

20.1 RELEASE NOTES

FOR GENERAL SOLUTION ENHANCEMENTS

APRIL 6, 2020 - FINAL VERSION



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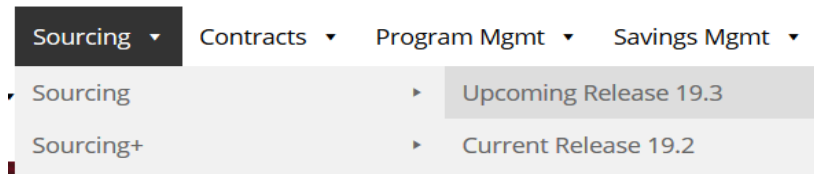
WELCOME

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 **general release notes** related to basics and administration for the following JAGGAER One solutions:

- Contracts+
- eProcurement
- Inventory Management
- Invoicing
- Savings Management
- Sourcing
- Supplier Management

Important! Solution-specific Release Notes are available on the release page for each solution on the Product Release Library. The image below is an example of how to access a specific page for a solution.



Please see the main 20.1 page on the Product Release Library to access the Feature Snapshot.

<https://library.jaggaer.com>

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.
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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.

Online Help Updates

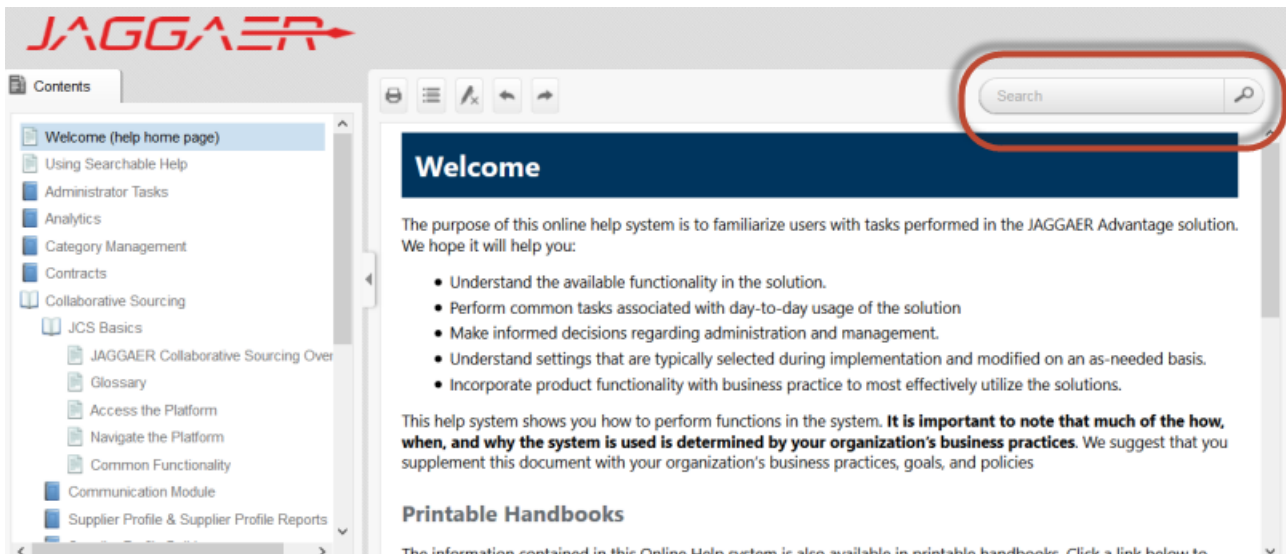
The Online Help tool is designed to provide organizations with comprehensive information about using the JAGGAER ONE tool. Users can browse or search for topics to get product help. In release 20.1, we have made updates to the User Interface (UI), navigation and the way the help search results are displayed in the online help.

USER INTERFACE UPDATES




The UI color scheme and layout has been updated. The new look and feel are designed to look cleaner and provide more space for the help text.

NAVIGATION UPDATES

- The **Search** field is now located in the top-right corner of the Online Help screen in the topic toolbar. This allows users to search the help topics while still being able to view the Table of Contents on the left.



- In addition to the Search field, the following options are available on the topic toolbar.
 - **Print** - Click to print the topic that is open. A Print dialog opens where you can select print options and send the topic to a printer.
 - **Expand All** - Click to expand all elements such as togglers, drop-down effects, and expanding text effects in a topic (if they are not yet expanded).
 - **Collapse All** - Click to collapse all elements such as togglers, drop-down effects, and expanding text effects in a topic (if they are expanded).

-  **Add or Remove Highlights** - After a user performs a search for a topic and opens it, the search text found in the topic are highlighted. This button works as a toggle to turn the highlights on or off.
-  **Back** - Click to open the topic that was viewed previously in the sequence.
-  **Forward** - Click to open the next topic in the sequence.

SEARCH RESULTS UPDATES

Previously, when a search was performed, search results displayed on the left, hiding the view of the TOC. The new Online Help displays search results in the main screen section. Search results include the topic name and the first few sentences of the topic text. Click on the blue link to access the topic.

Your search for "Online help" returned 13 result(s).

[Using Help](#)
Using the Searchable Help The Online Searchable Help can be used a number of ways, including browsing through topics, performing a search, or using the index feature. Read the information below to learn more about the functionality and tools available with Help. Basics Links in Help Links to ...

[Welcome \(help home page\)](#)
Welcome The purpose of this online help system is to familiarize users with tasks performed in the JAGGAER Advantage solution. We hope it will help you: Understand the available functionality in the solution. Perform common tasks associated with day-to-day usage of the solution Make informed ...

