JAGGAER ONE

19.3 RELEASE NOTES

FOR GENERAL SOLUTION ENHANCEMENTS

**NOVEMBER 11, 2019 - FINAL VERSION**

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WELCOME

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

This document provides **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.
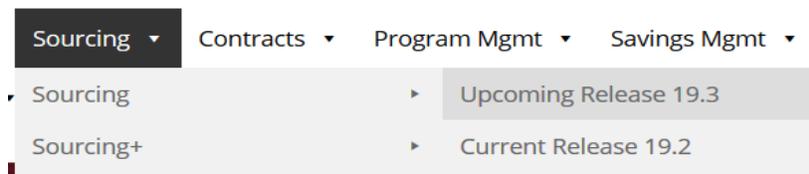
Please see the main 19.3 page on the Product Release Library to access the Feature Snapshot.

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.

Updated Site Navigation and User Interface

As we continue to make new solutions available, it is imperative that we work toward a consistent user experience across all JAGGAER One products. In release 19.2, we introduced optional User Interface (UI) updates, which included side bar and header navigation updates and new product iconography that will become standard across all solutions. In release 19.3, we are continuing to refine the UI. The following updates have been made:

- Previously, there were two options on the side bar navigation menu related to product search, **Orders** and **Documents**. These menu options have been merged into a single **Orders** option. **Note**: This change is also related to general changes to document search and approval organization. Please see **New Search Interface is Mandatory for Specific Document Types and Requests**, on page 8 for additional information.

- A Color Theme can now be used in the UI to brand the site for your organization. In release 19.2, only light shading or dark shading were available. **Important**: As we deploy the release to the Usertest environment, the Color Theme functionality is still being developed. Updates will be made throughout the UIT period and the goal is for the feature to be fully developed by the push to Production. Please contact JAGGAER if you have questions.

- A streamlined header to increase workspace and approve overall aesthetic.

For release 19.3, the new UI continues to be optional. It is on by default in the UIT environment and customers can turn it off. It is off by default in the Production environment and customers can turn it on. **However, in release 20.1, the new UI will become the standard. Therefore it is highly recommended that customers begin using and testing the new UI as soon as possible.**

Customer Impact

- Related Solutions: All Solutions.
- Feature Activation: This feature is **On** by default in the UIT environment but can be turned off by an organization administrator. The feature is **Off** by default in the Production environment but can be turned on by an organization administrator.
- New Permissions related to this Feature: None.
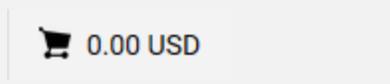- New Notifications related to this Feature: None.

USER IMPACT

- Users who are already using the new UI will notice the following changes:

  - Where there used to be an **Orders** menu option and a **Documents** menu option, there is only a single **Orders** option available. The two menu options have been merged. Please see **New Search Interface is Mandatory for Specific Document Types and Requests**, on page 8for additional information about document search and approval updates.

  - The color of the side bar navigation (and fly-out sub menus) may be changed to a 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.

- Users who are new to using the updated UI will notice the following (changes from the 19.2 release):

  - **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.

Menu Item	Description
	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 and action items, active shopping cart and help and other resources. The new UI includes some updates to the iconography. The table below lists the icon along with the functions they access.

Menu Item	Function
Search (Alt+Q) 🔍	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.
🛒 0.00 USD	Provides access to the user's active shopping cart.
❤	Provides access to the Bookmarks feature. Users can create, manage and click on bookmarked pages.
🚩 24	Provides access to the user's action items.
🔔	Provides access to the user's notifications.
👤	Provides access to the user's user profile.

ADMINISTRATOR IMPACT

- Administrators can manage the use of the new UI for 19.3.

1. Navigate to **Setup > General Site Settings > System Settings and Configuration**. The screen opens with the **Configuration** tab active.

2. In the **Appearance** section, locate the **Use JAGGAER One Navigation Experience** field. Take one of the actions below:

   - To enable the new UI, click the **Override** radio button and then click the **Yes** radio button.

   - To disable the new UI, click the **Override** radio button and then click the **No** radio button.

3. Click **Save** to save the configuration.

- Changing the Color Theme - Follow the steps below to create and select a custom color theme.

    1. Navigate to **Setup > Site Appearance and Behavior > Manage Site Appearance**.

    2. Existing color themes display on the page. This include the previous **Light** theme and **Dark** theme.

    3. Too add a custom color theme, click the **Add Color Theme** button.

    4. The **Add Color Theme** window displays. Configure the fields:

        - **Name** - Enter a meaningful name for the color theme.

        - **Navigation** - Select a color for the Side Bar navigation menu.

