

## 19.3 RELEASE NOTES

FOR CONTRACTS+ ENHANCEMENTS

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NOVEMBER 11, 2019 - FINAL VERSION



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# WELCOME

The **19.3 JAGGAER One Product Release** will be available in the production environment starting November 11, 2019. The purpose of Release Notes is to prepare administrators for the upcoming release from an application standpoint.

This document provides release notes for the **Contracts+** solution. General release notes, additional solution-specific release notes, and other supplemental information such as a Feature Snapshot, are available on the Product Release Library:

<https://library.jaggaer.com>

**Note:** Please see the **19.3 Release Notes for General Enhancements** for information about key release dates and training opportunities.

## 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.

# CONTRACTS+ ENHANCEMENTS

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

## Additional Levels of Conditional Visibility on Contract Request Templates

With this release, users are now able to configure up to five levels of conditional visibility for contract request template questions, pages, and groups. For example, users can now configure the visibility of Q6 to depend on Q5, Q5 on Q4, Q4 on Q3, Q3 on Q2, and Q2 on Q1.

Conditional visibility remains limited to the same response types supported previously, which are dropdown list, yes/no, multiple select (pick many), and multiple choice (pick one).

### Customer Impact

- Related Solutions: Contracts+
- 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

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- Contract Request Templates are configured under **Contracts**  **> Libraries > Contract Request Templates**.
- Users are not able to set up visibility rules that loop (for example, Q3 is dependent on Q2, Q2 on Q1, and Q1 on Q3).

### ADMINISTRATOR IMPACT

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- This feature does not impact administrators.

### INTEGRATION IMPACT

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- This feature does not impact integration.

### Supplier Impact

- This feature does not impact suppliers.

# Custom CCF Validation Rules for Dates

With this release, customers now have the ability to configure custom contract field (CCF) validation rules for dates.

Customers can create date validation rules so that the entered values are within contract date boundaries or a specific time frame, including contract start date, contract end date, contract review date, and custom date.

CCF date validation rules are respected on contracts and contract requests. Messages display for users if they attempt to enter CCF values in violation of the configured rules.

## Customer Impact

- Related Solutions: Contracts+
- 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

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- To configure custom contract field validations:
  1. Navigate to **Contracts**  **> Libraries > Custom Fields**.
  2. Click the **Edit** button next to the Date field to be updated, or click Create Custom Field to create a new one. An overlay for updating or creating the custom field opens.
  3. When Date is selected as the response type for the field, an option appears on the overlay for field validation.
  4. Click the **Add/Edit Validation Rules** button. An overlay for setting the validation rules opens.
  5. Select the earliest allowed date using the **From** field dropdown, and the latest allowed date using the **To** field.
  6. The available options for both fields are Contract Start Date, Contract End Date, Contract Review Date, and Custom Date.
  7. Click **Save Changes**. The validation rules overlay closes and you are returned to the overlay for configuring the custom contract field.

## ADMINISTRATOR IMPACT

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- This feature does not impact administrators.

## INTEGRATION IMPACT

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- This feature does not impact integration.

## Supplier Impact

- This feature does not impact suppliers.

## Skip Workflow Approval for Auto-Renewal Contracts

With the 19.3 release, a new setting under General Contract Settings has been introduced to allow contracts that are set up for auto-renewal to renew without going through workflow approval again.

If this option is enabled, an auto-renewal contract is created at the time indicated in the auto-renewal settings. It will stay in Executed: Future status until its start date. On the start date, the contract status will then change to Executed: In Effect.

## Customer Impact

- Related Solutions: Contracts+
- Feature Activation: This feature is **Off** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: Contract Renewal Auto Executed, Contract Renewal Auto Executed Failure.

### USER IMPACT

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- The full contract PDF created at the auto renew creation time will use the new contract dates and placeholders, as with manual renewal.
- If custom contract fields (CCFs) have changed since the original contract was created, the renewed contract will include the new CCFs, as with manual renewal.
- If the Automatic Auto Renew to Executed option is enabled, certain circumstances can still prevent auto-renew contracts from being moved to Executed: Future status.
  - Examples of such circumstances include invalid CCF validations or missing required fields.
  - In these situations, the renewal contract will be created in draft status, and the violations will be indicated on the UI and at field level.
  - The existing email notification Contract Renewal Auto-Created has been updated to only trigger when auto-renew contracts do not skip approval workflow.

### ADMINISTRATOR IMPACT

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- To enable this feature:
  1. Navigate to **Contracts**  > **Contract Administration** > **General Contract Settings**.
  2. On the **Automatic Auto Renew to Executed** option, select **Yes**.

3. Click **Save Changes**.

#### INTEGRATION IMPACT

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- This feature does not impact integration.

#### Supplier Impact

- This feature does not impact suppliers.

## Make Clauses Read-Only on the Contract Main Document

With this release, users now have the ability to make negotiable, non-alternative language clauses in the Clause Library read-only by locking them, preventing them from being edited.

Users can lock clauses from the new Inserted Clauses tab in the Word App add-in. This allows customers to lock down clauses on the contract (main document) after contract negotiations are completed.

