JAGGAER

19.1 PRODUCT RELEASE NOTES
FOR JAGGAER ADVANTAGE CONTRACT LIFECYCLE MANAGEMENT

MARCH 1, 2019 - FINAL VERSION

Table of Contents

Welcome

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 19.1 release. The main goal of this document is to provide an overview of key features that are planned and committed for delivery.

Note: The release will be available in the Prep environment prior to the release in Production. We recommend that customers use the prep period to test the features.

Master Contract Document Negotiation in RFQ

Previously, it wasn't possible for buyers to begin negotiating the Master Contract Document (MCD) during the RFQ process. Now, the JAGGAER Advantage platform provides two platform configuration options for sharing selected pre-existing contracts with suppliers during RFQ negotiations:

1. Generic contracts made visible to all invited suppliers in an RFQ.

2. Generic contracts made visible to all invited suppliers and specific contracts made visible to specific suppliers in an RFQ.

Note - This feature is available only for clients who access both the RFQ module and the Contract Lifecycle Management module.

Customer Impact

- Feature Impact: This feature is **OFF** by default and must be enabled by JAGGAER.
- New User Rights related to this feature: None.
- Existing User Rights related to this feature:
    - **Access RFx Details**- Provides read-only access to the RFQs**Details > Generic Contract** page.
    - **Modify Details Before Publishing**- Provides edit access to RFQs**Details > Generic Contract** page.
    - **Modify Details After Publication**- Provides edit access to the RFQs**Details > Generic Contract** page.
    - **Note -** Users must have the standard rights necessary for contract creation and negotiation.
- New Notifications related to this feature: None

USER IMPACT

Note - The platform does not stipulate any rules for the use of either generic or specific contracts linked to RFQ. Buyers are free to configure their RFQ envelopes in the manner necessary to obtain the required results.

REQUIREMENTS FOR CONTRACTS TO BE SELECTED AS GENERIC

- The contract must be visible to the buyer who is configuring the RFQ settings.

- The contract must be located in the same project as the RFQ. **Note –** Contracts can be selected even if they were previously linked to other RFQs in the same project.

- The contract must be in *Created* status.

- The most recent MCD version of the contract must be approved and confirmed.

RESTRICTIONS ON GENERIC CONTRACTS

- Contracts that have been selected as generic contracts cannot be deleted and they cannot be associated with a main contractor.

- New MCD versions cannot be created from contracts that have been associated to an RFQ as generic contracts.

- Settings on the RFQs **Details > Generic Contract** page can be changed only when the associated RFQ is in either *To Be Published* status or in *Running* status.

SHARING GENERIC CONTRACTS WITH ALL INVITED SUPPLIERS

- Permissioned buyers navigate to the RFQs **Details > Generic Contract** page and click **Edit** to access the options in the **MCD Management** drop-down. The following choices are available:
  - *No* (default choice)
  - *Yes - MCD Not Visible to Suppliers*
  - *Yes - MCD Visible to Suppliers*
- Choosing either of the *Yes* options will unveil a mandatory **Generic Contract** field. Clicking **Select Contract** will open the list of contracts available in the given project that could be selected as generic. Buyers can filter this list for the appropriate selection, highlight the contract and click **Select**.
- Once a generic contract is selected and saved, an **Access Contract Details** button will appear on the RFQs **Details > Generic Contract** page. Buyers can click this button to access the **Settings** page of the linked contract. The **Back** button on the **Settings** page returns buyers to the RFQ.
- Buyers can also access the generic contract details through a new **Generic Contract** link which appears above the list of suppliers on the RFQs **Details > Suppliers (#)** page.
  - The contract's **Details > Settings** page contains a *Linked RFQs* section containing links to the associated RFQ.
- Buyers can **Edit** the RFQs **Details > Generic Contract** page and change the linked contract while the RFQ is in *To Be Published* status or *Running* status. Changes to a specific contract will not affect invited suppliers' submitted responses.

REQUIREMENTS FOR SPECIFIC CONTRACTS

- The contract must be visible to the buyer who is configuring the RFQ and also to the contract's main contractor.

- The contract must be located in the same project as the RFQ and it cannot have already been linked to any other RFQ.

- The contract must be in either *Created* status or *Published* status.

- The associated supplier in the RFQ must be the main contractor in the linked contract.

