

SOURCING OPTIMIZER MAINTENANCE RELEASE NOTES

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WELCOME

What Are Maintenance Releases?

Maintenance releases are minor software upgrades that are scheduled between major release dates. The purpose of these releases is to accommodate minor feature requests from clients, the promotion of corrected defects, and activities for client go-lives.

Please refer to this document at any time for an updated list of changes and features for the **Sourcing Optimizer** JAGGAER solution.

NOTE: Only defects and features deemed significant to the JAGGAER customer base are included in this document. Occasionally, changes will warrant additional communication, and in this case, an email will be sent to administrators communicating these changes.

Maintenance Release Schedule

Maintenance releases generally occur every two weeks on Thursday mornings (approximately 10am, ET). They do not affect your ability to access and use your site. A site outage is not required.

The Maintenance Release Document will be updated only when there are changes affecting customers in a maintenance release or major release. If there are no updates affecting customers, a new version of the document is not created.

Sourcing Optimizer

This section of the document provides information about maintenance releases and major releases for the Sourcing Optimizer JAGGAER solution.

Updates as of November 5, 2020

Event Completion

When an event manager configures an event, they can enable many features, such as packages and capacity. Previously, the bidder was informed of the existence of these features, and could see whether they were complete, but there was no direction given to the bidder stopping them from leaving an event after loading bids. The resulting partial information could cause communication and analysis issues.

With the new Event Completion feature, buyers can define exactly which parts of an event are required, and the level of completeness needed for each. They can then monitor supplier completion status for each feature on one page, and send notifications to suppliers that their proposals may not be considered until complete.

Buyers can also force an explicit completion confirmation from suppliers by enabling **Final Proposal Submission Action Required**. When enabled, suppliers are required to indicate that they are submitting the bid round's final proposal by clicking the Submit Completed Proposal button.

Buyer Impact

- Feature Activation: This feature is **ON** by default but optional for use.

USER IMPACT

- To enable Event Completion for an event, select Yes for **Event Completion Guidance** on the Configure Options page of the event.
- To configure event completion:
 1. When enabled on an event, navigate to **Configure > Event Completion**, or navigate to the event's Configure page and click the **Configure** link for Event Completion. The Event Completion configuration page opens.
 2. Optionally, enable **Final Proposal Submission Action Required**.
 - When enabled, suppliers are required to indicate that they are submitting the bid round's final proposal by clicking the Submit Completed Proposal button.
 - If this option is not enabled, bidders only have to complete the required steps of the event.

3. For each event area listed, select the **level of interaction** required by the bidder. Bids in incomplete offers can be removed from consideration during analysis.

Which event areas are listed depends on event configuration. They may include intent to bid, bid sheet for each round, capacity, reference document download, event document response, and other features.

By default, each area is set as Not Required. You can also select:

- **Partial Interaction** - Bidder must enter some information.
- **Full Interaction** - Bidder must complete every entry.

4. Click **Save** on the overlay that appears to save Event Completion configuration.

- To monitor supplier completion status, navigate to **Monitor > Event Completion**. This page lists the completeness of each area requiring partial or full interaction for each supplier.
 - Suppliers can also be sent notifications from this page. Select the suppliers you want to send notifications to, then click the **Actions** dropdown and select **Send Notification**. You are taken to the Notifications page where you can compose and send a notification for the selected suppliers.
- The Scenario Settings step of Analysis Configuration now includes the option **Include Bids from Incomplete Suppliers**. Incomplete suppliers are excluded by default.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

For events with **Event Completion** configured, bidders must complete the configured requirements for their proposals to be considered complete. Bids in incomplete offers may be removed from consideration.

For events with **Event Completion** configured and **Final Proposal Submission Action Required** enabled, bidders see additional messaging on the home page and other pages, and are required to indicate that they are submitting the bid round's final proposal by clicking the Submit Completed Proposal button.

- The home page displays the message: "Final Proposal Submission: once your full proposal is complete, please indicate that you are submitting this bid round's final proposal by clicking the 'Submit Completed Proposal' button on the right. Your Bids may not be considered for analysis without this final submission," along with the **Submit Completed Proposal** button.
- The bidder cannot click the Submit Completed Proposal button if they have not completed everything required by the buyer. Changes made after submission reset the submission status to incomplete.

- When the supplier updates the bid builder or uploads a bid sheet, a message appears indicating: "This does not complete your proposal. You are required to submit your completed proposal here," with a link to the supplier home page.
- Other supplier pages display the message: "In order to have your bids under consideration, you must complete the final submission workflow here," with a link to the supplier home page.

Updates as of August 20, 2020

Intelligent Award Navigator (IAN)

Sourcing Optimizer users often run events at an advanced level of complexity, where comparisons between scenarios becomes challenging. This release introduces the new Intelligent Award Navigator (IAN) function, which assists in this analysis by taking on the work of evaluating possible solutions.

IAN asks the user to pick one of their scenarios to use as the starting point for analysis, and to define several preferences, such as awarding more/less suppliers.

