

20.1 RELEASE NOTES

FOR CONTRACTS+ ENHANCEMENTS

APRIL 6, 2020 - FINAL VERSION



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WELCOME

The **20.1 JAGGAER One Product Release** will be available in the production environment starting April 6, 2020. 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 **20.1 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.

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.
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.

CONTRACTS+ ENHANCEMENTS

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

Sell-side Contracts and Salesforce Enhancements

In 20.1, Contracts+ now supports sell-side contracts. This support includes many updates that impact general Contracts+ functionality, as well as Salesforce integration. The following updates impact all users:

- Users are able to create a sell-side contract in Contracts+ without having Salesforce integration.
- Contract types have default templates for both buy-side and sell-side.
- The **Contract Template Library** has a new **Contract Class** search option.
- **Contract Search** in Contracts+ is searchable by contract class without requiring a Salesforce account. An ADW rule, "Is Contract Sell Side," may also be used.


A variety of additional improvements are available only to users using Salesforce integration:

- Contracts+ can create a sell-side contract using a Salesforce account **Contract Party Type**.
- Salesforce accounts, account types, account addresses, and opportunities sync over to Contracts+ every 15 minutes.
- Contracts+ displays the Salesforce parent account hierarchy when creating a sell-side contract using a Salesforce account.
- Users can create a contract from the **Account** page in Salesforce.
- Contract Search in Contracts+ is searchable by Salesforce opportunity if the organization has Salesforce integration.
- In Salesforce, users cannot create a contract if the Salesforce opportunity's close date has passed.
- Notifications can be sent to Salesforce contract requesters to advise them on updates that have occurred on their contracts.

Customer Impact

- Related Solutions: 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

- When creating a contract, users are able to select either "Buy-side Contract" or "Sell-side Contract" from the **Contract Class** drop-down menu.
- When searching the Contract Template Library, **Contract Class** is now a search option. The search feature can be found at **Contracts**  **Libraries** > **Contract Template Library**. Next to the search bar in the top left corner of the page, click **More Options** to access the detailed search, shown in the following image.

Contract Template Library

Contract Templates [Main Documents](#)


Template Name [Hide Options](#)

Contract Class

Contract Type
Buy-side Contract
Sell-side Contract

Status All

[Clear](#) [Search](#)

- When searching for a contract, all users are able to select either "Buy-side Contract" or "Sell-side Contract" from the **Contract Class** drop-down menu. This search feature can be found at **Contracts**  > **Contracts** > **Search Contracts**.

Search Contracts - Advanced

[Simple Search](#) | [?](#)

Contract Number	<input type="text"/>	Second Party	<input checked="" type="radio"/> Any of <input type="radio"/> All of
Contract Name	<input type="text"/>	Work Group	<input type="text"/> Q
Keywords	<input type="text"/>	By Start/End Date	Effective <input type="text"/>
Contract Class	<input type="text"/>	Created Date	All Dates <input type="text"/>
Contract Type	Buy-side Contract Sell-side Contract	Approvals Completed	All Dates <input type="text"/>
Contract Status	Type to filter... Q	Scheduled Termination Date	All Dates <input type="text"/>
Contract Version Type	<input type="text"/>	Contract Term Extended	<input type="text"/>
Contract Manager	<input type="radio"/> Any <input type="radio"/> Me <input checked="" type="radio"/> Pick... <input type="text"/> Q	Include Archived	No <input type="text"/>
Summary	<input type="text"/>	Contract Ended Early	<input type="text"/>
		Jurisdiction	Type to filter... Q
		Reporting Commodity Code	Code, Description Q
			<input type="checkbox"/> Include Additional Commodity Codes

ADMINISTRATION IMPACT

- Organizations that are not currently using Salesforce integration but wish to do so must contact JAGGAER for setup.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Globalization of CCFs and General Questions for Contracts and Contract Requests

In 20.1, users can now enter Custom Contract Fields (CCFs) and their selectable values, such as multiple choice options and dropdown list options, in different languages. This allows users with different languages to see the CCF field name and selectable values in their language when the CCF is being used in contracts.


This feature is also available for the General Questions that are used on Contract Requests. Users can enter General Questions and their responses in different languages. Users with different languages can see the questions and responses in their language when working with Contract Requests.

Note: This feature does not apply to imports or exports.

Customer Impact

- Related Solutions: 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

- To manage custom fields, users must go to **Contracts**  **> Libraries > Custom Fields**. From here, they can create new custom fields by clicking **Create Custom Field** in the upper right or edit existing custom fields by clicking **Edit** next to the corresponding custom field in the list.
- Users may click the **Add/Edit Translations** button to enter new content for each supported language for the corresponding element. **Note:** translations are set for individual elements of the field. It is possible to create custom fields for which only responses or only field names are translated.

