workflow Complete** - Notifies the budget owner that a budget has completed the Budget Manager approval workflow, if they have the notification enabled.
- **Budget Returned to Draft** - Notifies the budget owner that a budget that they have sent for approval has been returned to Draft status, if they have the notification enabled.
- **Budget Exceeded** - Notifies the budget owner that spend has exceeded the total budget amount, if they have the notification enabled.

USER IMPACT

See the Budget Manager Handbook and help topics in the online searchable help for a complete guide to Budget Manager. Here is an overview:

- The new **Budget Manager** solution is identified by the  symbol and is accessed from the left menu of the application.
- **Budget Search** is used to find budgets and monitor spend. Search filters can be used to find and sort budget data. Search results can be exported from this page for reporting. Users can see the following information for each budget.
 - **Budget** - The total budget amount.
 - **Held** - The amount held by completed purchase requisitions.
 - **Committed** - The amount committed on approved and distributed POs.
 - **Expensed** - The amount paid out on invoices.

- **Remaining** - The budget amount minus the sum of Held + Committed + Expensed.
- **Account Codes** are used to select the account code string that will track spend for the budget. The system will track spend for items on any PRs, POs and invoices that use the same account codes that are selected on the Account Codes page.
- **Date Ranges** are used to define the time period that spend will be tracked. There are four options for creating date ranges, called Date Range Types. They are: Annual, Quarter, Month or Custom.
 - **Annual**- The user enters a fiscal year and the budget amount for that year.
 - **Quarterly** - The user enters the budget amount and fiscal year, and the system initially divides it evenly across quarters for the fiscal year. The user can adjust the amounts entered for each quarter.
 - **Monthly** - The user enters the budget amount and fiscal year, and the system initially divides it evenly across months for the fiscal year. The user can adjust the amounts allocated to each month.
 - **Custom** - Start and End dates are selected. After date range is entered, users enter the budget amount for the date range.
- **Review and Submit** and **Approval** pages ensure that all required items are completed and to submit a budget for approval into the Budget Manager approval workflow.
- **Budget Manager Import/Export** allows users to add new budgets, update budget information, or download budget data for reporting purposes.
- Organizations can configure the Requisition Workflow to perform budget checks. If enabled for your organization, a **Check Budget** option also allows users to click a Check Budget button during checkout to see if their order is within the budget limit before placing their order. The option requires the use of the Updated requisition document format.

ADMINISTRATOR IMPACT

See Budget Manager Administration and Setup in the online searchable help for a guide to the steps required for setting up Budget Manager. Here is an overview:

- Contact JAGGAER to enable Budget Manager license and set up the budget manager workflow and update the requisition workflow if needed. The budget manager workflow is used to approve budgets and is not connected to the requisition workflow.
- Once the Budget Manager workflow is set up, the **Budget Manager Budget Amount** ADW workflow rule can be applied to a workflow step to route the budget based on the budget value.
- Organizations have the option to use the **Check Budget** feature with Budget Manager. If Budget Manager is enabled and the **Budget validation during checkout** setting is

enabled, users can click the Check Budget button during checkout and the system will check their order against the budget in Budget Manager. A message will indicate whether the order is within or exceeds budget limits. The option requires the use of the Updated requisition document format.

- Contracts will continue use existing budget tracking functionality. Budget Manager is not tied to the contract budget tracking options in Contract Compliance Tracker or Contract Lifecycle Management.

INTEGRATION IMPACT

- If your organization uses the Budget Tracker feature, once the new Budget Manager license is enabled, the option to check budget before users submit a cart will go through Budget Manager.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

This feature does not impact suppliers.

Multi-Factor Authentication (MFA) for PR Approval

Currently, JAGGAER has the ability to configure Multi-factor Authentication (MFA) for users who are logging into the system, which requires a user to present a one-use-only JAGGAER-supplied code after the username and password have been provided.

In 19.1 we have extended the Multi-factor Authentication capability so that it can be used for PR approvals. Organizations that need an extra level of security when approving sensitive documents can configure a PR workflow step to flag items that need MFA.

Once set up, users who are approving a purchase requisition in the application will see a MFA window which will ask them to choose an authentication method and enter a code in order to approve the requisition.

Organizations can choose which authentication programs they want to use. Google Authenticate, Sophos, OTP, SMS or email authentication programs are available. Please note that OTP Auth is only available for iOS devices. Some authentication methods require users to download apps for the initial validation.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **OFF** by default. Contact JAGGAER to configure workflow to use MFA. Administrator setup is also required.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- If an organization has MFA configured for a PR workflow step, when an approver clicks "Approve" on that step, a Multi-factor Authentication window will prompt them to select an authentication method. Once they select a method, an MFA code is sent to the user via that method and they must enter it to approve the requisition.
- Users can approve single or multiple requisitions from the Quick View on the My Approvals page. Only one authentication code is needed if multiple requisitions are selected and approved using the line action for approval. Users can also approve from Document Actions within a requisition. After the code is entered, they must approve requisitions within a time period set by the organization.
- If an invalid code is entered, an error message is displayed. If an invalid code is entered three times, the user will be directed back to the My Approvals page and there will be an entry in the PR history that validation has failed. Users will receive an error after the time period has passed and they try to approve another PR.
- There is some set up that is required the first time a user validates using Google Authenticator, Sophos Authenticator, and OTP Auth. Users will need to download these apps from the app store onto a mobile phone, then enter a device name and scan a QR code. OTP Auth is only available for iOS devices. The text method (SMS (Short Message Service)) is only available if users have a phone number entered on their user profile.
- History indicates "MFA verified".

ADMINISTRATOR IMPACT

- The **Multi-factor Authentication** tab has been updated to accommodate MFA configuration for both **Login** (this is existing functionality) and **Workflow** (a PR workflow step on Requisition workflow).
- Here is how to configure the workflow portion of MFA. See **Set Up MFA** in the online searchable help for complete step-by-step instructions:
 - a. Navigate to **Setup > General Site Settings > Security Configuration**.
 - b. Click on the **Multi-factor Authentication (MFA)** tab.
 - c. Select the authentication methods that are displayed to users when they are

- approving a requisition.
- d. In the Workflow Settings section, select **Yes** next to **Allow MFA in Workflow** to attach MFA authentication to a manual workflow step.
 - e. Enter a number in the **Time a Token is valid before user is prompted again for authentication (secs)** field to set the number of seconds that a MFA code is valid for. Users will receive an error after the time period has passed and they try to approve another PR.
 - f. Save the changes.
- Once the Multi-factor Authentication settings are enabled, please contact JAGGAER to add the MFA workflow activity flag to a manual requisition workflow step. The Multi-factor Authentication settings must be enabled for workflow before JAGGAER can set up the workflow.
 - Organizations can choose which authentication programs they want to use. Google Authenticate, Sophos, OTP, SMS or email authentication programs are available. Please note that OTP Auth is only available for iOS devices. The text message option will only be available if the user has a mobile phone number in their profile. Some authentication methods require users to download apps for the initial validation.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Ability to Add Logo to PO Fax by Bill To Address

Currently, customers can upload a logo for the PO fax and customize it by business unit. In 19.1, new settings for PO faxes provide another configuration option that allows organizations to set the logo on a PO fax based on a company's Bill To address.

Customer Impact


- Related Solutions: eProcurement
- Feature Activation: This feature is **OFF** by default but can be configured by a system administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- If configured for your organization, PO fax logos will change according to the Bill To address of the company on the purchase order.

ADMINISTRATOR IMPACT

Configure the PO fax logo to display based on a company's Bill To address as follows:

1. Navigate to **Setup**  > **Organization Structure and Settings** > **Manage Default Addresses**.
2. Click on the **Bill To** tab.
3. Select an **address**.
4. Select the **Use Bill To Logo as Fax Letterhead** checkbox. A **Select** button is displayed.
5. Click the **Select** button and choose one of these options:
 - **Select An Image...** - Allows you to select an image that has already been uploaded in to your site.
 - **Upload An Image...** - Allows you to upload and select a new image for the logo.
 - **Do Not Use An Image** - Choose this option to delete an image that has been configured for the logo type.
6. Click **Save**.

Once the image is selected it will show on the Bill To address screen on PO faxes.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

- Suppliers will see the logo for the company associated with the Bill To address on the Faxed PO document.

Ability to Override PR Exchange Rates

Currently, JAGGAER updates exchange rates nightly, and use those rates on purchase requisitions until new exchange rates are imported. In 19.1, we have added the ability to override the current exchange rate on purchase requisitions and use a specified one. This can be helpful when there is an agreement between a customer and a supplier to use a specified exchange rate and not the current (fluctuating) one.

The overridden exchange rate is copied from the purchase request to POs, PO faxes, and change requests. This change does not affect invoices.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER. Administrator setup is also required.
- New Permissions related to this feature: **Override Document Exchange Rates** (Permission Settings >Administration > System Administration) - Gives a user permission to override exchange rates on purchase requisitions. This setting is off by default. This permission is only visible if an organization has the Override Document Exchange Rates feature enabled.
- New Notifications related to this feature: None

USER IMPACT

- An **Override exchange rates...** link is displayed on requisitions if the following conditions are in place:
 - The organization has the feature enabled.
 - The logged in user has the Override Document Exchange Rates permission.
 - There is only one supplier on the requisition. Exchange rates cannot be overridden if there are multiple suppliers on a requisition.
 - The requisition is in Pending or an editable workflow status. When a requisition is in Completed status, the Override Exchange Rate link is not displayed.

The link is displayed on the **Summary** page in the **Supplier / Line Item Details** section. Multiple supplier sections are displayed if a requisition has the same supplier but there are lines with different currencies, and the link is displayed in each section.

- The overridden exchange rate will be copied from the purchase request to POs, PO faxes, and change requests. This change does not affect invoices.
- How it works:
 - When the **Override exchange rates...** link is clicked, an **Override Exchange Rates** window opens. It shows the current exchange rates for all currencies applicable to the requisition.
 - Each line displays the **Base Currency** set for the organization, the current **Exchange Rate**, and the **Supplier Currency** (this is the currency used by the supplier for the item).
 - Users click the **Override** checkbox next to a currency in the window to clear the current Exchange Rate field and enter the exchange rate that should be used, then click **Save**.

