19.3 RELEASE PREVIEW

SEPTEMBER 27, 2019

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WELCOME

The **19.3 JAGGAER One Product Release** will be available in the production environment starting November 11, 2019. The purpose of Release Notes is to prepare administrators for the upcoming release from an application standpoint.

This document provides **general release notes** related to basics and administration for the following JAGGAER One solutions:

- Analytics
- Category Management
- Contracts
- Program Management
- Savings Management+
- Sourcing+
- Spend Analytics+
- Supplier Management+

Important! Solution-specific Release Notes are available on the release page for each solution on the Product Release Library. The image below is an example of how to access a specific page for a solution.
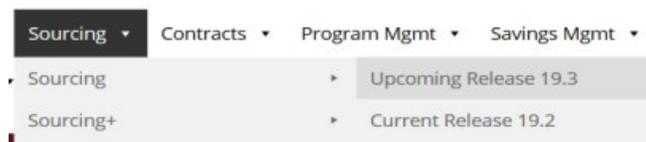
Please see the main 19.3 page on the Product Release Library to access the Feature Snapshot.

https://library.jaggaer.com

This document will help you:

- 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.

OBJECTIVES

The purpose of the **Release Preview** is to provide information about major release themes and general information about features related to those themes.

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

KEY DATES

The table below provides a list of key dates for the JAGGAER 19.3 Product Release. **Note**: 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).

Event	Date and Time	Description and Details
Release Promotion to Prep	Date prior to Production Release to be specified.	Draft documentation (Release Notes, Online Searchable Help and Handbooks) is provided when the release is pushed to the Prep environment. A pre-recorded release webinar and solution-specific videos will be available on the Product Release Library during the Prep testing period. 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.
Release Available in Production	November 11, 2019	Final documentation will be provided at this time.

GENERAL ENHANCEMENTS

This section focuses on general updates.

Updated Site Navigation and User Interface

As we continue to make new solutions available, it is imperative that we work toward a consistent user experience across all JAGGAER One products. In release 19.3, we will begin this initiative by making user interface (UI) updates, including side bar and header navigation updates and new product iconography, that will become standard across all solutions.

For the 19.3 release, the new UI will be optional. Organizations must contact JAGGAER to have it enabled. **However, in release 20.1, the new UI will become standard. Therefore, it is highly recommended that customers begin using and testing the new UI as soon as possible.**

Smart Assistant Updates

The Smart Assistant was introduced in release 19.2. The Smart Assistant is a virtual assistant that helps users by answering questions and performing simple actions in the JAGGAER suite of products. In release 19.3, we have made the following updates:

- **Voice Recognition** - This update will allow users to speak their questions to the Smart Assistant and receive an answer both by text and by voice.

- **Email Support when answer is Unknown** - This update will allow users the option to have the Smart Assistant send an email when it does not have the answer.

- **New User Right** - A new user right will be available that will control visibility of the Smart Assistant on the user level.

- **User Picture Displays** - When available, the picture associated with the user typing the question will display as an icon in the chat window.

Note: The Smart Assistant is currently in Beta. Please contact JAGGAER to have it enabled.

Ability to Search by Username in User Management

In release 19.3, a new **Username** search filter is available in User search. This filter allows organizations to search by username (user ID) in User Management (**User Management > Manager Users > Users**).

Usability Enhancements to Category, Business Unit and Region Selections

Previously, users could search categories and other "tree" type lists by entering criteria in a free text search box. With the 19.3 release, several usability enhancements are available when making selections in the Category Tree and other areas. A "Search As You Type" (SAYT) feature allows users to see matching results as criteria are entered. Also, the user can more easily identify all selected values on the page. This enhancement is available in the following areas of the platform where multiple leaves/nodes are selected:

1. Category Tree

2. Business Unit Tree

3. Region Tree

Ability to Require Email Address as the Username for New Users

In some cases, an organization may prefer that email addresses are utilized as usernames for the application. In release 19.3, we are providing organizations with the ability to *require* usernames to be the email address. This can be configured for organization users, supplier users or both. **Note**: This feature is primarily intended for organizations that use single sign on procedures with existing internal systems. It will need to be enabled by JAGGAER. Your JAGGAER representative will advise as to whether or not it is appropriate to activate this feature for your organization.

New "Completed with Errors" Status for Asynchronous Batch Processes

In some cases, an asynchronous batch process may have errors that do not prevent it from completing. When this happened previously, the status of the batch process was "Completed" without any indication that there were errors. In release 19.3, we have added a new **Completed with Errors** status that indicates that there were errors in the process and highlights the number of errors.

Ability to Display a Progress Bar in Object Details

In release 19.3, organizations have the option to enable a "progress bar" that displays in the object details. Progress bars graphically represent the step that an object is in to give users a quick visual of the status of the object. The graphic represents the highest-level steps for an object. For example, a progress bar in an RFQ will display the following steps: *Preparation, Bid Collection, Bid Evaluation, Finalization* and *Completed*.

Application Supports Google ReCaptcha

The current Captcha technology is limited to an open source technology, which is sometimes not readable by a user. In 19.3, we will begin supporting Google ReCaptcha. Organizations will have the option to use the current Captcha or Google ReCaptcha.

ANALYTICS ENHANCEMENTS

This section focuses on general updates to the JAGGAER ONE Analytics solution.

