

20.1 PRODUCT RELEASE NOTES

FOR CONTRACTS ENHANCEMENTS

APRIL 6, 2020 - FINAL VERSION



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WELCOME

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 20.1 release. The main goal of this document is to provide an overview of key features that are planned and committed for delivery.

Important: Please see the General release notes document for information about features that affect all modules, as well as some features that are intended for multiple modules. These include:

Objects Deletion Consolidation

Objects Administrative Deletion

Visibility on Archived Object Lists of Other Buyer Organizations

Redefine Rights in Objects - "Select All" Option

Ability to Search on Project Team when Adding Users to Objects

Ability to Restrict Users to Creating Objects from Templates

Template Name Visibility in Object Details

Separate Access Right for RFx, Auction and Contract Attachments

FEATURE ICON KEY

Features may be added after publication of the Release Preview document. Additionally, in some cases, a feature may be included with a specific Product group for the Release Preview, but moved to another Product group for the full Product Release Notes. If there is a noteworthy change to a feature, the release note will be marked with one of the following icons:

New!	Indicates that the feature release note was added since the initial version of the release notes was published with the push to the test environment.
Updated!	Indicates that the feature release note has had a major update since the initial version of the release notes was published with the push to the test environment.
Moved!	Indicates that the feature release note has been moved to a different document since the initial version of the release notes was published with the push to the test environment.

CONTRACTS ENHANCEMENTS

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

Improved Usability of Master Contract Document and Price List Area for Main Contractor

In previous releases, the main contractor was shown the current approved Master Contract Document (MCD) and price list, and any previously approved MCD and price lists.

In 20.1, the main contractor has the ability to see all earlier MCDs and price lists, so long as they had permission to view those earlier values when they were negotiated, even if they were not made active. If the main contractor did not have permission to view an MCD or price list at the time when they were current, those records are not viewable.

Customer Impact

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

USER IMPACT

- Users will be able to view not just the current MCD and price list records, but past MCD and price list records as well.

ADMINISTRATION IMPACT

- The main contractor can only view historical records if they had the permission to view MCD and price list records when that information was current.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

- This feature increases suppliers' visibility on MCD and price list versions, allowing them to maintain full traceability.

Management of Qualification Partners as Subcontractors

When a supplier organization is classified as "consortium" by the selected legal structure and has the EVM_CATEGORY_QUALIFICATION parameter configured, a number of contract-related effects can occur.

For these organizations, qualification partners may become subcontractors. To make this transition more convenient, 20.1 includes an option to copy existing qualification partners into the subcontractor management area.

Customer Impact

- Related Solutions: Contracts
- Feature Activation: This feature is **ON** by default for organizations classified as “consortium” and with the EVM_CATEGORY_QUALIFICATION parameter configured.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

USER IMPACT

- Users with permission to set subcontractors may copy qualification partner data into the subcontractor management area. This option is available in the event that the main contractor or an already configured subcontractor is registered with a legal structure that has been configured as "consortium."
- Users can select a category assessment when qualification partners have been configured and copy all or some of them as subcontractors.
- By default, copying qualification partner data into subcontractor management follows the guidelines established by the categories defined at the contract level.

ADMINISTRATION IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Signature Blocks Will Not Appear More than Once Per Document on Master Contract Document Proposals Generated from a File

It was previously possible for a customer to have more than one system signature clause added to Master Contract Document (MCD) proposals that are generated both from clauses and an upload file.

In 20.1, the generated proposal omits any duplicate signature clauses when such a document is sent for signature. If the MCD is generated solely from clauses, multiple clauses will still appear in the final document per the user's configured settings.

Customer Impact

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

USER IMPACT

- Users will have a better experience through the reduction of multiple signature clauses added at the end of the MCD when it has been generated from an uploaded file.

ADMINISTRATION IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

- Suppliers will have a better experience through the reduction of erroneous signature clauses.

Timestamp Included at Signature Clause Level

In 20.1, a timestamp can be included on the signed contract document when DocuSign integration is activated to record when the signatories approved the document. If a timestamp is added to the signature placeholder, it will be viewable to all parties with permission to view the document.

Customer Impact

- Related Solutions: Contracts
- Feature Activation: This feature is **OFF** by default. You must contact JAGGAER to enable it.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

USER IMPACT

- Users with the appropriate permission can configure whether a signature placeholder includes a timestamp in the **Electronic Signature Settings** section of **Agreement Settings**.
- On the **Agreement Settings** tab, users can select **Edit** in the upper right-hand corner of the screen. From this screen, they can adjust the settings of the Master Document Agreement. Under the **Electronic Signature Settings**, a timestamp can be added by selecting "Yes" from the **Timestamp Used** dropdown box. Selecting "No" will remove the timestamp from the electronic signature.


- Independently from the configuration of involved signatories, the representation of date and time is standardized for all signatories. An example of a standardized date can be seen below the signature field in the following screenshot.

Signature Area

Organisation Name:
The Buyer organisation

Role/Title:
CFO

Name:
Dimitri Hernanes

Signature:  DocuSigned by:
5EE294354BC1454
06.02.2020 | 20:07:24 CET
(dd.mm.yyyy | hh:mm:ss)

ADMINISTRATION IMPACT

- To enable this feature, administrators must contact JAGGAER support.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Electronic Signatures in Arabic Locales Aligned from Right to Left

In 20.1, the Contracts module supports the generation of a Master Contract Document that supports right-to-left orientation for all information in the signature placeholder when the document is set to Arabic localization.

