

19.3 PRODUCT RELEASE NOTES

FOR CONTRACTS ENHANCEMENTS

NOVEMBER 11, 2019 - FINAL VERSION



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WELCOME

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 19.3 release. The main goal of this document is to provide an overview of key features that are planned and committed for delivery.

CONTRACTS ENHANCEMENTS

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

Dynamic Clause Management

With this release, the Clause Management area of contract templates has been reorganized, and new options are available to allow for the dynamic management of clauses on contracts created from the given template.

Contract Template Configuration Changes

The Clause Management area of contract templates has been updated as follows:

- The **Unlink clause** button allows users to unlink clauses from the template.
- The **Manage mandatory links** button has been removed. This functionality is now managed in the new **Link properties** page.
- The **Mandatory** column has been replaced by the **Link properties** column.
- The new **Edit link properties** button has been added for all the clause links available on the template, except for special signature clause links. Clicking this link allows users to access the new **Link properties** page, and to modify associated properties.
- A set of icons has been added to represent the properties for the clause.
- The **View Library Content** link opens a pop-up window with information on the clause.
- The **Validation** column contains information on the last action taken on a given clause that has not yet been validated. Managed values are:
 - **"---**" - No changes have been applied since last validation.
 - **Remove** - There is a request to remove a clause previously configured in the template.
 - **Add** - There is a request to add a new clause to the template.
 - **Change** - Configuration of an existing clause has been changed.
- The **Send Link Clause Validation Alert** button has been renamed to **Freeze and Send Clause Link Validation Alert** (this is available only for users not assigned to the **Clause Link Validator in Templates** user right). Once the request has been sent, all Clause Management becomes read-only.
- The new **Unfreeze and Send Clause Link Validation Recall Alert** button now appears on the Clause Management page when a validation request has been sent. Clicking this allows users to recall the validation request.
 - When this button is used, the following notification is sent: "B > B: Inform Users with Rights to 'Clause Link Validator in Templates' that Clause Link configuration previously sent for validation has been recalled."

The new **Link Properties** page provides the following:

- The **Clause Link Information** area provides a **View Library Content** link to access details of the clause.
- The **Current Clause Link Properties** area provides the following:
 - The current properties of the given clause link.
 - The suggested properties for the given clause link when changes have been applied. Changes become immediately effective when applied by a user assigned with the **Clause Link Validator in Templates** user right.
 - Relevant action buttons, depending on the validation status of the clause link.

For each clause link, the following can be configured:

- **Link type:**
 - **Optional** - Clause link can be disabled once contract is created.
 - **Mandatory** - Clause link cannot be removed once contract is created.
 - **Conditional** - Clause link will or will not be used on a given Master Contract Document proposal, based on the question associated as the activating condition. The activating condition can be based on one of the questions configured in the Additional Information area. Selectable question's typologies are:
 - **Yes/No** - User can set the rule based on Equal/Not equal criteria for the selected value.
 - **Option list** - User can set the rule based on Equal/Not equal criteria for one or more of the values configured in the list.
 - **Multi choice option list** - User can set the rule based on All the selected/At least one of the selected/None of the selected criteria for one or more of the values configured in the list.
 - **Clause Content Editable in Contract** - Users can define if the content of the clause can be edited or not when the contract is created. In cases where a clause is configured as read-only, neither buyer nor main contractor can modify the content defined for that clause in the library.

Contract Behavior

When a contract is created from a contract template, the Clause Management area is populated, taking into consideration the last validated set of clauses with their properties (e.g. a clause added but not yet validated will not be copied).

In cases where some clauses have been configured as conditional:

- An error message is provided in cases where the user takes actions that may prevent conditional rules from being verified (e.g. when a new contract type is selected, and questions used to configure conditional questions are not available in the new contract type).
- When a new Master Contract Document proposal is created, a new summary page reports conditional clauses, questions that have been configured to define conditionality, and answers associated to those questions.
- If the answer to a mandatory question has not been provided, creation of the MCD proposal is prevented.

- Based on the answer provided to questions used to determine conditionality, the clause will or will not be added to the given MCD proposal.
- Once a new proposal has been created, all questions that have been involved to determine conditionality will become read-only until the proposal is approved or rejected.
- A new icon appears by proposal MCDs, and clicking it opens a pop-up with questions and related answers that were evaluated when the proposal was created.