RESTRICTIONS ON SPECIFIC CONTRACTS

- The main contractor associated to a specific contract cannot be changed.

- The linked contract cannot be activated or deleted.

- Settings for the associations of specific contracts can be changed if the associated RFQ is in either *To Be Published* status or in *Running* status. These settings are found on the RFQs **Details > Suppliers** page.

- Additionally, if a specific contract's associated supplier has provided a response, settings for the linkage of these specific contracts can also be changed if the associated RFQ is in any of the following statuses:

  - *Qualification Clarification*

  - *To Be Evaluated*

  - *Qualification Evaluation*

  - *Technical Evaluation*

  - *Commercial Evaluation*

  - *Final Evaluation*

  - *Best and Final Offer*

  - *Best and Final Offer Evaluation*

  - **Note -** Changes to a specific contract will not affect the associated supplier's submitted response.

SHARING SPECIFIC CONTRACTS WITH SELECTED SUPPLIERS

- If one of the *Yes* options has been selected in the **MCD Management** drop-down on the RFQs **Details > Generic Contract** page, permissioned buyers can associate, modify, and remove the linkage of each invited supplier to a specific contract and mon-

itor the status of the MCD proposal for each supplier using new columns and icons on the RFQs**Details > Supplier** page.

- A blue link icon for each supplier allows buyers to link a specific contract to a specific supplier. The same icon allows buyers to change the associated supplier after the first linkage is made.

- After the buyer uses the link icon to create a specific contract link(s), the following items will appear on the **Details > Suppliers** page:

    - A new **Contract Code** column displays the specific contract linked to each supplier.

    - A red trash can icon allows buyers to remove a specific contract link.

    - A series of green, red, and yellow dots indicate the status of the contract's negotiation:

        - Green - The MCD has been approved by the supplier.

        - Red - The MCD has not yet been created.

        - Yellow - The MCD is under negotiation with the supplier.

- Each time the configuration of a specific contract is changed in the RFQs**Details > Suppliers (#)** area, the change is registered in the project's History of Changes.

BEHAVIOR OF LINKED RFQS

- If the RFQ is linked to associated contract(s), it is not possible to move the RFQ and any of its linked contracts into separate projects.

- If the RFQ is used to create a new RFQ template, all links will be removed in the created template.

- If the RFQ is used to create a new RFQ, and the project is **unchanged**, all links to specific contracts will be removed and the link to the generic contract will be retained.

- If the RFQ is used to create a new RFQ, and the project is **changed**, all contract links will be removed.

- If the **Create Round in New RFQ** option is selected, the buyer can choose if the link between each supplier and their associated specific contract should be moved to the new RFQ or retained in the existing RFQ. If the **Create Round in New RFQ** option is employed more than once in the original RFQ, only the specific contract links that were not moved in previous round creations can be copied into the new RFQ.

- If the **Create Round in New RFQ** option is selected, all generic contract associations will be maintained in the existing RFQ and copied to the new RFQ.

- If the RFQ is deleted, all contract links will be removed.

BEHAVIOR OF LINKED CONTRACTS

- When a contract is linked to an RFQ, its status is changed to *Linked to RFQ*.

  - The **Contract Status** portlet has been updated to reflect the new *Linked to RFQ* status.

  - The *Linked to RFQ* status has been added as an option in the **Contract Status** search filter on the platform's **Sourcing > Contracts > My Contracts** page.

- It is not possible to use mass contract management functionality to change a contract with *Linked to RFQ* status or to move a contract with *Linked to RFQ* status.

- Once a contract has been linked to an RFQ, the **Manage Master Document** dropdown cannot be changed to *No* on the contract's **Details > Settings** page.

CREATING FINAL CONTRACTS FROM ASSOCIATED CONTRACTS

- When buyers **Create Contract**, up to three different options will be presented to them in the **Available Contract Templates** area, which is located on the second page of the modified contract creation wizard:

  - *Generic Contract* - A new contract is created from the generic contract and the generic contract remains available for future use as a template. Availability of this option is dependent upon RFQ configuration.

  - *Supplier Specific Contract* - The supplier's specific contract is used as the final contract (this option can only be used once for the associated supplier). The status of the existing specific contract is reset to either *Created* or *Published*. Availability of this option is dependent upon RFQ configuration and also upon the settings for the associated supplier.

