

## SOURCING OPTIMIZER RELEASE NOTES FOR CONTRACTS+ INTEGRATION

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# Welcome

This document focuses on recently released features for Sourcing Optimizer.

## Objectives

The purpose of the **Sourcing Optimizer Release Notes** is to provide information about recently released features for JAGGAER's Sourcing Optimizer. As a reminder, please refer to the Product Release Library at any time for updates and additional information regarding releases:

<http://library.jaggaer.com>

# Contracts+ Integration for Contract Creation

Contracts+ integration allows buyers to run sourcing events in Sourcing Optimizer as normal (collect bids and run optimization), then select the suppliers they want to award to, and send the information to Contracts+ for contract creation.

After selecting a supplier to award to, the user is then taken to Contracts+ where they can continue with contract creation.

The Scenario Contracting Report is available under **Reports > Scenario Contracting**. It displays information regarding contracts for the winning supplier, including contract created status (yes or no), awarded items, contracted items, awarded unit price, and contracted unit price.

This feature must be enabled by JAGGAER. Users must also be registered in both JAGGAER Indirect and Sourcing Optimizer, and the two user accounts must be linked.

## Buyer Impact

- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER.

### USER IMPACT

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- To begin contract creation from Sourcing Optimizer:
  1. After running event optimization, navigate to **Reports > Overview**.
  2. Select the scenario to use and click the **Create Contracts from Scenario** button. The Scenario Contracting page opens.
  3. Select a **supplier attribute** to map to the Supplier ERP Number.
  4. Optionally, select an **item attribute** to map to the Catalog Number.
  5. Optionally, select an **item attribute** to map to the Item Description field.
  6. Click on a listed **supplier name** to view the supplier's winning items.
  7. Select which of the supplier's winning items to use with contract creation.
  8. Continue to select winning items from suppliers as needed.
  9. Save the selected configuration. Buttons appear for finalizing or deleting each pending contract.
  10. Click **Finalize Contract**. Contracts+ opens to continue with contract creation.
- Users must be a registered in both JAGGAER Indirect and Sourcing Optimizer, and the two user accounts must be linked. The linking is a one-time configuration and can be initiated from within JAGGAER Indirect or from Sourcing Optimizer.
- To generate the token from JAGGAER Indirect:

1. The user must have the JAGGAER Indirect permission **Link My Account to ASO** (Permission Settings > Administration > User Administration).
  2. Once the permission is enabled, a new page is available in the User Profile for **Link to ASO Account** (User Profile > Update Security Settings).
  3. Select the **Generate Link Token** button. The Link Token is displayed. Select and copy the token.
  4. Login to Sourcing Optimizer.
  5. Navigate to the **SSO User Linking** page by clicking the **SSO User Linking** button in the pop-out menu.
  6. Paste the link token generated in JAGGAER Indirect into the **Link ASO User to SelectSite User** section, and click **Link SelectSite User** button. You receive a confirmation that the accounts are linked.
- To generate the token from Sourcing Optimizer:
    1. Navigate to the **SSO User Linking** page by clicking the **SSO User Linking** button in the pop-out menu.
    2. The **ASO LinkToken Retrieval** section contains a link. Click the **Copy to Clipboard** button to capture the token.
    3. Login to JAGGAER Indirect.
    4. Navigate to your user profile, and go to the **Update Security Settings > Link to ASO Account** page.
    5. Paste the copied token into the **ASO User Link Token** field, and click the **Link Accounts** button.
    6. You receive a confirmation that the accounts are linked.

## INTEGRATION IMPACT

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This feature does not impact any third-party integrations.

## Supplier Impact

This feature does not impact suppliers.