JAGGAER ONE Harmonization - Updated Site Navigation and User Interface Live with 20.1

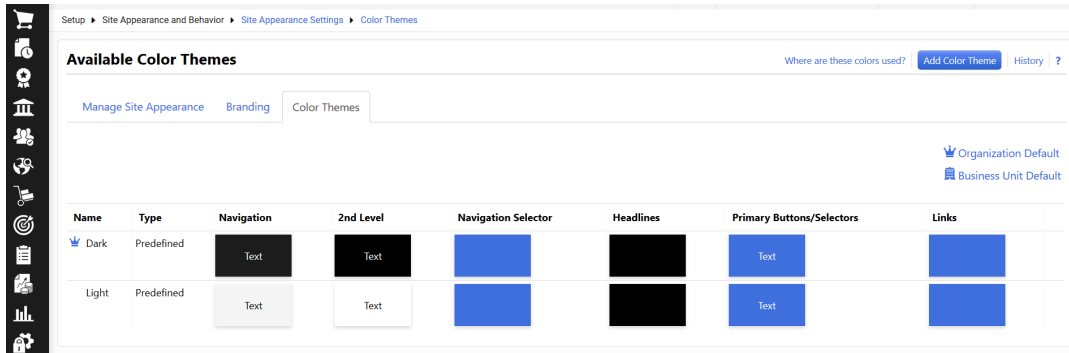
Over the past several releases, we have worked toward a consistent user experience across all JAGGAER ONE products. In the past two releases, we introduced optional User Interface (UI) updates, which included side bar and header navigation updates and new product iconography, and a new area to configure Color Themes for branding in the new UI. **With the 20.1 release, the new UI is the standard and cannot be disabled.**

Some enhancements with the 20.1 release include:

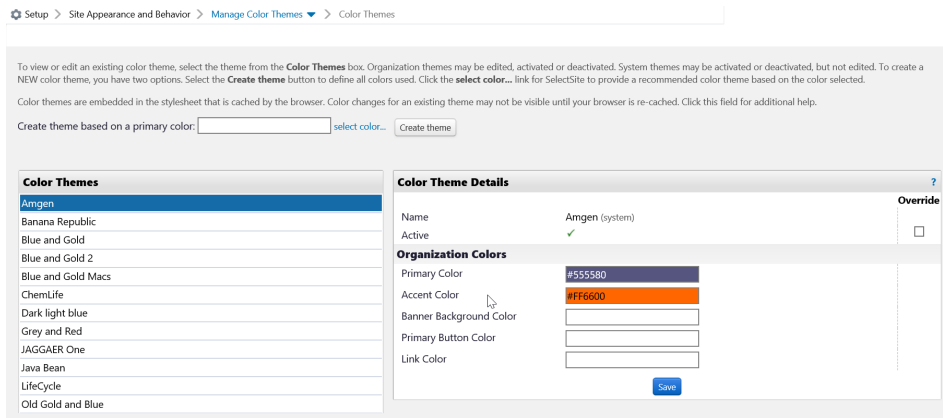
- A new **Branding** page allows users to easily manage what Color Themes and Logos are active as default for the organization as well as for active business units. Previously, only logos could be customized per Business Unit; with 20.1, the **Branding** page allows customers to choose a different configured color theme for a business unit as well.
- The Organization Message and Site Logos page has been renamed to **Organization Message**, as all site logos are now managed on the Branding page.
- The new user interface **Color Themes** page has been updated to more easily add and manage the color themes available to the organization.
- There is no longer a setting to opt into the JAGGAER ONE experience, as it will be live for all customers.

Important Note: Organizations should be aware of the following configurations as they prepare for the updated UI in 20.1 to be released in the production environments:

- **Your Organization Banner Logo must be updated** to the appropriate size or it will not display (250 px width by 25 px height).
- **Your Organization Logo that displays for Customer Branded Portals (if available) should also be updated.** Otherwise, it will display as resized and possibly appear distorted in the Branded Portal.
- **During UIT, you should enable the new UI in your production environment to have access to the new Color Themes page,** and choose a default theme or create new color themes to be migrated with 20.1.
 - Only the two system options (Dark theme and Light theme) and any color themes you create from within the new UI Color Themes page will be migrated with 20.1 (**Setup > Site Appearance and Behavior: Color Themes**).



- No Color Themes from the previous Color Themes settings page will be migrated with 20.1 (Setup > Site Appearance and Behavior > Manage Color Themes - page will no longer exist with 20.1).










Customer Impact


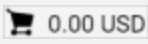

- Related Solutions: All Solutions
- Feature Activation: This feature is **ON** by default and cannot be disabled
- New Permissions related to this Feature: None
- New Notifications related to this Feature: None




USER IMPACT

- Users who are already using the new UI will not see any changes. Users who were not previously opted into the new UI will now see the new UI by default.
 - The color of the side bar navigation (and fly-out sub menus) may be changed to an organization-branded color theme.
 - The site header has been refined to allow for more work space on the page. The site logo is smaller so as to take up less space. Menus have a more modern look and feel and may look slightly different to a user.
 - Side Bar Navigation Changes** - The table below displays the updated icons along with the product/feature access that they provide. **Note:** The menu options available to you may vary based on your organization's licensed product.

Menu Item	Description
	Home menu.
	Shop menu.
	Orders menu.
	Contracts menu.
	Suppliers menu.
	Sourcing menu.
	Reporting menu.