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: Validation recalled for Template Clause Links

USER IMPACT

- User rights related to clause management now work in the following ways:
 - The **Manage Templates** user right now allows users to create contract templates and to work in the Clause Management area. This right also allows users to change properties associated with each clause link.
 - The **Clause Link Validator in Templates** user right is required to validate clause links defined for templates, and settings for each of the clause links.
 - For users without the **Clause Link Validator in Templates** user right, the **Freeze and Send Clause Link Validation Alert** button is shown only in cases where there is at least one clause link in a validation status other than “—”. Once clicked, a confirmation message is displayed, and upon confirmation, the existing alert is sent. After the alert is sent, it is not possible to link or unlink clauses, sort clauses, or to change clause properties until validation occurs. When a user assigned with **Clause Link Validator in Templates** validates changes, those changes become effective.
 - Changes applied in the **Clause Management** area by users assigned with the **Clause Link Validator in Templates** user right will be immediately effective.
- Once a contract is created from a template with conditional clauses, each time a new MCD version is generated, all questions used to define conditional rules are verified. This automatically causes a clause to be included in the new MCD version, or not, based on the provided answers.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Define What is Copied when Creating a New Contract from an Existing Contract

With the 19.3 release, the contract creation page for copied contracts has been updated to allow for greater flexibility in what is copied over to the new contract. This is applied only when creation is started from an existing contract and not from a contract template.

Additionally, users are now allowed to choose if clause content is inherited from the clause library or from the last revision available on the original contract.

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 copying contracts, users now have the following additional options:
 - **Transfer subcontractors** - Selected by default. Not available if "Manage subcontractors" has not been configured in the source contract.
 - **Transfer attachments visible only to buyers** - Selected by default. It is not available if "Attachments visible only to buyers" has not been configured in the source contract.
 - **Transfer attachments visible to main contractor** - Selected by default. It is not available if "Attachments visible to main contractor" has not been configured in the source contract.
 - **Transfer prices** - Selected by default. It is not available if "Price list" has not been configured in the source contract.
 - **Transfer additional information values** (from contract, from project, or do not copy) – The "From the contract" option is selected by default.
 - **Transfer clauses** (default library content or origination contract content) – The "Default library content" option is selected by default. It is not available if "Manage master document" has not been configured in the source contract.
 - **Transfer signatories** - Selected by default. It is not available if "Manage master document" has not been configured in the source contract with the option "Yes, with electronic signature."

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Signatory Configuration Enhancements

With this release, new configuration options and user rights have been introduced to provide further segmentation of users who can configure global and local signatories.

Depending on configuration, we now allow for users to be assigned rights in the management of global signatories, management of local signatories, and usage and configuration of signatories in contracts and contract templates.

A new configuration parameter for local signatories allows customers to enable the following:

- Allow creation of local buyer signatories only
- Allow creation of local supplier signatories only
- Allow creation of both local buyer and supplier signatories

The new user right **Create Local Signatories** is available when this functionality is configured. The settings available for this user right are:

- No
- Yes, if I am the Owner
- Yes, if I am on the Project Team
- Yes

The Manage Signatories user right has been renamed **Edit Signatories List**. Users assigned with this right can access the Signatories area in contracts and contract templates, and:

- Select global signatories
- Sort existing signatories
- Export list of configured signatories
- Deactivate a signatory
- Delete a signatory

The Signatories area is now available:

- In read-only mode, to all users with access to the **View Master Document** area on the specific contract/template.
- In edit mode for all users with the **Edit Signatories List** user right on the contract/template.
- For creation of local signatories, for users with the **Create local signatories in contracts** user right on the contract/template (if permitted by configuration).

Configuration of global signatories remains available for company super-user and users assigned with **Manage Users, Roles, Users Lists and Divisions** user right.

Customer Impact

- Related Solutions: Contracts
- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER.
- New Permissions related to this feature: Contract Management > Create Local Signatories.
- New Notifications related to this feature: None

USER IMPACT

- User access to view and configure signatories depends on customer configuration and user rights settings.

ADMINISTRATOR IMPACT

- The new Create Local Signatories user right is available when the local signatory functionality is configured, and is found under **User Rights > Contract Management > Create Local Signatories**.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

New Notification When a Contract Cannot be Expired

A new notification alert is now sent in cases where a contract is not moved to Expired status when it reaches its end date for at least one of the following reasons:

- The main contractor is currently allowed to edit the Additional Information area.
- The main contractor is currently involved in MCD proposal negotiation.
- The main contractor is currently involved in price list proposal negotiation.

The notification alert is: B > B: Email Alert sent by the batch procedure if a contract could not be moved to “Expired” status when the end date has been reached.

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: B > B: Email Alert sent by the batch procedure if a contract could not be moved to “Expired” status when the end date has been reached.

USER IMPACT

- The new alert is sent to all users configured in the buyer side email recipients list of the contract.
- The contract does not change status, but a new warning icon appears beside the status on the My Contracts, Global Contracts, and Contract Discussions lists.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Improved Usability for MCD to be Electronically Signed with DocuSign

Previously, in order for a contract to be selected as “generic contract” in an RFQ when the integrated MCD negotiation process was configured, the contract had to have a current and approved master contract document (MCD) proposal as its most recent proposal.

In 19.3, it is now also possible to associate a contract as “generic contract” with an RFQ in the following situations:

- The Manage Master Document setting has been configured with **Yes, with electronic signature**.
- The Current MCD proposal has been approved and the status is currently **To be signed**.