Create Custom Contract Field



Field Name *****

Internal Name *****

Response Type *****

Response Options *****

Option *	Option
<input type="text" value="Enter option here"/>	<input type="button" value="Add/Edit Translations"/> <input type="button" value="+ Add Option"/>

Add Help Text Yes No

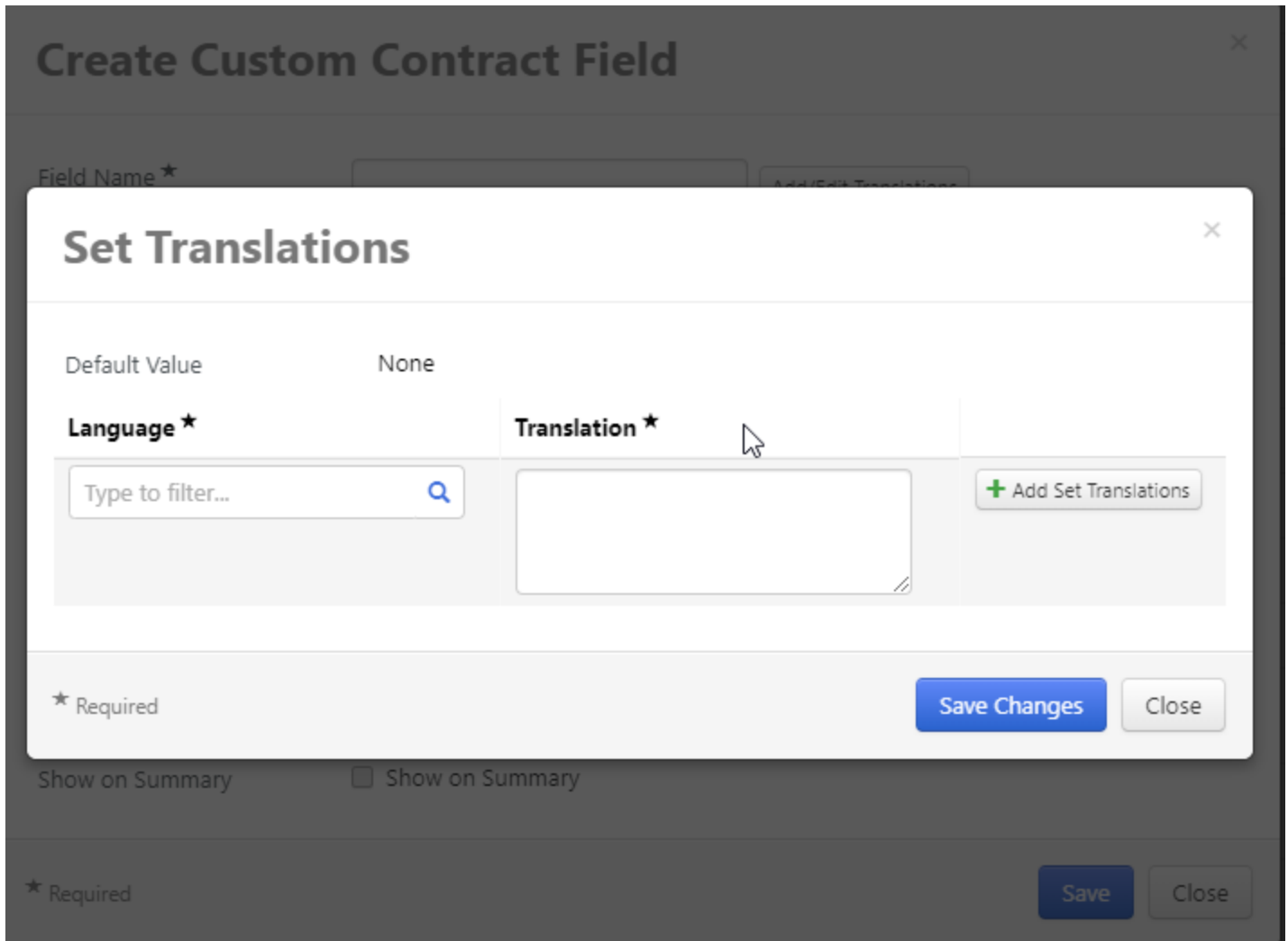
Show on Advanced Search Yes No

Active ***** Yes No

Show on Summary Show on Summary

***** Required

- In the **Language** field, users select the language they wish to create content for. In the **Translation** field, they enter the content they wish to display when the field is viewed in the selected language. When they have finished, users must click the **Add Set Translations** button to confirm the translation. When all translations are finished, the **Save Changes** button must be pressed to complete the process.



- Translations are added immediately to all corresponding locations in the document, if the user has the corresponding permissions. These areas include the Custom Field Library, Contract, Contract Request, and Contract Type.
- Translated content is visible when users are viewing the site in the corresponding language.
- If no translation is provided, the default language is used.
- ADW rules show translations when a rule uses a translated CCF and its options.
- The Add/Edit Translations button is not visible unless the organization supports multiple languages.
- This feature does not apply to imports or exports.

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.

Custom Contract Field Monetary Data Type

In 20.1, users are able to create custom contract fields (CCFs) with the new **Monetary Value** response type.


Users are able to define monetary value CCFs in the **CCF Library** and associate one or more currencies with them. Currencies available for this are limited to those that are active in the user's organization.

Users can create validation rules for minimum and maximum values for monetary value CCFs.

Customer Impact

- Related Solutions: 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

- To create a new CCF, users must navigate to **Contracts**  **Libraries** > **Custom Fields**. The **Create Custom Field** button in the upper-right corner of the screen opens the **Create Custom Contract Field** menu.
- Users can assign a currency to CCFs by selecting the **Monetary Value** response type when creating the CCF. **Note:** if only one currency is available in the organization, the monetary value is set to read-only and currencies cannot be edited.

