

20.2 RELEASE NOTES

FOR GENERAL SOLUTION ENHANCEMENTS

JULY 20, 2020 - FINAL VERSION



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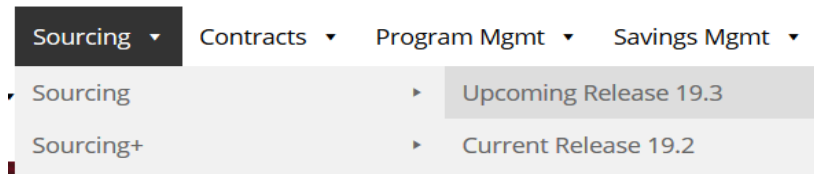
WELCOME

The **20.2 JAGGAER One Product Release** will be available in the production environment starting July 20, 2020. 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:

- Contracts+
- eProcurement
- Inventory Management
- Invoicing
- Savings Management
- Sourcing
- 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 20.2 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.

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:

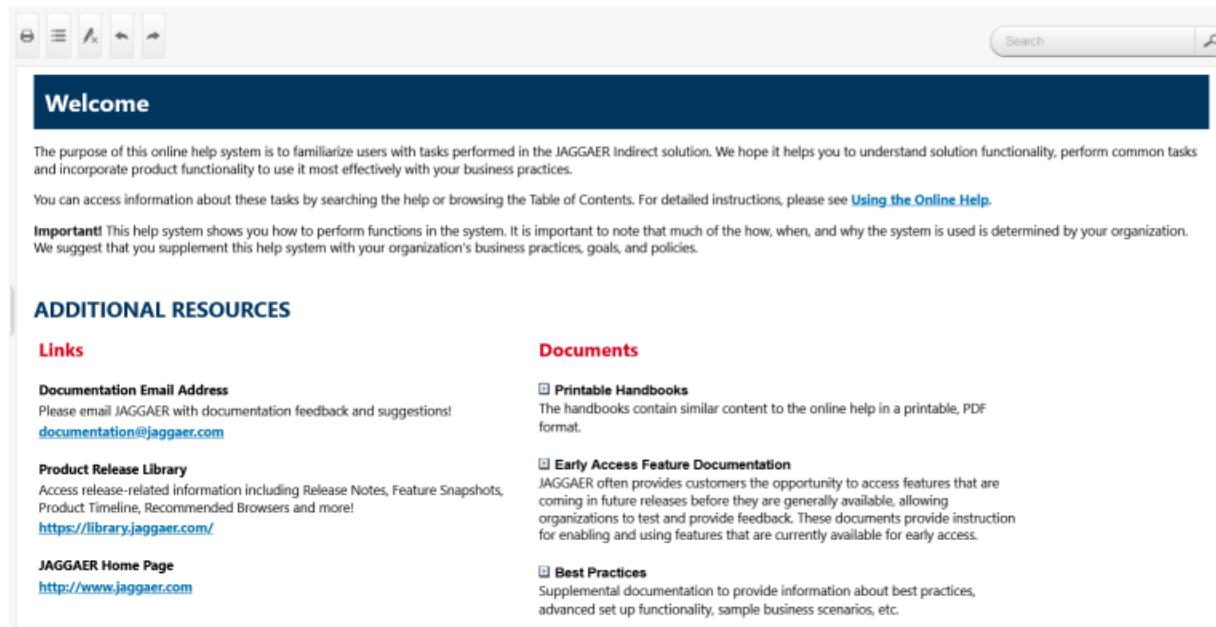
New!	Indicates that the feature release note was added since the initial version of the release notes was published with the push to the test environment.
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Updated!	Indicates that the feature release note has had a major update since the initial version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

GENERAL ENHANCEMENTS

Online Help Updates

The Online Help tool is designed to provide organizations with comprehensive information about using the JAGGAER ONE tool. Users can browse or search for topics to get product help. In an effort to add more value to the Online Help as a resource for customers, JAGGAER has updated the Welcome page. We have redesigned the page to make documents easier to access and added useful links.



As we work toward making the Online Help as useful as possible, we would appreciate feedback and suggestions from our customers. Please email documentation@jaggaer.com with feedback.