Customer Impact

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

USER IMPACT

- Electronic signatures on MCD documents using Arabic localization will now be fully readable in standard, right-to-left Arabic.

ADMINISTRATION IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

"Refresh Tags" Feature Enhancements

In 20.1, the "Refresh Tags" feature is updated to improve usability, reduce manual operations, and improve performance. The process by which tags are registered as "custom properties" when a Word file is generated by the application has been modified for improved tracking, and automatic tag updating has been introduced in specific steps of the Master Contract Document (MCD) workflow.

Customer Impact

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

USER IMPACT

- All users have access to improved tag management, which improves performance and reduces the number of actions required to manage clauses with tags.
- Tags will be refreshed whenever the MCD is editable, including:

- When the contract is created.
- When a new clause is linked to the contract.
- When a clause in a contract is recreated from the library.
- When a new revision of an existing clause is created in the contract.
- When the MCD proposal is created.
- When the MCD or a single clause is edited and changes are saved.

ADMINISTRATION IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Master Contract Document Approval Usability Enhancements

Formerly, users with permission to complete Master Contract Document (MCD) approvals had to navigate a number of mandatory confirmation messages. In 20.1, these users are able to finalize MCD approval through a simplified approval process that requires fewer actions to navigate.

Customer Impact

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

USER IMPACT

- Users will experience a streamlined approval process for MCDs.

ADMINISTRATION IMPACT

This feature does not impact any third-party integrations.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Log Users Who Mass Extract Contracts

Formerly, users could mass extract contracts via the Mass Contract Management tab without any record of their action registered in logs. In 20.1, this activity is logged in activity reports that can be extracted in the event an audit is conducted.

Customer Impact

- Related Solutions: Contracts
- 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.

ADMINISTRATION IMPACT

- Administrators will be able to have records of mass extraction pulled for audit purposes.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Default Selection to Transfer Formula Column Values from RFQ to Contract

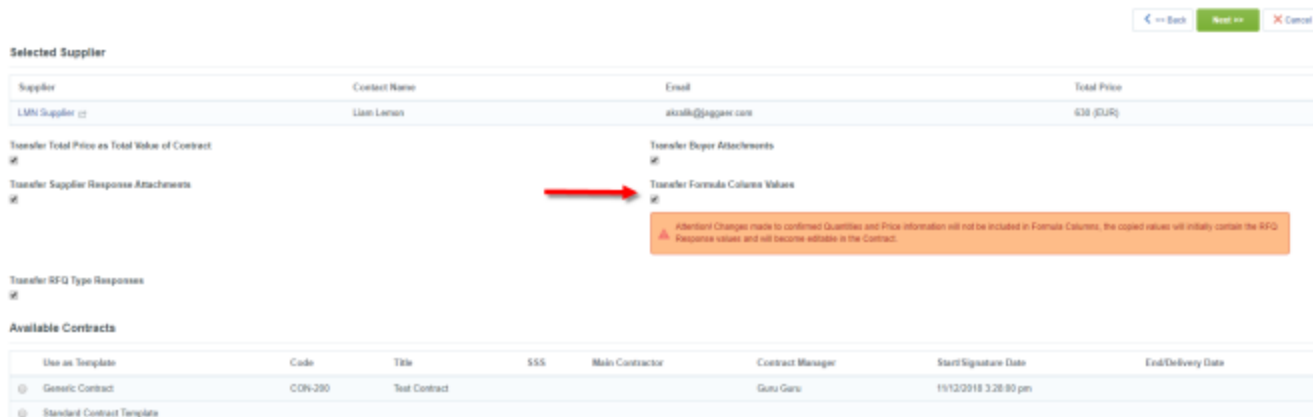
When buyers create a contract from an awarded or pre-awarded RFQ, a list of settings is provided for the buyers to use for configuring the contract. Formerly, the option to **Transfer Formula Column Values** was not automatically selected. Because this option is usually selected by buyers during contract creation, this setting is now selected by default for all contracts created from the RFQ.

Customer Impact

- Related Solutions: Sourcing+, Contracts
- Feature Activation: This feature is **ON** by default but optional for use.
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- During contract creation from an awarded or pre-awarded RFQ, the **Transfer Formula Column Values** option is now selected by default.
 - This option is located in the **Selected Supplier** section of the Contract Creation page.
 - An alert appears directly below this option which reads, "*Attention! Changes made to confirmed Quantities and Price information will not be included in Formula Columns, the copied values will initially contain the RFQ Response values and will become editable in the Contract.*"



Selected Supplier

Supplier	Contact Name	Email	Total Price
LMN Supplier	Liam Leman	alrall@jaggaer.com	438 (EUR)

Transfer Total Price as Total Value of Contract

Transfer Supplier Response Attachments

Transfer RFQ Type Responses

Transfer Supplier Attachments

Transfer Deque Attachments

Transfer Formula Column Values

Attention! Changes made to confirmed Quantities and Price information will not be included in Formula Columns, the copied values will initially contain the RFQ Response values and will become editable in the Contract.

Available Contracts

Use as Template	Code	Title	SSS	Main Contractor	Contract Manager	Start Signature Date	End/Delivery Date
<input checked="" type="radio"/>	CON-280	Test Contract			Guru Guru	15/12/2018 3:28:50 pm	
<input type="radio"/>		Standard Contract Template					

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.