- Header Navigation Changes** - The header navigation is where users can access their user profiles, notifications, action items, active shopping cart, help and other resources. The new UI includes some updates to the iconography. The table below lists the icon along with the functions to which they provide access.


Menu Item	Function
	The search field allows for you to search on various items across the site. You can search on documents such as contracts, search for suppliers or users. You can also search the online searchable help.
	Provides access to the user's active shopping cart.
	Provides access to the Bookmarks feature. Users can create, manage and click on bookmarked pages.

Menu Item	Function
	Provides access to the user's action items.
	Provides access to the user's notifications.
	Provides access to the user's user profile.


- A new **Help** button is displayed in the User Profile. When selected, an overlay displays with the help text for fields on the current page.

ADMINISTRATOR IMPACT




Organization Message Page

- The Organization Message and Site Logos page has been renamed to **Organization Message (Setup  > Site Appearance and Behavior > Organization Message)**.
- The **Organization Message** settings will continue to be managed on this page.
- Organization Logo management is no longer on this page, and is now managed on the new Branding page, explained below.



Manage Site Appearance Page


- The **Manage Site Appearance** page (**Setup  > Site Appearance and Behavior > Site Appearance Settings**) has been updated:
 - The option to use the JAGGAER ONE experience no longer exists, because the new UI is now standard for all organizations and users.
 - **Use Gravatar for User Images (Avatars)** - The default setting is **Yes**, indicating that the user's Gravatar will be displayed in the User Profile area, if any. To disable, select the Override option, and **No**.
 - An "avatar" is an image that represents the user online; a small picture that appears next to the user's name when interacting with websites. A Gravatar is a Globally Recognized Avatar. You must upload it and create a profile at <https://gravatar.com> using your organization email. Once uploaded, when you participate in any Gravatar-enabled site, your Gravatar image will automatically display as well.
 - **Default Organization Home Page** - Begin typing a home page name (i.e. Shopping) or select the search icon to see a list of Home Pages for selection. Once selected, click **Save** to save your settings.
 - This setting was previously located at **Setup > General Site Settings > System Settings and Configuration > Configuration** tab in the **Appearance** section. The function of the setting has not changed.

New Branding Page to Set Color Themes and Logos

- A new **Branding** page allows users to easily manage what color themes and logos are active as default for the organization as well as for active business units.
 1. Navigate to **Setup**  **> Site Appearance and Behavior > Site Appearance Settings > Branding**. The screen displays Default Settings for the organization for the:
 - Color Theme
 - Banner Logo
 - Mobile Logo
 - Email Logo
 - Fax Logo
 - Login Page Logo
 2. If the Multi Business Unit (MBU) license is enabled, each active Business Unit displays as a row in order to select the color theme and logos for the business unit. **Note:** The **Login Page Logo** image is managed for the Default Organization only, and cannot be overridden by Business Unit.
 3. Select **Edit** for the desired row (organization default or business unit) to update the settings.
 - **Color Theme** - The Default selection is the organization selected setting. To override, select the Override button and choose another **Color Theme** from the dropdown.
 - For each **Logo**, the organization's currently configured logo for the object is selected as the "Override" value if one was configured prior to 20.1. If none was configured, the business unit will show the Default logo.
 - To override the default selection, click the Override button and select the edit icon  to select or upload a new image.
 - To edit the business unit selection, click the edit icon  to select or upload a new image.
 - If no business unit color theme or logos are configured, the business unit will inherit the Default Setting for color theme
 4. Click **Save** to save the configuration.





Note: The logos above are no longer managed on the previous Organization Message and Site Logos page (now named **Organization Message**).

- **Image Selector** - The image selection for logos on the Branding page allows the user to easily select or upload an image from the organization's configured images (**Setup**  **> General Site Settings > Manage Organization Images**), or upload an image directly. When the edit icon  is selected:
 - The option to **Select an Image...** and the organization's configured images for the type of logo being selected are displayed by default. Click on a displayed image to choose the image for the logo.
 - If many images are displayed, begin entering content in the search image field to search by image title.
 - When the desired image is selected, click **Use This Image**.
 - Click **Save Changes**.

- Select **Upload an Image...** to upload a new image.
 - Click **Select File** to browse for the file name, or simply drag and drop the file from your desktop into the Select File box.
 - When the desired file is selected, click **Use This Image**.
 - Click **Save Changes**.
 - Uploading an image will automatically save the image to the appropriate setting under image management (**Setup**  **> General Site Settings > Manage Organization Images**).
- Click the **Download** link next to the image to download the image, make changes such as resizing, in order to upload.


Color Themes page

Important! If no Color Themes have been created via the new UI Color Themes page prior to 20.1, this page will only display the system Light and Dark color themes. No Color Themes will be migrated from the previous UI Color Themes page. It is highly recommended that administrators opt into the new UI on their production site prior to 20.1 and create appropriate color themes on the new Color Themes page that will be available when 20.1 is live.


- Updated **Color Theme** page (**Setup**  **> Site Appearance and Behavior > Site Appearance Settings**) that displays all the Color Themes available to the organization to use as the organization Default, Business Unit Default, and for selection by individual users with the appropriate permission.
 - The **Organization Default** is indicated with .
 - The **Business Unit Default** is indicated with .
 - Click **Where are these colors used** link in the top right of the page to see a display of where each of the Color Theme settings are used on a page in the application. Click anywhere to remove the overlay display.
- To create and manage **Color Themes**:
 1. Navigate to **Setup**  **> Site Appearance and Behavior > Site Appearance Settings** and select the **Color Themes** tab.
 2. Existing color themes (configured from the updated navigation Color Themes page) display on the page. The list includes the previous **Light** theme and **Dark** theme.
 3. To add a custom color theme, click the **Add Color Theme** button.
 4. The **Add Color Theme** window displays. Configure the fields:
 - a. **Name** - Enter a meaningful name for the color theme.
 - b. **Navigation** - Select a color for the Side Bar navigation menu.
 - c. **2nd Level** - Select a color for the fly-out menus that display when an option is selected in the Side Bar navigation.
 - d. **Navigation Selector** - Select a color that displays on a menu item when you hover over the item.
 - e. **Headlines** - Select a color for screen and section headlines.