- *Standard Contract Template* - A new contract is created. This option is always available.

- A new checkbox called *Transfer Additional Information Values from RFQ* is also presented on the first page of the contract creation wizard. If the same question was configured in both the RFQ and in the contract, this option permits the buyer to choose whether the answer value will be saved from the RFQ or from the contract.

- An entry is made in the History of Changes when a specific contract is transformed into a final contract.

IMPACT ON REPORTING

- If **MCD Management** is set to *Yes* in the **Generic Contract** area of the RFQ, a new section called *Linked MCD Contract Information* appears after the *Overview* section in both the **Printable View** and the **Summary Report**.

- Datamart has been updated to include new settings and configured links for both generic and specific contract associations.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature has no integration impact.

Supplier Impact

- After suppliers click **Create Response**, a **View Proposed MCD Content** button is revealed. Suppliers can click this button to download the contract document.
  - **Note -**This option is only available if the**MCD Management**drop-down on the RFQs**Details > Generic Contract** page has been set to *Yes - MCD Visible to Suppliers*.
- If the supplier is the main contractor for a specific contract, a **Contracts** page becomes accessible after the supplier clicks **Create Response**. This page allows the supplier to navigate between the RFQ and its associated contract. Suppliers can access the linked contract and use standard CLM functionality to carry out negotiation of the MCD.
- The *Linked to RFQ* status has been added to the options in the **Status** search filter on the **Sourcing > Contracts > My Contracts** page.

Electronic Signature Clauses Automatically Added to Contracts that Require Them

JAGGAER Advantage allows organizations to create a contract document from an MS Word file or a group of clauses. When this is the case, you have the option to require that an electronic signature clause be included in the contract document, indicated by a setting in the contract details. Previously, an electronic signature clause always had to be added manually. In 19.1, the clause is included automatically when the setting is configured to require electronic signature.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- The **Manage Master Document** setting (located on the **Details > Settings** screen on the contract) determines if the contract can be created from an MS Word or group of clauses. When the *Yes, with electronic signature* option is selected, the setting allows the functionality while requiring an electronic signature clause. As of 19.1, an electronic signature clause will be added automatically when this option is selected.
- If there are already additional clauses attached to the contract, the electronic signature clause will be placed as the last clause.
- If the **Manage Master Document** setting is changed from *Yes, with electronic signature* to a different option, the electronic signature clause will NOT be removed, but will not have any effect on the process.
- This electronic signature clause is not added when managing a contract via **Mass Contract Management**, as clause management is not supported by that functionality.

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.

Main Contractor Organization Automatically Selected on the Supplier Signatories Screen

Buyer and supplier signatories can be specified for contracts requiring electronic signature. In release 19.1, the designated Main Contractor organization will be automatically selected when configuring a supplier signatory. Previously, a user was always required to search for and select the supplier organization. Because a signatory will generally be a user from the Main Contractor organization, this reduces the steps necessary to complete this action. Users will then have the option to change the organization when completing configuration of the signatory. This feature will also apply to a buyer signatory. The buyer organization defaults to the user's organization, but can be changed.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- When creating a supplier signatory, the application will automatically populate the supplier organization that is set as the Main Contractor for the contract.
- Previously, a user would access the **Signatories** tab, choose to create a supplier signatory and the next step would be to select the supplier organization. That step has been removed and the user will now be taken directly to the **New Signatory Settings** configuration screen, where **Organization** field is populated with the Main Contractor organization.
- The organization can be changed, if necessary. A **Change** button now displays to the right of the **Organization** field. Follow the steps below to change the supplier.

1. Click on the **Change** button. Supplier selection fields display.
2. Click on the drop-down field to select a new supplier organization, or click the Select Supplier button to search for and select an organization.
3. Click the **Next** button (located in the top-right corner). You are returned to the **New Signatory Settings** screen with the new supplier organization populated in the **Organization** field.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Ability to Perform Specific Contract Actions Based on User Rights

Previously, there were several actions that could only be performed by the user designated as the Contract Manager for the contract. However, in some cases, it may be useful or necessary for a user who is not the Contract Manager to have the ability to perform these actions. In 19.1, we have provided the ability for users to have access to the following actions based on their user rights.