Report Drill-Through Functionality

Tableau reporting typically provides a subset view of data. In some cases, a report may require further investigation and analysis using the detailed transactional information associated with the report. Previously, because Tableau does not contain the transactional data, it was not possible to view it in relation to the report. In the 19.3 release, we are introducing the concept of "drill through" functionality. This functionality allows organizations to define a data set that can be exported to allow for offline analysis.

Important: The addition of this feature is dependent on installation of the **2019.3.1** version of Tableau. This upgrade will be performed after 19.3 release, by the beginning of December. The feature will be available only after the upgrade.

Reorder the Options for Available Reports in Report Tree Management

Previously, in the Report Tree Management, when a user clicked the **Actions** button for Available Reports, there were two options: *Delete* and *Edit*, in this order. In release 19.3, we have reversed the order.

Ability to Search Fields and Tables when Creating a Data Source

When creating or editing a Data Source, tables and fields are selected to be used in the source. Available tables display in a list on the **Source** tab and available fields display in a list on the **Fields** tab. Previously, a user had to scroll through the lists to locate the correct source table or field. In release 19.3, we have added a search field on each tab. Users can filter the lists by entering search criteria in the field.

Ability to Export a Schedule a Data Source Export to an FTP/SFTP

In the past two releases, JAGGAER has added the ability to perform scheduled and on-demand data exports in Data Source Manager. In release 19.3, we have expanded this functionality by providing organizations with the ability to export the data to a defined FTP/SFTP site.

Embedded Fixed-Sized Reports are Left Justified

After a recent Tableau update, embedded fixed-size reports became centered. In release 19.3, we have corrected this issue and making the reports left justified.

Custom Tab Access Updates

Previously, the Analytics vertical navigation bar only displays the first 10 custom tabs. In release 19.3, the navigation bar displays more than 10 tabs for easier access. In addition, the number of custom tabs displayed when custom tabs are accessed from **Reporting > Analytics** on the left navigation menu has been increased from 10 to 15.

New "Request Type" Field for Scheduled Jobs

In release 19.3, we are now displaying a new **Request Type** field with jobs on the Scheduled Jobs screen. This screen will display the type of request; *Subscription, DSM Export, etc.*

Refresh Button Available on Jobs Tabs

In release 19.3, we have added a **Refresh** button to **Completed Jobs** and **Scheduled Jobs** tabs. Previously, using the browser refresh would take the user back out to the **Report Tree Management** page, requiring the user to have to re-access the tab. This feature allows users to refresh the tab without having to exit it.

Link on the Export Notification on the Scheduled Jobs Tab

When a data source export is requested in Data Source Manager, a pop-up confirmation notification displays. In 19.3, the pop-up notification will include a link to the Completed Jobs tab where the user can retrieve the export.

CATEGORY MANAGEMENT ENHANCEMENTS

Unified Activities List

Currently, when a Category Strategy reaches *Running* status, both the **Activity Planning** and the **Activity Progress** pages are accessible. Users must navigate between these pages to add, start, monitor, and complete activities and to export Excel reports.

In 19.3, a unified **Activities** list will be introduced to save time and page clicks by facilitating users' ability to manage activities and access the associated objects and reports. This **Activities** list will appear on the **Activity Planning** page until the Category Strategy reaches *Running* status. At that point, the **Activity Progress** page will replace the **Activity Planning** page, which will no longer be accessible. All actions to be performed on the activities that were distributed among the two pages will be available from this single page.

In addition, the following new features will be available through the unified **Activities** list:

- Search filters

- A more robust **Activity Details** page

- Printable view (when available for the linked objects)

Ability to Access Category Strategies from Projects

It is possible to link Category Strategies to projects, but platform effectiveness is limited by a lack of visibility to these links from within projects' **Links** pages. Users can see and access associated projects from within a Category Strategy, but they cannot see or access associated Category Strategies from within a project.

With this enhancement, users will be able to access a link to associated Category Strategies from within projects through the use of a new **Links > Strategies** page that will appear in projects with associated Category Strategies.

In 19.3, a new **Links** page has been added for projects with associated Category Strategies. With this enhancement, users can access links to associated Category Strategies from within projects.

Access to Comment Fields for Methods, Levers, and Purchasing Strategies

While Methods have an associated **Comments** field to include an explanation of how the Method will be used to bring its Strategy to a successful conclusion, Levers and Purchasing Strategies do not have an associated **Comments** field to add context to their role within a Strategy. This inability to explain the specific role of each Lever and Purchasing Strategy leads to confusion for the strategy team in the selection and usage of specific Levers to meet their Strategy goal.

In 19.3, a new **Lever Comments** field will be associated with Levers and Purchasing Strategies to provide greater clarity for strategy teams in the selection and management of Levers within a Strategy.

Presetting Data in the Spend and Demand Forecast Templates

Preset Excel templates that contain listings of validated field entries save time and effort for users. They also simplify the forecasting process when users are unfamiliar with the data elements that are available in a solution.

Currently, preset Spend and Demand Forecast templates are not available for Category Management. In 19.3, Excel templates will be introduced to save time and improve efficiency for users who export Excel forecast data from the platform.

Estimated Start Date for Activities

Currently, when planning a strategy Activity, the only available start date field is the **Actual Start Date**, which is automatically generated and based on the system date. Without a **Planned Start Date** field, users are unable to measure their performance based on a comparison of the planned start date and the actual start date of their strategic activities.

With this enhancement, an **Estimated Start Date** will be available on the **Activity Details** page when users create or edit an Activity. When the optional **Estimated Start Date** field is populated, users will be able to receive reminder alerts prior to the start of the Activity and also to measure the timeliness of their Strategy implementations.