        - **Second Level** - Select a color for the fly-out menus that display when an option is selected in the Side Bar navigation.

        - **Navigation Selector** - Select a color that displays on a menu item when you hover over the item.

        - **Headlines** - Select a color for screen and section headlines.

        - **Buttons/Selectors** - Select a color for buttons.

        - **Links** - Select a color for links in the application.

    5. Click **Save Changes**.

    6. To use the new color theme in the application, you need to make it the default. Click options arrow on the **Edit** button and select **Make Default Color Theme**.

    7. You can change the default color theme back to the Light or Dark option by clicking the **Make Default Color Theme** button for the appropriate option.

- The area of the header in which the organization logo displays is reduced in the new UI. It is important that organizations refine their logos before the UI becomes standard in 20.1. Optimal size is 200 px width by 30 px height.
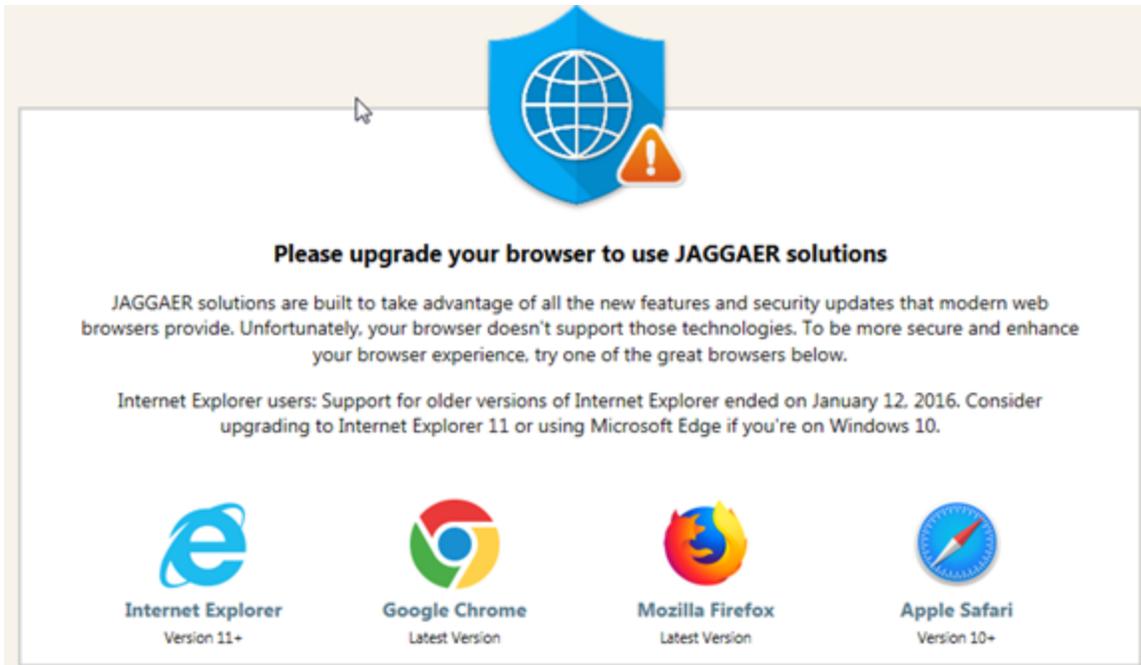
INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Application will No Longer Function in Internet Explorer 6-10

While JAGGAER has not supported Internet Explorer 6-10 for the past several releases, organizations have still been able to access and use the application in these older browser versions. As of release 19.3, the application will no longer function in IE 6-10. Function will cease for Test sites when the release goes live in the **Usertest** environment on October 18, 2019. Function will cease for Production sites when the release goes live in the **Production** environment on November 11, 2019. If a user attempts to access the application in IE 6-10, following screen will display.

Organizations that use these browser versions should begin making arrangements to upgrade as soon as possible prior to the release. For a complete list of supported browsers, please access the link below.

https://library.jaggaer.com/wp-content/uploads/Supported-Browsers-Devices.pdf

Ability to Display Supplier Profile Legal Structure Options Based on Country Selection

Suppliers and customers can select a Legal Structure in the Supplier Profile based on a standard list, regardless of the supplier's country of origin. Clients whose business interests extend to multiple countries must allow non-US supplier's the ability to select a Legal Structure that is consistent with the business structures established within their country of origin, or the country in which they conduct business. With the 19.3 release, customers can choose to expose Legal Structure selections unique to the supplier's selected country of origin. If enabled, this feature is available in the following areas where Legal Structure is selected:

- Customer Branded Portal - Where the supplier selects a Legal Structure in the registration profile.