This feature works with the desktop version of Word 2016 and above.

#### Customer Impact

- Related Solutions: Contracts+
- 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

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- The new **Inserted Clauses** tab on the Word App add-in shows all the clauses in the document that are eligible to be locked. They must be negotiable, non-alternative language clauses used in the main document.
- On the tab, users can click the **Lock** button beside a clause to lock it, meaning the text of that clause cannot be changed.
- The **Unlock** button appears beside locked clauses. Users can click this button to unlock a clause and make it editable again.
- This feature works with the desktop version of Word 2016 and above.

#### ADMINISTRATOR IMPACT

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- This feature does not impact administrators.

## INTEGRATION IMPACT

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- This feature does not impact integration.

## Supplier Impact

- This feature does not impact suppliers.

## Reject Contract Action and Status

This release introduces a new contract action called **Reject**. When rejected, a contract is removed from workflow, its status is changed to Rejected, and a rejection time stamp is added.

When a user selects the Reject action on a contract, an overlay opens where they can enter the rejection reason.

This enhancement provides customers with a way to indicate that a contract is rejected and should no longer be worked on.

Rejected contracts appear in contract search results. Users cannot amend or renew rejected contracts. Rejected contracts can still be archived, copied, and returned to draft.

Users with these permissions are able to use the Reject action:

- **Approve/Reject/Return Contracts** (renamed from Approve/Return Contracts)
- **Approve/Reject/Return Contracts on Behalf of Another Approver** (renamed from Approve/Return Contracts on Behalf of Another Approver)
- **Approve/Reject/Return Contracts Via Email** (renamed from Approve/Return Contracts via Email)

## Customer Impact

- Related Solutions: Contracts+
- 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: Rejected Contract Returned to Draft, Contract Rejected Notice

## USER IMPACT

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- Contracts must be in workflow in Pending Approval status to be rejected.
- To reject a contract, click the **Contract Actions** dropdown button on the contract and select **Reject**. The Reject overlay opens.
- The explicit contract manager and contract facilitator are notified that a Rejected contract has been returned to draft if they have opted into the Rejected Contract Returned to Draft notification.

- Contracts cannot be changed from Rejected to Draft status using import.

#### ADMINISTRATOR IMPACT

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- This feature does not impact administrators.

#### INTEGRATION IMPACT

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- This feature does not impact integration.

### Supplier Impact

- This feature does not impact suppliers.

## Allow Contract Managers to Add Ad-hoc Approvers

Previously, when a contract was in approval workflow, only an approver on the active workflow step, who had the **Add Ad-Hoc Approver for Contract Approvals** permission, could add an ad-hoc approver.

With the 19.3 release, explicit contract managers, contract facilitators with the permission, contract administrators, and super users are able to add ad-hoc approvers, as well as ad-hoc steps with ad-hoc approvers, to contracts in approval workflow.

Ad-hoc approvers must have the **Perform Ad-Hoc Approve/Reject/Return Contracts** permission, which has been renamed from Perform Contract Ad-Hoc Approvals.

### Customer Impact

- Related Solutions: Contracts+
- 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

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- To add an ad-hoc step to a contract:
  1. Search for and select the contract to update. It must have entered workflow approval,
  2. Click the **Contract Actions** dropdown button and select **Add Ad-Hoc Step**. The Add Ad-Hoc Step overlay opens.
  3. On the **After Step** dropdown field, select which step the ad-hoc step should come after.
    - The first step in contract workflow cannot be an ad-hoc step.
    - Users cannot choose steps in between the robot and signature steps.

4. On the **Ad-Hoc Approvers** field, search for and select the approver or approvers for the step.
5. Enter additional comments in the **Comments** field.
6. Click **Save** to save the ad-hoc step configuration and close the overlay. The ad-hoc step is added to the contract workflow.

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#### ADMINISTRATOR IMPACT

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- This feature does not impact administrators.

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#### INTEGRATION IMPACT

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- This feature does not impact integration.

### Supplier Impact

- This feature does not impact suppliers.

## Apply eSignature Signers Based on Conditions

With this release, organizations are able to configure eSignature rules to automatically add appropriate internal eSignature signers based on certain conditions being met.

Users can now create rules from the General Contract Settings administration area based on Contract Type, Contract Value, Contract Total Value, and Commodity Codes to determine and assign eSigners.

To accommodate this change, eSignature settings in the General Contract Settings area have been reconfigured into two tabs:

- **eSignature Administration** - Includes all eSignature configuration settings.
- **eSignature Rules** - New page where users create eSigner rules and can view related history.

To add a rule, users select the rule element, add signer(s), provide the rule information, and indicate whether it is active or inactive.

The signers automatically change as the rules are changed and the values used in the rules change, until the contract is submitted for workflow. At that time, the signers will remain static.

### Customer Impact

- Related Solutions: Contracts+
- Feature Activation: This feature is **Off** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

## USER IMPACT

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- eSignature signers may be automatically assigned to contracts for signature, depending on configuration.