Create Custom Contract Field ×

Field Name ★

Internal Name ★

Response Type ★

Currency ★ 2 Value(s) Selected

Add Help Text Yes No

Active ★ Yes No

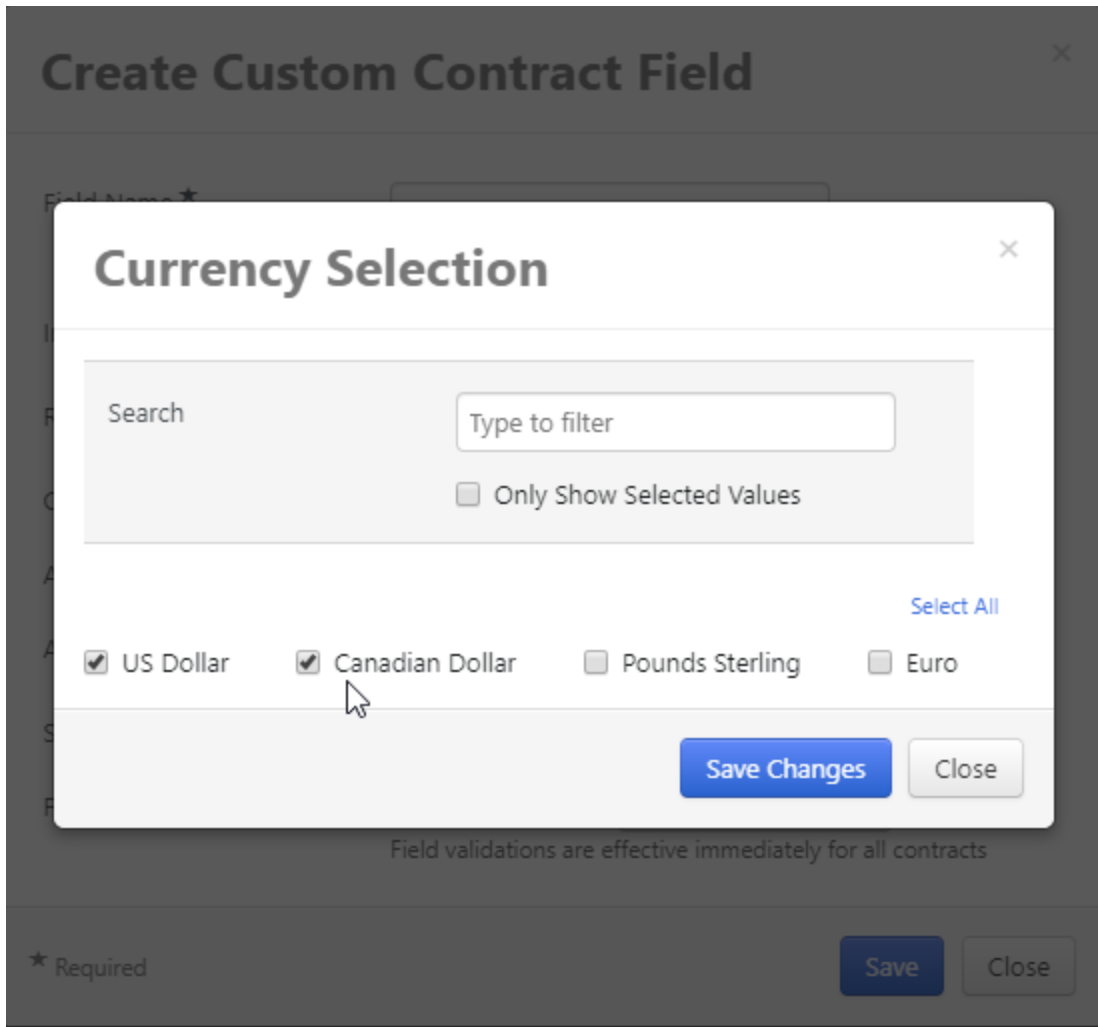
Show on Summary Show on Summary

Field Validation ? ★ No Value Selected

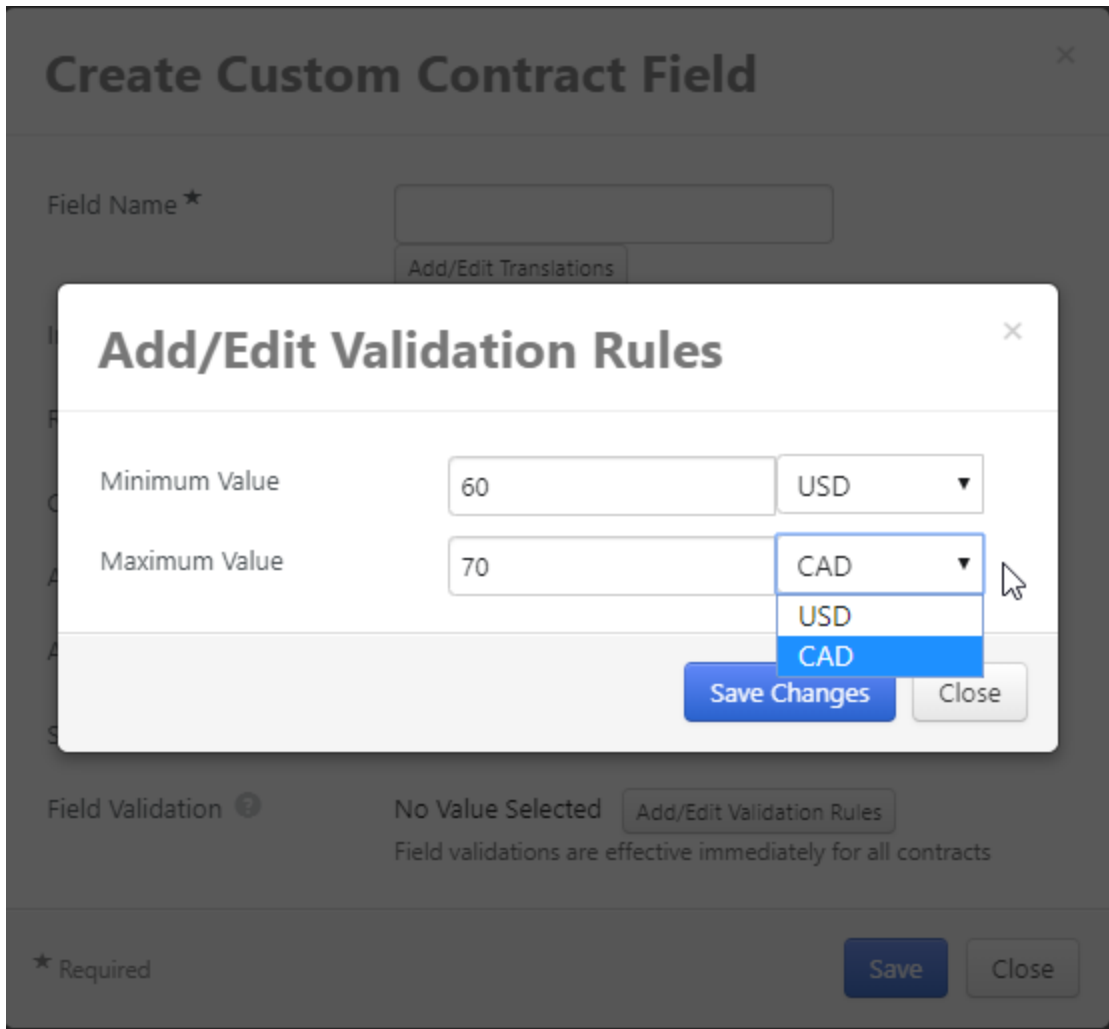
Field validations are effective immediately for all contracts

★ Required

- To set currencies, the user must press the **Add/Edit Currencies** button. This opens the **Currency Selection** screen shown in the following image. The available currencies are limited to those that are active in the organization and are listed at the bottom with check boxes. Users can search for specific currencies using the Search field and can limit the visible currencies to only those that have been selected. When all desired changes have been made, click **Save Changes** to return to the Create Custom Contract Field menu.



- Validation rules can be set for monetary CCFs by clicking **Add/Edit Validation Rules** on the Create Custom Contract Field menu. This allows the user to set minimum and maximum values for the CCF.
- When creating validation rules for monetary CCFs, the user selects a currency to be used for determining if the entered value is valid for both the minimum and maximum values. The user may select a different currency for each value. When all changes have been made, click **Save Changes** to return to the Create Custom Field menu.



- If there is more than one valid currency for the CCF, the application uses the exchange rate to determine validity for all other currencies. The exchange rate is locked when the contract is submitted to workflow and unlocked if the contract is returned to draft.
- Like other CCFs, a monetary CCF can be used in both contracts and contract requests.
- Monetary CCFs may be used in the Word app as placeholders.

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.

Custom Contract Field String Pattern Validations

In 20.1, users have the ability to define customized pattern validations for their text (single line) and text (multi line) custom contract fields (CCFs).


Users can create their own customized pattern along with a specific message which will display when an invalid format is used or to display the required format prior to entering a value. This will allow users to customize their field names to improve organization and searchability per the needs of their organization.

Custom contract field validation settings, once set, will be effective immediately for all contracts that use those CCFs, standardizing field formatting across the organization.

Customer Impact

- Related Solutions: 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

- To create a new CCF, users must navigate to **Contracts**  > **Libraries** > **Custom Fields**. The **Create Custom Field** button in the upper-right corner of the screen opens the **Create Custom Contract Field** menu.
- When creating new CCFs, users who select the response type text (single line) and text (mult line) can click the **Add/Edit Validation Rules** button to open the **Add/Edit Validation Rules** menu.