- f. **Primary Buttons/Selectors** - Select a color for buttons.
 - g. **Links** - Select a color for links in the application.
 - h. Click **Save Changes**.
5. To use the new color theme in the application, navigate to the **Branding** page. Refer to the Branding page instructions, above, for information about setting the organization and business unit defaults.


History for Appearance Changes

- Selecting the **History** link on any tab in Site Appearance Settings navigates the user to the **Configuration History** page (**Setup**  **> General Site Settings > System Settings and Configuration > Configuration**), and includes history for changes to the Site Appearance settings.

Updating the Organization Banner Logo

- The area of the header in which the organization **Banner Logo** displays is reduced in the new UI to allow for more page space. It is important that organizations refine their logos before the UI becomes standard in 20.1. **Optimal size is 250 px width by 25 px height.**
- To update the logo, navigate to the **Branding** page as described above.
 - For the **Default Settings** row, select the **Edit** button.
 - For the **Banner Logo**, select the edit icon . If Default is active, select the **Override** button, then the edit icon.
 - Upload a new resized image by selecting **Upload an Image**, and drag and drop the image file name into the **Select File** area. Select **Use This Image**, then **Save Changes**.
 - You may choose to **Download** the current image, resize the image in an image editor, and upload the new saved image. Select **Use This Image**, then **Save Changes**.
 - Repeat this action for all Business Units as appropriate.
 - If the Business Unit inherits the default Organization Banner Logo, no additional changes need to be made.
 - If the Business Unit has its own Banner Logo, it must be resized as indicated above.

Updating the Customer Branded Portal Banner

- If your organization provides a Customer Branded Portal for suppliers, you must also resize the Customer Branded Portal Header Image as per the new UI specifications.
 - Navigate to **Suppliers**  **> Configuration Settings > Supplier Portal Configuration** and scroll to the **Supplier Portal Home Page** section.
 - For the **Supplier Portal Header Image**, select the **Manage** dropdown button.
 - Click **Select an Image** if there is a resized image available in your organization's list of images.
 - Click **Upload an Image** to navigate to Image Management, where you can add a new image (no larger than 250px width by 25 px height). Follow the instructions for providing an image at **Supplier Portal Configuration** in the **Administration and Configuration Handbook** or online searchable help.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

- Suppliers will see the default dark color theme and other UX enhancements (i.e. icons and menu selections) in the Supplier Network Portal.
- Suppliers will see your organization's chosen color theme in the Customer Branded Portal. Please note that if you do not resize the image that displays in the top banner of your Customer Branded Portal, the image will appear distorted to supplier users.

Document Search User Interface - Updates Updated!

For the past several releases, JAGGAER has been rolling out a new search interface throughout the application, including for document search and request search. The new search interface is live for sales orders, receipts, sales invoices, and requests. However, users have had the ability to opt in to the new search for Requisitions, Purchase Orders, Change Requests, and Invoices. With the 20.1 release, the new document search interface remains optional for these document types, and the existing user profile setting continues to determine if users see the classic search or new search. Also with the 20.1 release, additional filters are available for document searches as well as several usability enhancements.

After the 20.1 release, JAGGAER will be communicating with customers individually to implement the new document search interface for Requisitions, Purchase Orders, Change Requests and Invoices.

Refer to [Early Access Guide for Document Search](#) in the online searchable help for additional information.

Important: A new **Guided Tour** is available to users who opt-in to the new search experience when navigating to a new search page. **Guided Tour** options include a step-by-step walk through on the search page as well as viewing a video and accessing additional information directly from the solution.


Customer Impact

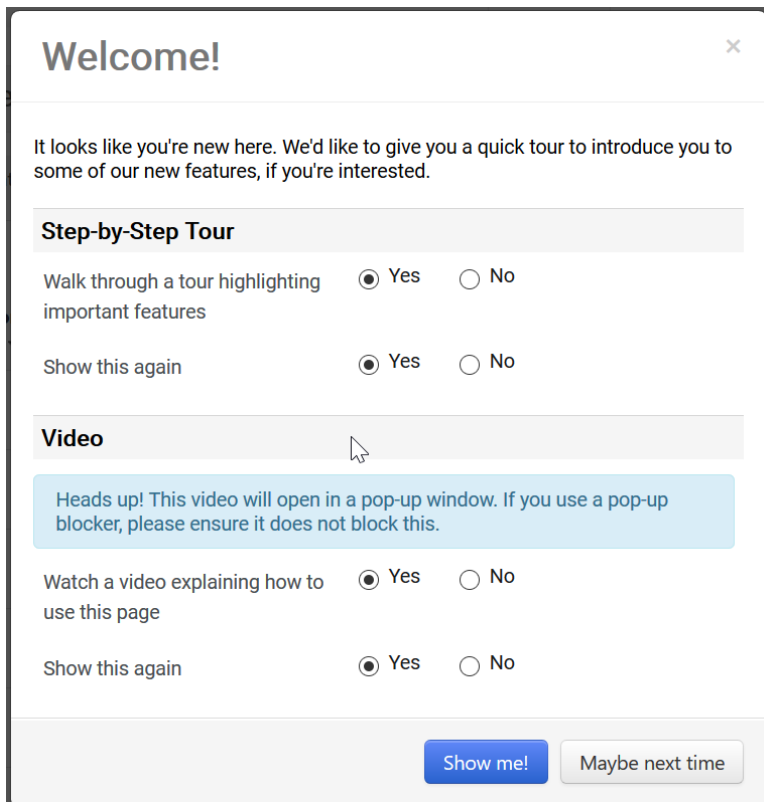
- Related Solutions: All Solutions
- Feature Activation: This feature is **ON** by default. Customers who wish to use the improved search for requisitions, purchase orders, change requests, and invoices will need to opt in.
- New Permissions related to this Feature: None
- New Notifications related to this Feature: None