- The overridden rate applies to *all* lines on the document that use the currency.
- Users can clear the Override checkbox to restore the default exchange rate.
- If the supplier's currency and the organization's base currency are the same (i.e., USD to USD), then the Override checkbox will show but it will be disabled.
- If there are lines with rates that have not been overridden, the exchange rate at the time of the PR to PO flip is used.
- Once the rates have been overridden and saved, the new amounts and rates will be saved to the requisition and will carry over to the purchase order, PO fax and any change requests once the requisition has completed.
- Exchange rates can be changed while the requisition is in the workflow and on change requests.
- Approvers with the Override Exchange Rate permission can override rates.

ADMINISTRATOR IMPACT

- Contact JAGGAER to enable the Override Exchange Rates feature.
- If setting is enabled:
 - The **Override Document Exchange Rates** permission is displayed under Permission Settings > Administration. Administrators will need to enable the permission for users or user roles who are permitted to override exchange rates on requisitions.
 - Users with permission will see the **Override exchange rates...** link in the **Supplier / Line Item Details** section on the Checkout page and on requisitions with only one supplier. The overridden exchange rate will be copied from the purchase request to POs, PO faxes, and change requests. This change does not affect invoices.
- (optional) Organizations can choose to show or hide the exchange rate on PO faxes by adding the **Exchange Rate** field to their active PO document configuration.

INTEGRATION IMPACT

The feature does not affect integration

Supplier Impact

- If the PO fax has been configured to show exchange rates, suppliers will see the overridden rates on the faxed PO.

Form Request Enhancements

In 19.1, form requests have been enhanced to improve the user experience.

On Procurement form requests:

- The Fulfillment Center address on the Supplier page of Procurement Requests and Procurement Request templates has been updated to indicate the preferred fulfillment address of the selected supplier. Users can select alternative fulfillment addresses.
- Procurement Request templates have been updated so that conditional settings remain in place when a multi-select question is changed.

On all form requests:

- The **Form Data > Template Questions** ADW workflow rule has been updated for all form request types so that changes to questions on a form request template will not affect the ADW workflow rule when the new template version is published.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- Fulfillment Center addresses on the Supplier page of procurement requests have been updated to display the preferred address of the selected supplier in bold, and labeled **(preferred)**, to indicate that the address is preferred by default. Users can select an alternative fulfillment address.

ADMINISTRATOR IMPACT

- The following updates have been made to Procurement Request templates:
 - On the Supplier page, **Fulfillment Center addresses** have been updated to display the preferred address of the selected supplier in bold, and labeled **(preferred)**, to indicate that the address is preferred by default. Users can select an alternative fulfillment address.
 - On the **Question** page, multi-select type questions have been updated so that the conditional settings remain in place when a multi-select question is changed, unless the answer is removed.
- These updates have been made to all for request types:

- The **Form Data > Template Questions** ADW workflow rule (line-level) has been updated for all form request types so that changes to questions on a form request template will not affect the ADW workflow rule when the new template version is published.

INTEGRATION IMPACT

This feature does not affect integration.

Supplier Impact

This feature does not impact suppliers.

Address Visibility Updated for MBU

The Multi-Business Unit feature allows organizations to have Ship To and Bill To addresses displayed to a user based their assigned business unit. Previously, this was limited to shoppers only, who would see addresses based on their assigned business unit.

With this release we have updated the visibility settings of Bill To and Ship To addresses so that all users will see Ship To and Bill To addresses based on their assigned business unit, or the business unit of document they are viewing, to make it easier for buyers and approvers to select the correct address on a document.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

For organizations with MBU enabled, users who are viewing or approving a PR, PO or invoice will see addresses on the document as follows:

- Users with an assigned business unit will see addresses on a document that match either their assigned business unit or the business unit on the document.
- Users without an assigned business unit will see addresses on a document that match the document's business unit and addresses with no business unit.

ADMINISTRATOR IMPACT

Administrators may need to update permissions for user roles and profiles.

INTEGRATION IMPACT

This feature does not affect integration.

Supplier Impact

This feature does not impact suppliers.

Ability to View a Sales Order from a Related Purchase Order

In support of the new **Sales Order Revisions** feature, we have added the ability to view and link to a sales order from a related purchase order. This can be a useful feature for users, even if it is not being used in the context of sales order revisions. **Note:** For additional information about the new **Revisions** feature, please see **Sales Order Revisions**, on page 75.

Where and how the link is included on the sales order depends on the user interface style being used by your organization. If you are using the traditional, "tabbed" user interface for purchase orders, the link needs to be added via document configuration. If you are using the newer "wizard" interface, the link is available by default.

Customer Impact

- Related Solutions: eProcurement, Inventory Management
- Feature Activation: Depends on the UI being used for purchase orders. See additional information below.
- New Permissions related to this Feature: None
- New Notifications related to this Feature: None

USER IMPACT

- Users now have the ability to link to and open related sales orders from a purchase order.
- **Accessing the sales order from the PO via the classic "Tabbed" interface.**
Note: The Sales Order Number field must be added to the PO document configuration in order to be available from this UI. See **Administrator Impact** below for additional information.
 1. Open the purchase order and locate the **Sales Order Number** field on the **Summary** tab.
 2. Click the **View** link to the right of the sales order number.
 3. The sales order opens.

- Accessing the sales order from the newer wizard interface.
 - Option #1 - Sales Order has been added to the **View Related Documents** field located in the main details in the top-left corner of the screen. Click the link and select the **View** link for Sales Order.
 - Option #2 - If the **Sales Order Number** field has been added to the document configuration, it will display on the **Summary** screen. Locate the field and click on the View link.

ADMINISTRATOR IMPACT

- A **Sales Order Number** field is available to be placed on the Summary page.
- For additional information about document configuration, please see **Document Setup and Configuration** in the online searchable help.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

eProcurement Business Analytics with Looker

This release introduces a new **Business Analytics Dashboard** for eProcurement using Looker software. Looker is the third party visualization and reporting tool embedded in the JAGGAER Indirect solution suite. It provides enhanced reporting options for JAGGAER Indirect's eProcurement solution and allows customers to explore eProcurement data for in-depth analysis.

An initial version of the feature is introduced with this release, with more enhancements on the way. It offers:

- An out-of-the-box eProcurement dashboard that provides key information for requisitions, purchase orders and invoicing. Users can drill into the pre-configured data on the dashboards for further analysis, and they can also create their own dashboards, reports and charts with the data.
- Data analysis that can be shared with colleagues or downloaded in a variety of file types.
- Automated email delivery that can be scheduled so users can view reports without logging into the application.

eProcurement data has not changed, Looker simply changes the way that the data is presented and provides customers with more options for analyzing the data on their site.

Important Note: Customers that have been using the beta version of the Business Analytics Dashboard will need to recreate their reports for the 19.1 release.


Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default but optional for use. Administrator setup is also required.
- New Permissions related to this feature: These three permissions are located under Permission Settings > Administration, under the Reporting and Analysis subheading:
 - **View Business Analytics** - Allows users who have clearance to see all organization documents to view the business analytics dashboards.
 - **Configure Analytics Dashboards** Allows users to create reports and dashboards for organizations.
 - **Send Reports to Any Email Address** Allows users to send Looker reports and dashboards to other users with any valid email address.

Important Note: Please use discretion and enable the **Configure Analytics Dashboards** and **Send Reports to Any Email Address** permissions only for the users who need them.

- New Notifications related to this feature: None

USER IMPACT

- If the feature is enabled and a user has the appropriate permission, the Business Analytics Dashboards can be accessed by navigating to:
 - **Reporting**  > **Operational and Site Usage Reports** > **Business Analytics Dashboards**.
- The Business Analytics Dashboard uses these main components:
 - **Looks** are similar to reports. They are a single saved query of data that can be configured as a report or combined to create a dashboard. Looks help users see their data and build reports that help them analyze their business needs.
 - **Dashboards** are a collection of related **Looks** that provide an overall view of a data set. They are typically the launching point for exploring data further and can also be used to create alternative data analysis scenarios, reports and charts:
 - The initial Business Analytic Dashboard page opens to a **Summary** dashboard that provides key information for requisitions, purchase orders and invoicing. Users can drill into the dashboard data for further analysis.
 - Additional pre-configured PR, PO and Invoicing dashboards have been designed to show important information for eProcurement. They can be accessed from the **Explore** button in the top right corner of the page. Users can also drill into the data on these dashboards for further analysis.

- **Spaces** control the visibility of dashboards and looks so that only those who need to see specific data have access to it. Global, group, and personal spaces determine whether looks and dashboards can be shared with all users, a specified group of users, or saved to your own personal space.
- We recommend viewing the Business Analytics Reporting videos in **JAGGAER University** for a quick introduction to the Business Analytics Reporting feature. Step-by-Step instructions are also available under Business Analytics Dashboards in the online searchable help.

ADMINISTRATOR IMPACT

- Administrators will need to configure user profiles and user roles with the appropriate Business Analytics permissions.
- **Important Note:** Customers that have been using the beta version of the Business Analytics Dashboard will need to recreate their reports for the 19.1 release.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Updates to New Shopping Experience

In the last few releases we have been updating our shopping cart and checkout user interfaces to streamline, simplify, and modernize the user shopping experience.

In 19.1, the development of the new shopping experience continues. We have added simple search, advanced search, and non-catalog item entry tabs to the search field on the Shopping Home page and dashboards, making it easy to switch between search options. Go to and Browse links have also been added to provide access to additional items.

Comments, code favorite options, and PO clause functionality has been added. Multiple updates to the shopping, cart and checkout pages include:

- A full Product Details view in search results.
- Prompts during checkout that direct users to the appropriate area to complete required information.
- Enhanced shipping and billing address selection.
- The ability to override a line-level shipping address.
- Improvements to the non-catalog item overlay.




Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default for users who have enabled the new shopping experience.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

The New Shopping Experience has been updated with these changes:


Search

- **SIMPLE** and **ADVANCED** tabs have been added to the top of the search field that allows users to toggle between simple and advanced search pages. To support accessibility, a blue dot on the Advanced tab indicates that there is content in the advanced search fields.
- A **NON-CATALOG ITEM** tab has been added to the top of the search field. Refinements have been made to the overlay that include automatically finding catalog matches for a product being entered, an updated item detail section and supplier selection options.
- The **Go to** and **Browse** shortcut links have been added to the simple and advanced search fields, providing quick access frequently used features such as favorites or forms. The links are displayed as text above the field on a wide screen, and collapse into an actions icon  with a drop down menu on narrower screens.
- **Search results** have been updated:
 - Searches with a single results automatically open to the Details view.
 - New list  and grid  icons in the search results allow users to switch between a list view and a sticker view.
 - Search filters display supplier class icons in the By Product Flag, By Supplier and By Supplier Class search filters, and next to the supplier names in the search results. The first four supplier class icons are shown, with an ellipsis (...) displayed if there are more. Users can hover over the icons to see all the icons attached to the supplier.
 - On recommended search items, an **Add and Checkout** option has been added to the ADD TO CART button that will take users directly to the Checkout page where they can purchase their items without going through the search results pages.
 - The **Check Availability** functionality has been added, and the Live Price functionality has been updated.

Shopping

- The **Details view** has been expanded to a full page overlay. Updates include an auto-complete type ahead for the item descriptions link and an option to **add the item to another cart/PR/PO**.

Checkout

- The **Accounting Codes** panel in the Checkout page has been updated. A **Code Favorites** link has been added to the Accounting Codes panel, at header level and line level. It displays a list of accounting codes designated as the logged-in user's favorites. An auto-complete type ahead has been added to the code input fields. Users can begin typing a search term and the system will display a drop down menu that shows possible results that match the entered values.
- The **Bill To** and **Ship To** address windows have been redesigned. Users can remove personal addresses and we have added the ability to copy line level shipping addresses to other lines.
- **Comments** have been added to the checkout page. Users can click the Comments icon  in the top right corner of the Checkout page to provide comments for the cart/requisition as well view comments added by approvers for returned requisitions.
- **PO Clauses** can be set at all levels. On the header or on line items, users can click the Edit/View details link next to PO Clauses to open a window and select clauses.
- **Error and warning messages** are now displayed on the Checkout sidebar. Users can click on a message to open the area, make changes and save corrections.

ADMINISTRATOR IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Business Unit Added to PR Import

We've added the ability to incorporate the business unit into the purchase requisition import. If the requestor or Prepared By user has access to the business unit, and the business unit is included on the PR import, the requisition will use the correct document format assigned to that business unit.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default but use is optional.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

This feature does not impact users.

ADMINISTRATOR IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

- A new optional **Business Unit** tag has been added to the PR Import XML. If completed, it will validate fields and use the document configuration associated with the business unit provided. If the field is *not* completed, the document configuration will be based on the business unit of the Requestor or Prepared By user, if the requestor or Prepared By user has access to the business unit.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

This feature does not impact suppliers.

PO Workflow Validation Enhancements

In 18.3 we added the ability to have a PO validation workflow step. This included functionality that allows the system to be able to accept attachments through the validation, and each incoming document was attached to the PO.

For 19.1, we have updated this feature so that if an attachment has the same name as one that already exists on the PO, the previous document will be replaced with the new one. If multiple signatures are needed, this will result in one final document with all the required signatures.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default.

- New Permissions related to this feature:
- New Notifications related to this feature: None

USER IMPACT

During PO Validation, if an attachment is received that has the same name as an attachment already on a PO, it replaces the existing attachment with the new one. If multiple signatures are needed, this will result in one final document with all the required signatures.

ADMINISTRATOR IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

PO Export has been updated for this feature.

Supplier Impact

This feature does not impact suppliers.

Mapping Sets Renamed

Mapping Sets has been renamed to **Taxonomy Sets** to provide users with a more accurate description of the feature.

Customer Impact



- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

The term "Mapping Sets" has been replaced with "Taxonomy Sets".

ADMINISTRATOR IMPACT

The term "Mapping Sets" has been replaced with "Taxonomy Sets" in the following locations. The functionality has not changed.

- This navigation path has changed:
 - Previously: Setup  > Hosted Catalog and Ordering Configuration > Category and **UOM Mapping Sets** > Mapping Sets.
 - Has been changed to: Setup  > Hosted Catalog and Ordering Configuration > Category and **UOM Taxonomy Sets** > Taxonomy Sets.
- Header names on the left and right panels of the Mapping Sets page have been changed from "**Mapping Sets**" to "**Taxonomy Sets**" and the "**Hide Mapping Sets**" button is now "**Hide Taxonomy Sets**".
- Names have also been changed in Field Management.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Cardholder Data Purge

For organizations that use credit cards as a possible payment method, expired cardholder data will be purged from our systems 30 days after cards expire. Card numbers will be obfuscated after the retention period by masking all but the last four digits of the account number.

Customer Impact

- Related Solutions: eProcurement, Accounts Payable
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

Expired cardholder data is purged from our systems 30 days after cards expire.

- After card data has been purged, the full card number is no longer available. Card numbers will be obfuscated after the retention period by masking all but the last four digits of the account number. Users will see the "masked" card number in the application, on all integration messages and distribution documents.
- If a purged credit card is attached to a user profile:

- The card will no longer be able to be used in the application. An indicator on a user profile that shows card is expired and there is no option to add a card.
- The card will not be applied to new purchases if set as the default card.
- A purged card number cannot be edited. Users will need to remove the card from their profile and add a new one.
- If a purged credit card is attached to a supplier profile card:
 - Expired card numbers will be obfuscated on the supplier profile card (ghost card) and will not be applied to new purchases.
 - Credit card data *can* be updated on supplier profiles.
- If a purged credit card is on a requisition, purchase order, or sales invoice card:
 - A message is sent to the user indicating the card data is removed.
 - For documents in draft or pending approval status, document configuration will control whether or not document can proceed based on rules for credit cards set by the organization.

ADMINISTRATOR IMPACT

Cardholder data will be purged from our systems thirty days after cards expire.

- After expired card data has been purged, the full card number is no longer available. Card numbers will be obfuscated after the retention period by masking all but the last four digits of the account number. The CV2 code will be removed. Users will see the "masked" card number in the application, on all integration messages and distribution documents.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

PCI-Compliant Fax Provider

For organizations that send orders to suppliers via fax, purchase orders that include credit cards will be distributed using a PCI-compliant fax provider.

Customer Impact

- Related Solutions: eProcurement, Accounts Payable
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

This feature does not impact users.

ADMINISTRATOR IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Ability to Provide Translations for Commodity Code Descriptions

Customers can configure a list of commodity codes for use in their organization's business processes. Commodity codes can be associated with a supplier from within the organization, or by the supplier in the Customer's Branded Portal.

By default, commodity codes are displayed to suppliers in the Branded Portal in the language loaded into the customer's system, as each list is specific to the customer organization. This means that, by default, if a customer organization has an English list loaded into the system, supplier users will see the list in English, regardless of their selected language in the Branded Portal.

With this release, however, customers can provide translations for each of their Commodity Code values and descriptions, so that suppliers can see translated text when viewing the list of commodity codes. The import and export of commodity code values also supports including translations. Users will continue to see the organization's default language for Commodity Codes for values that are not translated, or if the user's language has not been translated by the organization.

Note: Commodity Code translations can be managed by any customer with the JAGGAER eProcurement solution. **Customer Branded Portals** can be configured by customers

with any of the following solutions: Supplier Management, Accounts Payable, Sourcing, Contract Lifecycle Management.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default but must be configured by an administrator
- New Permissions related to this Feature: None
- New Notifications related to this feature: None

USER IMPACT

- If configured by the customer, **Commodity Code** values and descriptions will display in the logged-in user's language associated to the user's profile:
 - In the supplier profile (**Suppliers > Search for a Supplier > Supplier Profile > About > General**).
 - In supplier search results (filter options).
 - In the Proxy view of Supplier Registration.
 - When reviewing supplier profile changes (Accept/Decline Pending Review).
- If a translation is not configured for the user's logged in language, the value and description will display in the customer's default commodity list language.

ADMINISTRATOR IMPACT

- A new **Commodity Translations** page is available to enter Commodity Code and Description translations:
 - Navigate to **Setup > Hosted Catalog and Ordering Configurations > Category, Commodity and UOM Taxonomy Sets** and select the **Commodity Code** page from the **Default Mapping** list.
 - The organization list of Commodity Codes and Descriptions is displayed. Users can search by Commodity Code or Description to find a particular value to translate.
 - Select the **Edit** button for the Commodity Code and/or Description to be translated. In the overlay, select the language and enter the translation text.
 - The languages available are determined by the organization settings.
- The **Import/Export** page for Commodity Codes contains a new **Type** of request for **Commodity Values**.
 - To generate an **Export** file for review and updating:
 - Under the **Request** section, select **Commodity Translations** as the **Type**.
 - In the **Action** dropdown, choose **Export**.
 - Enter a **Description** for the export.

