



19.3 RELEASE PREVIEW

SEPTEMBER 27, 2019

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WELCOME

The **19.3 JAGGAER Product Release** will be available in the production environment starting November 11, 2019. The features in this document are specific to the following JAGGAER One solutions:

- Contracts+
- eProcurement
- Inventory Management
- Invoicing
- Savings Management
- Sourcing
- Supplier Management

OBJECTIVES

The purpose of the **Release Preview** is to provide administrators general information about 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 environments.
- 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: Test Sites Unavailable	Beginning October 18, 2019, 8am ET	The 19.3 release will be promoted to the Test (usertest) environment from Friday, October 18, 2019, 8am ET through Sunday, October 20, 2019 12 pm ET. An email will be sent when the promotion is complete.
Release Validation in	October 20, 2019 - November 7, 2019	Three weeks prior to General Availability, release enhancements can be viewed and tested in the Test environment.

Event	Date and Time	Description and Details
Test Environment	(Three Weeks)	<p>Additional Information:</p> <ul style="list-style-type: none"> • Draft documentation (Release Notes, Online Searchable Help and Handbooks) is provided when the release is pushed to UIT. • A pre-recorded release webinar and solution-specific videos will be available on the Product Release Library during the UIT 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.
Production Unavailable (Begin Release Upgrade)	Beginning November 8, 2019, 9pm ET through November 10, 2019, 12pm ET	The 19.3 release will be promoted to the Production environment from Friday, November 8, 2019, 9pm ET through Sunday, November 10, 2019, 12pm ET.

An email will be sent out when the promotion is complete. Final documentation will be provided at this time (Release Notes, Online Searchable Help and Handbooks).

GENERAL ENHANCEMENTS

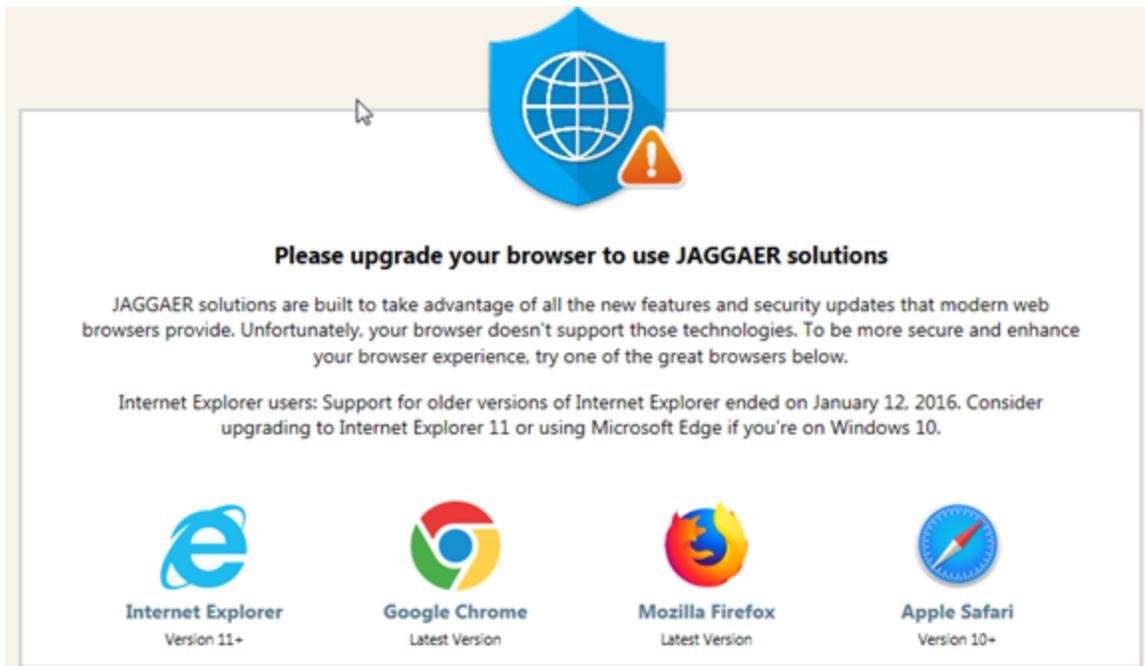
Updated Site Navigation Interface

As JAGGAER continues to make new solutions available, it's imperative that we work toward a consistent user experience across all products. In 19.3, we will continue this initiative by providing an updated user interface (UI). Changes will include a revised site look and feel and new product iconography.