- **Main Contractor Editing** - Users with the **Edit Created Contracts** user right have the ability to edit or stop editing the main contractor on contracts. Users with the **Edit Active and Published Contract** user right have the ability to edit or stop editing the main contractor on the Active or Published contracts.
- **Replace Final Master Document** - This functionality allows organizations to revise and replace the final Master Contract Document. In 19.1, users who have both the **Edit Master Document Proposals** AND **Approve Master Document Proposals** user rights have the ability to perform this action.
- **Manage Clause Approval Requests** - Users with the **Manage Clause in a Contract** user right have the ability to send and recall approval requests for changes to clauses on a contract.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- Users with the user rights as described above now have the ability to perform specific contract actions.

ADMINISTRATION IMPACT

This feature does not impact administrators.

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Master Contract Document Management Improvements

In 19.1, we have made various improvements to the management of Master Contract Documents on a contract. These include:

- As options and functionality have been added to the Master Contract Document (MCD) screen on the contract, the screen itself has become increasingly crowded and hard to read. In release 19.1, we have redesigned the screen to make the actions taken on both the buyer and supplier side more clear.
- The process for uploading/managing a new MCD has been streamlined to eliminate redundant and unnecessary steps.
- Uploaded files can now be deleted as long as they have not been used to create an MCD proposal.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- The Master Contract Document User Interface has been updated for clarity and legibility.
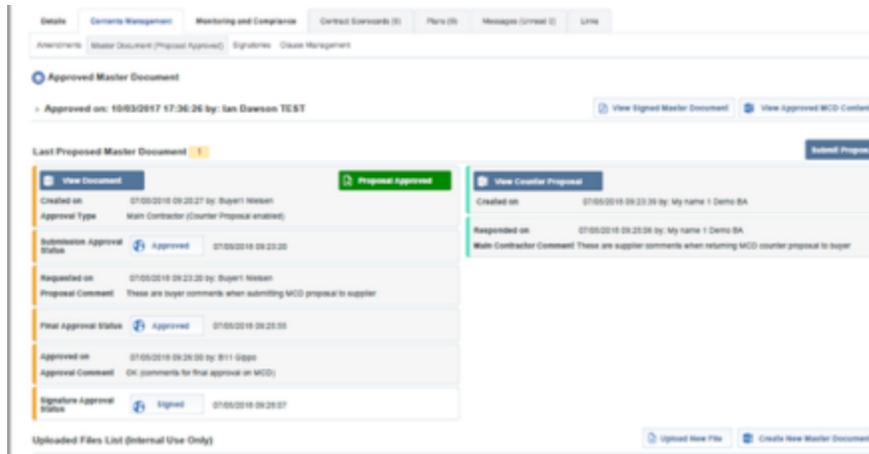
- The left side of the screen displays all buyer actions on the MCD. The left side displays all supplier actions.
- Actions are listed in sequential order from first to last.
- Buttons and links used to access documents display based on the owner of the document (buyer vs. contractor).
- When uploading/managing a new MCD document, a few steps have been eliminated (having to confirm the upload, for example) to make the process simpler. **Note**: This has also been updated for suppliers.
- Uploaded files can now be deleted, provided that they have not been used in an MCD proposal, either currently or previously. A new **Delete** column has been added and the delete icon 🗑 displays in the column for any file that is eligible to be removed. Click the icon to delete the file.

ADMINISTRATION IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

The streamlined process for uploading files is also available on the supplier side.

Additional Information Displayed with Linked Contracts

Contract linking is managed from the **Links > Contract Relationships** tab on the contract. Linked contracts are displayed in a list on this screen. In 19.1, we have added two additional columns of information for the contracts in the list: **Total Value of Contract** and **Currency**.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- Users are able to see the Total Value of the Contract and Currency for each linked contract.
- Lists can be filtered on the two new values.

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.

Contract Details Export updated to include Contracts based on Specific User Rights

In some cases, users have the ability to view a contract in the list, but their user rights do not allow them view the contract details. Previously if a user performed a *Contract Data* export, details for all contracts to which that user could view were included in the export file. The system did not regard if the user had access to contract details, only that the user could view to the contract in the list. However, the contract data export file includes many of the contract details that a user without detail access cannot view. In 19.1, the export process has been updated so that only the contracts to which a user has detail access are included when that user performs an export.