CONTRACTS ENHANCEMENTS

The features listed in this section apply to the JAGGAER ONE Contracts solution.

Dynamic Clause Management

With this release, the Clause Management area of contract templates has been reorganized, and new options are available to allow for the dynamic management of clauses on contracts created from the given template.

Contract Template Configuration Changes

The Clause Management area of contract templates has been updated as follows:

- The **Unlink clause** button allows users to unlink clauses from the template.

- The **Manage mandatory links** button has been removed. This functionality is now managed in the new Link properties page.

- The **Mandatory** column has been replaced by the **Link properties** column.

- The new **Edit link properties** button has been added for all the clause links available on the template, except for special signature clause links. Clicking this link allows users to access the new **Link properties** page, and to modify associated properties.

- A set of icons has been added to represent the properties for the clause.

- The **View Library Content** link opens a pop-up window with information on the clause.

- The **Validation** column contains information on the last action taken on a given clause that has not yet been validated. Managed values are:

    - **"---"** - No changes have been applied since last validation.

    - **Remove** - There is a request to remove a clause previously configured in the template.

    - **Add** - There is a request to add a new clause to the template.

    - **Change** - Configuration of an existing clause has been changed.

- The **Send Link Clause Validation Alert** button has been renamed to **Freeze and Send Clause Link Validation Alert** (this is available only for users not assigned to the **Clause Link Validator in Templates** user right). Once the request has been sent, all Clause Management becomes read-only.

- The new **Unfreeze and Send Clause Link Validation Recall Alert** button now appears on the Clause Management page when a validation request has been sent. Clicking this allows users to recall the validation request.

    - When this button is used, the following notification is sent: "B > B: Inform Users with Rights to 'Clause Link Validator in Templates' that Clause Link configuration previously sent for validation has been recalled."

The new **Link Properties** page provides the following:

- The **Clause Link Information** area provides a **View Library Content** link to access details of the clause.

- The **Current Clause Link Properties** area provides the following:

  - The current properties of the given clause link.

  - The suggested properties for the given clause link when changes have been applied. Changes become immediately effective when applied by a user assigned with the **Clause Link Validator in Templates** user right.

  - Relevant action buttons, depending on the validation status of the clause link.

For each clause link, the following can be configured:

- **Link type**:

  - **Optional** - Clause link can be disabled once contract is created.

  - **Mandatory** - Clause link cannot be removed once contract is created.

  - **Conditional** - Clause link will or will not be used on a given Master Contract Document proposal, based on the question associated as the activating condition. The activating condition can be based on one of the questions configured in the Additional Information area. Selectable question's typologies are:

    - **Yes/No** - User can set the rule based on Equal/Not equal criteria for the selected value.

    - **Option list** - User can set the rule based on Equal/Not equal criteria for one or more of the values configured in the list.

    - **Multi choice option list** - User can set the rule based on All the selected/At least one of the selected/None of the selected criteria for one or more of the values configured in the list.

- **Clause Content Editable in Contract** - Users can define if the content of the clause can be edited or not when the contract is created. In cases where a clause is configured as read-only, neither buyer nor main contractor can modify the content defined for that clause in the library.

Contract Behavior

When a contract is created from a contract template, the Clause Management area is populated, taking into consideration the last validated set of clauses with their properties (e.g. a clause added but not yet validated will not be copied).

In cases where some clauses have been configured as conditional:

- An error message is provided in cases where the user takes actions that may prevent conditional rules from being verified (e.g. when a new contract type is selected, and questions used to configure conditional questions are not available in the new contract type).

- When a new Master Contract Document proposal is created, a new summary page reports conditional clauses, questions that have been configured to define conditionality, and answers associated to those questions.

- If the answer to a mandatory question has not been provided, creation of the MCD proposal is prevented.

- Based on the answer provided to questions used to determine conditionality, the clause will or will not be added to the given MCD proposal.

- Once a new proposal has been created, all questions that have been involved to determine conditionality will become read-only until the proposal is approved or rejected.

- A new icon appears by proposal MCDs, and clicking it opens a pop-up with questions and related answers that were evaluated when the proposal was created.

- User rights related to clause management now work in the following ways:

  - The **Manage Templates** user right now allows users to create contract templates and to work in the Clause Management area. This right also allows users to change properties associated with each clause link.

  - The **Clause Link Validator in Templates** user right is required to validate clause links defined for templates, and settings for each of the clause links.

  - For users without the **Clause Link Validator in Templates** user right, the **Freeze and Send Clause Link Validation Alert** button is shown only in cases where there is at least one clause link in a validation status other than "---". Once clicked, a confirmation message is displayed, and upon confirmation, the existing alert is sent. After the alert is sent, it is not possible to link or unlink clauses, sort clauses, or to change clause properties until validation occurs. Only when a user assigned with **Clause Link Validator in Templates** validates changes, will those changes become effective.

  - Changes applied in the **Clause Management** area by users assigned with the **Clause Link Validator in Templates** user right will be immediately effective.

- Once a contract is created from a template with conditional clauses, each time a new MCD version is generated, all questions used to define conditional rules are verified. This automatically causes a clause to be included in the new MCD version, or not, based on the provided answers.

Define What is Copied when Creating a New Contract from an Existing Contract

With the 19.3 release, the contract creation page for copied contracts has been updated to allow for greater flexibility in what is copied over to the new contract. This is applied only when creation is started from an existing contract and not from a contract template.