For the 19.3 release, the new UI will be optional. It will be on by default in the UIT environment and customers will be able to turn it off at the organization level. It will be off by default in the Production environment and customers will be able to turn it on at the organization level. However, in release 20.1, the current UI will no longer be available. Therefore, it is highly recommended that customers begin using and testing the new UI as soon as possible. Specific details about the UI updates will be available in the full product release notes that are published when the release goes to UIT.

Application will No Longer Function in Internet Explorer 6-10

While JAGGAER has not supported Internet Explorer 6-10 for the past several releases, organizations have still been able to access and use the application in these older browser versions. As of release 19.3, the application will no longer function in IE 6-10. Function will cease for Test sites when the release goes live in the **Ustertest** environment on October 18, 2019. Function will cease for Production sites when the release goes live in the **Production** environment on November 11, 2019. If a user attempts to access the application in IE 6-10, following screen will display.



Organizations that use these browser versions should begin making arrangements to upgrade as soon as possible prior to the release. For a complete list of supported browsers, please access the link below.

<https://library.jaggaer.com/wp-content/uploads/Supported-Browsers-Devices.pdf>

Supplier Profile Legal Structure Options Based on Country Selection

Currently, the Legal Structures available for supplier selection are a standard list, regardless of the supplier's country of origin. Clients whose business interests extend to multiple countries must allow non-US supplier's the ability to select a Legal Structure that's consistent with the business structures established within their country of origin, or the country in which they conduct business. With the 19.3 release, Legal Structure selections, available to suppliers in the Customer Branded Portal as well as the customer's view of the Supplier Profile, will be determined by the supplier's selected country of origin.

Global Supplier History Search

Currently, administrators have a limited ability to track supplier changes. In 19.3, administrators will have the ability see what has changed in their supplier data across all suppliers. This provides a clearer image of important changes across suppliers for an organization.

Exchange Rate Import Configuration

With 19.3, we will be updating the customer exchange rate import validation to offer more granular control for validation of exchange rates during import.

New Search Interface is Mandatory for Specific Document Types and Requests

Important Note: In release 19.3, we will be changing the name **Form Requests** to simply **Requests** in the application. Where this release note mentions Request, we are referring to what are currently called Form Requests.

For the past several releases, we have been rolling out a new search interface throughout the application, including for document search and request search. Currently, it is optional to use the new search. A setting in the user profile determines if the user sees the classic search interface or the new search interface for all document types and requests. In 19.3, the new search interface will no longer be optional for sales orders, receipts, sales invoices, and requests. It will be on by default for those search types and users will not be able to opt out.

The new document search interface will still be optional for requisitions, purchase orders, and invoices. The setting in the user profile will determine if users see the classic search or new search for those document types. The current goal is for the new search interface to be mandatory for all document types in release 20.1.

Document Search and Approval Menu Changes

In release 19.3, the navigation to document search and approvals will be updated. The main goal of these updates is to organize access to these objects by solution. For example, access to approvals will be separated from document search, and each product will have its own **Approvals** sub-menu. Form requests will also be grouped by product.

Due to the separation of document search and approvals, the **Documents** menu will be renamed to **Orders**. **Note:** Users who opted in to the new search interface currently have both a **Documents** and **Orders** menu. The two menus will be merged.

Additional changes to sub-menus will be made. Full details will be available in the Product Release Notes available when the release is promoted to the Userstest environment.