- Click **Submit**.
- When the export is completed, the file will be accessible in the **Recent Activity** on the right. You may need to click the **Refresh the Screen** link in the upper right to see an updated status of the export request.
- The Export file is the format for importing Commodity Code translations in bulk. There is no template for **Commodity Code translations**. You must first perform an export and make edits within the Excel file before importing. The file contains a Commodity Code and Commodity Description worksheet. The fields are as follows:
 - **Identifier (read only)** - This is the internal system code used to identify the commodity code. The column is read-only and you should not make changes to the values in this column.
 - **Default (Read only)** - This column lists the default language content for the commodity code. If no translations are provided, this is what all users will see, regardless of their language selection.
 - Language options per column - Each remaining column is a language supported by the organization. Enter the translated content for the code or description in the appropriate language column.
- To **Import** a Commodity Translations file:
 - Under the **Request** section, select Commodity Translations as the **Type** of validation or import file.
 - To update commodity code translations, choose **Commodity Translations**.
 - Choose the **Action**:
 - **Validate**: You may choose to Validate the file only. This will analyze the file for any errors and provide a file with errors and warnings. After validation is complete, you have the option of importing information that did not error.
 - **Import**: You may choose to Import the file without validation. If there are no errors or warnings associated with the import, no Errors/Warnings file is provided.
 - Enter a **Description**. The Description field is required. Enter text that describes the type of validation or import you are performing.
 - Browse and choose the **File Name**. Select the file name with the information you need to import.
 - Click **Submit**.
 - The page refreshes, and your request is "Pending" in the **Recent Activity** section of the Import/Export tab. Choose the **Refresh this Page** link to refresh the screen and view the status of your request until you see it is Completed.

- If you chose to Validate the import file, a Validation file is created noting any rows with errors, warnings or duplicates. Click the file to open and review any errors that you may want to correct and re-validate the file. If you would like to import the file you validated (the information that did not error or generate a warning), choose the **Click to import...** link to import the file. The data that contained errors, warnings or duplicates will not be included in the import.
- If you chose to Import the file without first validating, you will see the validation file link only if errors or warnings were identified during the import process. If no errors or warnings were detected, no validation file is generated.
- Once you see that the Import has a status of **Completed**, the commodity values or translations have been updated.

INTEGRATION IMPACT

- This feature does not impact integration.

ADDITIONAL KEY POINTS ABOUT THE FEATURE

- The **History** for the Commodity Code page will capture changes made related to translations.

Supplier Impact

If configured, suppliers searching for commodity codes in the Customer Branded Portal will see values and descriptions in the translated value for their logged in language. If the customer does not configure a translation for the user's logged in language, the value and description will display in the customer's default commodity list language.

Contract Compliance Tracking

Contract Compliance Tracking Enhancements

In 19.1, the following enhancement in Contract Lifecycle Management also affects Contract Compliance Tracking:

Total Contract Value

Please refer to the Contract Lifecycle Management section for information about this enhancement.

Accounts Payable

The following Accounts Payable features have been added or updated with 19.1.

Global eInvoicing

In 19.1, JAGGAER Indirect supports Global eInvoicing compliancy requirements under a new **Global Invoicing** license. In this release there will be support for B2B eInvoicing legislation requirements mandated in the European Union (excluding Italy and Portugal), Asia Pacific and the Middle East.

Please contact JAGGAER for more information about this feature and the specific countries that are supported.

New Multi-Check Requests

In 19.1, a new **Multi-Check Request** form allows users to create check requests with multiple line items on the same form by using a "Save and Add Another" option. For example, a user who is submitting expenses for a trip could add line items for car rental, hotel rental and food expenses on one multi-check request.

There is no limit to the number of forms that can be added, and edit options allow users to make changes to individual forms prior to submitting the request for approval.

Customer Impact

- Related Solutions: Accounts Payable
- Feature Activation: This feature is **ON** by default but workflow must be enabled by JAGGAER. Administrator setup also required. Please contact JAGGAER to set up the workflow for this feature.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- A new **Multi-Check Request** form provides a **Save and Add Another** option, so that users can create a check request with multiple line items on the same form:
 - Multi-check requests are identified by **Multi-Check Request** listed as the form **Purpose**.
 - Multiple forms are added to a multi-check request by selecting **Save and Add Another** on the **Review and Submit** page. When selected, the completed form

is saved and the user is returned to the first step of the wizard (the **Details** page) with a new, blank form and editable fields.

- There is no limit to the number of additional forms that can be added to a multi-check request. They are all tied to the same form number.
- A new **Check Requests** section is displayed in the left menu of multi-check requests. It shows each form that has been added to the request.
 - Forms are listed in the order in which they were added. Columns show each form's **Description** and **Amount**.
 - An **Edit** button next to each form allows users to change individual forms. Clicking **Edit** opens the form in a new window, where content can be changed and saved by clicking **Save Progress** or **Save and Close**. Once the multi-check request has completed the approval workflow, the save buttons are not displayed and the Edit button changes to "View".
 - The last form that was added is in bold and does not have an Edit button, because it is open.
- In the **Supplier Invoice Number** field on the **Questions** page, users can change the supplier number on each form added to the request. The field may or not be required, based on the template settings. If the field is not required, users can leave this field blank.
- On the **Review and Submit** page:
 - The **Submit** button has two options:
 - **Save and Add Another** is second option in the drop down under Submit. If selected, the completed form is saved and the user is returned to the first step of the wizard (the **Details** page) with a new, blank form and editable fields. Subsequent additions will add new forms to the request with the same form number.
 - **Submit** sends the multi-check request into the approval workflow.
 - The **Add to Favorites** button on this page also allows users to save multi-check requests to their Favorites.
 - Once a multi-check request is submitted into the approval workflow, fields on the forms are still editable. If field values on forms are changed while the multi-check request is in workflow, the updated values will be copied over to the invoice.
 - The system will create a separate invoice for each form on a multi-check request. The invoice number is displayed in the sticker area of each form within a multi-check request (the top left corner of the page).

- **Other things to note**

- Selecting **Discard Request** from Request Actions will discard only the form being edited at the time. The forms already saved will be retained. If there is only one form, it can be discarded and the entire multi-check request will be deleted. The Discard option is only displayed if the request is in Incomplete status. It is displayed in the Edit window for each child form, but not on the parent form.
- **Multi-Check Request** has been added to **Document Search**. The Form Purpose column indicates if a document is a multi-check request. When a user clicks on a name, it opens the parent multi-check request, and its associated forms can be accessed from the Check Request page.

ADMINISTRATOR IMPACT

- New **Multi-Check Request** templates must be created and workflow must be set up to use this feature.
- Create a multi-check request template as follows:
 1. Navigate to **Administer > Shopping Settings > Manage Request Templates**.
 2. Click **Build a New Request Template**.
 3. In the **Purpose** field, select **Multi-Check Request**.

Note: The form Type is "Check Request" or "Credit Memo", the form Purpose is "Multi-Check Request".

4. Configuration of Multi-Check Request templates is similar to Check Request templates with these differences:
 - The **Request Purpose** search filter on the **Manage Request Templates** page has been updated to include a Multi-Check Request search option.
 - On the **Supplier Invoice Number** field (under Questions), the **Response Is Required** checkbox is editable. If the checkbox is blank on the template, users can leave the field blank when they submit a request. Validation prevents users from entering duplicate values for a supplier.

Note: The Supplier Invoice Number is *not* editable on check request templates and this does not change.

- Please contact JAGGAER to set up the **Form Request Workflow** to accommodate Multi-Check Requests.
 - JAGGAER will also need to configure workflow for multi-check requests if your organization uses standard workflow, or if a new workflow step is required.

- Organizations that use ADW can set up the following rules on an existing ADW workflow step:
 - The **Form Purpose** ADW rule has a **Multi-Check Request** (document-level) option that triggers when the purpose of the form request is Multi-Check Request.
 - The **Template Questions** ADW rule shows questions from multi-check request templates. See also [Check Request Form Request Questions Added to Invoice Workflow](#).

INTEGRATION IMPACT

- Import/export has been updated to accommodate multi-check requests.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

This feature does not impact suppliers.

Supplier Section Updated on Check Requests

In 19.1, the Supplier section of check requests and credit memo requests has been updated:

- The **Supplier** field search options have been updated so that users can use the type ahead or supplier search to find suppliers, or manually enter a supplier name.
- The **Remit-To Address** field on the **Supplier** page now automatically populates with the primary fulfillment address of the selected supplier. Users can select alternative Remit-To addresses from a drop down list.
- For organizations with TSM, a **Payment Method** field has been added to the **Supplier** page. It shows the supplier's payment method Title and Type, including multiple payment methods if there is more than one attached to a Remit-To address.

Customer Impact

- Related Solutions: Accounts Payable
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

These updates have been made to Supplier page of check request and credit memo requests:

- The **Supplier** field search options have been updated so that users can use the type ahead or supplier search to find suppliers, or manually enter a supplier name.
- Once a supplier is selected, the **Remit-To Address** field on the **Supplier** page now automatically populates with the primary Remit-To address of the selected supplier. Users can select alternative Remit-To addresses from a drop down list. The addresses displayed will abide by Restrict by Business Unit settings for organizations and suppliers. If a Remit-To address becomes inactive, a message will ask the user to select a different (active) address when they select the form. If there are no active Remit-To addresses, the page refreshes with fields for manual address entry and users can enter a new address.
- For organizations with TSM, a **Payment Method** field has been added to the **Supplier** page. It shows the supplier's payment method Title and Type, including multiple payment methods if there is more than one attached to a Remit-To address.

ADMINISTRATOR IMPACT

This feature does not affect administrators.

INTEGRATION IMPACT

This feature does not affect integration.

Supplier Impact

This feature does not impact suppliers.

Question Attachments Updated on Check Requests

In 19.1, a new setting on Check Request and Credit Memo Request templates can be used to define whether attachments to **File Upload** types of questions are copied to the **Internal Attachments** section on the invoice generated from the request.

Customer Impact

- Related Solutions: Accounts Payable
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- The **Questions** section has been updated so that attachments on **File Upload** types of questions are copied to the **Internal Attachments** section on the invoice generated from a request if the notice "This attachment will be copied to the invoice" is displayed under the attachment. If the notice is not displayed, attachments to that question will not be uploaded to the invoice.