Site Basics Handbook Includes Supplier Profile Management Topics **New!**

Previously, general Supplier Profile Management topics applicable to multiple solutions were available only when accessing the online searchable help in the application. With this release, the topics are merged into the **Site Basics Handbook**, allowing the information to be accessed in printed form

SITE BASICS

USER HANDBOOK

PRODUCT VERSION 20.2

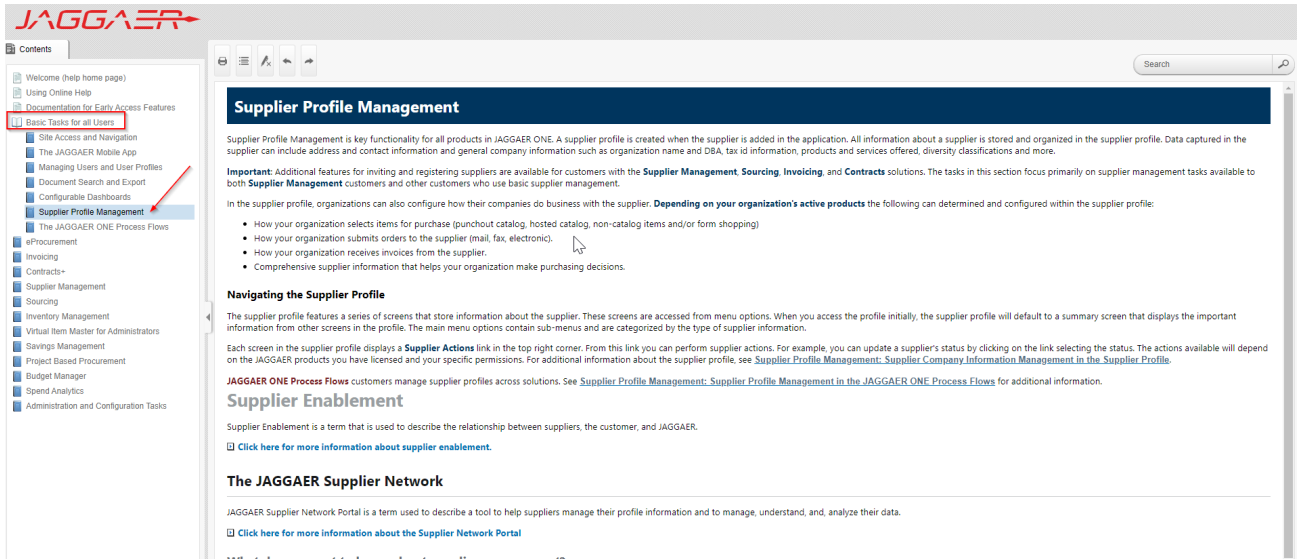


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The topics are still available in the online searchable help, but now under the **Basic Tasks for All Users** section.



These topics are separate from the topics specific to the **Supplier Management** solution.

Document Search User Interface - Updates

For the past several releases, JAGGAER has been rolling out a new search interface throughout the application, including for documents and requests. The new search interface is live for Sales Orders, Receipts, Sales Invoices and Requests. Users have the ability to opt in to the new search via a user profile setting for Requisitions, Purchase Orders, Change Requests and Invoices, which will continue to be optional with the 20.2 release (refer to [Early Access Guide for Document Search](#) in the online searchable help for additional information).

However, several usability enhancements have been added in the 20.2 release to the new search interface for Sales Orders, Receipts, Sales Invoices, Requests, Requisitions, Purchase Orders, Change Requests and Invoices. All users will see changes to Sales Orders, Receipts, Sales Invoices and Requests. Only those users who have opted in to the new search interface will see the changes for Requisitions, Purchase Orders, Change Requests and Invoices:

- A new **Quick Filters** section displays available filter options with counts. This allows users to more easily refine search results.
- An **Expand/Collapse button** is available to easily remove or display the **Quick Filters** and **My Searches** tabs next to search results.
- The **Save As** button includes new options for managing searches, viewing documents you own, and seeing your recent approvals for the selected document search (as permissions allow).
- A new button for **Pin Filters** contains the options to **Pin Filters** and **Pin Columns** (previously under the **Save As** button dropdown).
- The **Export** dropdown contains the option to **Export Selected Rows** in addition to the existing **Export** option that includes all rows.

Also, the **Order Consolidation** pages have been updated with the same look and feel as other new search pages. The functionality for creating a consolidated order is unchanged. See **Order Consolidation - UI Enhancements for Early Access Users** in the **eProcurement Release Notes** for additional information.

