

## 19.2 RELEASE NOTES

FOR GENERAL SOLUTION ENHANCEMENTS

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JULY 21, 2019 - FINAL VERSION



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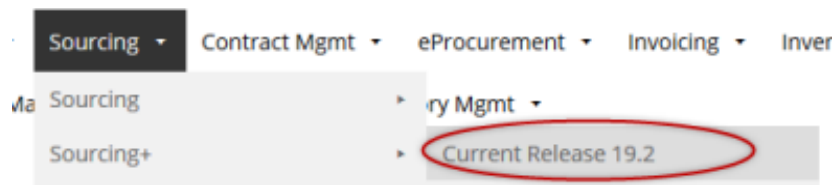
# Welcome

The **19.2 JAGGAER One Product Release** will be available in the production environment starting July 21, 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 19.2 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.

## New Site Navigation Look and Feel

As JAGGAER continues to make new solutions available, it's imperative that we work toward a consistent user experience across all products. In 19.2, we will begin this

initiative by providing an updated site navigation look and feel. Changes will include new product iconography as well as changes to the top navigation bar.

For the 19.2 release, the new UI is optional. Initially, it will be optional in the UIT environment and customers can turn it on at the organization level. Once the release is pushed to Production, the UI will be on by default in UIT. It will be off by default in the Production environment and customers can turn it on at the organization level. However, in release 19.3, the current UI will no longer be available. **Therefore, it is highly recommended that customers begin using and testing the new UI as soon as possible.**

**Important:** Because the updated UI is optional for 19.2, product help and documentation have NOT been updated to reflect the look and feel and iconography. These updates will be made to documentation with the 19.3 release when the changes become mandatory.




## Customer Impact













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

## USER IMPACT


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- **General look and feel** - The updated user interface contains more neutral colors (black and white) in the left on top menu bars.
- **Left menu bar changes** - In general, the icons on the left menu remain the same with more neutral colors. However, there are some changes to the iconography. The table below displays the 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	Product/Feature Access
	The <b>Home</b> menu item returns the user the site home page.
	The <b>Shop</b> menu item provides access to shopping tasks such as product search and ordering. It also allows users to access their carts and orders and shopping admin tasks such as order consolidation, shared cart management and managing the carts and orders of other users.
	The <b>Documents</b> menu item provides access to general document search, import and export. Additionally, users can access their document approval tasks.

Menu Item	Product/Feature Access
	The <b>Orders</b> menu item provides another way to access documents related to orders, as well as related approval tasks.
	The <b>Contracts</b> menu item provides access to all features related to the Contracts+ product. In addition, users can access the Consortium feature, hosted catalog items and price and the Org Catalog.
	The <b>Accounts Payable</b> menu item provides access to features related to the Invoicing product.
	The <b>Suppliers</b> menu item provides access to Supplier Management-related features.
	The <b>Sourcing</b> menu item provides access to features related to the Sourcing product.
	The <b>Inventory</b> menu item provides access to features related to the Inventory Management product. In addition, users can access the Chemical Inventory feature.
	The <b>Portfolio Savings</b> menu item provides access to features related to the Savings Management product.
	The <b>Project Based Procurement</b> menu item provides access to features related to the Project Based Procurement product.
	The <b>Budget Manager</b> menu item provides access to features related to the Budget Manager product.
	The <b>Reporting</b> menu item provides access to reports. The available reports are related to a variety of products and vary based on what your organization has licensed.
	The <b>Administer</b> menu item provides administrators access to site-wide administration tasks such as user management, dashboard management and email management.
	The <b>Setup</b> menu item provides administrators access to site-wide set up tasks such as workflow management, site appearance and behavior, field management and general site settings.

- **Top menu bar changes** - The top menu 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
	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.

Menu Item	Function
 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

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- Administrators can manage the use of the new UI for 19.2.
  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.

## INTEGRATION IMPACT

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This feature does not impact any third-party integrations.

## Supplier Impact

This feature does not impact suppliers.

## Ability to Delete System Users

Previously, users could not be deleted, only made inactive. Making a user inactive prevents the user from logging in and utilizing the application, but it does not remove the user's personally identifiable information (name, contact information, etc.). In 19.2, we have added the ability to delete users, thereby removing user information from the system.

When a user is deleted, the username is no longer stored in the application. Because username is "dynamically" retrieved on documents the username will be obscured on these objects. However, because user information such as first name, last name, address, etc. is

"stored" on a document, that data will still display. This will apply to exports as well. The stored user information will be included in the export, but the username will be obscured.