Create Custom Contract Field ×

Field Name ★

Internal Name ★

Response Type ★

Add Help Text Yes No

Show on Advanced Search Yes No

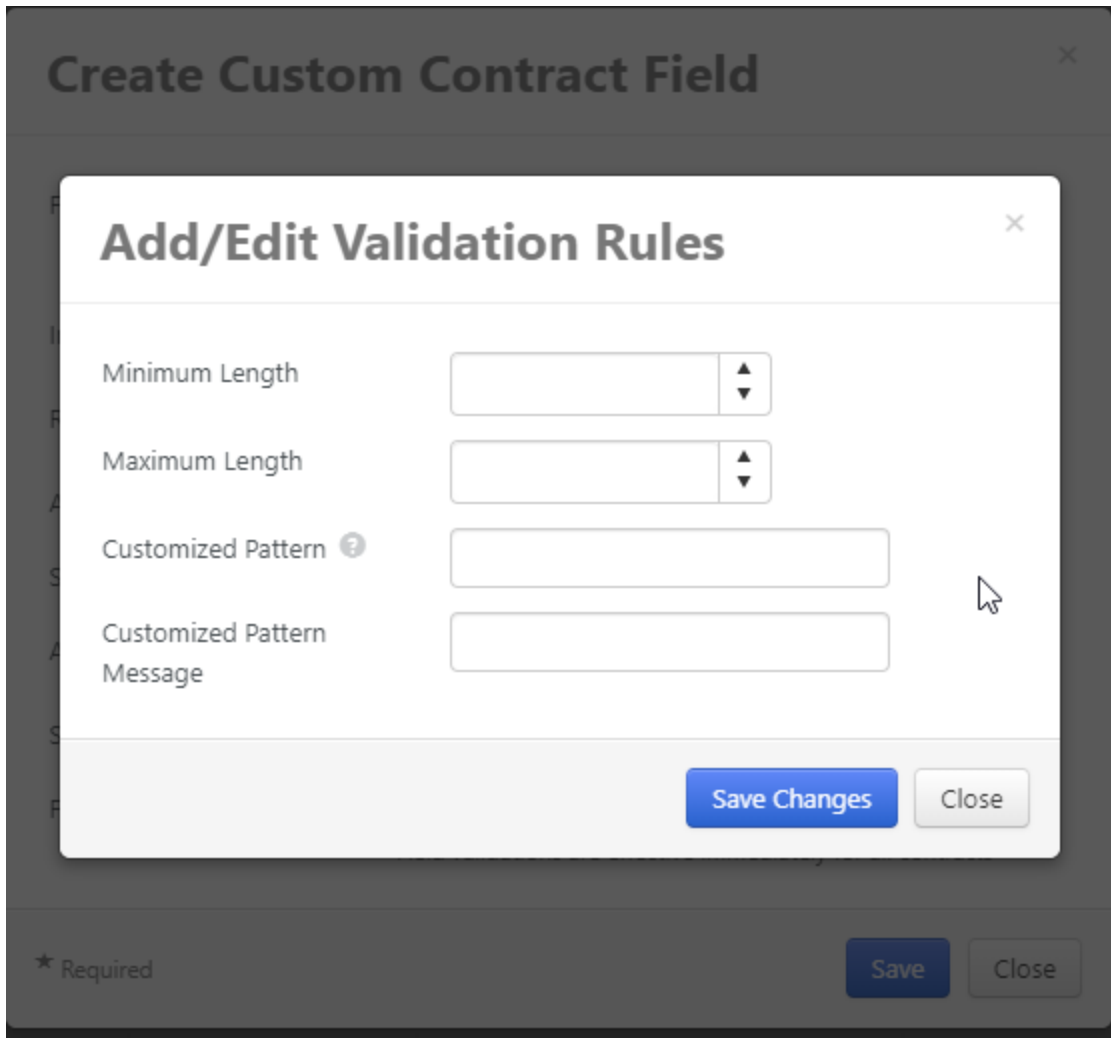
Active ★ Yes No

Show on Summary Show on Summary

Field Validation ?
Field validations are effective immediately for all contracts

★ Required

- In the Add/Edit Validation Rules menu, users may set the minimum and maximum values for the CCF. For text (single line) and text (multi line) CCFs, users now have the option to customize the format of the field using string patterns.
- To set a string pattern, users must type the format into the **Customized Pattern** field. **Note:** Customized patterns use industry-standard format rules that can be found here: <https://ryanstutorials.net/regular-expressions-tutorial/regular-expressions-basics.php#escaping>.
- All validation rules are respected when performing a Contract Import action for both CSV and XML formats.
- Users may also include a customized pattern message by typing the desired message into the **Customized Pattern Message** field.
- When they are finished updating their validation rules, users must click the **Save Changes** button to return to the Create Custom Contract Field menu.



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.

Lock Placeholders in Main Documents

Placeholder values in JAGGAER Contract Authoring for Word App documents are populated from the data in Contracts+ via Word App synchronization. This means that any changes users make to placeholder values in downloaded Word documents are overwritten when synchronization occurs.

In 20.1, Contract Managers and Contract Facilitators can mark specific placeholder values as read-only in downloaded Word versions of main documents, preventing users from making changes to the downloaded contract documents.

Note: This feature applies only to Main Document attachments. CCF tables do not have this locking functionality.

