



## 21.1 Release Notes

### For General Solution Enhancements

Version: March 15, 2021 - Initial Version

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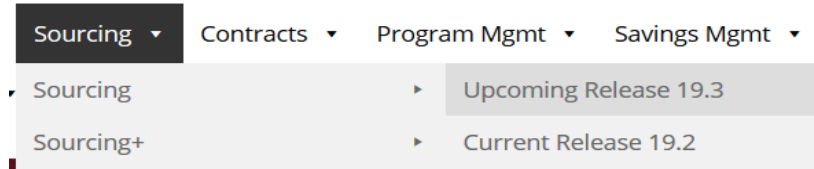
# Welcome

The **21.1 JAGGAER One Product Release** will be available in the production environment starting April 12, 2021. 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 21.1 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:

<b>New!</b>	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.
<b>Updated!</b>	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.
<b>Moved!</b>	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

## Splittable/Non-Splittable Parent-Child Custom Fields Allowed as Code Favorites and Applicable to Documents

With the 20.3 release, buyers were given the ability to configure parent-child relationships between non-splittable custom fields as well as between non-splittable fields and splittable fields. As part of this feature, additional flexibility was given to placement of parent and child fields on a document as well. However, if a code is configured in a **non-splittable parent / splittable child** relationship, it could not be added as a **Code Favorite** in the user profile. This feature also affected a user's ability to use Code Favorites on documents in the solution.

With the 21.1 release, codes that are in a **non-splittable parent / splittable child** relationship can be added to a user's **Code Favorites**. As a result, users now have the ability to use these **Code Favorites** as code defaults on requisitions and invoices. Along with this feature, a hierarchy has been introduced for applying Code Favorites to documents, such as invoices created from Contracts and Non-PO Invoices.

### Customer Impact


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

### User Impact

- If a code is configured in a **non-splittable parent / splittable child** relationship, it can be added as a **Code Favorite** in the user profile to set default values (**User Profile > Default User Settings > Custom Field and Accounting Code Defaults > Code Favorites**).
  - There is no change how users select from Code Favorites within a document. The applicable child fields will become available when the parent is selected, regardless of group placement.

- If a **Code Favorite** includes a **non-splittable parent / splittable child** relationship and is flagged as a Default in the user profile, it can now be used in populating new transactions including requisitions and invoices according to the following hierarchy:
  - If an invoice is being created **from a contract** with "Code Defaults on Invoice" values (Contracts > Search Contracts > [selected contract] > eProcurement Setup page), the contract codes will be applied first.
  - If the user is creating a **non-po invoice NOT associated with a contract**, configured Non-PO Code Rules will be applied (Accounts Payable > AP Administration > Manage Non-PO Code Rules).
  - If neither of those conditions apply to the invoice, the **User Profile Code Favorites Defaults** will be applied.

## Administrator Impact

- The **User Import** process has been updated to allow for parent-child splittable/non-splittable combinations when importing custom field values. process (**Administer**  > **Manage Users** > **Import Users From a File**)
  - When providing code favorites information, the Values column must include the Parent value with each child in the **Values** string:

Username	Action	Code Favorite Name	Default Code Favorite	Values	Favorite Split Type	Percent Split
jclemens	[ADD]	jclemens 1	FALSE	Region:APAC Company:Weyland-Yutani Cost Center:576920 Account:		100
jclemens	[ADD]	jclemens 10	FALSE	Region:APAC Company:Chigusa Corporation Cost Center:101210 Account:		100
jclemens	[ADD]	jclemens 11	FALSE	Region:APAC Company:Chigusa Corporation Cost Center:101210 Account:	% of Price	50
jclemens	[ADD]	jclemens 11	FALSE	Region:APAC Company:Chigusa Corporation Cost Center:101940 Account:	% of Price	50
jclemens	[ADD]	jclemens 12	FALSE	Region:North America Company:Borgia Industries Cost Center:582303 Account:		100
jclemens	[ADD]	jclemens 13	FALSE	Region:North America Company:Borgia Industries Cost Center:582303 Account:	% of Price	20
jclemens	[ADD]	jclemens 13	FALSE	Region:North America Company:Borgia Industries Cost Center:600300 Account:	% of Price	10
jclemens	[ADD]	jclemens 13	FALSE	Region:North America Company:Borgia Industries Cost Center:587227 Account:	% of Price	70
jclemens	[ADD]	jclemens 14	FALSE	Region:North America Company:Alphatech Hardware Inc. Cost Center:600705 Account:		100
jclemens	[ADD]	jclemens 15	FALSE	Region:North America Company:Alphatech Hardware Inc. Cost Center:690000 Account:		100
jclemens	[ADD]	jclemens 16	FALSE	Region:APAC Company:Weyland-Yutani Cost Center:583377 Account:	% of Price	22