**Note:** Deleting a user should be a very deliberate action. Use caution when assigning permission to perform this task.

## Customer Impact

- Related Solutions: All Solutions.
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this Feature: **Delete a User (Permissions Settings > Administration > User Administration)**.
- New Notifications related to this Feature: **User Has Been Deleted**. **Note:** This is not managed by a notification preference. It's an email that will be sent to any user who has the **Delete a User** permission.


## USER IMPACT

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- End users may notice the obscured username on documents and in other places in the system such as search results.
- User management is generally an administrator task. Please see **Administrator Impact** below for information about deleting a user.

## ADMINISTRATOR IMPACT

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- Administrators with the **Delete a User** permission can perform the user deletion task. Follow the steps below:
  1. Navigate to **Administer**  **> Manage Users > Search for Users**.
  2. Search for and access the appropriate user.
  3. Expand the **Administrative Tasks** section on the left menu.
  4. Click **Delete User**.
  5. A Confirmation pop-up displays. Click **Yes** to proceed with the deletion or **No** to cancel it.
  6. A pop-up displays while the deletion is in progress. The message on the pop-up changes once the deletion is complete. Click **Close**.
- **Important!** User deletion cannot be reversed. Deleted users cannot be reactivated. Use extreme caution when deleting users.
- When a user is deleted, all administrators who have the Delete a User permission receive an email notification that includes the username of the deleted user. It also includes the "replacement" name for the user as it will display in documents, etc. in the system.

- **Hint:** You can locate removed users via user search by entering "removed" in the general search field in simple search.

## INTEGRATION IMPACT

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This feature does not impact any third-party integrations.

### Supplier Impact

This feature does not impact suppliers.

## Ability to Search Suppliers by State/Province

**Note: This feature will NOT be available with the 19.2 major release. It will be made available in a regularly scheduled Maintenance Release after the 19.2 production release.**


The Advanced Supplier Search allows for searching by Country of Origin or Zip Code area based on the information contained in the supplier's profile. However, customers may have a need to identify suppliers who have locations, or fulfillment centers, in certain states or provinces. With the 19.2 release, users now also have the ability to search for suppliers based on Fulfillment Address State/Province assignments. Users first select a Country, and then enter or select a State/Province associated with the Country as search criteria.

### 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

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- The Supplier Advanced Search (Suppliers  > Manage Suppliers > Search for a Supplier: Advanced Search) now contains an option to search by Country and State/Province.
  - A new option displays for **Fulfillment Address State/Province**.
  - Select a Country from the dropdown list.
  - Begin entering a State to select a value, or select the search icon to search/select from all values. If a State list is not presented, you may enter in text as the State/Province value.. Only one value can be selected/entered. You cannot select/enter a State without first selecting a Country.
  - When criteria is entered, click **Search**. Results display based on your criteria.



- A disclaimer will display indicating that results are returned based on the Fulfillment Center Address information provided by the supplier.

#### ADMINISTRATOR IMPACT

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- This feature does not impact administrators.

#### INTEGRATION IMPACT

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- This feature does not impact existing integrations.

#### ADDITIONAL KEY POINTS ABOUT THE FEATURE

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- Please note that many suppliers have not provided ISO designated values for State values in fulfillment center addresses. Results are returned based on the content in the database. Therefore, if a valid state/province is not populated within a supplier's Fulfillment Center addresses, then that supplier who may actually have a Fulfillment Center in the searched State/Province will not be returned in the search results.

### Supplier Impact

This feature does not impact suppliers. However, some supplier addresses may need to be updated to ensure the state values meet ISO designations.

## Ability to Define Custom Field Type and Length

Custom fields are used to track customer-specific information such as department numbers, accounting codes, employee numbers, work codes, requisition type, and more. Previously, all custom field values were variable text with a maximum length of 100 characters. Many customers would like to more specifically define fields as a number or text type. With this release, customers now have the ability to select a **Custom field style type** as text or numeric for validation purposes. Validation will occur where custom field values are entered: user profile custom field default values and personal lists, custom field integration points, carts, requisitions, purchase orders, invoices, and sales orders, as applicable to your organization.

**Note:** Style type can be selected for **new custom fields created after the 19.2 release only**. Custom fields that existed prior to 19.2 will remain as text fields with 100 character length and cannot be changed.