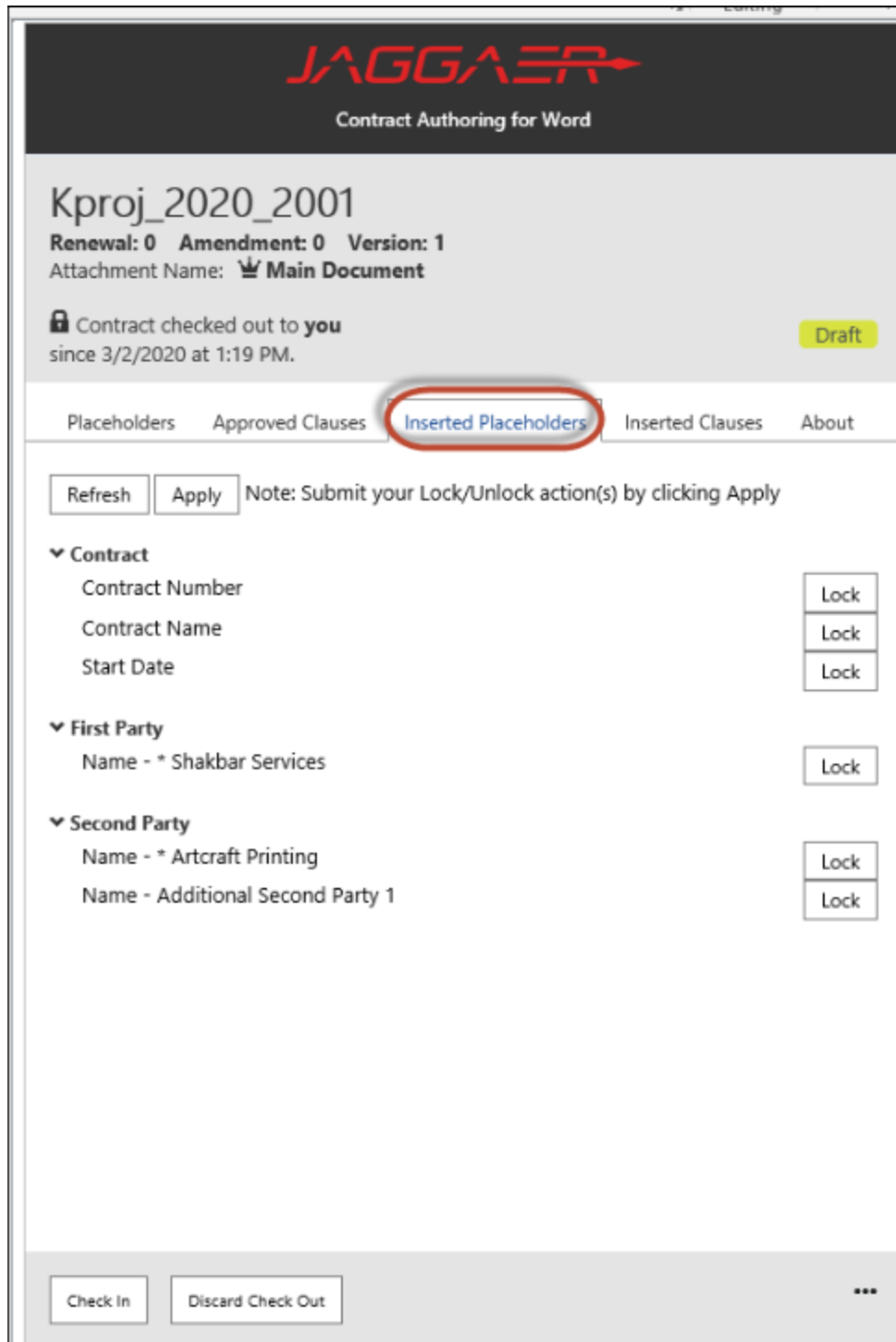
Note: This feature requires Microsoft Word 2016. Earlier versions of Microsoft Word are not supported.

Customer Impact

- Related Solutions: 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

- A new **Inserted Placeholders** tab in the Word App is visible on Main Documents for users who have explicit Contract Managers or Contract Facilitators. This tab tracks all instances of placeholders in the document.



- By clicking the **Lock/Unlock** button, Contract Managers and Contract Facilitators can lock the associated placeholder for editing in all instances in which it occurs in the document. Once all desired lock/unlock actions have been performed, clicking the **Apply** button updates the setting.
- The placeholder setting carries over to **Amendments & Renewal**.
- The **Contract Copy** action will always unlock all placeholders, allowing them to be edited in the copied document.

- If the document is sent to external parties who do not have the Word add-in, they can still “recommend” placeholder changes by typing in a value. These changes are reflected when the user performs a Compare action. The user may implement any of these changes manually.

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 Requests Full Export


Previously, the **Contract Requests** export feature only provided a data export of the columns that appeared on the page. In 20.1, a new CSV Export option is available that pulls additional data broken down into several separate files, covering general data, workflow data, and questions and answers.