USER IMPACT

- The new search functionality continues to be optional for Requisitions, Purchase Orders, Change Requests, and Invoices. Please contact an Administrator to have the search enabled for these document types.

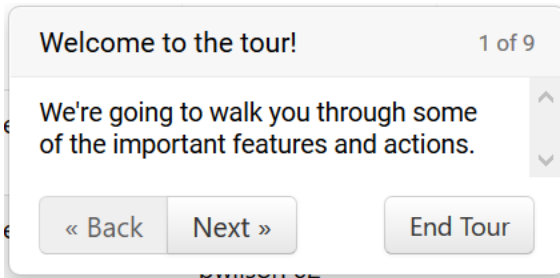
Guided Tour and Video of Enhanced Search Features

- A new **Guided Tour** is available when users opt in to the new search for Requisitions, Purchase Orders, Change Requests, and Invoices. When navigating to one of these search pages (**Orders**  **Search: Requisitions, Purchase Orders, Change Requests or Invoices**), the following overlay displays:

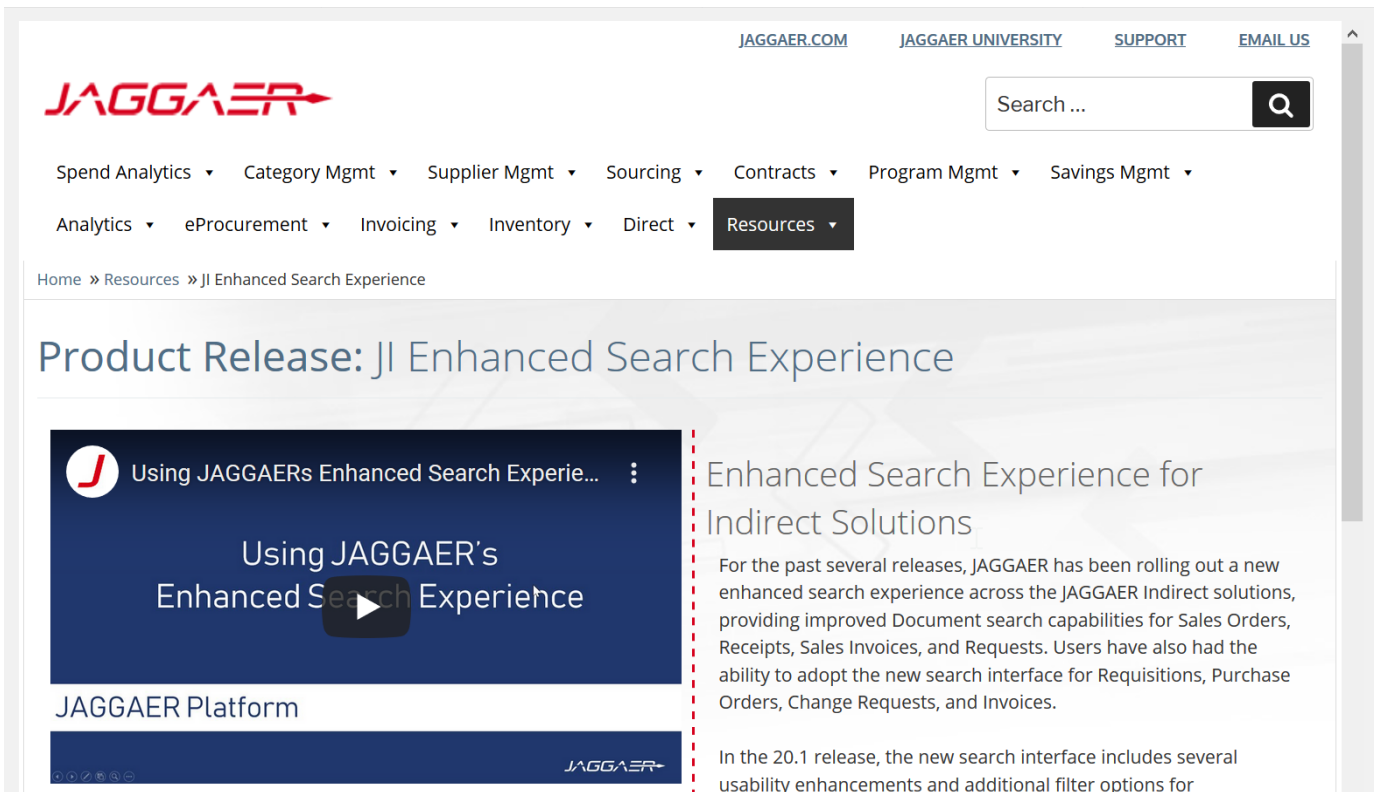


- **Step-by-Step Tour** options:
 - **Walk through a tour highlighting important features** - The default selection is based on your user profile setting (see below). Click **Yes** to allow an overlay to display that will walk you through the various features on the search page in a step-by-step manner. Click **No** to not display the tour. See below for additional information about the tour.
 - **Show this again** - **Yes** is selected by default. This will allow the Step-by-Step Tour options to display in the overlay each time you navigate to one of the new opted-in search pages. If **No** is selected, the option to view the Step-by-Step Tour will not display again. This option can be re-enabled in the user profile.
- **Video** options:
 - **Watch a video explaining how to use this page** - The default selection is based on your user profile setting (see below). Click **Yes** to display a pop-up window (must be allowed by your browser) to watch a video and access additional information about the search enhancements. Click **No** to not display the video.
 - **Show this again** - **Yes** is selected by default. This will allow the overlay to display with the Video option each time you navigate to one of the new search pages available via opting in. If no is selected, the video option will not display again. This option can be re-enabled in the user profile.
- **Show me!** - Click this button to close the overlay and see the option(s) selected as **Yes** above.
- **Maybe next time** - Click this button to close the overlay. If **Show this again** is **Yes** for either section, the overlay will display the next time you navigate to one of the opted-in search pages.

- **Step by Step Tour** - If this option is selected and you click the **Show Me!** button, a **Welcome to the Tour** overlay will display. Click **Next>>** to navigate through the tour. Each step is displayed at different areas on the page to walk the user through the different features. Click **End Tour** at any time to close the tour.



- **Video** - If this option is selected and you click the **Show Me!** button, a pop-up window displays (if allowed by your browser) that navigates the user to the JAGGAER ONE Product Release Library page where a video and additional information about the new document search features is located.




- You can **choose to disable or re-enable the Guided Tour in the user profile (User Profile > User Profile and Preferences: Guided Tour Instructions)**. For each option, the Last Shown time and date displays.
 - **Show Step-by-Step Tour** - This enables the option to view the Step-by-Step Tour when navigating to an opted-in search page.
 - **Show Video** - This enables the option to view the Video when navigating to an opted-in search page. The Last Shown
 - Click **Edit Section** to change the settings, then click **Save Changes**.

20.1 Features for the New Search UI


- **Created Date/Time** now included in **Request** search results (Supplier Requests, AP Requests, Sourcing Requests, Contract Requests, Procurement Requests). Results can be sorted by this column.
- Requisition, PO and Buyer Invoices searches now include the ability to search by **Contract Type** (for organizations with the appropriate licenses).
- All searches contain an action ellipses at the beginning of each search results to allow granted users the ability to perform appropriate actions for the document (i.e. Copy to a New Cart for Requisition, Create Invoice from Sales Order, etc.)