### Customer Impact

- Related Solutions: eProcurement, Invoicing, Supplies Manager
- Feature Activation: This feature is **OFF** by default. Please contact JAGGAER to enable.
- New Permissions related to this feature: None
- New Notifications related to this feature: None



## USER IMPACT

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- Custom field values have always been validated to be text less than 100 characters. Validation will continue to occur for custom field values as configured. For custom fields created after the 19.2 release, a user can expect custom field value validation as follows:
  - For text fields, the value will be validated for the defined length. An error message will display if the value exceeds the Maximum text length defined for the field.
  - For number fields, the value will be validated to be numeric. An error message will display if the value is not a number. Note: Leading zero's will be removed upon save.
  - Validation remains unchanged for fields created prior to the 19.2 release, which is validation for variable text up to 100 characters. An error message displays for values greater than 100 characters.

## ADMINISTRATOR IMPACT

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- When creating a new **Custom Field** (Setup  > Configure Documents > Manage Custom Fields: Definitions), a user can now set a **Custom field style type**:
  - **Text** - This is the default value, and will allow variable character entry. This selection represents no change from previous functionality.
    - When selected, enter a **Maximum text length** up to 100. The default value is 100.
  - **Number** - Select this option to require that values for the field be numeric. Integers and decimals will be allowed, as well as negative numbers.
    - When selected, the **Custom field style** cannot be **Yes/No**. Only **Organization-wide list** and **Use user profile permissions** (default) are available for selection.
- The Custom Field Value Import (Setup  > Configure Documents > Manage Custom Fields: Import/Export - CSV Values Import/Export and CF XML Import) will validate for the designated style type and length.
- Validation will occur according to the Custom field style type settings for text length or number, as appropriate, in areas where an administrator may enter custom field values.

## INTEGRATION IMPACT

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- This feature does not impact integrations for custom fields existing prior to 19.2, as the validation for existing custom fields cannot be changed.
- If new custom fields are added to integration points, values will be validated as per the type and maximum length settings.

## ADDITIONAL KEY POINTS ABOUT THE FEATURE

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- Areas where custom field value validation occurs remains unchanged, and includes (as applicable to your organization):
  - Custom Field Value setup
  - User Profile (UI and import)
  - User Roles
  - Carts
  - Requisitions (depending on import settings, invalid data may be allowed into workflow)
  - Purchase orders (including import)
  - Invoices (including import)
  - Sales orders
  - Custom field integration points
- See **Custom Field Management** in the online searchable help for additional information.

### Supplier Impact

If suppliers are allowed to enter custom field values on a sales invoice, they will continue to see validation error messages if invalid values are entered.

## Ability to Associate Suppliers to a Business Unit

Multiple Business Unit (MBUs) within an organization are often diverse in their locale and perhaps even business focus. Suppliers interacting with the customer organization may interact with a single business unit, or subset of business units, within that organization. Previously, only supplier fulfillment centers can be associated to an organization's business unit(s). With the 19.2 release, customers have the ability to associate supplier instances with individual business units. When a supplier is associated with a particular business unit, the ability to manage that supplier profile is limited to members of that business unit. Users will be able to search for and find BU-assigned suppliers even if those suppliers are not associated with the user's assigned BU.

### Customer Impact

- Related Solutions: All Solutions with Multi-Business Unit
- Feature Activation: This feature is **ON** by default but must be configured by the customer

- New Permissions related to this Feature: **Manage Supplier/Business Unit Associations** (Permission Settings > Administration > Supplier Administration)
- New Notifications related to this feature: None


## USER IMPACT

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- Users with the appropriate permission have the ability to associate a business unit to a supplier:
  - From supplier search results, click the **Available Actions** dropdown and select the new option for **Manage Supplier/BU Associations**.
  - In the **Manage Supplier/BU Associations** overlay, the selected suppliers are displayed.
    - To associate the selected suppliers to a business unit, select from the listed Business Unit values, and click **Associate**. The suppliers will be associated to those Business Units.
      - If the selected suppliers are already associated with any of the BUs, the association process will only add the suppliers to those selected BUs who previously had no association to the selected suppliers. The Associate action does not remove / replace associations for any BUs not selected.
    - To remove Associated Business Units, click **Disassociate**.
      - If one or more Business Units are selected when clicking Disassociate, this removes the association for those BUs selected for all selected suppliers.
      - If no Business Units are selected when clicking Disassociate, this removes all business unit associations for all selected suppliers.
- Only in-network suppliers, and real supplier instances can be associated to business units.
  - Out-of-network suppliers cannot be associated to business units.
  - Organizational Node instances cannot be associated to business units, as they are not considered real supplier instances.
- The Supplier Advanced Search (Suppliers > Manage Suppliers > Search for a Supplier: Advanced Search) contains a new filter for Business Unit Association. Users can select from all active BUs within the organization to identify suppliers associated with that business unit. Note: This filter option is available only if the **In Network** option is selected as the **Relationship** for the search. The filter is not available if **Out of Network** or **All** is selected as the **Relationship** value.