ADMINISTRATOR IMPACT

- On Check Request and Credit Memo Request templates, a new **Add to Invoice** checkbox has been added to **File Upload**-style questions. It determines if attachments to the question are copied to the Internal Attachments section on the invoice generated from the submitted request.
- When adding a question to a check request or credit memo request template, and a Response Type of **File Upload** is selected, the **Add to Invoice** checkbox is displayed.
 - **If the checkbox is selected** - Any attachments uploaded to the question will be copied to the Internal Attachments section of the generated invoice. A notice on the check request or credit memo request form indicates to users that "This attachment will be copied to the invoice". The checkbox is selected by default.
 - **If the checkbox is not selected** - Any files uploaded to the question will not be copied over to the generated invoice. There is no notice on the question.
- Existing File Upload questions on templates will have the Add to Invoice checkbox unchecked (blank) by default.
- If the attachment is changed after a check request is submitted to workflow, the new version will be transferred to the invoice.
- On the invoice, only PDF files in **Attachments** section are selected as the invoice image.

INTEGRATION IMPACT

This feature does impact integration.

Supplier Impact

This feature does not impact suppliers.

Check Request Questions Added to Invoice Workflow

Currently, invoice workflow can be configured so that when an invoice is generated from a Procurement Request, its questions and answers can be evaluated in invoice workflow to help route the invoice generated from the request.

In 19.1, a new **Check Request Form Request** ADW rule now provides this ability for Check Requests to provide greater routing and workflow options for capturing invoice documents in workflow.

Customer Impact

- Related Solutions: Accounts Payable
- Feature Activation: This feature is **ON** by default but optional for use. It can be enabled by an organization administrator for organizations that use ADW. If your organization uses standard workflow, or if new workflow step is required, please contact JAGGAER.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

This feature does not impact users.

ADMINISTRATOR IMPACT

- A new **Check Request Form Request** ADW rule has been added to **Invoice Workflow** and can be used to route invoices generated from check requests based on answers to questions on a Check Request template.
- Organizations that use ADW can set up the new rule in an existing ADW workflow step on **Invoice Workflow Setup**. If your organization uses standard workflow, or if a new workflow step is required, please contact JAGGAER to have the rule set up.
- To set up the rule:
 - a. Go to **Setup > Workflow Setup > Invoice Workflow Setup**.
 - b. Click the **Advanced Dynamic Workflow** tab and open a rule for editing.
 - c. Under **Line-Level** rules, select **Form Data**, and select the **Check Request Template Questions** option. A list of Check Request templates that can be selected and their questions are listed in the available fields.

Note: The Template Questions option shows questions from Procurement Request templates.

- d. Select a **Template Title** and **Question**, then complete additional fields and save your changes.
- The Standard (Description) and Text (Multi-line) types of questions are not available for selection on the rule.

- Validation occurs for incorrect values or missing information. Also, if a check request template question is changed while a check request is in draft mode, a message is displayed at the top of check requests in progress requesting user to update question information.

INTEGRATION IMPACT

- Import/export has updated to accommodate the **Check Request Form Request** rule.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

This feature does not impact suppliers.

Check Request Form Types Updated in Workflow

In 19.1, the form type of line items on invoices generated from check requests, multi-check requests, and credit memo requests has been updated so that check requests are routed through workflow as expected.

Customer Impact

- Related Solutions: Accounts Payable
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

This feature does not impact users.

ADMINISTRATOR IMPACT

The form type of line items on invoices generated from check requests, multi-check requests, and credit memo requests has been updated so that they are routed through workflow as expected. Now, when an invoice has been created from one of these types of form requests, the ADW rule or static workflow rule for Form Type will trigger.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

New AP Configuration Setting

In 19.1, a new **Prevent Receipt Submission if PO Line Cancelled** setting has been added to the Configure AP Settings page that allows organizations to prevent receipts from being created if the associated PO has been cancelled.


Customer Impact

- Related Solutions: Accounts Payable
- Feature Activation: This feature is **OFF** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- If the new AP Configuration setting is enabled, if the PO for any line on a receipt has been cancelled, the Complete button is disabled and a receipt cannot be created.

ADMINISTRATOR IMPACT

- Enable the new setting as follows:
 1. Navigate to **Accounts Payable**  > **AP Administration** > **Configure AP Settings**.
 2. Under the **Accounts Payable Settings** sub-heading, select the **Prevent Receipt Submission if PO Line Cancelled** checkbox to stop receipts from being created if a PO has been cancelled. When the checkbox is selected, if the PO for any line on a receipt has been cancelled, the Complete button is disabled and a receipt cannot be created. When the checkbox is blank, it is possible to create receipts when a PO has been cancelled.
- On quantity receipt lines, a warning will indicate that the PO Line has been cancelled.
- Changes are recorded in history.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Contract Lifecycle Management Enhancements

The features listed in this section apply to the JAGGAER Indirect Contract Lifecycle Management solution.

Send and Receive Messages to and from Supplier Portal

With this release, buyer users have the ability for communications, including attachments, to appear in the contracts area of the supplier portal without having to email recipients.

Additionally, suppliers can send communications, including attachments, to buyers from the portal without having to email recipients. Supplier users must have the Contracts permission in order to view contracts, and thus send messages.

Contract communications on the Communication Center page are now differentiated between internal and external to facilitate this change.

Internal communications do not appear on the supplier portal. Users have the option to send these communications to other internal users, but they are not be able to send them to supplier users or email addresses.

External communications appear on the supplier portal. If the supplier does not have portal access when the communication is sent, but later gets access, previously sent external communications will automatically appear there.

Users can optionally enter recipient email addresses for sending the communication externally. They are also able to add internal user recipients.

Customer Impact

- Related Solutions: Contract Lifecycle Management
- Feature Activation: This feature is **On** by default but optional for use.
- New Permissions related to this feature: None.
- New Notifications related to this feature: **Notification Preferences > Contracts > New Contract Communication.**

USER IMPACT

- The **Communication Center** page on contracts is now organized into Internal and External tabs.

- On the **Internal** tab, click the **Add Internal Message** button to create internal communications.
- On the **External** tab, click the Start **External Communication** button to create external communications.
- All Communication Center conversations from prior to the 19.1 release appear as internal communications on the Communication Center page.
- If an email address is not included in an external communication, the supplier will still see the communication on their supplier portal.
- Users who are part of a conversation as selected users or through email receive email notifications.
- Explicit contract managers, explicit stakeholders, and portal users get the new **New Contract Communication Notification** notifications only if they opt into the notification and they were not already a part of the conversation (as selected users or through email).

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

Supplier users with the Contracts permission can send communications, including attachments, to buyer users from contracts on the supplier portal.

External communications sent from the buyer appear on the supplier portal. If the supplier does not have portal access when the communication is sent, but later gets access, previously sent external communications will automatically appear there.

Total Contract Value

When enabled for the contract type, users can now enter a value on the contract header of their contracts. The entered value on an original contract becomes the total contract value, and each amendment or renewal of that contract increases or decreases the total contract value.

This allows users to report on the value at the contract version level, as well as the total value of all versions.

The contract information displayed on the left side of a contract includes the total contract value. The Contract Family page of a contract displays the accumulated total of contract versions, and the value of each version.


Customer Impact

- Related Solutions: Contract Lifecycle Management, Contract Compliance Tracking
- Feature Activation: This feature is **Off** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

USER IMPACT

- The **Value** field appears on the contract header of contracts using contract types with Total Contract Value enabled.
- Navigate to the **Contract Family** page on contracts to see the value for all contract versions.
- When copying a contract that has the **Value** field populated, the new contract will use the value amount from the copied contract. Users can then change the value, which will update the Total Contract Value.
- When creating a contract from a template that has the **Value** field populated, the new contract will use the value amount from the template. Users can then change the value, which will update the Total Contract Value.
- When creating an amendment from a contract that has the **Value** field populated, the new value is set to zero. Users can then change the value, which will update the Total Contract Value.
- When performing a contract renewal for a contract that has the **Value** field populated, the new value is set to zero. Users can then change the value, which will update the Total Contract Value.
- Users can search contracts by contract value and contract total value on the **Search Contracts - Advanced** page, under the new Contract Value heading.
- The Value field can be updated by CSV and XML imports. Total Contract Value cannot be imported or changed via import. Exports include both the Total Contract Value and Value fields.

ADMINISTRATOR IMPACT

- To enable the **Value** field for a contract type:
 - Navigate to **Contracts**  > **Contract Administration** > **Contract Types**.
 - Select a contract type from the list or create a new contract type.
 - Select **Yes** for **Show Total Contract Value**.
 - Click **Save Changes**. Contracts of this contract type now include the Value field on the contract header.

INTEGRATION IMPACT

- **Important!** If an organization uses contract import or export files to integrate with other internal systems, these changes may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.
- The Value field can be updated by CSV and XML imports. Total Contract Value cannot be imported or changed via import. Exports include both the Total Contract Value and Value fields.

Supplier Impact

This feature does not impact suppliers.

Obligation Enhancements

With this release, several enhancements have been made to the **Obligations Across Contracts** report to make managing obligations easier and faster for users.


Users are now able to select and update multiple obligations on the report at once, including marking them as complete and changing first party owners and first party stakeholders.

Additionally, users can now export the report. The report also now includes first party stakeholders.

Customer Impact

- Related Solutions: Contract Lifecycle Management
- Feature Activation: This feature is **On** by default but optional for use.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

USER IMPACT


- All existing logic as to who and when an obligation can be marked complete or have its first party owners and first party stakeholders edited remains the same as making the changes on the obligations individually.
- If a contract is checked out by someone other than the person making the change, the change will not be successful. The contract must be either not checked out or already checked out to the person making the change.
- To update multiple obligations at once:
 - Navigate to **Contracts**  > **Reports** > **Obligations Across Contracts**.
 - Obligations can be selected and deselected using the checkboxes beside each one on the report. Options to **Select All** and **Deselect All** are also available.
 - Click the **Actions** dropdown button and select **Mark as Complete** or **Change Owner/Stakeholder**.
 - If you select Mark as Complete, the Mark as Complete pop-up opens.
 - Enter a completed date, and optionally enter notes and attachments.
 - Click Mark as Complete. The Obligation is marked as complete.
 - If you select Change Owner/Stakeholder, the Change Owner/Stakeholder pop-up opens.
 - Select to change either **First Party Owner** or **First Party Stakeholder**.
 - Select the action to perform, either **Add**, **Reassign**, or **Remove**. Depending on the action you select, additional fields will appear to search for and select the users to change.
 - Click **Change**. The obligation is updated.
- If a user selects multiple obligations, and some can be marked as complete, but others cannot, the successful ones will be marked as complete and the others will not. A message will appear notifying the user that there were unsuccessful obligations.
- Some obligations require documentation in order to be marked as complete. If a user selects multiple obligations, and one or more requires documentation, the user is notified, and the **Attachments** field becomes required.