Using the New Document Search (previous release)


- **Quick Search**




1. When the option is selected to search a document, results display by default for the last 90 days.
2. Enter a keyword or phrase in the **Quick search** field.
3. Click the search icon . Matching documents are returned in the search results.

- **Advanced Search** - Use the filter options to perform a more specific search.

1. Click the **Add Filter** button (located to the right of the **Quick search** field). A list of available filters displays. **Note:** These filter options are the same options that displays on the current Advanced Search page.
2. You can search for a specific filter by entering a value in the field. The list of filters will be refined and only matching filters display.
3. Click the checkbox for the appropriate filter. Configuration options display. For example, if you choose **Business Unit**, an overlay displays from which you can select the appropriate business unit. **Important:** When there are many options, a list of "suggested" values displays with the configuration overlay. To choose a value that is not in **Suggested** list, enter a value in the search field.
4. When you have made the appropriate configurations to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. Click the  to remove the filter.
5. Repeat the steps above to add additional filters. The search results update to reflect the new filters.

- **Configuring Search Results Columns** - You have the ability to choose the columns that display in the search results and the order in which they display.

1. On the Search Results page, click the  located on the right, above the document list. The **Configure Column Display** screen displays. A list of all available columns displays on the left, and a list of selected columns displays on the right, where you can sort the order in which they display on the search results page.
2. Follow the steps below to add columns:
 - a. Locate the column(s) in the list. You can scroll through the list or enter a value in the search field to search for a column.
 - b. Click the checkbox for each column you would like to add. The columns are automatically added to the bottom of the selected columns list on the right. See the next step for information about sorting the list.
3. Manage the selected columns list.

- To sort an item in the list, you can drag the columns to the selected location or use the   to move the columns up and down.
 - To delete a column from the selected list, click the .
4. By default, the updated selected and sorted columns only display for the life of the current search.
 - **Best Practice!** If you would like to keep the column configuration for all searches going forward, select the **Pin columns as my defaults** checkbox.
 5. Click **Apply**.
- **Taking Action from Search Results** - You can choose to take appropriate actions (per user permissions) for the document type using the action ellipses at the beginning of each search result or at the header row for multiple results. The actions for each document and process for completing those actions are unchanged.
 - To take action on a single row:
 1. Click the ellipses at the beginning of the row. The appropriate actions for the document will display as hover text.
 2. Select the appropriate option and follow the instructions.
 - To take action on multiple rows:
 1. Click the ellipses at the beginning of the header row.
 2. Click **Show Multiple Selection**. Check boxes are now displayed in the header row and for each row.
 3. Select the appropriate boxes. If the header row checkbox is selected, all results on the page are selected.
 4. Once selections are made, click the ellipses in the header row again. The appropriate actions for the document will display as hover text.
 5. Select the appropriate option and follow the instructions.
 - Refer to [Early Access Guide for Document Search](#) in the online searchable help for additional information.