- Customer's view of the supplier profile and via proxy registration

- Supplier Request Form

- Advanced Dynamic Workflow rule configuration

Customer Impact

- Related Solutions: All Solutions
- Feature Activation: This feature is **OFF** by default but can be configured by an administrator
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- If enabled for the organizations, users will see the following changes:
  - On the **General** page of the Supplier Profile, a **Country of Origin** is required before a **Legal Structure** can be selected.
  - The **Legal Structure** list contains values that are unique to the selected **Country of Origin**.
  - If no **Country of Origin** selection has been made, a **Legal Structure** cannot be selected. If the user clicks in the **Legal Structure** field prior to **Country of Origin** selection, an error message displays, indicating the user must first select a **Country of Origin**.
  - **Legal Structure** based on **Country of Origin** selection exists everywhere in the solution where **Legal Structure** can be selected, including the supplier's view of the registration profile in the Customer Branded Portal, the customer view of the Supplier Profile, and Supplier Request forms.

ADMINISTRATOR IMPACT

- To enable this feature, select the **Enable International Legal Structures** setting under the **International Settings** section at **Setup** ✸ **> General Site Settings > System Settings and Configuration > Configuration.**
- When configuring Advanced Dynamic Workflow (ADW) rules based on **Legal Structure**, a **Country** dropdown is available to select prior to selecting the appropriate **Legal Structures** to apply to the rule.

INTEGRATION IMPACT

- A supplier import file must either include a **Country of Origin** when a **Legal Structure** is also provided, or the pre-existing record for that supplier must have a designated country against which the imported **Legal Structure** can be validated. The imported **Legal Structure** must be a valid for the designated **Country of Origin** provided.
  - If a **Legal Structure** is provided in the import file but a **Country of Origin** is not available (either within the import file or within the pre-existing supplier record), the user will be notified of this invalid data via a message in the error file associated with the import, and this will prevent the import from occurring.
  - If an invalid **Legal Structure** is provided in the import file, the user will be notified of this invalid data via a message in the error file associated with the import, and this will prevent the import from occurring.

Supplier Impact

- If enabled for the customer organization, suppliers will be required to select a **Country of Origin** before selecting a **Legal Structure** for the Customer Branded Portal Registration Profile.

Global Supplier History Search

Administrators have the ability see what has changed in their supplier data across all suppliers. This provides a clearer image of important changes across suppliers for an organization.

Customer Impact

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

USER IMPACT

This feature does not impact users.

ADMINISTRATION IMPACT

- This feature allows administrators to track supplier history through the **Supplier History** tab.
- To access this feature, administrators must select **Suppliers > Manage Suppliers > Supplier History.**
- To access this feature, administrators must have the **Manage Supplier Profiles** permission.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Exchange Rate Import Configuration

We have updated the customer exchange rate import validation to offer more granular control for validation of exchange rates during import.

Customer Impact

- Related Solutions: All
- Feature Activation: This feature is **Off** by default. Administrators can enable it.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

This feature does not impact end users.

ADMINISTRATION IMPACT

- Follow the steps below to activate the feature:
    1. In the left-side toolbar, go to **Setup** 💠**> General Site Settings > Configure Currency Settings.**From here, you can access three sub-windows using the tabs at the top of the screen: **Currency Configuration**, **Import/Integration Options**, and **Currency Configuration History**. Currency Configuration is the default location.
    2. To configure import options, select the **Import/Integration Options** tab to open the corresponding sub-window.
    3. On the **Import/Integration Options** sub-window, there are three options available, each of which can be toggled to be active independent of the others:
        - **Automatically activate inactive currencies**- Automatically activates currently inactive currencies if those currencies are imported.
        - **Require all rates to be converted from the base currency** - Prevents importing currency conversion rates other than those in reference to the base currency.
        - **Prevent duplicate currencies** - Generates an error message if an import contains duplicate entries for a given conversion rate.
    4. To enable an option, click the **Yes** radio button. To disable an option, click the **No** radio button. These options are disabled by default.
    5. Click **Save**.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Search Interface is Mandatory for Specific Document Types and Requests

For the past several releases, we have been rolling out a new search interface throughout the application, including for document search and request search. Previously, it was optional to use the new search. A setting in the user profile determined if the user saw the classic search interface or the new search interface for all document types and requests. In 19.3, the new search interface is no longer optional for sales orders, receipts, sales invoices, and requests. It is on by default for those search types and users cannot opt out.

The new document search interface is still optional for requisitions, purchase orders, change requests, and invoices. The setting in the user profile will determine if users see the classic search or new search for those document types. The current goal is for the new search interface to be mandatory for all document types in release 20.1.