Additionally, users are now allowed to choose if clause content is inherited from the clause library or from the last revision available on the original contract.

- When copying contracts, users now have the following additional options:

  - **Transfer subcontractors** - Selected by default. Not available if "Manage subcontractors" has not been configured in the source contract.

  - **Transfer attachments visible only to buyers** - Selected by default. It is not available if "Attachments visible only to buyers" has not been configured in the source contract.

  - **Transfer attachments visible to main contractor** - Selected by default. It is not available if "Attachments visible to main contractor" has not been configured in the source contract.

- **Transfer prices** - Selected by default. It is not available if "Price list" has not been configured in the source contract.

- **Transfer additional information values** (from contract, from project, or do not copy) – The "From the contract" option is selected by default.

- **Transfer clauses** (default library content or origination contract content) – The "Default library content" option is selected by default. It is not available if "Manage master document" has not been configured in the source contract.

- **Transfer signatories** - Selected by default. It is not available if "Manage master document" has not been configured in the source contract with the option "Yes, with electronic signature."

Signatory Configuration Enhancements

With this release, new configuration options and user rights have been introduced to provide further segmentation of users who can configure global and local signatories.

Depending on configuration, we now allow for users to be assigned rights in the management of global signatories, management of local signatories, and usage and configuration of signatories in contracts and contract templates.

A new configuration parameter for local signatories allows customers to enable the following:

- Allow creation of local buyer signatories only

- Allow creation of local supplier signatories only

- Allow creation of both local buyer and supplier signatories

The new user right **Create Local Signatories** is available when this functionality is configured. The settings available for this user right are:

- No

- Yes, if I am the Owner

- Yes, if I am on the Project Team

- Yes

The Manage Signatories user right has been renamed **Edit Signatories List**. Users assigned with this right can access the Signatories area in contracts and contract templates, and:

- Select global signatories

- Sort existing signatories

- Export list of configured signatories

- Deactivate a signatory

- Delete a signatory

The Signatories area is now available:

- In read-only mode, to all users with access to the **View Master Document** area on the specific contract/template.

- In edit mode for all users with the **Edit Signatories List** user right on the contract/template.

- For creation of local signatories, for users with the **Create local signatories in contracts** user right on the contract/template (if permitted by configuration).

Configuration of global signatories remains available for company super-user and users assigned with **Manage Users, Roles, Users Lists and Divisions** user right.

- The new Create Local Signatories user right is available when the local signatory functionality is configured, and is found under **User Rights > Contract Management > Create Local Signatories**.

New Notification When a Contract Cannot be Expired

A new notification alert is now sent in cases where a contract is not moved to Expired status when it reaches its end date for at least one of the following reasons:

- The main contractor is currently allowed to edit the Additional Information area.

- The main contractor is currently involved in MCD proposal negotiation.

- The main contractor is currently involved in price list proposal negotiation.

The notification alert is: B > B: Email Alert sent by the batch procedure if a contract could not be moved to "Expired" status when the end date has been reached.

- The new alert is sent to all users configured in the buyer side email recipients list of the contract.

- The contract does not change status, but a new warning icon appears beside the status on the My Contracts, Global Contracts, and Contract Discussions lists.

Improved Usability for MCD to be Electronically Signed with DocuSign

Previously, in order for a contract to be selected as "generic contract" in an RFQ when the integrated MCD negotiation process was configured, the contract had to have a current and approved master contract document (MCD) proposal as its most recent proposal.

In 19.3, it is now also possible to associate a contract as "generic contract" with an RFQ in the following situations:

- The Manage Master Document setting has been configured with **Yes, with electronic signature**.

- The Current MCD proposal has been approved and the status is currently **To be signed**.

- It is possible to associate a contract as "generic contract" with an RFQ in the following situations:

- The Manage Master Document setting has been configured with Yes, with electronic signature.

- The Current MCD proposal has been approved and the status is currently To be signed.

Enhanced Management of Additional Information Area for Main Contractor

With this release, super users and the current contract manager are now able to access the **Recall Editability** action on the Additional Information, Master Contract Document, and Price List areas of a contract, even in cases where the contract is managed in a project with workflow, and the task-hosting contract has been configured to limit this action in the affected area through Task Activity filters.

Once the Recall Editability action is used, these pages become read-only as per the configuration defined in Task Activity filters.

- Super users and the current contract manager are now able to access the **Recall Editability** action on the Additional Information, Main Contract Document, and Price List areas of a contract, even if this has been configured as not available as per the activity filters.

- Once the **Recall Editability** action is used, these pages become read-only as per the configuration defined in Task Activity filters.

- This feature only applies in cases where:

  - A contract is managed in contract workflow

  - A contract is currently associated to a task where activity filters have been configured to have buyer side, Additional Information, Master Contract Document and Price List areas in read-only mode.

  - Additional Information, Master Contract Document, and Price List areas are editable by main contractor.

Optionally Copy Total Value when Creating Contract from RFQ

Previously, when a contract was created from an RFQ, the total value of the contract was automatically populated using the total price list.

With this release, the new **Transfer Price List Total as Total Value of Contract** option has been added to the contract creation process for contracts created from RFQs.

This option is selected by default, and allows users to maintain the previous behavior.

If this option is deselected, the total value of the contract is not automatically filled during contract creation and the field is left empty.

This option is not available for RFQs configured with offline response supplier access (simplified RFQs).

- The **Transfer Price List Total as Total Value of Contract** option appears during the contract creation process for contracts created from RFQs. This option is selected by default.