Display Search Results Widget

- The **Display Search Results** widget, released with 19.3, is available for all users, regardless of if they are opted in to the new search or not. It provides additional column and grouping selections than the previous Saved Search: Documents widget. **Important Note:** It is recommend to replace any usage of the **Saved Search: Documents** widget for Form Requests with the **Display Search Results** widget. Usage of the **Saved Search: Documents** widget with any search type other than form requests will be automatically converted in a future release.
 - When using this widget with All Orders, Requisitions, Purchase Orders, Invoices or Change Requests, links will be fully functional **for users who have opted in to the new search experience**. For users who have not opted in, all links will go to the legacy search results User Interface where it will display the saved search.
 - Saved searches created in the new search experience are not backwards compatible. Users who have not opted in will still be able to view the information but links to full search results will be disabled.
 - If you continue to use the previous Saved Search widgets for search results, but are opted into the new search, any new saved searches (using the new search interface) will NOT display in the existing Saved Search widget.
 - You **MUST** use the new Display Search Results Widget to see new saved searches if opted in. The Display Search Results widget **WILL** display saved searches created before opting in.

- Receipts, Sales Orders, Sales Invoices and Requests (Supplier Requests, Sourcing Requests, AP Requests, Procurement Requests, Contract Requests). saved searches are available in the Display Search Results widget only.
- The **Saved Search: Documents** widget will be removed once all organizations are utilizing the new search for all documents. **It is recommended to discontinue use of this widget** and begin using Display Search Results widget instead. It is impacted in the following ways by the new search functionality:
 - When the widget has a saved search for **Receipts, Sales Orders, or Sales Invoices**, all links redirected to the updated search interface. This widget can no longer be used for new saved searches. Existing widgets will be automatically converted to the new widget in a future release.
 - When the widget has a saved search for **Request** searches, any links to search results are disabled. This widget can no longer be used for new saved searches. Any existing usage of this widget must be manually converted to the **Display Search Results** widget. Form Request saved searches cannot be converted automatically.
 - Widgets which have been configured for All Documents, Requisitions, Purchase Orders, Invoices, and Change Requests will remain unchanged for users who have not opted in to the new search experience. Users who have opted in to the new search experience will be redirected to the updated search interface. Any existing usage of this widget will be automatically converted to the new widget in a future release.
- Refer to **General Widgets** and **Adding Dashboard Widgets** in the **Site Basics Handbook** or online searchable help for additional information.

ADMINISTRATOR IMPACT

- The optional searches can be enabled at the user or role level. Please see [Early Access Guide for Document Search](#) in the online searchable help for additional information about enabling the new search experience in the user profile.
- The Guided Tour options can be enabled at the user level only.

INTEGRATION IMPACT

This feature does not impact integrations.

ADDITIONAL KEY POINTS ABOUT THE FEATURE

- Best Practices for optimizing the new search experience:
 - Use the **Pin Columns** feature from search results to keep columns you frequently use in your displayed search results, without having to select them each time.
 - Begin using the **Display Search Results** widget for saved searches.

Supplier Impact

Suppliers will see the enhanced search options as described above.


Ability to Restore Deleted Suppliers

Users with the **Delete a Supplier** permission (**User Profile > Permission Settings > Administration > Supplier Administration**) can delete suppliers from the organization's network. Previously, if the organization needed to restore a supplier after deletion, they had to contact JAGGAER. With the 20.1 release, users with the ability to delete a supplier can now **Restore** a supplier to the database.

Customer Impact

- Related Solutions: All Solutions
- 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 with the **Delete a Supplier** permission (**User Profile > Permission Settings > Administration > Supplier Administration**) can now restore a deleted supplier. Global network suppliers as well as those created locally by the organization can be restored.
- To **Restore** a supplier:
 - Review deleted suppliers by navigating to **Reporting**  **> Supplier Management > Deleted Suppliers**.
 - Select the appropriate supplier. The supplier profile displays with the supplier name stricken through.
 - From the **Supplier Actions** dropdown, select **Restore Supplier**.
 - A confirmation overlay displays the Supplier Name and JAGGAER Supplier ID. Click **Restore** to continue.
 - A confirmation message displays that the supplier has been restored.
- When a supplier is reinstated for an organization, all supplier profile field information exists the same as before the deletion (i.e. address information, contacts, etc.). However, any system actions that occurred as part of the deletion action must be addressed manually as appropriate. For example:
 - Make the supplier active for shopping.
 - Add the supplier to supplier groups.
 - Mark the supplier as prime.
 - Enable ERP sync.
 - Add the supplier to supplier performance templates and scorecards.
- If a supplier was in the process of registering when the deletion occurred, the customer must re-invite the supplier to register. If the supplier had completed the registration at the time of the deletion, the supplier will again be considered registered, and no additional action is required.
- For more information on this feature, see [Deleting Suppliers](#) in the **Supplier Management** section of the online searchable help.

ADMINISTRATOR IMPACT

This feature does not impact administrators.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.


Supplier Profile - Diversity Contact Type Available

Supplier contacts are managed in a supplier's profile and associated with a Contact Type. Customer and Supplier users can add and manage contacts. With the 20.1 release, a new Diversity type has been added as a Contact Type. This allows suppliers and customers to designate the supplier contact responsible for managing diversity related classifications so customers know who to contact regarding any diversity related questions such as missing or outdated certificates, additional reporting information, etc.