- In the example above, **Region** and **Company** are the non-splittable parent fields, and **Cost Center** and **Account** are the splittable children. Note that the Parent name and values are listed for each row. All related field names must be included for each row, even if the related fields are in different document groups.
  - An error message will display for the row if the prerequisite parent is not included on the row for the child custom fields.
- When Exporting a user or list of users in **Advanced, Tab Delimited** format, the ...**CodeFavoritesExport** file in the .zip archive contains the configured Parent value at the beginning of each Code Values string, as displayed above. This was existing behavior for splittable parent-child relationships, and has now been extended to non-splittable parents.

## Third-Party Integration Impact

This feature does not impact any third-party integrations.

## Supplier Impact

This feature does not impact suppliers.


# Supplier Profile - New Mobile Number Field for Supplier Contacts

With the 21.1 release, users have the ability to enter a **Mobile Phone Number** for supplier Contacts. This Mobile Number can be used for two-factor authentication with Contracts+ (see **Support for DocuSign Advanced Electronic Signatures** in the 21.1 Contracts+ Release Notes). For Supplier Management customers, the field can be configured in the Supplier Registration profile form (see **Ability to Require Supplier Contact Mobile Number in Supplier Registration** in the 21.1 Supplier Management Release Notes).

## Customer Impact

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

## User Impact

- Users can include a **Mobile Phone** for a supplier contact.
- Navigate to a supplier profile (**Suppliers**  **> Manage Suppliers > Search for a Supplier > [selected supplier] > Contacts and Locations > Contacts** page)
  - Select a contact from the list, or click to **Add a Contact**.
  - Note the **Mobile Number** field available under the Phone field.

## Administrator Impact

- This feature does not impact administrators.

## Third-Party Integration Impact

- The **Supplier XML Export** and **Supplier Import** have been updated to include **Mobile Phone Number** field. Contact JAGGAER for details.

## Supplier Impact

- Suppliers will see the **Mobile Phone Number** field when managing or adding a **Contact** in the **Supplier Network Portal**.

# Business Analytics Enhancements

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. These updates have been made to the Business Analytics Dashboards in the 21.1 release:

- The field selection panel (i.e., the field picker) on the Explore pages has been updated with a new look. A new **In Use** tab shows Explore fields that are currently in use. New **search** options show popular fields and their descriptions, plus options for adding fields in the search results to Explore tables.
- A new **Quick Start** option in the Explore pages provides report examples and recommendations that can be used as starting point to run and build analyses. For those who create new reports in the interface, this makes it easier to begin building reports.
- **Form Requests** have been added as an Explore option. Some form request types will be added in this release and we will continue to add more in future releases.



## 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

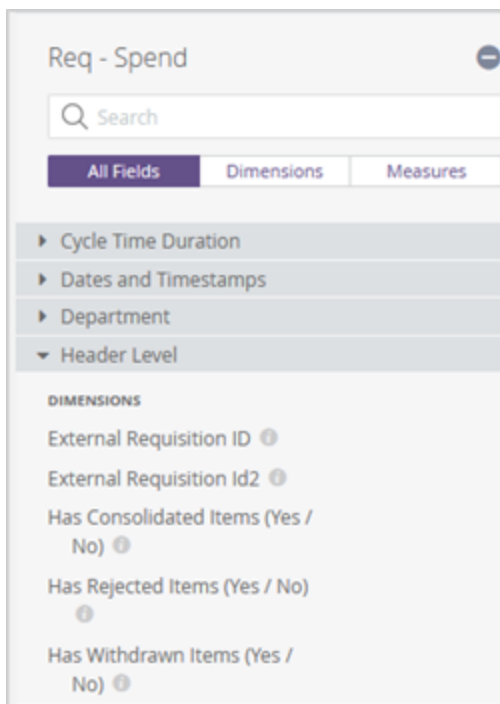
This feature does not impact end users.