  - When selected, the total value of the contract is automatically populated using the total price list.

- When this option is deselected, the total value of the contract is not automatically filled during contract creation.

Automatically Close Discussions when Contracts Archived

Previously, if automatic archiving was enabled, a contract was not automatically archived if there were any open discussions on it. As multiple discussions may occur on each contract, closing all of them could require a high level of manual work.

With this release, if the archival process is prevented by the existence of open discussions on a contract, those discussions are automatically closed and the contract is archived.

- If the automatic archiving process is enabled, open discussions on a contract that is to be archived are closed automatically.

Automatically Archive Terminated Contracts Based on Termination Date

Previously, when a contract was manually terminated and automatic archiving was enabled, the automatic archiving process used the contract end date rather than the termination date to determine if the archival was to be accomplished or not.

With this release, manually terminated contracts are now archived according to their termination date rather than their contract end date when automatic archiving is enabled.

- Manually terminated contracts are now archived according to their termination date rather than their contract end date when automatic archiving is enabled.

Attachments Area Hidden when Supplier Visibility is Disabled

Previously, the **Visible to Main Contractor** attachments area of a contract was visible to buyers even when contract supplier visibility was disabled.

With this release, the attachments area has been hidden from buyers when suppliers have not been granted access to contracts.

Additionally, when supplier visibility is disabled, the **Transfer Supplier Response Attachments** option that appears when creating a contract from an RFx event is hidden.

- The **Visible to Main Contractor** attachments area of a contract (accessed by navigating to **Details > Attachments > Visible to Main Contractor**) is now only accessible to buyers when supplier visibility is enabled.

- In cases where supplier visibility is disabled, but some attachments were previously uploaded in the **Visible to Main Contractor** area, all files that were stored there are no longer accessible.

- When supplier visibility is disabled, the **Transfer Supplier Response Attachments** option that appears when creating a contract from an RFx event is hidden.

New Search Filter for Contracts with Additional Information Editable by Main Contractor

A new contract search filter has been added to the My Contracts and Archived Contracts list pages.

The new **Additional Info Editable by Main Contractor** filter allows users to perform searches based on which contracts have the additional information area open to the main contractor for editing.

- The additional search filter is available on the following list pages:

    - **Sourcing > Contracts > My Contracts**

    - **Sourcing > Contracts > Archived Contracts**

PROGRAM MANAGEMENT

This section focuses on updates to JAGGAER ONE Program Management.

Ability to Perform Mass Updates for Project Team Membership

When a user leaves or changes their job position, a large number of projects may be affected by this change. Currently, users must be added and deleted from project teams manually. This can be a cumbersome process when an organization has a large number of projects.

In 19.3, we will provide the ability to perform mass changes to an individual user's project team assignments through the standard platform search and select method or through the standard import/export process.

SOURCING+ RFX

This section focuses on updates to JAGGAER ONE Sourcing+ RFx.

Improved Management of RFx Weighting

In 19.3, several improvements will be introduced to assist buyers in correctly weighting their RFx envelopes:

- A new button will be added under the **More** ⋯ ▼ drop-down menu on RFX envelope pages that will allow users to change weight configurations without first entering edit mode.

- If the data imported in envelope configuration contains a weighting error, more detailed information about the weights that were not imported will be provided to users.

- Additional details to guide users in correcting errors will also be provided when users publish an RFx that contains incorrect or missing weight configurations.

Improvements in the RFx Excel Configuration Template Used to Import Items to an Envelope Price Section

The following enhancements will be added to the RFx Excel Configuration template to improve the user experience and to decrease the occurrence of import errors:

- Manual input will no longer be necessary for **Units of Measurement (UOM)** and **Quantity/Base Price**. These fields will be populated with drop-down lists.

- Validation rules will be applied to worksheet cells to ensure that data entries are in the correct format.

- The template will contain information about the type of data that is required for specific fields, such as text, numeric, etc. and it will also indicate if the field is mandatory.

- Color coding of worksheet cells will be improved to more clearly indicate their association to specific fields.

When users edit a Commercial envelope and use the option to **Import Items** located under the **More** ⋯ ▼ drop-down menu available for each **Price** Section, the Excel template which is used to import items into a given section of an RFx has been changed as follows:

Addition of Take It or Compete Process

A new **Take It or Competition** (TIOC) option will support a process by which buyers can ask one or more suppliers to update their offers to match the buyer proposals. **Take It or Competition** can be useful when a buyer wants to award an RFQ to a supplier that has not made the best offer. With TIOC, a buyer will be able to pre-award an RFQ to a supplier and ask this supplier to confirm the buyer's listed price. If the supplier accepts, they must edit and resubmit their RFQ offer to match the given price. When this occurs, the awarding to the supplier will be finalized. If suppliers reject TIOC offers, the RFQ will not be awarded. Instead, The RFQ will return to *Final Evaluation* status.