Customer Impact

- Related Solutions: All Solutions
- 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 adding and managing contacts for suppliers, **Diversity** is a new **Type** available for selection.
 - Navigate to a Supplier Profile (**Suppliers**  **> Manage Suppliers > Search for a Supplier > [selected supplier] > Contacts and Locations > Contacts**) to add and manage contacts.
 - See **Managing Supplier Contacts in the Supplier Profile** in the online searchable help for additional information about managing supplier contacts.

ADMINISTRATOR IMPACT

- Customers control what options are displayed to suppliers in the Customer Branded Portal Registration Profile via the Entity and Individual Registration configuration settings (**Suppliers**  **> Configuration Settings > Registration Configuration > Entity/Individual Registration** pages).
 - Under the **Contacts** section for registration, select the **Diversity Contact** option. Select the appropriate visibility options.
 - See **Registration Profile Fields** in the **Supplier Management Handbook** or online searchable help for additional information about registration configuration.

INTEGRATION IMPACT

- The Diversity Contact Type can be designated in the supplier import.

Supplier Impact

- Suppliers also have the ability to add and manage Diversity Contact Types in the network portal, and in Customer Branded Portals if made available.

Supplier XML Import Updates

To enhance the usability for importing supplier information from external systems, several new fields will be added as optional for the Supplier XML import action with the 20.1 release. With this release, several new fields and control settings from the Supplier Profile will be available to be optionally included in the Supplier XML Import.

Customer Impact

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

USER IMPACT

- This feature does not impact users.

ADMINISTRATOR IMPACT

- Administrators can choose to include additional fields in the Supplier XML import as detailed in the Integration Impact section below.

INTEGRATION IMPACT

- The supplier XML import now allows the following supplier profile fields. All fields are optional to be included in the DTD for the Supplier XML Import:
 - Legal Structure
 - Custom payment Terms
 - Invoice Document Legal Type
 - Allow non-catalog items
 - Allow general form purchases
 - The following fields are also supported for Global Suppliers:

- VAT Exempt
- Supplier Capital
- Supplier Shareholders
- Supplier Tax Representative ID
- Commercial Registered Court
- Supplier Registered Seat
- Supplier Commercial Registration Number

Supplier Impact


This feature does not impact suppliers.

All Suppliers History Enhancements New!

Customer Impact

- Related Solutions: All Solutions
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this Feature: None
- New Notifications related to this Feature: None

USER IMPACT

- The Suppliers History page is now **Consolidated Supplier History (Suppliers  > Manage Suppliers)**. The available history information for all suppliers that is available on the page has not changed. Available filters have not changed.
- A new **Available Actions** button is available to export and view export results.
 1. Click **Available Actions > Export Search Results**. A **Request Export** overlay displays.
 2. Enter a **Description** for the export, or keep the default.
 3. Click **Submit**.
 4. A confirmation message displays.
 5. To access the export file, click **Available Actions > View Recent Exports**. You are navigated to the **Administer > Administration > View Import and Export Results** page.
 6. Find your requested export, and click to download the file.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integrations.

ADDITIONAL KEY POINTS ABOUT THE FEATURE

- See **Consolidated Supplier History** in the online searchable help for additional information.

Supplier Impact

This feature does not impact suppliers.

New Dashboard Widget **Updated!**

In this release we have created a new type of dashboard widget that provides a link to another dashboard in the application to make it easier for users to navigate through the application and find what they need.


Customer Impact

- Related Solutions: All
- 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


- If the new widget has been added to a dashboard, users can use the widget to navigate to another dashboard.

ADMINISTRATOR IMPACT

- Add the widget to a dashboard as follows. Note that this widget can only link to one other dashboard. Multiple copies of the widget can be added to a dashboard.
 1. Navigate to **Administer**  > **Administration** > **Manage Organization Dashboards**.
 2. Click **Edit** next to the dashboard you want to add the widget to.
 3. Select **+ Add Widget**.
 4. Select the **Dashboard Navigation** widget type.

5. Complete these fields:

- **Name** - Enter a title for the dashboard widget. This is the name that appears at the top of the widget.
- **Dashboard Type** - Select a Home Page dashboard from the drop-down list. These are the Home Pages for different areas of the application. The Home Page dashboard selected here will determine what dashboards are available for selection in the Destination Dashboard field.
- **Destination Dashboard** - Select the dashboard that you want to link to. The drop-down list displays all the dashboards that have been configured for dashboard type selected above, for example, all the Contracts dashboards, or all the Shopping dashboards. By default, the name of the dashboard selected here is displayed in the widget.
- **Background Color Style** - Choose the color that appears in the background of the widget. You can choose to match the widget's header color or select a custom color. If the **Match Header Color** option is selected, the widget background will change to whatever color is selected for the header of the widget. If the **Custom Color** option is chosen, users can click the **select color...** link to view a color picker or enter a hexadecimal value.
- **Background Image** - To display an image in the widget instead of the dashboard name, users can upload an image in this field by clicking **select image...** and following the prompts to choose an image.

Note: A new **Dashboard Navigation Image** option is available under Setup  > General Site Settings > System Settings and Configuration, on the **Image Management** tab. Organizations can upload the images they want to use for the Dashboard Navigation widgets here.

6. Click **Save Changes** and publish the dashboard.

- Visibility for the widget is based on user permissions. Users who do not have access to the destination dashboard in the widget will not see the widget. For administrators who are managing dashboards, the widget will be displayed, but a message will indicate that they do not have access to the dashboard they are linking to.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.