Note: The new search will be active for all customers with the **20.3 release**. In the meantime, JAGGAER will work with customers who would like to implement the new search prior to the 20.3 release. Please contact your JAGGAER representative with any questions.

Customer Impact


- Related Solutions: All Solutions
- Feature Activation: This feature is **ON** by default. Customers who wish to use the improved search for requisitions, purchase orders, change requests and invoices will need to opt in.
- New Permissions related to this Feature: None
- New Notifications related to this Feature: None

USER IMPACT

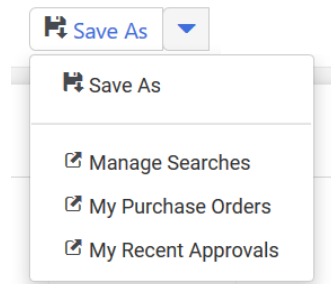
- The new search functionality continues to be optional for Requisitions, Purchase Orders, Change Requests and Invoices. Please contact an Administrator to have the search enabled for these document types. Refer to the [General Release Notes for the 20.1 release](#) in the JAGGAER Product Release Library for details of the new search.
- Enhancements with the new search UI for the 20.2 release include:

The screenshot shows the 'Search Requisitions' page. On the left, there are filter panels for 'Approved By', 'Business Unit', 'Commodity Code', and 'Contract Type'. The main area contains a table of requisitions with columns: Requisition Number, Supplier, Requisition Name, Requisition Status, Prepared For, Submitted Date, and Total Amount. At the top right, there are buttons for 'Save As', 'Pin Filters', and 'Export All'. Below the table, there are navigation controls like 'Page 1 of 2' and '10 Per Page'.

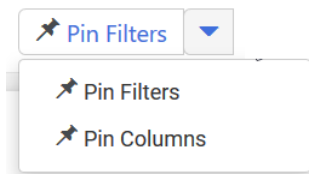
Requisition Number	Supplier	Requisition Name	Requisition Status	Prepared For	Submitted Date	Total Amount
2564900	Discount Office Supplies, Inc. (i)	2020-06-09 tritonadmin 01	Completed	Triton Admin	6/9/2020 11:29:31 AM	607.90 USD
2556840	Discount Office Supplies, Inc. (i)	2020-06-03 bwilson 01	Completed	Brynn Wilson	6/3/2020 4:30:32 PM	13.50 USD
2553762	Discount Office Supplies, Inc. (i)	2020-06-01 bwilson 01	Completed	Brynn Wilson	6/1/2020 1:08:06 PM	77.97 USD
2484444	Discount Office Supplies, Inc. (i)	2020-04-01 bwilson 01	Completed	Brynn Wilson	4/1/2020 12:40:04 PM	25.99 USD
2476101	Discount Office Supplies, Inc. (i)	2020-03-25 bwilson 01	Completed	Brynn Wilson	4/1/2020 11:53:51 AM	25.99 USD

- **Expand/Collapse** button - Beside the **Search [Document]** header, select the button  to view the **Quick Filters** and **Saved Searches** panels on the left. Select again to hide.
- **Quick Filters** - A new panel for **Quick Filters** now displays on the left beside the existing **My Searches** panel, making it easier to see the filters available to further refine search results. As with other search results pages, simply select or deselect options from the filter list to refine results. You can continue to use the **Add Filter** dropdown above search results, which will update the Quick Filters information.
- **Save As** button has moved to the right side of the page.
- You can choose to manage searches and navigate to your own documents and approvals from the **My Searches** tab on the left. This is existing behavior. However with this release, the **Save As** button dropdown now contains these options as well, so you do not have to expand the left panel to access them:

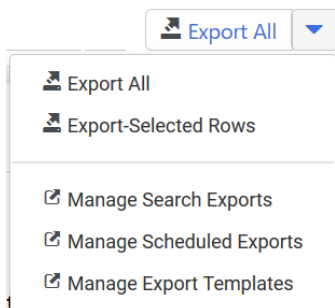
- Manage Searches
- My [Document type]
- My Recent Approvals




- The **Pin Filters** and **Pin Columns** options have been moved to a new **Pin Filters** button. Previously, these options existed under the **Save As** button dropdown. This action is recommended when you use the same filters and column layout for searches, so you do not have to reapply filters and rearrange columns each time.