Customer Impact

- Feature Activation: This feature is **ON** by default.
- New User Rights related to this feature: None

USER IMPACT

- Only contracts to which a user has contract detail access are included in the contract data export. Users may notice that specific contracts are no longer included in the export file.
- If a user does not have detail access to any contracts and performs a contract data export, an export file is still generated. A message displays in the file that the user does not have rights to view the details of any contracts.

ADMINISTRATION IMPACT

- Although this feature does not have any direct impact, administrators may be contacted by users who notice that contracts have been removed from their export files. The ability to view contract details is controlled by the **Access Contract Details** user right on the user, role and contract level.

INTEGRATION IMPACT

- As with any update to an export process, organizations should review any integrations that may be affected by the change. For example, if a user utilizes the contract detail export to integrate with any internal or third-party systems, that user should review that integration to ensure that there are no issues.

Supplier Impact

This feature does not impact suppliers.

Contract Price Lists Export updated to include Contracts based on Specific User Rights

In some cases, users have the ability to access a contract, but their user rights do not allow them view the price lists. Previously if a user performed a *Latest Price Lists* export, price lists for all contracts to which that user has access were exported. The system did not regard if the user had access to price information for a contract, only that the user has access to the contract or contract details. In 19.1, the export process has been updated so that only price lists on contracts for which a user has price access are included when that user performs an export.

Customer Impact

- Feature Activation: This feature is **ON** by default.
- New User Rights related to this feature: None

USER IMPACT

- Only contracts to which a user has price list access are included in the contract data export. Users may notice that price lists for specific contracts are no longer exported.
- If a user does not have price access for any contracts and performs a latest price list export, the system will export a single file with a message that informs the user that no valid price lists were found.

ADMINISTRATION IMPACT

- Although this feature does not have any direct impact, administrators may be contacted by users who notice that price lists have been removed from their export files. The ability to view contract details is controlled by the **Access Contract Details** and **View Prices Area** user rights on the user, role and contract level.

INTEGRATION IMPACT

- As with any update to an export process, organizations should review any integrations that may be affected by the change. For example, if a user utilizes the price lists export to integrate with any internal or third-party systems, that user should review that integration to ensure that there are no issues.

Supplier Impact

This feature does not impact suppliers.

New Tags Available for DocuSign Alerts

In some cases, email alert are sent to signatories from DocuSign. "Tags" allow information from the contract to be plugged into the subject line or body of the alert automatically to enhance communication information. In 19.1, the following new tags are available:

- **Subject Line**
  - Contract Title
- **Body**
  - Contract Description
  - Division Name and Title

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- The general impact of this feature is that users who receive DocuSign alerts may notice additional information in the emails.

ADMINISTRATION IMPACT

- Administrators will need to work with JAGGAER to remove the new tags in the DocuSign alerts if they are not needed.

INTEGRATION IMPACT

- While DocuSign is, itself, an integration, no other third-party integrations are affected by this feature.

Supplier Impact

This feature does not impact suppliers.

Ability to Resend a DocuSign Alert

In some cases, a DocuSign alert needs to be resent to a specific signatory or group of signatories. For example, a user might inadvertently delete the email alert. Previously, this involved recalling the signature process completely and resending it to all signatories. By doing this, any responses by other signatories would be reset and they would be required to respond again. In 19.1, we are providing functionality that allows you to resend an alert to a specific signatory.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- Alerts can now be resent to a specific signatory, vs. the previous method that required recalling the entire signature process and resending to all signatories.
- Follow the steps below to resend an alert:

1. On the contract, navigate to **Contents Management > Master Document**.
2. In the **Last Proposed Master Document** section, locate the **Signature Approval Status** field and click on the **Send for Signature** button. A new screen displays.

| Signature Approval Status | | Sent for Signature | 10/10/2018 10:02:16 |

3. Click the **Resend Alert** link located in the top-right corner of the screen. A new screen displays all users who have not yet replied to the alert.
4. Click the associated checkbox to select the user to which the alert should be resent. The options available differ depending on signature process.

   - If the signature process is **Sequential** you will only be able to select the first user in the sequence who has not responded to the alert. **Note**: When the selected signatory replies to the resent email, the next signatory in the sequence will automatically be sent an alert. You do not need to resend that subsequent signatories.
   - If the signature process is Parallel, you can select multiple signatories to which the alert should be resent.