The following chart illustrates this process:
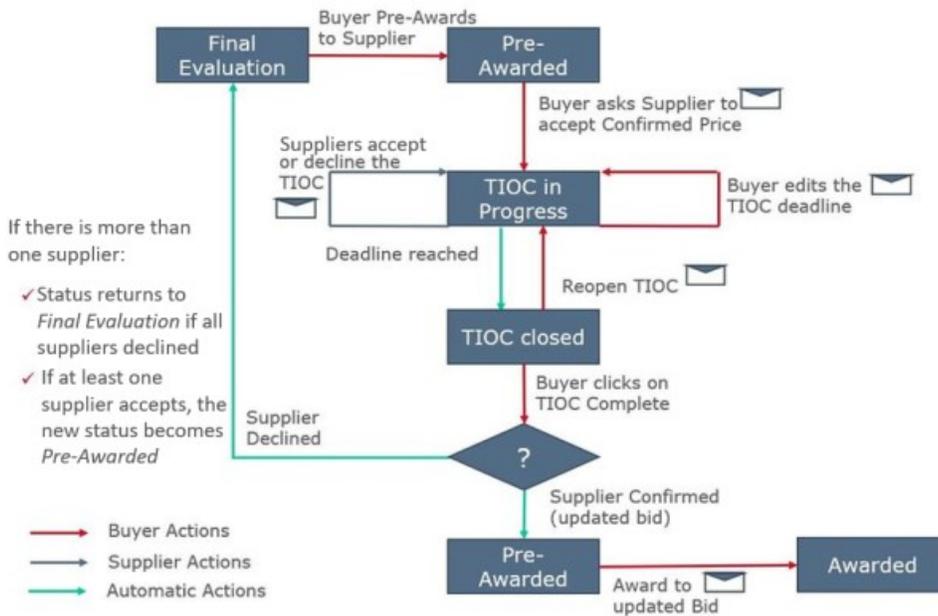
- Buyers' **Published RFx and Auctions** widget displays RFQs with TIOC offers *Closed* in the **Under Evaluation** filter.

- The **History of Changes** is updated with the following information:

  - Action Description

  - TIOC Deadline

  - Invited suppliers and associated Confirmed Price and Comment

  - If Confirmed Price is visible to suppliers

  - Commercial Envelope editability

- The following new emails support the TIOC Process:

  - Buyer-to-Supplier:

    - TIOC invitation

    - TIOC deadline editing

  - Supplier-to-Buyer:

    - New offer submitted

    - TIOC Offer declined

Ability to Hide the RFx Status for New Rounds from Uninvited Suppliers

When suppliers are not invited to a new round or Best and Final Offer (BAFO) in an RFx, they can see information about the new round in the UI and through email alerts. With this enhancement, information about new rounds and BAFOs will be hidden from suppliers that are not included in them.

Ability to Place Mandatory Checks at RFQ Pre-Awarding or at Awarding

Currently, mandatory awarding information is verified by the platform when RFQs are pre-awarded. This enhancement will provide additional flexibility for users, who will be able to configure their instance to verify mandatory awarding information at either the pre-awarding stage or awarding stage in an RFQ event.

- You must contact JAGGAER to enable this feature.

Visibility of Event Currency on the Commercial Envelope Evaluation Status Page

Currently, users do not see the event currency inside the **Commercial Envelope Evaluation Status** page. This omission can lead to user error. In order to improve the user experience, the **Currency** field will be added to RFQs' **Commercial Envelope Evaluation Status** page in 19.3.

Visibility of Total Reference Price on RFx Details Page

In order to improve usability and consistency across the platform, if configured, the **Total Reference Price** will be displayed on the RFx **Details** page below the **Estimated Contract Value** in RFx with Commercial envelopes. If applicable, users will have the option to refresh the value displayed in the **Estimated Contract Value** based on the value in the **Total Reference Price** field.

Improved Error Description for Incorrect Number Format

In 19.3, the error message that appears when a number is entered in an incorrect format will be updated to provide specific information to assist buyers in correctly formatting the numeric values in their RFx. This enhancement will apply to all RFx errors involving numeric fields.

Error text will be determined by user preference and the maximum number of decimal digits allowed in the instance configuration.

Addition of Category Description to the Supplier Qualification Analysis Page

When users on the **Supplier Qualification Analysis** page launch the screen overlay for **Categories Matched**, this pop-up box contains category codes, but not the corresponding category descriptions. The lack of category descriptions is an inconvenient omission for users. Functionality will be improved in 19.3 with the addition of **Category Description** to the **Categories Matched** screen overlay.

Improved Access to RFx Section Editing

In order to edit a section in an RFx envelope, it is necessary to expand the **More** [··· ▼] drop-down menu to access an **Edit Section** action link. This requires multiple clicks and it can be overlooked by users who lack familiarity with the solution.

In 19.3, this action will be improved with the transformation of the **Section Title** into a link to the section editing page.

Addition of the Event Title to Email Alert Subject Line

For improved usability, the **Event Title** field will be added to the subject line of the RFx email alerts that do not already display this information.

Alert Concerning Visibility of Supplier Messages

When buyers reply to messages from suppliers, they have the option to change the **Broadcast Message** drop-down from **No** to **Yes**. When buyers select this option, all suppliers receive the new message, but other suppliers in the event cannot see the original supplier message unless buyers manually copy and paste the message into the **My Message** area.

Currently, buyers are not alerted to this omission. With this enhancement, a message will appear onscreen when buyers change the **Broadcast Message** drop-down from **No** to **Yes**, alerting buyers that the supplier message will not be visible to other suppliers and informing them of the steps they can take to make the message visible.

Trusted Timestamps for RFx Messages

Trusted timestamps certify the time associated to activities within an event and prevent modification of related event information after the timestamp has been applied. Previously, it was possible to add a trusted timestamp to real-time events and logs within the Sourcing+ solution. With this enhancement, it is also possible to add trusted timestamps to RFx messages sent by buyers and suppliers and also to RFx messages forwarded by buyers.

- This feature requires the timestamp functionality to be configured with a Timestamp Certificate Authority.