## ADMINISTRATOR IMPACT

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- To create a new eSignature rule:
  1. **Navigate to Contracts  > Contract Administration > General Contract Settings.**
  2. Click the **eSignature Rules** tab to open it. Ensure the Rules Management tab is selected.
  3. Click the **Add Rule** button to create a new rule. The page changes to allow editing of the rule.
  4. Update rule info:
    - a. Click the **Edit** link in the **Rule Info** box to. The Rule Info overlay opens.
    - b. Update the rule name.
    - c. Update the display name.
    - d. Enter a rule description.
    - e. Select the **Active** checkbox to activate the rule.
    - f. Click **Save**. The overlay closes and your changes are saved.
  5. Add signers:
    - a. Click the **Add Signers** button in the **Signers** box. The User Search pop-up opens.
    - b. Search for and select the users you want to use as signers for the rule.
    - c. Click **Add Selected Users**. The pop-up closes and the users are added as signers for the rule.
  6. Add signature rules:
    - a. From the **Rules** box, select a new signers rule from the dropdown and click **Go**. The Edit Dynamic Rule Element overlay opens.
    - b. Configure the dynamic rule element using the available fields as required.
    - c. Click **Save**. The overlay closes and your changes are saved.
  7. Continue to add signer rules as required.

## INTEGRATION IMPACT

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- eSignature Rules can be imported, exported or validated with either XML or tab delimited text formats, as with other Dynamic Workflow rules.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

## Supplier Impact

- This feature does not impact suppliers.

## Turn eSignature On or Off by Contract Type

For customers with eSignature configured, this release introduces a new **Use eSignature** setting on the contract type. This allows users to override the eSignature setting on the General Contract Settings page for contract types.

Users are able to choose to use the default setting (the current setting from the General Contract Settings page), or override the default to always use or never use eSignature for the contract type.

New contracts created with the contract type use the selected setting. Existing contracts are not updated if the contract type's Use eSignature setting is changed.

## Customer Impact

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

### USER IMPACT

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- To configure this setting:
  1. Navigate to **Contracts**  > **Contract Administration** > **Contract Types**.
  2. Select the contract type you want to configure.
  3. On the **Use eSignature** option, select one of the following options:
    - **Use Default - Current Setting** - Use the current setting from the General Contract Settings page. The current setting is displayed here for reference.
    - **Override Default Setting- Always No** - Always disable eSignature for contracts with that contract type.
    - **Override Default Setting- Always Yes** - Always enable eSignature for contracts with that contract type.
  4. Click **Save Changes**. The contract type configuration updates are saved.

### ADMINISTRATOR IMPACT

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- This feature does not impact administrators.

## INTEGRATION IMPACT

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- This feature does not impact integration.

## Supplier Impact

- This feature does not impact suppliers.

# Allow Decimals for Contract Invoice Item Quantity

With the 19.3 release, customers can now configure the item quantity field to allow for up to four decimal places. If configured, buyers and suppliers are able to enter item quantities with the set number of decimal places on invoices.

This change applies to both buyer invoices and sales invoices.

## Customer Impact

- Related Solutions: Contracts+
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

## USER IMPACT

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- To create an invoice on a contract, click the **Contract Actions** dropdown button on the contract and select **Create Invoice**. The Create Invoice overlay opens.
- The **Quantity** field is a mandatory field for adding line items to invoices.

## ADMINISTRATOR IMPACT

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- To configure this feature:
  1. Navigate to **Setup > Hosted Catalog and Ordering Configuration > Default Ordering Settings (eg. Tax, S&H, Payments)**, then open the **Quantity** tab.
  2. Select the **Override Default Values** checkbox for **Number of Decimals Allowed in Quantity**.
  3. Enter the number of decimal places to be allowed for quantity. The maximum is four.
  4. Click **Save**.

## INTEGRATION IMPACT

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- This feature does not impact integration.

## Supplier Impact

- Suppliers can now enter item quantities with decimal places on invoices, depending on buyer configuration.

## Users Can Choose Another Virtual Item if Product is No Longer Available

See the 19.3 eProcurement release notes for more information.

## Show Contract Authoring Word Panel by Default

Organizations can now choose whether or not the side panel in the Contracts+ Word app is opened automatically when a Word document is downloaded from a contract and opened.

## Customer Impact

- Related Solutions: Contracts+
- 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

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- This feature's setting determines if users must manually open the Word app panel when opening Word documents downloaded from contracts.

### ADMINISTRATOR IMPACT

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- To configure this setting:
  1. Navigate to **Contracts**  > **Contracts Administration** > **General Contract Settings**.
  2. In the **Contract Authoring** section, selection one of the following options:
    - **Yes:** The Word app side panel will automatically open when a Word document is downloaded from a contract and opened. This is the default setting.
    - **No:** The Word app side panel will not automatically open when a Word document is downloaded from a contract and opened. Users will have to open the add-in manually.
  - This functionality is only applicable to Main Documents and Attachments. It is not applicable to Word documents downloaded from the Communication Center.

### INTEGRATION IMPACT

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- This feature does not impact integration.

## Supplier Impact

- This feature does not impact suppliers.