- Previously, the **Export** option contained only the option to Export all results, along with the options to manage search exports, scheduled exports, and export templates. Now, options to **Export All** or **Export Selected Rows** are available. Use the multi select ellipses on the left, if necessary, to enable the selection boxes for each row (existing functionality). You can then choose rows to export if appropriate, choosing the Export Selected Rows option. The functions of the remaining options are unchanged.



- As a reminder, a **Guided Tour/Video** is available (if enabled by the organization) to users when navigating to one of the new search pages (**Orders**  **Search:Requisitions, Purchase Orders, Change Requests or Invoices**). The Guided Tour and/or Video can be disabled in the user profile settings. Refer to [Early Access Guide for Document Search](#) in the online searchable help for additional information.


Important Reminder - Display Search Results Widget (communicated in previous releases)

- The **Display Search Results** widget, released with 19.3, is available for all users, regardless of if they are opted in to the new search or not. It provides additional column and grouping selections than the previous Saved Search: Documents widget. **Important Note:** It is recommended to replace any usage of the **Saved**

Search: Documents widget for Form Requests with the **Display Search Results** widget. Usage of the **Saved Search: Documents** widget with any search type other than form requests will be automatically converted between now and the 20.3 release.

- When using this widget with All Orders, Requisitions, Purchase Orders, Invoices or Change Requests, links will be fully functional **for users who have opted in to the new search experience**. For users who have not opted in, all links will go to the legacy search results User Interface where it will display the saved search.
- Saved searches created in the new search experience are not backwards compatible. Users who have not opted in will still be able to view the information but links to full search results will be disabled.
 - If you continue to use the previous **Saved Search** widgets for search results, but are opted in to the new search, any new saved searches (using the new search interface) will NOT display in the existing **Saved Search** widget.
 - You MUST use the new **Display Search Results** widget to see new saved searches if opted in. The **Display Search Results** widget will display saved searches created before opting in.
- Saved searches for Receipts, Sales Orders, Sales Invoices and Requests (Supplier Requests, Sourcing Requests, AP Requests, Procurement Requests and Contract Requests) are available in the **Display Search Results** widget only.
- The **Saved Search: Documents** widget will be removed once all organizations are utilizing the new search for all documents. **It is recommended to discontinue use of this widget** and begin using **Display Search Results** widget instead. It is impacted in the following ways by the new search functionality:
 - When the widget has a saved search for **Receipts, Sales Orders, or Sales Invoices**, all links redirected to the updated search interface. This widget can no longer be used for new saved searches. Existing widgets will be automatically converted to the new widget in a future release.
 - When the widget has a saved search for **Request** searches, any links to search results are disabled. This widget can no longer be used for new saved searches. Any existing usage of this widget must be manually converted to the **Display Search Results** widget. Form Request saved searches cannot be converted automatically.
 - Widgets which have been configured for All Documents, Requisitions, Purchase Orders, Invoices, and Change Requests will remain unchanged for users who have not opted in to the new search experience. Users who have opted in to the new search experience will be redirected to the updated search interface. Any existing usage of this widget will be automatically converted to the new widget in a future release.
- Refer to **General Widgets** and **Adding Dashboard Widgets** in the **Site Basics Handbook** or online searchable help for additional information.

ADMINISTRATOR IMPACT

- The optional searches can be enabled at the user or role level. Please see [Early Access Guide for Document Search](#) in the online searchable help for additional information about enabling the new search experience in the user profile.
- As a reminder, the **Guided Tours** feature is optional for the organization. If enabled for the organization, they are optional at the user level. As a reminder (functionality has not changed):
 - **Guided Tours** feature is enabled by default. To change, Navigate to **Setup**  **> Site Appearance and Behavior > Site Appearance Settings**. These settings control the display of videos and guided tours for the **Enable new search experience** feature, which allows the user to utilize the updated search interface for requisitions, purchase orders, invoices and change requests.

- **Show Step-by-Step Tour** - This setting controls the display of a step by step overlay of the different features on the page.
- **Show Video** - This setting controls the display of a video link with additional information about the **Early Access** feature.
- If an option is set to **Yes** (default), users will see an overlay with that option available when navigating to an **Early Access** feature page.
- If an option is set to **No**, the option to view (tour or step by step) will not display when the user navigates to the **Early Access** feature page, and there is no option to enable the disabled option(s) in the user profile.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

ADDITIONAL KEY POINTS ABOUT THE FEATURE

- Best Practices for optimizing the new search experience:
 - Use the **Pin Columns** feature from search results to keep columns you frequently use in your displayed search results, without having to select them each time.
 - Begin using the **Display Search Results** widget for saved searches.