## Administrator Impact

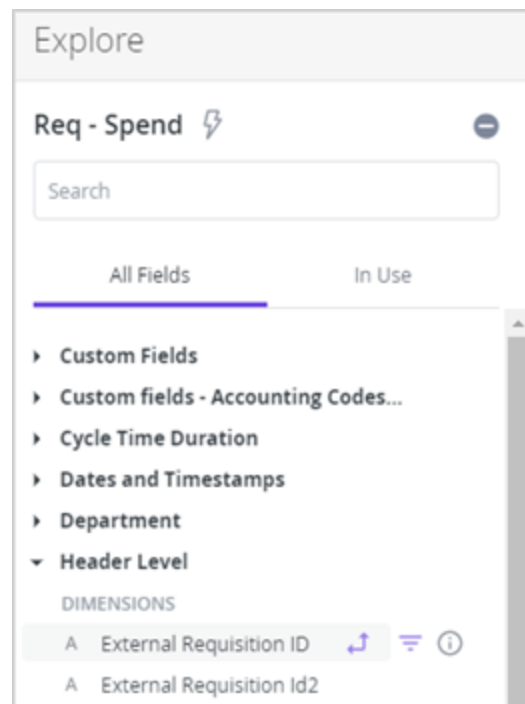
These changes to the Business Analytics Dashboards have been implemented with the 21.1 release. See [Business Analytics Dashboards](#) in the online help for more information.

### Field Picker Changes

The field picker on the Explore pages has been updated with a new look.

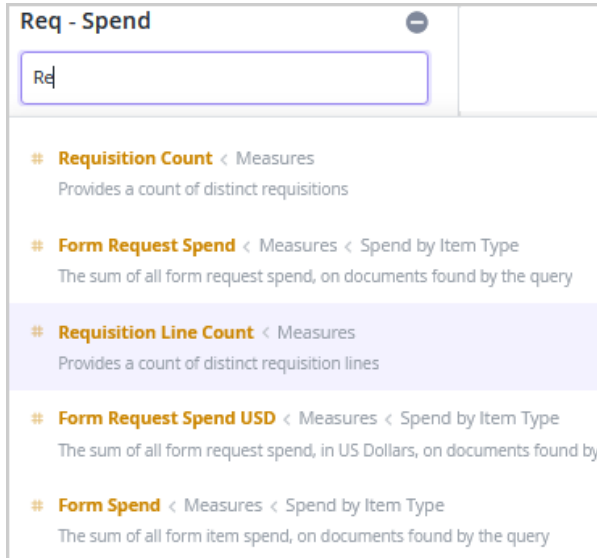


Classic

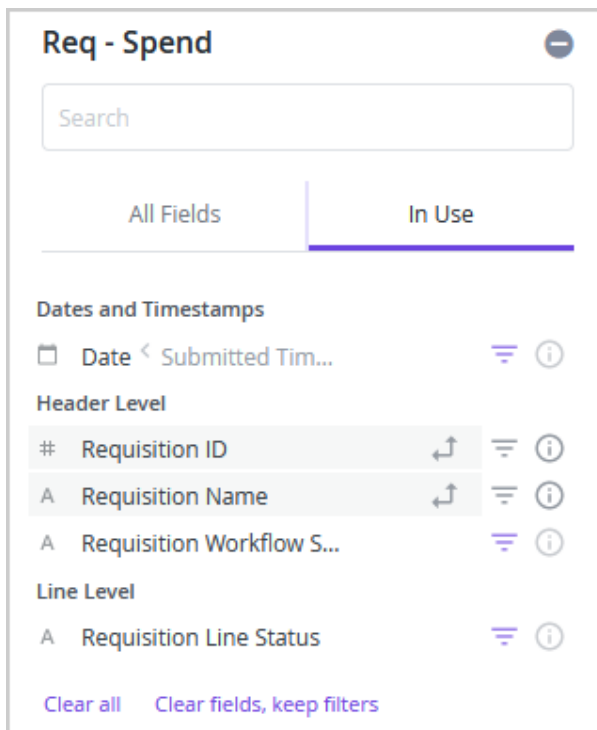


New

A new **search** field in the panel returns results weighed by popularity and by whether field names, types, data types, or descriptions match a search string. Clicking in a blank search bar displays a list of popular fields to choose from.



The **In Use** tab shows all fields that are currently active in an Explore, organized alphanumerically by view or view label. The icons next to each field indicate whether it is a dimension or measure, and the field's current and potential functions in an Explore query.






## New Quick Start Queries

A new **Quick Start** option in the Explore pages provides report examples and recommendations that can be used as starting point to run and build analyses. For those who create new reports in the interface, this makes it easier to begin building reports.

### Quick Start

Explore from a prebuilt query in Req - Spend

 <b>Total Requisition Amount</b> The total amount and document count of requisitions that have been submitted	 <b>Requisitions By Source Past 3 Fiscal Years</b> Requisitions by source, comparing past 3 fiscal years	 <b>Period Over Period Comparison Example</b> Example on how to utilize the Period Over Period comparison function
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## New Form Request Explore Option

A new **form request** Explore option has been added to the Explore panel. Some form request types will be added in this release and we will continue to add more in future releases.

## Third-Party Integration Impact

This feature does not impact any third-party integrations.

## Supplier Impact

This feature does not impact suppliers.