Note: The attachment is added to all the obligations being updated. If the user does not want this, they should only select those obligations that need the specific file.

- If a user selects multiple obligations, and one or more has invoice is intended when the obligation is complete, the user is notified that the Create Invoice action is not available. However, they can continue to mark the obligation as complete, and the

Note field will be required.

Note: The note is added to all the obligations being updated. If the user does not want this, they should only select those obligations that need the note.

- To export the report:
 - Navigate to **Contracts**  > **Reports** > **Obligations Across Contracts**.
 - Filter the report as required.
 - Click **Export**. The Export Request overlay displays.
 - Enter a note for the export and click **Submit**. The export request is submitted and can be downloaded from the **Contract Import/Export Results** page, as with other reports.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Add Ad-Hoc Approvers to Contract Approval Workflow

With the 19.1 release, administrators can enable the ability for users to designate ad-hoc approvers for contracts.

When this feature is enabled, users with the new **Add Ad-Hoc Approver for Contract Approvals** permission can designate an ad-hoc approver for contract approval. This allows users to gain approval from people not normally involved in the approval process.

Contracts must be in Pending Approval status and ad-hoc approvers must have the new **Perform Contract Ad-Hoc Approvals** permission.

Customer Impact

- Related Solutions: Contract Lifecycle Management
- Feature Activation: This feature is **Off** by default but can be enabled by an organization administrator.

- New Permissions related to this feature: **Approvals > Contract Approvals > Add Ad-Hoc Approver for Contract Approvals** and **Perform Contract Ad-Hoc Approvals**.
- New Notifications related to this feature: **Notification Preferences > Contracts > Contract Pending Workflow Ad-Hoc Approval**.

USER IMPACT

- To select an ad-hoc approver for a Pending Approval status contract:
 - The contract must be assigned to the current user. Click the **Contract Actions** dropdown and select **Assign to Myself** to do so.
 - Click the **Contract Actions** dropdown and select **Add Ad-Hoc Approver**. The Add Ad-Hoc Approver overlay displays.
 - Search for and select an ad-hoc approver and add comments.
 - Click **Save**. The user is made an ad-hoc approver on the contract.
- Ad-hoc approvers can make approvals via the **My Approvals** page, or by clicking the **Contract Actions** dropdown on the contract and selecting **Approve**.
- Ad-hoc approvers can opt into ad-hoc pending approval notifications under **Notification Preferences > Contracts > Contract Pending Workflow Ad-Hoc Approval**.
- Users can search for contracts with ad-hoc approvers on the Search Contracts - Advanced page by selecting the With Ad-Hoc Approvals status flag.

ADMINISTRATOR IMPACT

- To enable this functionality:
 - Navigate to **Setup > Workflow Setup > General Workflow Settings**.
 - Under the **Workflow Options** heading, enable **Allow users to add ad-hoc approvers for contracts**.
- Once this ability is activated, two new permissions become available:
 - **Add Ad-Hoc Approver for Contract Approvals** - Users with this permission can add an ad-hoc approver to a contract.
 - **Perform Contract Ad-Hoc Approvals** - Users with this permission can be used as an ad-hoc approver in contract workflow.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Ability to Complete Contracts Pre-Expiry

With this release, users with the appropriate access can end contracts in Executed: In Effect status before their set expiry dates.

This allows users to complete contracts in cases where all parties have agreed work has been completed early, but the End Date has not yet occurred.

Customer Impact

- Related Solutions: Contract Lifecycle Management
- Feature Activation: This feature is **On** by default but optional for use.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

USER IMPACT

- Only contracts in Executed: In Effect status can be completed early.
- To end a contract before its set expiry date, click the **Contract Actions** dropdown and select **End Contract Early**.
- Contracts that are ended early are changed to Expired or Complete status, depending on organization settings. The end date remains unchanged.
- On contracts that are ended early, if a user extends the expiration date, the contract is no longer considered ended early.
- Users can search for contracts ended early on the **Search Contracts - Advanced** page using the **Contract Ended Early** dropdown.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Prevent Deletion of Draft Contracts

With this release, organizations now have the option to prevent deleting draft original contracts. Draft amendments and renewals can still be deleted with this option. This allows customers to preserve the work that has gone into draft contracts.

Additionally, drafts of original contracts can now be archived. Amendments and renewals cannot be archived. This allows customers to remove the drafts from appearing in their everyday processes, such as contract searches.

Organization administrators have the ability to turn on the prevention of deleting draft contracts on the General Contract Settings page. Additionally, the new **Allow Delete Draft Contracts** permission is available to allow for the deletion of draft contracts for organizations that prevent deleting draft contracts by default.


Customer Impact

- Related Solutions: Contract Lifecycle Management
- Feature Activation: This feature is **Off** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: **Contracts > Contracts Permissions > Allow Delete Draft Contracts**.
- New Notifications related to this feature: None.

USER IMPACT

- If an administrator has prevented deleting draft contracts, users will be unable to delete draft contracts unless they have the **Allow Delete Draft Contracts** permission.
- To archive a draft contract, click the **Contract Actions** dropdown on the contract and select **Archive**. The contract is archived.
- To un-archive a contract, click the **Contract Actions** dropdown on the contract, and select **Un-Archive**. The draft contract is restored.
- Users cannot assign a contract facilitator on an archived draft contract. If a contract facilitator is already assigned, it will remain, but you cannot reassign or unassign a contract facilitator on an archived contract.
- Archived draft contracts do not appear in contract search unless the user chooses to include archived contracts.
- Original draft contracts can be archived/un-archived via CSV import. Draft amendments and renewals cannot be archived. Draft contracts cannot be archived/un-archived via XML import.

ADMINISTRATOR IMPACT

- To prevent the ability to delete draft status contracts:
 - Navigate to **Contracts**  > **Contract Administration** > **General Contract Settings**.
 - On the **General** tab, under the **Draft Contracts** heading, select **Yes** for **Prevent the ability to delete draft contracts**.
 - Click **Save Changes**.
- If you have prevented the ability to delete draft contracts, the new permission **Allow Delete Draft Contracts** will become available. It is disabled for users by default.

INTEGRATION IMPACT

- **Important!** If an organization uses contract import or export files to integrate with other internal systems, these changes may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.
- Original draft contracts can be archived/un-archived via CSV import. Draft amendments and renewals cannot be archived. Draft contracts cannot be archived/un-archived via XML import.

Supplier Impact

Archived contracts do not appear on the supplier portal.

Ability to Schedule Contract Terminations in Advance

Previously, terminating a contract occurred as soon as a user selected the terminate option on a contract. With this release, users can schedule contracts to be terminated in advance.

Only contracts in Executed: In Effect or Executed: Future status can have scheduled terminations.

On contracts scheduled for termination, user actions such as amending or renewing prompt the user with a notification asking if they want to proceed. If they do proceed, the scheduled termination is removed.

For contracts with auto renewal, the scheduled termination date must occur before the auto renew creation date, and before the contract end date.

Customer Impact

- Related Solutions: Contract Lifecycle Management
- Feature Activation: This feature is **On** by default but optional for use.

- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

USER IMPACT

- To schedule a contract termination in advance:
 - Navigate to the contract. It must be in Executed: In Effect or Executed: Future status.
 - Click the **Contract Actions** dropdown and select **Terminate**. The Terminate Contract overlay opens.
 - For the **Is the termination effective immediately?** option, select **No**.
 - Select the **date and time** to terminate the contract.
 - Enter an explanation for termination the contract.
 - Click **Schedule Termination**.
- Users can access options to change or cancel a scheduled contract termination by clicking the **Contract Actions** dropdown on the contract, and selecting **Update/Cancel Termination**.
- Contracts retain their status when a termination is scheduled. Users will see a warning message at the top of the contract.
- For statuses other than Executed: In Effect and Executed Future that allow terminations, users do not have the ability to schedule a termination.
- Copying a contract scheduled for termination does not copy the scheduled termination date.
- Users can search by scheduled termination date on the **Search Contracts - Advanced** page.
- Contract CSV and XML imports can also be used to schedule and change terminations. Cancelling scheduled terminations is not available via import.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- **Important!** If an organization uses contract import or export files to integrate with other internal systems, these changes may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.
- Contract CSV and XML imports can also be used to schedule and change terminations. Cancelling scheduled terminations is not available via import.

Supplier Impact

This feature does not impact suppliers.

Change or Add eSignature Signers without Repeating Workflow

With this release, users can reset the eSignature process on a contract once it has been sent out to be signed. They can then change or add eSignature signers and restart the process.

This allows customers to adjust eSignature signers without repeating the workflow approval process.

Customer Impact

- Related Solutions: Contract Lifecycle Management
- Feature Activation: This feature is **On** by default but optional for use.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

USER IMPACT

- To change eSignature signers on contracts in Out for Signature status:
 - On the contract, click the **Contract Actions** dropdown and select **Reset Signature Process**. The contract status changes to Pending Approval and signature tracking is reset.
 - Click **Contract Actions** and select **Check out for eSignature Changes**.
 - A pop up opens to confirm you want to check out the contract for eSignature changes. Click **Yes**. The eSigners page becomes editable.
 - Make the required changes to signers.
 - Click **Contract Actions** and select **Re-Start eSignature Process**. The eSignature process is restarted, with the signer changes in effect.
- This change applies to both DocuSign and Adobe.
- Once the eSignature process is reset on a contract, anyone who previously signed the contract will need to sign again, provided they are still included as signers.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Use Latest Custom Contract Field Configurations on Imports

With the 19.1 release, customers can choose to use the latest custom contract field (CCF) configuration version on their CSV and XML contract imports, or use the version the contract was created with.