Supplier Impact

Suppliers will see the enhanced search options as described above.

Pending Approval Document Reminders Include Form Request Approvals

Pending Approval Document Reminders can be configured to send to approvers if a document for which they are responsible has remained in a workflow step past a certain amount of time. Previously, Form Request approvals were not included in the reminder configuration. With this release, the **Form Request** approvals are included when **Pending Approval Document Reminders** are configured. These reminders do not require a user to be opted in to a specific notification, but are based on the organization's approval document reminder configurations only.

This reminder notification applies to approvers of the following **Form Request** types (which are available based on your organization's licenses):

- Supplier Requests
- Quick Quote
- Procurement Request
- Check Request
- Generic Request
- Contract Request

- Sourcing Event Request
- Multi-check request
- Budget Transfer Request

This reminder is not configurable by the user and is not controlled by **Notification Preferences**. There are no changes to the current workflow notifications when a Request is pending workflow approval or has moved through certain workflow steps, which are sent based on the user profile **Notification Preferences**.


Customer Impact

- Related Solutions: eProcurement, Supplier Management, Contracts+, Sourcing,
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator. **(Note: Current Pending Approval Document Reminder settings will apply to Form Requests by default)**
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- If **Pending Approval Document Reminders** are configured for the organization, users who are approvers of any type of **Form Request** will receive a reminder notification that a request remains in their workflow folder for approval as per the organization's configurations. This reminder notification applies to approvers of the following request types:
 - Supplier Requests
 - Quick Quote
 - Procurement Request
 - Check Request
 - Generic Request
 - Contract Request
 - Sourcing Event Request
 - Multi-check request
 - Budget Transfer Request
- If configured, a user who is a manager of a Form Request approver may receive a copy of the reminder sent to the approver.
- This reminder is not configurable by the user and is separate from the **Notification Preferences** that a user can enable for workflow status.

ADMINISTRATOR IMPACT

- Approval reminders are configured at [Setup !\[\]\(3da2b303d29c1ea489bbe26a3f5ac664_img.jpg\)](#) > [Workflow Setup](#) > [General Workflow Settings](#) in the [Pending Approval Document Reminder](#) section.
 - If values are configured for [Pending Approval Document Reminders](#), no additional configuration is necessary for Form Request Approvers to begin receiving reminder emails.
 - Please note the following configurations for the field [Which types of approvals should include the manager?](#):
 - If [All Approval Types](#) is selected, pending approval reminders will be sent to all approver managers for Form Requests as listed above. **Note:** If your current setting is [All Approval Types](#), you do not need to take any other action to send reminders to Form Request Approver managers.
 - If [Select Approval Types...](#) is selected, enter Form Requests to add Form Request Approver managers to the list.. Alternatively, you can select the search icon  to select or deselect it from the list of approval options.
- All other settings in the [Pending Approval Document Reminder](#) section will apply to Form Request reminders.
- See [Organization-Level Configuration Options](#) in the [Site Basics Handbook](#) or online searchable help for additional information about workflow approval reminders.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Business Analytics Dashboard Enhancements Updated!

Business Analytics Dashboards use Looker to explore data and create reports. Looker is a third-party visualization and data program that is run within JAGGAER ONE.

In 20.2 we have developed several new dashboards for Business Analytics:

- A suite of [Contracts](#) dashboards provides a summary of contract, contract usage, and contract approval processes.
- An [ePro Trends](#) dashboard provides customers a look at key factors in their document processes over a period of time. Organizations can use this information to note trends and make adjustments to improve performance.
- A new [Supplier Overview](#) dashboard allows customers to view their document activities for a single supplier.

In addition, we have created a new [Period Over Period Comparison](#) feature that can be used to explore trends over time. This is a flexible tool that allows users to choose the date range, granularity, and the number of past periods to include when comparing current data to past data.


Customer Impact

- Related Solutions: eProcurement, Invoicing, 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 end users.