Customer Impact

- Related Solutions: Contracts
- Feature Activation: This feature is **ON** by default but optional for use when the RFQ_MCD_NEGOTIATION parameter is activated.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- It is possible to associate a contract as “generic contract” with an RFQ in the following situations:
 - The Manage Master Document setting has been configured with Yes, with electronic signature.
 - The Current MCD proposal has been approved and the status is currently To be signed.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Enhanced Management of Additional Information Area for Main Contractor

With this release, super users and the current contract manager are now able to access the **Recall Editability** action on the Additional Information, Master Contract Document, and Price List areas of a contract, even in cases where the contract is managed in a project with workflow, and the task hosting contract has been configured to limit this action in the affected area through Task Activity filters.

Once the Recall Editability action is used, these pages become read-only as per the configuration defined in Task Activity filters.

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

- Super users and the current contract manager are now able to access the **Recall Editability** action on the Additional Information, Main Contract Document, and Price List areas of a contract, even if this has been configured as not available as per the activity filters.
- Once the **Recall Editability** action is used, these pages become read-only as per the configuration defined in Task Activity filters.
- This feature only applies in cases where:
 - A contract is managed in project with workflow
 - A contract is currently associated to a task where activity filters have been configured to have buyer side, Additional Information, Master Contract Document and Price List areas in read-only mode.
 - Additional Information, Master Contract Document, and Price List areas are editable by main contractor.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Optionally Copy Total Value when Creating Contract from RFQ

Previously, when a contract was created from an RFQ, the total value of the contract was automatically populated using the total price list.

With this release, the new **Transfer Price List Total as Total Value of Contract** option has been added to the contract creation process for contracts created from RFQs.

This option is selected by default, and allows users to maintain the previous behavior.

If this option is deselected, the total value of the contract is not automatically filled during contract creation and the field is left empty.

This option is not available for RFQs configured with offline response supplier access (simplified RFQs).

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

- The **Transfer Price List Total as Total Value of Contract** option appears during the contract creation process for contracts created from RFQs. This option is selected by default.
 - When selected, the total value of the contract is automatically populated using the total price list.
 - When this option is deselected, the total value of the contract is not automatically filled during contract creation.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Automatically Close Discussions when Contracts Archived

Previously, if automatic archiving was enabled, a contract was not automatically archived if there were any open discussions on it. As multiple discussions may occur on each contract, closing all of them could require a high level of manual work.

With this release, if the archival process is prevented by the existence of open discussions on a contract, those discussions are automatically closed and the contract is archived.

Customer Impact

- Related Solutions: Contracts
- Feature Activation: This feature is **ON** by default for customers with the AUC_RFQ_ARCHIVE parameter activated.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- If the automatic archiving process is enabled, open discussions on a contract that is to be archived are closed automatically.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Automatically Archive Terminated Contracts Based on Termination Date

Previously, when a contract was manually terminated and automatic archiving was enabled, the automatic archiving process used the contract end date rather than the termination date to determine if the archival was to be accomplished or not.

With this release, manually terminated contracts are now archived according to their termination date rather than their contract end date when automatic archiving is enabled.

Customer Impact

- Related Solutions: Contracts
- Feature Activation: This feature is **ON** by default for customers with the AUC_RFQ_ARCHIVE parameter activated.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- Manually terminated contracts are now archived according to their termination date rather than their contract end date when automatic archiving is enabled.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Attachments Area Hidden when Supplier Visibility is Disabled

Previously, the **Visible to Main Contractor** attachments area of a contract was visible to buyers even when contract supplier visibility was disabled.

With this release, the attachments area has been hidden from buyers when suppliers have not been granted access to contracts.

Additionally, when supplier visibility is disabled, the **Transfer Supplier Response Attachments** option that appears when creating a contract from an RFx event is hidden.

Customer Impact

- Related Solutions: Contracts
- Feature Activation: This feature is **ON** by default for customers that did not activate the ECM_SUPPLIER_VISIBILITY parameter.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- The **Visible to Main Contractor** attachments area of a contract (accessed by navigating to **Details > Attachments > Visible to Main Contractor**) is now only accessible to buyers when supplier visibility is enabled.
- In cases where supplier visibility is disabled, but some attachments were previously uploaded in the **Visible to Main Contractor** area, all files that were stored there are no longer accessible.
- When supplier visibility is disabled, the **Transfer Supplier Response Attachments** option that appears when creating a contract from an RFx event is hidden.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

New Search Filter for Contracts with Additional Information Editable by Main Contractor

A new contract search filter has been added to the My Contracts and Archived Contracts list pages.

The new **Additional Info Editable by Main Contractor** filter allows users to perform searches based on which contracts have the additional information area open to the main contractor for editing.

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

- The additional search filter is available on the following list pages:
 - **Sourcing > Contracts > My Contracts**
 - **Sourcing > Contracts > Archived Contracts**

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.