Customer Impact

- Related Solutions: All
- 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.
- The new search functionality is now standard for Sales Invoices, Receipts, Sales Orders, and Requests.
- Please see the **Using the New Document Search** topic in the **Site Basics Handbook** for instructions on using the new search.
- The **Saved Search: Documents** widget is impacted in the following ways by this change.
  - When the widget has a saved search for Receipts, Sales Orders, or Sales Invoices, all links redirected to the updated search interface.
  - When the widget has a saved search for Form Request or Request searches, any links to search results disabled.
  - 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.
- A new **Display Search Results** widget is now available. This widget is available for all users, regardless of if they are opted in to the new search or not. 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 will still be able to view the information but links to full search results will be disabled. The new widget provides additional column and grouping selections. **Note**: It is recommend to replace any usage of the old widget with the new one anywhere Receipt, Sales Order, Sales Invoice or Form Request saved searches were used.

ADMINISTRATION IMPACT

- The optional searches can be enabled at the user or role level. Please see the **Early Access to New Features** topic in the **Site Basics Handbook** or online searchable help for information about enabling the new search experience in the user profile.

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Document Search and Approval Menu Changes

The navigation to document search and approvals has been updated. The main goal of these updates is to organize access to these objects by solution. For example, access to approvals has been separated from document search, and each product has its own **Approvals** sub-menu. Form requests are also grouped by product.

Due to the separation of document search and approvals, the **Documents** menu has been renamed to **Orders**. **Note:** Users who opted in to the new search interface previously had both a **Documents** and **Orders** menu. The two menus have been merged.

Customer Impact

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

USER IMPACT

- Users will access features through different menu elements.
- The affected elements are:
    1. The **Document** menu will be merged into the **Orders** menu.
    2. The **Approvals** menu has been removed. In 19.3, each product has its own **Approvals** sub-menu.
    3. Form requests are now grouped by product.
    4. Under the **AP Menu**, **Receipts** is now a distinct option separate from **Invoices**.

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.

UOM Configuration by Organization

Currently, JAGGAER provides standard Units of Measure (UOM) that are available by default and cannot be changed or removed. In release 19.3, we are improving UOM functionality by allowing organizations to control which UOMs display, edit UOM names and description in the site default language, and provide UOM names and descriptions in languages other than the default.

Customer Impact

- Related Solutions: All
- Feature Activation: This feature is **On** for all organizations.
- New Permissions related to this feature: None
- New Notifications related to this feature:

USER IMPACT

- Users will only be able to view the enabled UOMs.
- Drop-down menus, such as on non-catalog items, legacy forms, and form requests, that contain UOMs will only display the enabled values.

ADMINISTRATION IMPACT

- A new UOM Configuration screen is available by navigating to **Setup** ⚙**> Hosted Catalog and Ordering Configuration > Org UOM Configuration**. You must have the Catalog Management permission to access and edit this screen.
- The **Org UOM Configuration** screen will display in the default language when accessed. To display UOM names and descriptions in another language, make a selection from the **Select a Language** drop-down field in the top-right corner. **Note:** The languages available in this field will depend on the languages enabled for your organization.
- Available UOMs are presented in a table format in alphabetical order by System Value. System Value is how the UOM is represented in the system, Value is how the UOM is represented by the organization, Description explains the UOM's value, and Active shows whether the UOM is currently activated or deactivated.
- By default, all standard JAGGAER UOMs are active. To deactivate a UOM, locate it in the list and deselect the Active checkbox. **Note:** This action can only be taken when you are viewing the list in the default language (Select a Language option in the drop-down field).
- You can manage the Value and Description by language, including the site default language. Follow the steps below:

    1. Locate the appropriate UOM in the list and click the **Edit** button.

    2. The **Edit** window displays. Depending on the language view you are in on the UOM Configuration screen, the window will display the default Value and Description for that language. For example, if you are viewing the UOM Configuration screen in the default language of English, the Value and Description fields will be the English terms. If you are viewing the UOM Configuration screen in German, the Value and Description fields will be the German terms.

    3. To overwrite the displayed terms, enter a text in each field.

4. You can also change the terms in other languages from the same window. Click the Languages option to display available languages and enter the terms in each field for the appropriate language.

5. Click **Save**.

INTEGRATION IMPACT

- Third-party integrations may rely on UOM values that are included in exported documents. In order to control how UOM values are exported in XML messages, change the mapping set in **Category, Commodity and UOM Taxonomy** sets.