UOM Configuration by Organization

There are currently limitations surrounding the selection and application of UOMs. In the 19.3 release, we will be improving functionality by allowing organizations to select and deselect UOMs from the list in our system. Organizations will also be able to edit UOMs to better suit their needs

CONTRACTS+ ENHANCEMENTS

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

Additional Levels of Conditional Visibility

With this release, users will be able to configure up to five levels of conditional visibility for questions, pages, and groups on contract request templates.

Conditional visibility will still be limited to the same types of questions supported today, which are dropdown, yes/no, multiple select - pick many, and multiple choice - pick one.

Custom CCF Validation Rules for Dates

With this release, we will provide the ability to configure custom contract field (CCF) validation rules for dates.

Customers will have the ability to create date validation rules so that the entered values are within contract date boundaries or a specific time frame, including contract start date, contract end date, contract review date, and custom date.

CCF date validation rules will be respected on contracts and contract requests. Messages will display for users if they attempt to enter CCF values in violation of the configured rules.

Skip Workflow Approval for Auto-Renewal Contracts

With the 19.3 release, we will introduce a setting to allow contracts set up for auto-renewal to renew without going through workflow approval again.

If this option is enabled, an auto-renewal contract will be created at the time indicated by the auto-renewal settings. It will stay in Executed: Future status until its start date.

Make Clauses Read-Only on the Contract Main Document

With this release, users will have the ability to make clauses that are marked as editable/negotiable in the Clause Library read-only on the contract main document.

This will allow customers to lock down clauses on the contract (main document) after contract negotiations are completed.

Reject Contract Action and Status

This release will introduce a new contract action called **Reject**. Contracts that have been rejected will be moved to the new contract status Rejected.

When a user selects the Reject action on a contract, an overlay will open where they can enter the rejection reason. When rejected, a contract is removed from workflow, its status is changed to Rejected, and a rejection time stamp is added.

This enhancement provides customers with a way to indicate that a contract is rejected and should no longer be worked on.

Rejected contracts will appear in contract search results. Like terminated contracts, users cannot amend or renew rejected contracts. Rejected contracts can still be archived and copied.

Users with these permissions will be able to use the Reject action:

- **Approve/Return Contracts** (will be renamed Approve/Reject/Return Contracts)
- **Approve/Return Contracts on Behalf of Another Approver** (will be renamed Approve/Reject/Return Contracts on Behalf of Another Approver)
- **Approve/Return Contracts via Email** (will be renamed Approve/Reject/Return Contracts Via Email)

Allow Contract Managers to Add Ad-hoc Approvers

Currently, when a contract is in approval workflow, only an approver on the active workflow step, who has the **Add Ad-Hoc Approver for Contract Approvals** permission, can add an ad-hoc approver.

With the 19.3 release, explicit contract managers and contract facilitators with the permission (which will be renamed **Perform Ad-Hoc Approve/Reject/Return Contracts**) will be able to add one or more ad-hoc steps with one or more ad-hoc approvers to contracts in approval workflow.

Apply eSignature Signers Based on Conditions

With this release, organizations will be able to configure contracts to automatically add appropriate internal eSignature signers based on certain conditions being met.

Contract configuration users will be able to create rules based on Contract Type, Contract Value, Contract Total Value, and Commodity Codes to determine and assign eSigners.

General Contract Settings for eSignature will be reconfigured into two tabs:

- **eSignature Administration** - Includes all eSignature configuration settings.
- **eSignature Rules** - This will be a new page where users create eSigner rules and can view related history.

To add a rule, contract configuration users will select the rule element, add signer(s), provide the rule information, and indicate whether it is active or inactive.

The signers will automatically change as the rules are changed and the values used in the rules change, until the contract is submitted for workflow. At that time, the signers will remain static.

Turn eSignature On or Off by Contract Type

For customers with eSignature configured, this release will introduce a new **Use eSignature** setting on the contract type. This will allow users to override the eSignature setting on the General Contract Settings page for contract types. Users will be able to choose one of the following options on the setting:

- **Use Default** - Will use the current setting from the General Contract Settings page.
- **Override Default Setting - Always No** - Always disable eSignature for contracts with that contract type.
- **Override Default Setting - Always Yes** - Always enable eSignature for contracts with that contract type.