CSV and XML imports now have the column **Update Custom Field Version**.

- If Yes/True is used for the column, the import validates against the latest version of the CCF configuration.
- If No/False is used for the column, validation works as it did previously. The import will validate against the CCF configuration from the time the contract was created.

Using the latest CCF version may result in existing CCF data related to the old CCF configuration being invalid. Invalid values are deleted.

Customer Impact

- Related Solutions: Contract Lifecycle Management
- Feature Activation: This feature is **On** by default but optional for use.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

USER IMPACT

- This feature does not impact users.

ADMINISTRATOR IMPACT

- If Yes/True is used for the **Update Custom Field Version** column, all validations (such as valid values and required fields) are validated against the latest version of the CCF configuration.
- If No/False is used for the **Update Custom Field Version** column, validation works as it did previously. The import will validate against the CCF configuration from the time the contract was created.

- Using the latest CCF version may result in existing CCF data related to the old CCF configuration being invalid. Invalid values are deleted.

INTEGRATION IMPACT

- **Important!** If an organization uses contract import or export files to integrate with other internal systems, these changes may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

This feature does not impact suppliers.

Sourcing Enhancements

This section focuses on enhancements to the JAGGAER Indirect Sourcing solution.

Enhanced Integration of Sourcing, Supplier Management, and eProcurement

The 19.1 release has introduced support for additional association options between custom supplier profile fields, including fields with attachments and grouped fields, and corresponding event question response fields. This enhancement further simplifies the supplier sourcing participation process to encourage greater on-going event participation rates.

If suppliers amend retrieved response data in select fields, users with the appropriate permissions have the option to commit these changes to their Supplier Profile directly from within the event.

Buyers also have the option to shop for, and add, supplier catalog items to an event directly from within the event during its construction.

Customer Impact

- Related Solutions: JAGGAER Indirect Sourcing, Supplier Management, and eProcurement
- Feature Activation: This feature is **ON** by default but optional for use.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- Custom supplier profile fields, including fields with attachments, and grouped insurance fields can be associated with event questions.

Questions with Attachments

- Buyers can add questions that can be responded to with Profile attachments by choosing **Add Question with Supplier Profile Content** in the **Add Question** drop-down, then selecting the appropriate Profile attachment field for event question association from the **Supplier Profile Field** drop-down that appears on the resulting overlay.
- As with other questions linked to Supplier Management, buyers have the option to edit the **Question Text** and to indicate if the question is mandatory. Buyers may also upload an attachment to the question.

Grouped Questions

- Buyers can add grouped questions by opening the **Add or Import** drop-down at the top of the **Questions** section and selecting **Add Block Questions with Supplier Profile Content**.
- An overlay containing a list of the available **Supplier Profile Field** block question choices will appear. After buyers select a block of questions to include, they can select the **Display Order** in which the block will appear.
- The entire set of fields that are contained in the block of questions are added to the sourcing event document. Buyers can use the **Delete Selected Questions** link to remove any irrelevant questions. They can also use the **Edit** option located beside each question to customize the **Question Text** and its required status for the event.

Adding Catalog Items to an Event

- Buyers can add items from catalogs to the event by choosing the **Add from Catalog** option in the **Add Product Line Item** drop-down, which is located in the **Items** section of the event **Settings and Content**.
- A **Shop** screen overlay appears from which buyers can locate and add catalog items, after specifying the number of each item that will be added to the event.
- In most cases, the supplier associated with the catalog item will also be added to the event. In cases where this does not occur, the supplier can be added manually in the event's **Suppliers** section.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact existing integrations.

Supplier Impact

- The supplier event participation process has been further simplified with additional linked fields.

Attachment Questions

- Attachments are copied from the Supplier Profile in real time when the supplier user acknowledges their intent to bid.

Grouped Questions

- When a buyer creates a question block, the platform selects the first match it encounters for the **Group** name when auto-populating the associated event questions for a participating supplier. If there is more than one group with the same name in a supplier's organization, supplier users will see a link labeled **Change Group** beside the

grouped field header. Clicking this link allows users to select the proper group whose data should be used for the associated event question responses.

Supplier Profile Updates

- Supplier users can send data updates for certain Question fields to their Supplier Profiles directly from within the event if they have the **Edit Company Profile** permission. The following field information can be updated from within the event:
 - Number of Employees
 - DUNS Number
 - Website
 - Business Description
- To update their Supplier Profile, users with the appropriate permission can click the **Update Profile** button located directly beneath the fields that can be updated from within the **Questions** section of a Sourcing event.
- Changes to the Supplier Profile are logged in the event's **History** area in the Supplier's Network.

Enhancements to Quick Quotes/Express Bids


The development of the **Quick Quotes** experience has continued in 19.1 with new enhancements designed to facilitate Quick Quote event creation, approval workflow, and Advanced Dynamic Workflow (ADW) rules.

Customer Impact

- Related Solutions: JAGGAER Indirect Sourcing
- Feature Activation: This feature is **ON** by default but optional for use.
 - **Note:** ADW rules are **Off** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

Quick Quote Creation

- Users can navigate to **Sourcing**  > **Sourcing Events** > **Create New Quick Quote Event** to create Quick Quote events directly from the primary Sourcing module menu.
- Copying a Quick Quote event results in the creation of a Quick Quote event. New events are based on the same template used to create the original event.

- A general sourcing enhancement in 19.1 enables users to shop for and add catalog items to events and event templates during event creation. See additional details about this enhancement in **Enhanced Integration of Sourcing, Supplier Management, and eProcurement**, on page 68.

Managing Quick Quotes

- When a Quick Quote event is amended, the Quick Quote Approval Workflow is applied to the event. **Note:** A sub-type workflow, which operates outside of the usual sourcing workflow, is necessary for Quick Quote events.
- New sourcing Advanced Dynamic Workflow (ADW) rules allow client workflow control based on the number of invited/responded suppliers associated with the event and whether a Finalized Award Scenario exists.

Managing Multi-Stage Events

- When a multi-stage event is **Under Evaluation**, a new option called **Create New Quick Quote Stage** appears in the **Workflow Action** drop-down.
- When buyers choose to **Create New Quick Quote Stage**, an overlay containing the following fields opens:
 - **Previous Stage Title** (Required) - This field appears only if it was not configured during the previous stage.
 - **New Stage Title** (Required)
 - **Event Type** (Required)
 - **Create from Template** (Required)
- Three action buttons also appear on the **Create New Quick Quote Stage** overlay:
 1. **Create New Stage** - The new stage is created and the user is presented with a draft version of the newly-created stage.
 2. **Create & Submit** - The new stage is created and immediately submitted into the Quick Quote Approval workflow. The user is presented with a draft version of the newly-created stage.
 3. **Close** - No new stage is created. The user returns to the previous stage of the event.
- **Note:** If the buyer's organization does not have a Quick Quote workflow configured, the buyer will receive an error message informing them that a Quick Quote workflow is needed.

ADMINISTRATOR IMPACT

- Two new sourcing Advanced Dynamic Workflow (ADW) rules have been introduced. These ADW rules, which were previously only available via the standard workflow process, are available for client assignment and control of Quick Quote events.
- See [New Advanced Dynamic Workflow \(ADW\) Rules](#) for additional details.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Adding Favorite Items to Sourcing Requests

Previously, when users created a sourcing request, they had to search for the items they had marked as favorites in order to add them to the request.

The Sourcing Request form now contains a new option to display relevant product items contained in the user's **Favorites** folders, allowing for quick and convenient selection and incorporation into the request form.

Customer Impact

- Related Solutions: JAGGAER Indirect Sourcing
- Feature Activation: This feature is **ON** by default but optional for use.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- The **Product Line Item** drop-down in Sourcing Request forms now includes an option to **Add from Favorites**.
- When the **Add from Favorites** option is selected, a list of the items that the user has designated as Favorites is displayed. Users can select the checkbox beside the item(s) they want to request.
 - A number field allows users to designate how many of each item will be requested. The default entry is 1.
 - After all items have been selected, users click the **Actions for Selected Favorites** drop-down and choose the option to **Add to Request**.
 - Users are returned to the **Product Line Items** page, which contains the selected items and quantities.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

New Advanced Dynamic Workflow (ADW) Rules

With the 19.1 release, Advanced Dynamic Workflow (ADW) rules have been added for administrative control when an event is being processed within workflow.

These rules allow for workflow administration based on the number of invited/responded suppliers associated with the event, based on whether any supplier responses have been submitted, and whether a Finalized Award Scenario exists. The new rules can be applied to both the standard workflow process and the Quick Quotes workflow.

Customer Impact

- Related Solutions: JAGGAER Indirect Sourcing
- Feature Activation: This feature is **Off** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- New sourcing Advanced Dynamic Workflow (ADW) rules are available for Quick Quote events, allowing workflow control based on the number of invited/responded suppliers associated with the event and whether a Finalized Award Scenario exists.

ADMINISTRATOR IMPACT

- Two workflow rules that were previously administered by JAGGAER personnel have been introduced into the ADW process where they may be configured by administrator users.
- **Number of Suppliers** considers both the number of suppliers that have been invited and the number of suppliers that have responded to an event. This rule may also be used for the "Has No Response" scenario to stop an event from moving forward in the approval workflow.

- **Number of Suppliers Invited** (available on both Approval and Evaluation workflows)
- **Number of Suppliers Responded** (available on both Approval and Evaluation workflows)
- **Has No Response** (available on both Approval and Evaluation workflows)
- **Sourcing Event has Finalized Award Scenario** considers events that have a finalized award scenario. This rule may be used to stop events that do not have a finalized award scenario from moving forward in the workflow until the awarding step has been completed.
 - **Has Finalized Award Scenario** (available only on Evaluation workflow)

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Inventory Management

The following Inventory Management features will be added or updated with 19.1.