Buyer Name Column Added To Supplier RFx and Auctions Lists

Currently, on the list pages of RFx and Auctions, suppliers can see the organization name associated with an event, but not the owner name. A new customizable **Owner** column will be added to these list pages for suppliers. This field will be visible only if the related flexible **Buyer Name** field has been configured.

The owner name filter will be available if this information is visible in either the object detail or in the list itself. If configured, owner data will also be included in Excel exports from these lists.

SOURCING+ PURCHASE REQUESTS

This section focuses on updates that affect Purchase Requests in JAGGAER ONE Sourcing+.

Improvements for Converting Purchase Requests to RFQs or Projects

Currently, it is not possible to convert a purchase request (PR) to a new project with workflow that was created from a template. As a workaround, it is necessary for users to first create a project from template, initiate the project workflow, enter the first task, and change its status to *Running* before converting the PR to the project. The process for converting a PR to a new RFQ also requires many steps.

In 19.3, we will simplify this process by eliminating clicks throughout the conversion process. In addition, if platform configuration allows, users will also be able to create a new project from a template within the conversion process. Upon confirmation of the project creation, the system will automatically place the new project and the task containing the converted RFQ into *Running* status. If desired, it will be possible for organizations to configure their conversion processes so that new projects can only be created from templates.

The user experience will be further improved with the addition of a single list from which users will be able to access all PRs converted in different RFQs within the same project.

Aggregated PR Heading View

When PRs are imported to the Sourcing+ solution from an external SAP ERP, the purchase requests cannot be aggregated by SAP PR code. To improve platform flexibility, an integrated PR which offers grouping by header object will become a format option for PRs that are created by automatic import from SAP ERPs.

With this enhancement, users will have the option to group all of the PRs with the same SAP code into a single selectable and clickable line, allowing for conversion of all aggregated PRs into RFQs with a single selection. In addition, users will be able to select multiple groupings of aggregated PRs and manage them simultaneously. Alternatively, users will be able to access individual PRs within the aggregate by clicking a single line to open a page displaying the underlying PRs.

SAYT for Stakeholder Divisions Selection

The Search As You Type (SAYT) feature improves speed and accuracy in platform searches. Currently, SAYT is not available for selections within the **Stakeholder Division** field. This enhancement will extend SAYT search capabilities to searches within the **Stakeholder Division** field.

SOURCING+ AUCTIONS

This section focuses on updates to the JAGGAER ONE Sourcing+ Auctions solution.

Conversion of Purchase Requests into Dutch Auctions and Japanese Auctions

Currently, it is not possible to convert an RFQ that originates from a purchase request (PR) into a Dutch auction or a Japanese auction.

In 19.3, it will be possible to convert RFQs that originate from a PR into Dutch auctions or Japanese auctions. Please note that it will not be possible to copy the data concerning RFQ offers into the Dutch or Japanese auction as a part of the RFQ conversion.

Transfer of Single-Envelope RFx Commercial Scores to Auctions with Best Score Formats

The **Best Score** ranking option, also known as **MEAT (Most Economically Advantageous Tender**, requires buyers to configure both a technical score and a commercial score. However, when a Best Score RFx is converted into a Best Score auction, only the technical score from the Technical envelope is transferred from the RFx to the auction. As a result, when a Best Score, single-envelope RFx with percentage scoring and an aggregation of supplier section scores is converted into a Best Score auction, technical scores located within the single envelope are not transferred. If customers who use this format want to include this data in the auction configuration, they must manually copy the technical score from the RFx into the auction, which is time consuming and increases the likelihood of errors occurring in the auction configuration.

With this enhancement, the technical scores from Best Score single-envelope RFx that are configured with **percentage scoring** and **aggregation of supplier section scores** will be transferred automatically when these RFx are converted to Best Score auctions.

Improved Visual Design of the Auction Monitor

With this enhancement, several of the color contrasts within the auction monitor will be improved, making it easier for users to distinguish auction starting times and Dutch auction prices.

Visibility of Reference and Reserve Price in Auction Chart Monitor

The **Reserve Price** and **Reference Price** fields serve as a guide for buyers, confirming the status of the auction's reservation price and reference price. Currently, this information is not presented in the Auction Monitor's **Chart** graphic.

With this enhancement, information about the auction's reserve price and reference price will be included in the Auction Monitor **Chart** so that users will have visual confirmation of the auction activity in relation to these pricing markers.

Timer Pinned to the Auction Header

In auctions with multiple lots or multiple items, the display can easily take up more than one screen. When this occurs, the auction timer can scroll off-screen. Buyers can use the fly-out menu on the left side of the screen to display the timer; however, suppliers don't have this option. Instead, they must scroll up and down between the bidding area and the timer. This can be disruptive to bidding, particularly if a supplier loses track of the location of a lot or item in the auction list.

In 19.3, the auction timer will be pinned to the auction header on suppliers' auction monitors so that supplier users can see the timer while they scroll through multiple lots and items.

Ability to Create Messages in Auctions with *To Start* Status

Currently, the **Create Messages** section of the **Messages** area is not available to buyers and suppliers when an auction is in *To Start* status. As a result, buyers and suppliers are unable to communicate with each other about upcoming auctions through the **Messages** area when these auctions are in *To Start* status. It is possible for buyers and suppliers to use the Auction Monitor message feature when auctions are in *To Start* status, but suppliers do not receive a message alert from the auction monitor and attachments cannot be included through this communication method.