New contracts created with the contract type will use the selected setting. Existing contracts will not be updated if the contract type's Use eSignature setting is changed.

Allow Decimals for Contract Invoice Item Quantity

With the 19.3 release, buyers and suppliers will be able to enter item quantities with up to two decimal places on invoices.

This change will apply to both buyer invoices and sales invoices.

EPROCUREMENT

SHOPPING AND ORDERING

Budget Manager Enhancements

In 19.3 we will continue development of the Budget Manager solution. Some of the enhancements planned for Budget Manager in this release are:

- A new feature will provide the ability to make manual spend adjustments to budgets.
- We will add the ability to create budgets with zero amounts so that customers can create empty budgets and transfer budgets into them.
- We will add the ability to configure budgets based on custom account code combinations.
- New options will be available for collecting requisition spend information in budget totals. Organizations will be able to start collecting spend when a cart is first submitted into workflow, or collect spend based on dates.
- Spend and transfer options will be updated to allow users with the appropriate permissions to request a transfer of funds from any budget they can view.

Virtual Item Master Enhancements

Currently, customers create records in their ERP system for items that are ordered frequently. The records can contain important manufacturer and supplier information, and the management of this manufacturer and supplier data is supported in our Virtual Item Master solution.

In 19.3, we will expand our Virtual Item Master solution to include customer commodity codes and customer accounting information on virtual item master items. This data will automatically be pulled into the product details when users create requisitions and will also be included in the export to customer ERP systems.

Organizations will be able to use the new functionality to link commodity codes to hosted catalog items, so that shoppers and suppliers will be able to find items using commodity codes. This will be useful for customers that rely primarily on their own commodity codes for categorizing items.

Commodity Codes Added to Advanced Search

In 19.3, we will add a new Commodity Code search field to the shopping Advanced Search so that users can search for products by commodity code.

Editable Delivery Fields on Change Requests

Currently, delivery fields on change requests are not editable. In 19.3, we will add a new setting that allows organizations to make delivery-related fields editable, and the changes will be merged back to the purchase order.

New Note Category for PRs and POs

In 19.3, we will create a new Additional Note category to provide more note options on a PR or PO. If the feature is enabled, a new Additional Note section is displayed on PRs and POs. Users will be able to add multiple notes to it, with a maximum of 1000 characters each.

Ability to Purge Draft Carts of Other Users

Currently, draft carts can only be deleted by the user who created them. In 19.3 we will add the ability for administrators to purge the draft carts of other users.

New Options for Product Views Based on Supplier Classes

Currently, organizations can control the visibility of suppliers and their products through the product views based on supplier classes. In 19.3, we will add a new setting to the supplier class type of product view that will provide more granular control of supplier and supplier product visibility.

The new settings will allow organizations to define the visibility of suppliers separately from their products on supplier showcases, product searches, non-catalog items, and forms. Organizations will be able to set up supplier class product views so that, for example, users will be able to select a supplier on non-catalog items and forms without being able to see products from that supplier.

New PO Workflow Error Queue

A new PO Workflow Error queue will allow organizations to monitor purchase order workflow distribution errors related to revision documents.

Ability to Export ADW History for PR Workflow

In 19.3, we will add an option to export ADW Rule and Rule Group history on the Requisition Workflow to assist in the review and evaluation of changes.

PO PDF Generation Process Updated

In 19.2, we added the ability to generate a PDF copy of the PO and attach it to the document at the end of the PO approval process.

In 19.3, we will make this functionality more flexible. New workflow settings will allow the system to generate a PDF copy of the PO at any point in the workflow. Organizations will be able choose the workflow step on which they want the PDF generated.

In addition, we will update PO Validation so that organizations will be able to send a PO PDF out for signature, and upon its return, replace the original file with the signed document.