ADMINISTRATOR IMPACT

- The following dashboards have been added to the Global menu for requisitions, purchase orders, invoices and contracts. They can be viewed as is, or they can be used as a starting point to explore an organization's data and create dashboards and looks.
 1. Navigate to **Reporting**  > **Operational and Site Usage Reports > Business Analytics Dashboards**.
 2. Expand the **Global** menu near the top right corner of the page and select one of these dashboards:
 - **Contract** dashboards provide a summary of contract, contract usage, and contract approval processes:
 - **Contract Overview**- Provides a general overview of contract data. It includes information such as the total number of contracts, the number of contracts in different statuses, the number of contract renewals and amendments, as well as contract data broken down by departments, business units, eSignature, contract managers, country, etc.
 - **Contract Process** - Includes information about how long it takes contracts to get approved, and cycle time information that shows how long a contract spends in different contract processes. New workflow filter options provide the ability to filter by both the internal review and contract approval workflow types.
 - **Contract Summary** - The Contract Summary dashboard has been updated to show a snapshot of information from the new contract dashboards below.
 - **Contract Utilization** - Shows contract spend information broken down by document type, department, and business unit, as well as data on total and average contract values.
 - **ePro Trends** - Provides insight on how key factors, across each document type, have been utilized over a given period of time. It includes information such as amount trends per document type over a given time, a snapshot of the suppliers that customers have worked with over time, manual workload for invoices, requisition amounts and approval trends. It uses the Period Over Period Comparison function as its filters.

- **Supplier Overview** - Allows customers to view their activity with a single supplier. It shows totals for requisitions, purchase orders, contracts and catalogs used with a selected supplier. It also includes information such as the top items that are ordered from the supplier, how long it takes orders to get approved and how long it takes invoices to get paid.
- We have changed the dashboard that is displayed on the Business Analytics Dashboards landing page. Previously, when users opened Business Analytics Dashboards, the Summary Dashboard was displayed for all customers. Now the dashboard that is displayed depends on the licenses held by an organization. If an organization has the eProcurement or Invoicing licenses, the dashboard is **P2P Summary**. If an organization has the Contracts+ license only, the dashboard is **Contract Summary**.
- A new **Period Over Period Comparison** group has been added to the following **Explore** options: **Invoice - Spend**, **PO - Spend**, **Req - Spend**. It can be used to examine trends over time by comparing current data to past data. Creating the report requires that filters are added in a specific order, as outlined below. Please see **Create a Period Over Period Comparison Report** in the online searchable help for complete instructions.
 1. Open the **Explore** menu and select one of the following options: **Invoice - Spend**, **PO - Spend**, **Req - Spend**.
 2. Expand the **Period Over Period Comparison** group in the left menu. Four filters and two dimensions are listed within the group.
 3. Add all the fields in the group to the report:
 - a. Click the **FILTER** button next to each filter field so that **all four filters** in this group are added to the report. The filters are displayed in the FILTERS panel on the right, but are not added to the DATA table.
 - b. Add the **Comparison Period Pivot** and **Selected Dates** dimensions to the report by clicking on their names. The fields are added to the DATA table.
 - c. Click the **PIVOT** button next to the **Comparison Period Pivot** dimension.
 4. (optional) Add other data fields to the report:
 - Most **Dimension** fields can be added as **filters**, such as business unit or department fields. The exception is Date fields. Date fields cannot be added to this report as they will conflict with the comparison function.
 - Only **Measure** fields should be added to the DATA table.
 5. In the **FILTERS** panel on the right, complete the Period Over Period Comparison filters as follows:
 - **Selected Date Range** - Select a date range for the review period. This is a date range for current data that the previous data will be compared to. For example, if a user wants to compare this year's data to previous years, "1 Year" would be selected in this filter.
 - **Show totals by** - Select how the results are broken down in the report, i.e., by Year, Quarter, Month, Week, or Day.

- **Compare to previous** - Select an option from the drop down to compare the Selected Date Range to the previous Year, Quarter, Month, Week, or Day. We recommend selecting a time unit that matches the one selected in the Selected Date Range filter so that identical data is compared, i.e., months to months or years to years.
 - **Number of past periods** - Enter the number of comparisons to view in the report. For example, if "3" is entered, the report will show the Selected Date Range and two previous ranges. If "5" is entered, the report will show the Selected Date Range and four previous ranges.
6. Add a **VISUALIZATION** chart.
 7. Click **RUN** to populate the data for the report. The results are displayed in the DATA table in a side by side comparison. **Note:** If there is no data available for any of the time periods selected for comparison, the entire time unit is not displayed in the table.
- A new **Days Until Expiration Tier** dimension has been added to the Contracts area. Users can choose a time period to find contracts that are about to expire within 30, 60, 90, 120 or 180 days from the current date.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.