To ensure that buyers and supplier users can communicate effectively through the JAGGER ONE Sourcing+ solution, in 19.3, they will be able to access the **Create Messages** section of the **Messages** area of auctions when these auctions have *To Start* status.

Auction ID Tag Added to Emails

In order to provide more information about the object of a sourcing event, in 19.3, it will be possible to have tags for the associated **Auction Code** added to several email alerts that are sent to suppliers.

SOURCING+ COLLABORATIONS

Project Details Now Available in the Collaboration Printable View Report

Currently, the associated Project's **Code**, **Title**, and **Reference** are not available in a collaboration's printable view report. As a result, when buyers share collaboration details for a committee to review offline, they are required to manually fill in the project details that are missing from the printable view report. With this enhancement, these project details will be available within the report.

SOURCING+ BID COLLECTOR

This section focuses on updates to the JAGGAER ONE Sourcing+ Bid Collector solution.

Ability to Add Item Lists to Bid Collector Document Object Templates

When object templates are created from Bid Collector documents, the item lists contained in the documents are not included in the templates. This omission results in extra time and effort spent by buyers who use these templates to create Bid Collector documents for sourcing events based on the same item lists.

With this enhancement, item lists will be included in the templates that are created from Bid Collector documents. This addition will save time and maximize the guidance buyers receive when creating Bid Collector documents from templates.

SUPPLIER MANAGEMENT+

This section focuses on general updates to the JAGGAER ONE Supplier Management+ solution.

Ability to Manage Consortium Within A Category Assessment

Many suppliers operate as part of a "Consortium", a specific type of legal structure which defines an independent legal entity and organization that has ongoing relationships with other legal entities known as consortium members, but still have independent ownership and control. Different suppliers could be part of a consortium and consortium may also have other consortia as members. These consortium supplier entities have their own organization profile data, but in some cases, may need to refer to some other consortium members when managing qualification prerequisites. With the 19.3 release an existing legal structure can be configured as a consortium, which makes additional options available to support consortiums within category assessments.

If the supplier is a Consortia entity, the buyer has the ability to explicitly indicate which consortium member (qualification partner) is supporting the qualification request for a given category in the category assessment. Qualification partners are editable by the buyer only, but the provided information related to the consortia and qualification partners can be displayed as read-only to supplier consortia entity.

Organizations must work with JAGGAER to determine the Legal Structures that are, by law, the consortia entities.

Supplier Category Selection - Ability to View Category Leaves Only

Supplier classifications are managed by a buyer and/or supplier in the Category Tree page, where user can select (flag) category leaves. When multiple category levels exist, viewing and selecting categories can be less efficient. With this release, organizations can limit the "depth" of the tree displayed in Supplier Classifications selection page and view leaf level categories in a separate window for easier identification.

This feature is available where Supplier classifications are added:

- By Supplier - During initial supplier registration Onboarding process

- By Supplier - After enabling

- By Buyer - In the Supplier Console

Ability to Limit Supplier Category Selection

Suppliers and Buyers can select categories from the category tree with no limitation on the number of categories. Many times, more categories are selected than are necessary. This creates more work when managing the supplier, especially as it relates to qualifying a supplier per category. With the 19.3 release, a limitation can be placed on the number of categories that can be associated with a supplier. The limitation applies to supplier or buyer users associating categories in all areas of the application where classifications can be added or removed, including:

- Supplier onboarding

- Editing categories after supplier activation (by supplier or buyer)

Validation for the number of categories occurs when associating categories in the UI as well as via Excel imports that associate categories to suppliers.

SUPPLIER MANAGEMENT+ : PERFORMANCE MANAGEMENT

This section focuses on updates to the Supplier Management+: Performance Management module.

Ability to Manage KPIs Via Excel Import

Previously, it was possible to massively create KPIs via Excel (Import), but there was no way to manage updates to existing KPIs via Excel. Changes and updates to KPIs had to be managed manually on an individual basis in the UI. With this release, system administrators can now update existing KPI information via an Excel mass update in addition to the existing mass KPI creation.

SPEND ANALYTICS+

This section focuses on updates to the Spend Analytics+ module.

Ability to Manage Grouping through an Import/Export Process

Previously, end user management of data grouping was performed exclusively through the user interface. Users had to access the Grouping Editor and group the data manually. In release 19.3, we are providing the ability to manage grouping through an import and export process. The data can be exported to an Excel file, where the grouping is updated. The updated file can then be imported. This updates the grouping configuration in the application.

Ability to Determine how Data Changes Impact Classification

The application allows for changes in the data and, in some cases, these changes can impact Spend Group categorization. Previously, there was not a way to manage if data changes impacted or did not impact categorization. For example, if an organization had a Spend Group based on Supplier and a new Supplier Master table was loaded with changes to a supplier's name, records categorized by Supplier Name within that Spend Group would be uncategorized. A 'new' Spend Group record would be created for the changed Supplier Name and that record would not have a category associated with it. In release 19.3, we are providing a Spend Group Change Management feature. This feature will allow organizations to determine if they will allow or disallow categorization changes to Spend Groups when data changes occur.

Knowledge Base IDs Automatically Generated when a New Record is Created

When a new Knowledge Base record is created, it requires a unique identifier (KBID). The KBID is an integer value. Previously, users had to manually create KBIDs, requiring them to keep track of used integer values in order to ensure that the IDs remain unique. In release 19.3, the application will automatically generate a unique KBID for a new record if one is not assigned. The generation of a unique KBID will occur within the User Interface and as part of the Knowledge Base Import process.