Mobile App Updated

Updates to the mobile application will allow users to enter Return Reasons on quantity receipts. This will allow users to return goods and complete the receipt process via the mobile app.

General Updates

These additional updates will be included with 19.3:

- The Banner supplier sync will be updated to provide more details in error messages to help with troubleshooting.
- For customers who use form requests and the cart return integration, the Form Request XML will be updated to include product descriptions. This will allow organizations to better integrate form requests with their ERP systems.

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 19.3, the development of the new shopping experience will include:

- New options for setting background color and images on showcase stickers. We will also extend color themes to the new shopping pages.
- We will add purchase orders to the new shopping experience UI and continue development of the purchase requisition UI to provide a consistent look for PRs, POs, and invoice documents.
- Updates to the search results grid view will accommodate a large number of search results.

These, along with many more updates, will be made to the Search, Shopping, Cart, and Checkout pages to enhance the new shopping experience.

INVENTORY MANAGEMENT

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

Automatic Allocations will Respect Receipt Inventory Locations

Currently, when the auto-allocation workflow step allocates inventory to a sales order, it pulls from receipts for the supplier without respecting the inventory location. In 19.3, the process will allocate physical inventory and quantities from receipts with the same location. This change should address most errors related to item allocations when attempting to complete a shipment on a sales order. Customers will no longer see the Allocation Mismatch error.

Stockrooms will Automatically Update in Response to Cancellations from Purchase Orders

Currently, stockroom sales orders must be manually updated to account for cancellations. In 19.3, stockroom sales orders can be automatically updated based on cancellations from purchase orders.

Receipt XML Import will Support Replenishment

In release 19.3, JAGGAER will update receipt import for replenishment orders so that item inventory and related inventory receipts will be automatically updated in the stockroom. The Receipt Import DTD has been updated to support a stocked items section. The stocked items elements will allow the system to receive lot number and expiration date to use when creating the inventory receipt. If the import message includes other information, like the location internal name for where the item should be stocked, that information will override any stored values from the purchase order. If the stocked item elements are not present in the body of the XML message, the application will check to see if the PO line as the Replenish stock flag set to true. If it is set to true, the system will automatically take the stocked item data from the PO and use it to create an inventory receipt where inventory counts are updated.

Receipt ID Included in Inventory Search

In 19.3, we will be adding a receipt ID column to the inventory search table when running a receipt search.

Update Receipts to Respect Inventory Location

In 19.3, all receipts will include a location ID by default. This will reduce the occurrence of the **Receipt Quantity Mismatch** error seen when attempting to allocate items on a sales order. We will be working with customers to update existing receipts to ensure that all records feature a location ID to further prevent the mismatch error from occurring.

INVOICING

New Virtual Payment Cards

In 19.3, we will begin implementation of virtual payment cards. We will be developing this feature in partnership with various financial institutions, starting in this release with JPMorgan Chase. This will be the first phase of development that will span more than one release.

Virtual payment cards will allow JAGGAER to offer improved fraud protection to our customers by providing the ability to assign a one-time credit card number to an associated order amount. Once the feature is enabled, a virtual payment card can be assigned to a transaction, and it will provide a randomly generated credit card number valid for that specific amount and that specific transaction.

New Receipt Workflow

In 19.3, we will create a new Receipt Workflow that will allow our customers to send their receipts through an approval process. The new workflow will include ADW and static rules, notifications, and approval options.

New Remit To Address Format for Check Request Forms

Currently, users who want to select a Remit To Address on legacy Check Request forms need to select an address title from a drop down list before they can view the entire address. They may have to perform this action repeatedly, potentially many times, in order to select the correct address.

In 19.3, a new tile-based Remit To Address format will be available for legacy check request forms. If configured, users will be able to click a "Select Remit To Address..." link to open a window and select an address. In the new format:

- All available addresses will be fully displayed in one view.
- A search option will be available for use with a large number of addresses.
- Users will be able to add or change addresses, and set an address as the default address for future use.