5. Click **Confirm**. A new alert will be sent.

- **Important**: If an alert is resent, the signatory must reply using the link in the new email. The link in the original alert is no longer valid.

ADMINISTRATION IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature allows email alerts to be resent to both Buyer and Supplier signatories.

Alert sent to All Contract Email Recipients when the Electronic Signature Process is Completed

When a signatory signs a contract electronically, the status of the signature is not automatically updated on the contract. A batch process runs every six hours to change the status of any outstanding signatures from **Signature in Process** to **Signature Complete or Signature Request Declined** on the appropriate contract. Alternatively, a signatory can access the contract to update the status of the signature process. Previously, a contract user had to access the contract in order to know if an electronic signature has

been changed to complete. In 19.1, we have added an email alert that notifies all users who are defined as email recipients when an electronic signature process is completed.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- Users who are designated as email recipients for a contract will receive an email alert when an electronic signature has been changed to Signature Complete or Signature Request Declined.

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.

Alert Sent to Contract Users when a Contract is Activated

As of 19.1, an alert will be sent to all email recipients on a contract when that contract is activated. The exception will be the user who activates the contract. Additionally, alerts will not be sent when a contract is activated through mass contract management.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- Users will receive email alerts when a contract is activated if they are on the list of email recipients for that contract.

ADMINISTRATION IMPACT

This feature does not impact administrators.

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Non-Essential CLM Confirmation Messages Removed

In order to streamline and simplify processes within the CLM process, we have removed all non-essential confirmation messages. These are messages for which simply inform the user that an action has been taken, yet require the user to click **OK** to close the message. Removing these messages reduces the number of clicks required to move through the process.

Customer Impact

- Feature Activation: This feature is **ON** by default.
- New User Rights related to this feature: None

USER IMPACT

- End users will notice less confirmation messages in the CLM process.

ADMINISTRATION IMPACT

- Administrators will notice less confirmation messages in the CLM process.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Enhancements Related to Contract Termination Date and Time Reporting

In 19.1, the following changes have been made to date and time recording related to contract termination.

- Termination date and time has been added to the contract summary report.
- Termination date and time is included in the **History of Changes** log for the contract.

- Termination date and time is removed from the contract **Settings** tab when a terminated contract is re-activated.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- Once a contract is terminated, a **Termination Date** displays in the **End/Delivery Date Type** section of the contract summary report. The field displays both the date and time that the contract was terminated.
- The contract's **History of Changes** screen logs changes made to the contract. The **Contract Terminated** entry now includes the date and time.
- When a contract is terminated, **Termination Date** and **Termination Time** fields are displayed on the contract's Settings screen. Previously, if a contract was reactivated, those fields remained on the screen. As of 19.1, the fields will be removed for a reactivated contract.

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 Template Formatting Available when Editing Clause Content

Clause content can be managed online or through a process JAGGAER Advantage opens the content in MS Word. Changes and additions are made and the Word content is saved back to the clause in the application. As of 19.1, the default Master Document Template styles and formatting will be available when creating and editing clause content via one of these methods. Previously, the clause content could only be associated with the Master Document Template once the final version was generated. This update allows users to preview the clause data as it will display in contract before saving the final version.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- The available styles and formatting when editing clause content online or in MS Word now match those available in the MCD.

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.

Application does Not Allow a File that Exceeds the DocuSign Limit to be Attached

DocuSign has a 25 MB attachment limit. Previously, a user was able to select a file that exceeded this limit and start the upload, with the upload only failing at the end of the process. In 19.1, we have added functionality that blocks users from being able to select a file larger than 25 MB if the contract is configured to require an electronic signature (and therefore must be sent through DocuSign). The attachment screen displays a message communicating the DocuSign file limit to help warn users prior to selecting a file.

Note: If, in the future, DocuSign modifies its attachment limit, JAGGAER will modify this feature to reflect the new limit.

Customer Impact

- Feature Activation: This feature is **On** by default.
- New User Rights related to this feature: None

USER IMPACT

- This feature applies to the attachment of a document (Master Contract Document, Proposal, etc.) to a contract that is configured to require electronic signature.
- If a user attempts to select a file that is over the 25 MB limit, a message displays saying that the file exceeds the size limit and the file cannot be attached.

- In a further effort to prevent users from attempting to attach a file that is too large, a message displays on the Attachment screen that communicates DocuSign's attachment size limit.

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.