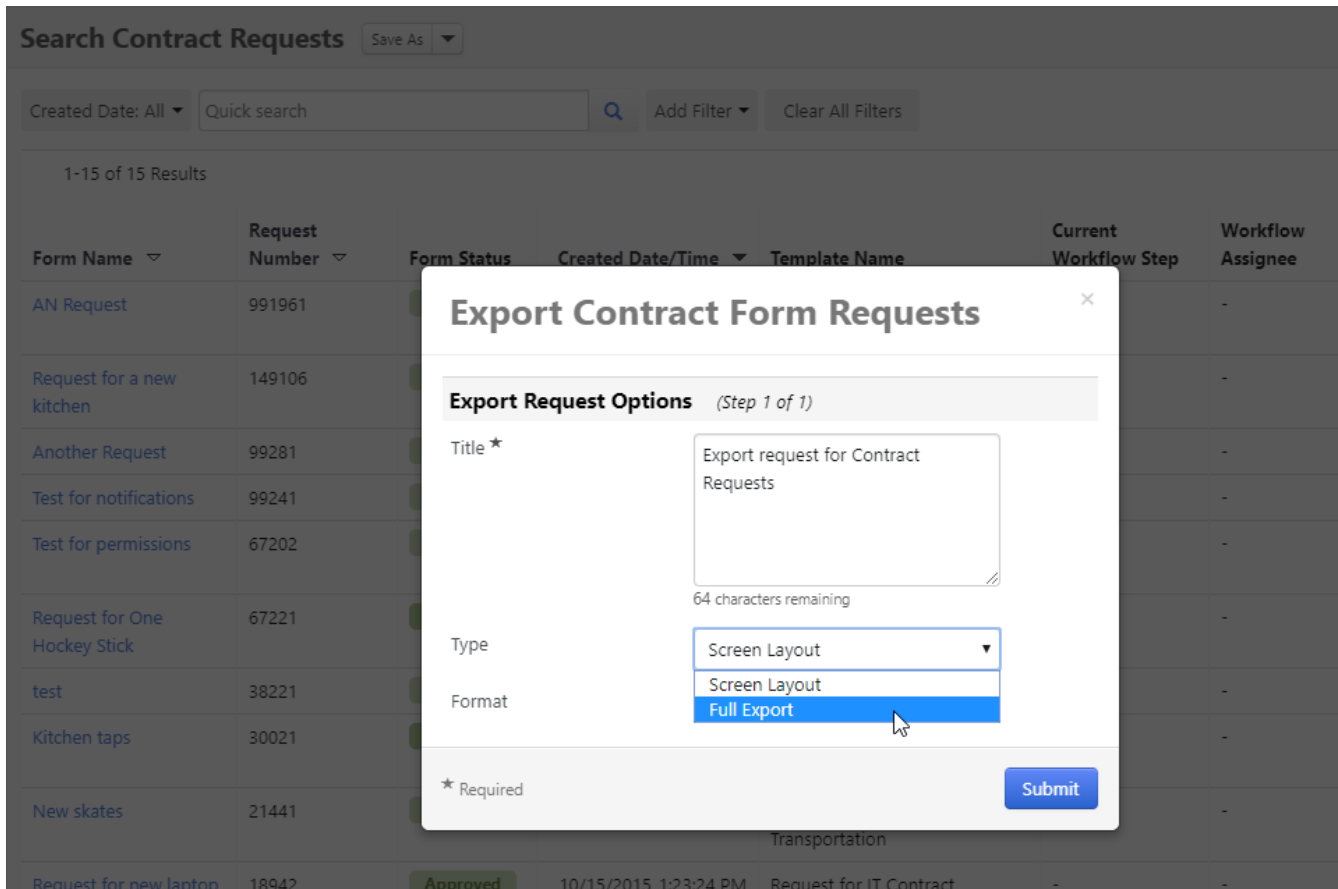
Note: The workflow file shows approved or rejected requests. If a request is currently in workflow, it will not appear as a row in this file until it has been either approved or rejected.

Customer Impact

- Related Solutions: Contracts+, Sourcing, Supplier Management
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

USER IMPACT

- To export a contract request, the user must navigate to **Contracts**  **>Requests > Search Contract Requests**. Here they may enter their desired search criteria to find a list of applicable contracts.
- Once the list is populated, the user must click the **Export** button in the upper-right corner of the screen to open the **Export Contract Form Requests** menu.
- When exporting contract requests, the user may choose between the "Screen Layout" and "Full Export" options from the **Type** drop-down menu.



- The format of the exported file is determined by the setting of the Type field.
 - The "Screen Layout" type setting produces an Excel-formatted document.
 - The "Full Export" type setting produces a CSV-formatted document.
- When all settings are complete, the user must click the **Submit** button to proceed. They are returned to the Search Contract Requests screen.
- The saved export can be found and downloaded in **Manage Search Export**. This can be found by clicking the drop-down arrow next to the Export button in the upper right of the Search Contract Requests screen.

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.

Ad-hoc Approvers in Forms Workflow

In 20.1, Forms workflow supports ad-hoc approvers. This allows organizations to increase the rate at which the workflow moves by adding qualified users to the approval process where needed.

A new setting allows organizations to permit ad-hoc approvers at their discretion. When enabled, users who have been granted the appropriate permissions can add an ad-hoc approver anywhere in the workflow. Only users with the **Perform Ad-Hoc Approve/Reject/Return Request** permission can be added as approvers.


Customer Impact

- Related Solutions: Contracts+, Sourcing, Supplier Management , Invoicing, eProcurement
- Feature Activation: This feature is **OFF** by default.
- New Permissions related to this feature:
 - **Add Ad-Hoc Approver for Contract Approval** (Permission Settings > Approvals > Contract Approvals) - Allows the user to assign an ad-hoc approver from the pool of users who have the Perform Ad-Hoc Approve/Reject/Return Request permission.
 - **Perform Ad-Hoc Approve/Reject/Return Request** (Permission Settings > Approvals > Contract Approvals) - Allows the user to be assigned as an ad-hoc approver for a contract workflow step.
- New Notifications related to this feature: None

USER IMPACT

- Users with access to the **Request Form** as well as the **Add Ad-Hoc Approver** permission are now able to add an ad-hoc approver anywhere in the workflow.
- Users can only add approvers who have the **Perform Ad-Hoc Approve/Reject/Return Request** permission.