Sales Order Revisions

In 19.1, we have added Sales Order Revision functionality. This functionality allows revisions to be made to a sales order that has completed workflow. The revision can be triggered by revisions made to a related PO order or by changes made to the sales order itself.

DETAILS

- **PO Revision** - When a PO revision is made to a purchase order with a related sales order, the revision is synched with the sales order and all details are carried over. This includes both document and level and line item changes. The sales order revision is created automatically when the PO revision is finalized.
- **Sales Order Revision** - The new feature also allows you to make changes to the sales order itself and create a revision. In this case, however, the revised details must be finalized on the sales order in order for the revision to be created.
- **Supplier Portal** - Previously, if a PO revision was made to a purchase order related to a sales order, the application would create a new sales order in the portal. With the new functionality, the existing sales order will be revised.

A new **Revisions** tab has been added to the sales order document in both the customer site and the supplier portal. This tab records and displays the revision information. The changes between revisions are noted in the history of the sales orders.

Customer Impact

- Related Solutions: Inventory Management.
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this Feature: **Finalize Sales Order Revisions (Permission Settings > Orders > Sales Order Fulfillment)**. This permission gives the user the ability to create a revision from an updated sales order.
- New Notifications related to this Feature: **Sales Order Revised by Purchase Order (Notification Preferences > Supplies Manager)**. This notification informs the user that a sales order revision has been created from a revision to the related PO. The notification contains the details of the change, including any notes entered with the change.

USER IMPACT

- Revisions to Sales Order Documents
 - Inventory Management users can make changes on the sales order (shipping information, billing information, delivery options, etc.) and create a revised sales order document with those changes.
 - Users with the new can use the new **Finalize Sales Order Revisions** permission can perform the Finalize Revision action to create the revision. For additional information about setting permissions, please see **Viewing and Managing Assigned Permissions in the User Profile** in the **Site Basics Handbook** or online searchable help
 - Follow the steps below to finalize a revision.
 1. Access and open the appropriate sales order.
 2. Make updates as necessary.
 3. In the **Available Actions** field on the sales order select *Finalize Revision*.
 4. Click **Go**.
 5. In the **Finalize Revision** overlay, enter a name and optional description for the revision. **Note:** The value in the Name field will display for the revision on the Revisions tab.
 6. Click **Save**.
- Revisions to PO Documents
 - Revisions made to a purchase order that has a related sales order create a revision on the linked sales order.
 - When a PO revision is finalized, the changes are synched to the sales order. Updates are automatically reflected in the sales order. For example, if a quantity change is made to a line item on the PO, the line item quantity is changed on the sales order.
 - The system automatically creates the sales order revision. The revision is logged on the new **Revisions** tab (see additional information below).
 - If a quantity change is made to a PO line item and the line item on the sales order already has shipments against it, the system will check that the new quantity is not less than the shipped quantity. If that is the case, a warning will display and the edit will not be synched to the sales order.
 - If a change request is being created on a PO related to a sales order with shipments against it, a message will display with a warning that any line item changes that result in a quantity less than what has already been shipped will not be synched to the sales order.
 - If the sales order is fully shipped and closed, a warning message displays and the revision data will not be synchronized to the sales order.
 - Users with the new **Sales Order Revised by Purchase Order** notification enabled, will receive an email, or in-application notification when a sales order has been revised by a PO. For additional information about enabling notification pref-

erences, please see **Setting Notification Preferences in the User Profile** in the **Site Basics Handbook** or online searchable help.

- A new **Revisions** tab displays on the sales order. The tab records all sales order revisions; whether they were a result of a PO revision or from a revision made to the sales order itself. Additional information:
 - The first version of the sales order is logged as **original version** and will always display on the Revisions tab, even if no revisions have been made to the document.
 - Each revision is listed, along with the following information:
 - **Revision No.** - The number of the revision. **Note:** Revisions are listed from latest revision to earliest revision.
 - **Revision Name** - If the revision was made directly to the sales order, this field will display the revision name entered in the Name field. If the revision was the result of a PO revision, the name will be **Modified by PO revision**. If you entered a description, the description is displayed here as well. Clicking the **view...** button in this field allows you to view the sales order summary in a separate window.
 - **Revised By** - If the revision was made directly to the sales order, this field will display the name of the user who *finalized* the revision. If the revision was the result of a PO revision, the field displays **System**.
- Once the revision has been finalized, the revision number displays to the right of the sales order number in the main document details.
- When edits are saved on a sales order, a new message displays, warning the user that changes have been made since the last revision.
- Revision details are recorded on the **History** tab of the sales order.

ADMINISTRATOR IMPACT

- Administrators should be aware of the new permission and notification preference related to this feature. End users may not have the ability to enable these objects to use the feature.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

Sales order revisions will be synched with sales orders in the supplier portal. Details will be documented for suppliers in the Supplier Release Notes delivered with the 19.1 release.

Ability to Include Inventory Elements on the Receipt XML Export

In 19.1, organizations can choose to include inventory elements on the Receipt XML export for quantity receipts created from replenishment purchase orders. A new receipt export

DTD will be available that includes elements such as stocked item name, item number, stocked units, etc. The new elements are available for line items that are flagged as "Add to inventory" on the quantity receipt. If the organization has updated to the new DTD and the receipt export connection is configured to include inventory data, then the new elements will be populated for the item. This feature is intended to help customers with strict cost management practices keep an accurate account of their inventory value in their ERP system.

Customer Impact

- Related Solutions: Inventory Management.
- Feature Activation: This feature is **OFF** by default. Please contact JAGGAER to have the new export DTD enabled.
- New Permissions related to this Feature: None
- New Notifications related to this Feature: None

USER IMPACT

This feature does not impact end users.

ADMINISTRATOR IMPACT

- Administrators should contact JAGGAER to have this functionality enabled.

INTEGRATION IMPACT

- Any changes to an export that is used in conjunction with another third-party system should be thoroughly tested before going into effect. Additional fields exported when the new DTD is active are the same fields that are on the **Commodity Receiving** tab of the quantity receipt. These include (for each line):
 - PO Number
 - PO Line Number
 - Product Name
 - Catalog Number
 - QTY/UOM Ordered
 - Previous Receipts
 - Quantity
 - Line Status
 - Stocked Item
 - Stocked Item Number
 - Stocked Units
 - Fulfillment Center
 - Location

- Expiration Date
- Lot Number
- Per Item Cost

Supplier Impact

This feature does not impact suppliers.

New Inventory Adjustment Integration Point for Inventory Management

Most changes to inventory occur via a replenishment purchase order or a sales order. Periodically, a stockroom needs to make a manual adjustment to an item. An example would be a cycle count, a return or manual removal because of damage to an item. When these manual adjustments occur; the financial system was previously blind to these changes. In 19.1 we are introducing a new integration point that will send an XML message when a manual adjustment is made to inventory. The new integration point allows customers to receive an XML message when an item is adjusted outside of normal purchasing practices. This will assist organizations that need to keep strict accounts on the value of their inventory within their financial ERP system.

Types of inventory adjustment actions that will be available in 19.1:

- **Receive Inventory** - Manually receiving inventory on an item in Inventory Management.
- **Adjust Inventory** - Manually adjusting inventory on an item in Inventory Management.
- **Cycle Count Adjustment** - Setting quantity for an item/location via cycle count.
- **Annual Cycle Count** - Setting quantity for an item/location via annual cycle count.

Customer Impact

- Related Solutions: Inventory Management.
- Feature Activation: This feature is **OFF** by default.
- New Permissions related to this Feature: None
- New Notifications related to this Feature: None. **Note:** The feature will use the standard notification when the export fails.

USER IMPACT

This feature does not impact end users.

ADMINISTRATOR IMPACT

- Although administrators can configure this feature, it is a good idea to consult with JAGGAER Indirect Professional Services to assist with configuring and testing the new integration point. Additional resources may be needed to help troubleshoot issues.
- The new integration point is configured under **Settings > General Site Settings > Document Export Settings**. The administrator will need to define a connection, a schedule and a trigger for **Supports Inventory Adjustments**.
- When implemented, the administrators will manage the error message queue under **Administer > Find and Fix Errors > Inventory Adjustment Errors** in situations where the export message fails to send successfully to the customer system.

INTEGRATION IMPACT

During initial implementation and testing, the customer may find it necessary to setup a middleware solution for receiving the message. For example, adjusting inventory during cycle count does not have a specific set of financial codes associated from which an accounting adjustment can be made. Customers may need to create a table in their middleware solution to define a default set of codes per item part number and location. Then when they receive the Inventory Adjustment Message for the Cycle Count action, the middleware solution should have custom code maintained by the customer to read the message and then find financial values from the lookup table. The middleware program will need to combine the data from the message and the lookup table in order to update the ERP system.

Supplier Impact

This feature does not impact suppliers.

Ability to Send Returned or Cancelled Items as a Negative Quantity on the Receipt XML Export

In 19.1, XML document export connections for receipts can be updated with two new flags to send a returned or canceled quantity as a negative value in the XML message. In the past, some customers have turned off the ability to enter a return or a cancel on a quantity receipt because the exported quantity value was sent as a positive number which was causing errors in financial accounting. Customers who have turned off the ability to return or cancel item quantities on a receipt may want to turn that functionality back on and try the process with the new connection flags set to true.

Customer Impact

- Related Solutions: Inventory Management.
- Feature Activation: This feature is **OFF** by default. Please contact JAGGAER to enable.

- New Permissions related to this Feature: None
- New Notifications related to this Feature: None

USER IMPACT

This feature does not impact end users.

ADMINISTRATOR IMPACT

- Administrators should contact JAGGAER to enable this feature.

INTEGRATION IMPACT

- Any changes to an export that is used in conjunction with another third-party system should be thoroughly tested before going into effect.

Supplier Impact

This feature does not impact suppliers.