## ADMINISTRATOR IMPACT

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- A new tab for **Associated Suppliers** has been added for managing business units when a business unit has been selected (Setup  > Organization Structure and Settings > Add/Manage Business Units: Business Units <select BU>).

- The tab lists the suppliers who have been associated with the business unit.
- Selecting the Supplier Name navigates the user to the supplier profile.
- No action can be performed from this page; it is for informational purposes only.

## INTEGRATION IMPACT

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- This feature does not impact integration.

## Supplier Impact

This feature does not impact suppliers.

# Product Reference Number Field Available in Catalog Content Extracts and Item Master Exports

In 19.2, the **Product Reference Number** field has been added to the Catalog Content extract for Inventory Management customers and for customers self-manage hosted catalogs (customers who do not use the Global Supplier Portal).

Customers who use Org Catalog or Virtual Item Master may also include the field in the Item Master export.

The Product Reference Number is a unique JAGGAER database ID for an item. Product Reference Number can be used in PR and PO import to make an exact match with hosted catalog item.

## Customer Impact

- Related Solutions: Inventory Management, eProcurement (for customers who manage supplier content), Org Catalog Customers and Virtual Item Master Customers.
- Feature Activation: This feature is **On** by default.
- New Permissions related to this Feature: None
- New Notifications related to this Feature: None

## USER IMPACT

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- **Product Reference Number** field is now included, by default, in the Hosted Catalog content extract for customers who meet the criteria. **Note:** If the content extract is modified and used to import content, the Product Reference Number field is ignored on import.
- **Product Reference Number** can also be included in the Item Master export for customers who meet the criteria, but the user must choose to include it in the export. To

include Product Reference Number in the export, click the **Include Linked Hosted Data Option** when performing the extract.

## ADMINISTRATOR IMPACT

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- See Integration Impact section below.

## INTEGRATION IMPACT

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Changes to import and export processes may impact third-party integrations that use the import or export files. Be sure to review your organization's integrations with the Catalog Content extract or Item Master export to identify any potential issues.

## Supplier Impact

This feature does not impact suppliers.

# Documentation Updates

In 19.2, several documentation updates will be made to support the introduction of JAGGAER One and promote consistency among all JAGGAER One products.

## RELEASE NOTES

Starting with 19.2, there will be multiple release note documents. In addition to a General document for features related to basics and administration for all products, there will be a separate document for each product feature set. The individual release notes documents will be available on the appropriate release page on the Product Release Library. For example, the Sourcing Release Notes will be displayed on the Sourcing page of the PRL.

Release date and time information will be available in the general release notes document.

## FEATURE SNAPSHOT

Moving forward, the feature snapshot will be a stand-alone document available from the main release page of the Product Release Library.

## HANDBOOK AND HELP CHANGES

With the introduction of JAGGAER One, many of the product names were slightly changed or updated. Handbook and online help will be updated in 19.2 to reflect the updated naming. This includes handbook names as well as the content within the handbooks. The table below displays the previous handbook name, along with the new name. **Note:** This is a list of the major handbooks only. In-application quick guides and other documentation will also reflect the updated naming. Handbooks and online help will still be accessed in the same way as they are currently.

<b>Previous Handbook Name</b>	<b>New Handbook Name</b>
Accounts Payable Handbook	JAGGAER ONE Invoicing Handbook for Users and Administrators
Advanced Supplier Management Handbook	JAGGAER ONE Supplier Management Handbook for Users and Administrators
Budget Manager Handbook	JAGGAER ONE eProcurement Budget Manager Handbook for Users and Administrators
Contract Lifecycle Management Handbook	JAGGAER ONE Contracts+ Handbook for Users and Administrators
eProcurement Handbook	JAGGAER ONE eProcurement Shopping and Ordering Handbook for Users and Administrators
Inventory Management Handbook	JAGGAER ONE Inventory Management Handbook for Users and Administrators
Project Based Procurement Handbook	JAGGAER ONE eProcurement Project Based Procurement for Users and Administrators
Savings Management Handbook	JAGGAER ONE Savings Management Handbook for Users and Administrators
Sourcing Handbook	JAGGAER ONE Sourcing Handbook for Users and Administrators
Spend Radar Handbook	JAGGAER ONE Spend Analytics Handbook for Users and Administrators