ADMINISTRATION IMPACT

- Administrators must enable the **Add Ad-Hoc Approver** permission for the organization to enable this feature. This permission can be found at **Setup**  **> General Workflow Settings** in the **Workflow Options** section.
- Administrators must grant users the **Add Ad-Hoc Approver for Request Approval** permission to enable them to use this feature. This permission can be set under the **User Profile**.
- Administrators must grant the **Perform Ad-Hoc Approve/Reject/Return Request** permission to users for them to be selectable as ad-hoc approvers.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Columns in Saved Search Contracts Widget

In 20.1, the **Saved Search** widget for Contracts+ has been updated to provide additional search information by including the following columns in export files:

- Work group
- Contract Manager
- Current workflow Step Name
- Business Unit
- Department

Customer Impact

- Related Solutions: 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

- Users who export saved searches now have additional columns of information included in their output. These columns are:
 - Work group
 - Contract Manager
 - Current workflow Step Name
 - Business Unit
 - Department
- For full information on how to save and export searches, refer to **Saved Searches** in the **Contracts+ Handbook**.

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.

Select Master Item ID for Contract Non-Catalog Items


Previously, it was possible to link catalog and non-catalog items to the item master ID, but not contract non-catalog items. With this release, users are able to link contract non-catalog items to the item master ID. Item master ID has been added to the integration XML export, XML contract import for products and service items, and non-catalog items import and export.

Note: Organizations must have the **Virtual Item Master** license to use this feature.

Customer Impact

- Related Solutions: 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

- A user may create non-catalog items by adding them directly to a contract. They may do so by navigating to **Contracts**  > **Search Contracts** and searching for the desired contract.
- When the search results are returned, the user must select **Edit/View Details** from the drop-down menu next to the **Open Summary** button for the desired contract.
- Once the contract details are open, the user must select the **Goods and Services** option in the left-side menu.
- On the **Goods and Services** page, the user must select the **Non-Catalog Items** tab.
- On the **Manage Non-Catalog Items** sub-tab, the user may add or edit non-catalog items.
- When creating or editing a non-catalog item, the user may now link the item to an item master ID by searching for the item master ID in the **Item Master ID** field, as shown in the following image. **Note:** this option is only available for organizations that have a Virtual Item Master license.

Contract Non-Catalog Item

Description	Catalog Number	Size	Price	Packaging (UOM)
<input type="text"/> 254 characters remaining expand clear	<input type="text"/>	<input type="text"/> For example: 1/g, 1L, 1 cm System size: none	<input type="text"/> USD	<input type="text"/> For example: 1/EA, 1 CS System packaging: none

Promote in product search

Color

UNSPSC

Category Name *no value*
[select category](#)
[assign category from UNSPSC](#)

Commodity Code *no value* Override ⓘ

Searchable Keywords
700 characters remaining [expand](#) | [clear](#)

Long Description
4000 characters remaining [expand](#) | [clear](#)

Manufacturer Name

Manufacturer Part Number

Item Master Id

Product Flags

- Controlled substance
- Recycled
- Hazardous material
- Radioactive
- Rad Minor
- Select Agent
- Toxin
- Energy Star
- Green

Upload new image No file chosen

Attribute	Value
Featured	<input type="checkbox"/>
Hold Item	<input type="checkbox"/>
Hot List Item	<input type="checkbox"/>
Multi-Select	Select values...
Text Box	<input type="text"/> 4000 characters remaining expand clear
VIM ID	<input type="text"/> 4000 characters remaining expand clear

- Once set, the item master ID is included in the integration XML export, XML contract import for products and service items, and non-catalog items import and export.

ADMINISTRATION IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

However, contracts exported to the ERP via XML have been updated to include an Item Master ID field.

Supplier Impact

This feature does not impact suppliers.

New Placeholder in Word App for Other Names New!

In 20.1, users of the Word app now have access to a new placeholder, Other Names. This placeholder populates the selected fields with the selected Other Name for the contract's Second Party. For sell-side contracts only, this feature can also be used to populate the selected fields with the Other Name of the contract's First Party.

Customer Impact

- Related Solutions: 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

- Users can now select Other Names under the **Second Party** placeholder category in the Word app in order to populate the selected fields.

The screenshot displays the JAGGAER Contract Authoring for Word interface. The main document area on the left shows a contract template with a placeholder OtherName in the text: "This contract is between parties Luster Ltd and Advertising Experts OtherName KLL Limited for the duration of: 3/1/2020 12:00 AM through and including 11/30/2020 11:59 PM". A context menu is open over the placeholder, showing the "Other Names" category selected. The right-hand sidebar shows the contract details for "Kproj_2020_2012", including renewal, amendment, and version information. Below this, the "Placeholders" section is expanded to show the "Second Party" category, with a list of available "Other Names" including "* Advertising Experts", "Ace Glass Inc.", and several "Additional Second Party" entries. At the bottom of the sidebar, there are "Check In" and "Discard Check Out" buttons.

- **For sell-side contracts only**, users can select Other Names under the **First Party** placeholder category in the Word app in order to populate the selected fields.

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.