Ability to Restrict Remit To Address Search by Business Unit

For organizations that use the MBU feature, the **Restrict Remit-To Address search by Business Unit** setting allows organizations to restrict the Remit To address search on invoices, check requests, multi-check requests, and credit memos by a fulfillment center's business unit. If it is configured, search results

include all Fulfillment addresses and all Remittance addresses tied to the business unit, as well as Remittance addresses not tied to a fulfillment center. This sometimes results in many addresses being available for selection and can make choosing the correct Remit To address difficult.

In 19.3, new settings will allow organizations to restrict Remit To Address search results by business unit only, and also to assign supplier Remit To addresses directly to business units, so that users who are selecting a Remit To address will only see Remit To Addresses with business units that match the ones configured on their profile.

As part of this update, the **Restrict Remit-To Address search by Business Unit** setting will be renamed to **Restrict Remit-To Address search by Fulfillment Center Business Unit**.

Global Invoicing Updates

In 19.3 we will continue to add functionality to support Global Invoicing compliance.

Updates to New Invoice Experience

JAGGAER is currently redesigning **Invoices** and **Credit Memos** with a new, modern user interface.

In 19.3 we will add PO search, accounting codes, document actions, and the ability to edit line items to the New Invoice Experience, along with several more updates as development of this feature continues.

SOURCING

Event Data Export Enhancement

The standard reports in Sourcing have targeted objectives based on curated data and include only the data points that are relevant to these objectives. The Looker tool does not identify Sourcing availability and cannot be used to gather sourcing data. As a result, there is a gap in the ability of the Sourcing reporting tools to meet customer-specific reporting needs.

With this enhancement, a new export option called **Export Evaluation Spreadsheet** will be added to the **Evaluation Actions** drop-down, enabling users to scrub and evaluate their custom data sets outside of the JAGGAER ONE platform. Key item and supplier data points will be included in the flattened, multiple-sheet Excel files to allow users to focus only on the response data that is most important to them and to facilitate maximum data manipulation.

Ability to Leverage Supplier Performance Data for Sourcing Event Evaluations

Supplier Management provides a solid framework whereby clients can establish performance metrics for use in evaluating and comparing the suppliers with which they do business. Currently, the Sourcing solution does not leverage this data in the administration of sourcing events. As a result, buyers are not able to easily capitalize on the value of this data when managing and evaluating sourcing events.

In 19.3, JAGGAER ONE will integrate performance data from Supplier Management for use in Sourcing event evaluations. With this enhancement, event evaluators will have the ability to leverage comparative Scorecard data during the evaluation process. Evaluators will also have the ability to disqualify suppliers from event award consideration when reviewing the Scorecard comparison data.

Introduction of Diversity and Supplier Class Filters in the “Supplier Award Summary” Report

Currently, there is no easy way in the Sourcing solution for users to quickly determine the amount of business awarded to suppliers based on the suppliers' diversity categories or the categorical classes to which they have been assigned. In 19.3, new filter options will be added to the Supplier Award Summary report to allow users to quickly assess their event award history to **Diverse Suppliers** and to suppliers within targeted **Supplier Classes**. New columns will be introduced into the report itself to expose these supplier attributes and categories.

SUPPLIER MANAGEMENT

Following are updates to features in the JAGGAER ONE Supplier Management solution. Features in this section do NOT apply to the general supplier management that is bundled with other solutions.

Ability to Restrict Supplier Payment Method Selection Based on Country

Currently, customers can configure the supplier registration to include various payment methods such as direct deposit, credit card, checks, etc. Some payment methods, however, do not apply in certain countries. With the 19.3 release, organizations will be able to configure the supplier registration profile form to restrict the types of payment methods available based on the country selection for the payment method. By default, when the 19.3 release is initially deployed, all payment methods will apply to all countries, as this matches the current system behavior. When restricted to specific countries, the restriction will apply to supplier users in the Customer Branded Portal as well as buyer users viewing the Supplier Profile in their organization solution.