- Any integrations that interact with specific UOMs may be affected if the corresponding UOMs are selected or deselected by an org. Making a UOM value inactive will remove any inbound and outbound package UOM mappings that were configured on the Category, Commodity and UOM Taxonomy Sets.

Supplier Impact

This feature does not impact suppliers.

Ability to Export ADW History

We have added the ability to export ADW Rule History and Rule Group History data as a CSV file. A new Export CSV option has been added to Workflow Setup for all document types to assist in the review and evaluation of changes.

Customer Impact

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

USER IMPACT

This feature does not impact users.

ADMINISTRATOR IMPACT

- In **Workflow Setup**, a new **Export CSV** option has been added to ADW Rule Group History and Rules History tabs for all document types. It provides the ability to export the ADW Rule Group History or Rules History, as follows:

  1. Navigate to **Setup** ⊡ **> Workflow Setup** and select one of the **Workflow Setup** options, such as Requisition Workflow Setup, Purchase Order Workflow Setup, etc.

  2. Click the **Advanced Dynamic Workflow** tab.

  3. Click the **Rule Group History** or **Rules History** sub-tab.

4. Apply filters if needed.

5. Click the **Export CSV** button. The filtered ADW Rule Group History or Rules History is downloaded as CSV file.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Business Analytics Dashboard Enhancements

Business Analytics Dashboards uses Looker to explore data and create reports. Looker is a third party visualization and data program that is run within JAGGAER ONE.

In 19.3 we've made the following updates to Business Analytics Dashboards:

- **Instant Dashboards** have been enabled. When a dashboard is opened, data from the previous run is displayed immediately while the system runs a query and uploads current data for the dashboard in the background. A spinner icon indicates that the system is loading data.

- New **Drill Down** options have been added. When users click on a data point to "drill down" into the data, new EXPLORE options allow users to view the related data in a table format. In the table, users can further explore data by clicking on data in a table cell. New link options also allow users to view a related document or supplier profile within the application.

- New **Conditional Alerts** allow users to create alerts on dashboards so that the system will send notifications when the conditions specified for the alert have been met or exceeded.

Customer Impact

- Related Solutions: eProcurement, Invoicing, 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

- **Instant Dashboards** - When users open a dashboard, data from the previous run is displayed immediately while the system runs a query and uploads current data for the dashboard in the background. A spinner icon in the top right corner of tiles indicates that the system is loading data.

- **Alerts** - Users can set up alerts for tiles in a dashboard and the system will send a notification when the alert conditions have been met or exceeded.

  - Alerts can be marked as **Private** or **Public**. Private alerts are only visible to the user who created the alert. Public alerts are visible to any user with permission to access the underlying content of the dashboard tile. Users who can see an alert on a dashboard can subscribe to it if they wish to receive email notifications for the alert.

  - Alerts are indicated by a bell icon in the top right corner of a tile. Clicking on the icon will open a windows that show alert information for the tile. Users who can see an active alert can click **Follow** in the alert window to subscribe to the alert and the system will send them an email notification when the conditions set by the alert are met.

  - **Alerts** need to be set up before other users can view or follow them. Alerts can only be set up on tiles on a dashboard, not the dashboard itself.

    1. Open the **dashboard** that you want to add alerts to. The dashboard must be out of edit mode.

    2. Click the bell icon in the top right corner of a tile you want to add an alert to. Public alerts and your own private alerts are displayed in an overlay.

    3. Click the **Create Alert** button at the button of the overlay, then complete the fields in the Create Alert overlay.

    4. Click **Done**.

- **Drill down** - When users click on a data point to "drill down" into the data, EXPLORE fields options may be displayed that, if selected, allow users to view the related data in a table. Users can further explore data in the table with these options:

  - Any data in the table that displays an underscore when paused over with a mouse can be clicked on to view more information.

  - A **link** icon ⋯ next to a document or supplier ID number in a table indicates that the item can be viewed in the application:

    - If users click on a **Document ID** dimension, they will have the option to go directly to that document within the application, which will open in a new tab.

    - If users click on a **Supplier ID** dimension link, they will have the option to go directly to that supplier's profile within the application, which will open in a new tab.

ADMINISTRATOR IMPACT

- Administrators may need to set up alerts for shared dashboards.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Looker Browser Support

The Business Analytics Dashboards feature uses Looker to explore data and create reports. Looker is a third party visualization and data program that is run within JAGGAER ONE.

Please be advised that Looker no longer fully supports **Internet Explorer 11** and recommends that organizations switch to a fully supported browser. Looker fully supports the current release of **Chrome**, **Firefox**, **Edge** and **Safari** browsers. Microsoft Edge is recommended for organizations that use a Microsoft browser.