IAN takes the user's preferences and investigates the solution space for the starting scenario (the scenario with the lowest cost). This is the range of all possible solutions that meet the preferences for the scenario. IAN finds options that get close to the defined preference criteria and presents interesting options to the user. For example, solutions with fewer suppliers, or ones with more suppliers but better RFI scorecard values.

The user gets a notification that IAN has options available for consideration once they are ready. They can then view a high-level comparison of two options, showing how each fare against cost, coverage, savings, and the defined preferences. The user selects their preferred option, and IAN uses that choice to inform its approach to finding the next two selections.

The selection process continues until either the user declares that they have arrived at a solution they like, or until IAN has reached the point where there are no additional solutions in the space that the user would prefer based on previous choices.

Buyer Impact

- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER.

USER IMPACT

To configure Intelligent Award Navigator (IAN) on an event:

1. When an event qualifies for IAN assistance, the message "Your event qualifies for advanced scenario navigation. Click here to configure!" appears on the event. Click the message or navigate to **Scenarios > Intelligent Award Configuration**. The Intelligent Award Configuration page opens.
2. Select a scenario from the dropdown or select an existing IAN run.

3. Enter a **Title of Investigation**.
4. Optionally, enter **comments** on the investigation.
5. Enable the desired criteria for IAN to use when analyzing results for evaluation.
6. Choose from the available dropdown options to configure the specifics of each criteria.
7. Click **Launch IAN**. You are returned to the Intelligent Award Navigator Configuration page. You will receive email notification when selections are available.

Comparison options for IAN runs are accessed from the Intelligent Award Management page. You can only compare options on IAN runs in Awaiting Decision status.

Click the gear icon on the Intelligent Award Management page to access the IAN configuration options:

- Select the **minimum required coverage** percentage for options, from 90% to 100%. Changes to minimum required coverage apply to future selection options, they do not apply to selection options already available.
- Choose whether or not to **send emails on run completion**.

To compare IAN run options:

1. Once comparison options are available on an IAN run, navigate to **Scenarios > Intelligent Award Management**. You can only compare options on IAN runs in Awaiting Decision status.
2. Click the **Awaiting Decision** link for the IAN run you want to compare options for. The decision page displays the two available options on separate cards, with their costs, coverages, and other information.
3. Optionally, click the **Save as Scenario Results** link on any cards to save the presented option as a scenario.
4. Select your preferred option by clicking the **Continue with this selection** button on its card. The Confirm Selection overlay opens displaying the selected card's information.
5. Click **Select** on the overlay to confirm your selection. The IAN run is changed to In Progress status. You will be notified via email when additional comparison options are available.
6. Continue to select preferred options when they become available. The selection process continues until either the user arrives at a solution they like, or until IAN has reached the point where there are no additional solutions the user would prefer based on previous choices.

The following new reports are available with IAN:

- To view the IAN comparison report, navigate to **Reports > Intelligent Award Comparison**.

This report allows you to select two IAN runs from the same or different scenarios and view a comparison of the costs and coverages between.
- To view the IAN analysis report, navigate to **Reports > Intelligent Award Analysis**.

This report allows you to select an IAN run to view information on it. It also provides the ability to create scenarios from each option in the selected run.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Updates as of April 16, 2020

Contracts+ Integration for Contract Creation

Contracts+ integration allows buyers to run sourcing events in Sourcing Optimizer as normal (collect bids and run optimization), then select the suppliers they want to award to, and send the information to Contracts+ for contract creation.

After selecting a supplier to award to, the user is then taken to Contracts+ where they can continue with contract creation.

The Scenario Contracting Report is available under **Reports > Scenario Contracting**. It displays information regarding contracts for the winning supplier, including contract created status (yes or no), awarded items, contracted items, awarded unit price, and contracted unit price.

This feature must be enabled by JAGGAER. Users must also be registered in both JAGGAER Indirect and Sourcing Optimizer, and the two user accounts must be linked.

Buyer Impact

- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER.

USER IMPACT

- To begin contract creation from Sourcing Optimizer:
 1. After running event optimization, navigate to **Reports > Overview**.
 2. Select the scenario to use and click the **Create Contracts from Scenario** button. The Scenario Contracting page opens.
 3. Select a **supplier attribute** to map to the Supplier ERP Number.
 4. Optionally, select an **item attribute** to map to the Catalog Number.
 5. Optionally, select an **item attribute** to map to the Item Description field.
 6. Click on a listed **supplier name** to view the supplier's winning items.

7. Select which of the supplier's winning items to use with contract creation.
 8. Continue to select winning items from suppliers as needed.
 9. Save the selected configuration. Buttons appear for finalizing or deleting each pending contract.
 10. Click **Finalize Contract**. Contracts+ opens to continue with contract creation.
- Users must be a registered in both JAGGAER Indirect and Sourcing Optimizer, and the two user accounts must be linked. The linking is a one-time configuration and can be initiated from within JAGGAER Indirect or from Sourcing Optimizer.
 - To generate the token from JAGGAER Indirect:
 1. The user must have the JAGGAER Indirect permission **Link My Account to ASO** (Permission Settings > Administration > User Administration).
 2. Once the permission is enabled, a new page is available in the User Profile for **Link to ASO Account** (User Profile > Update Security Settings).
 3. Select the **Generate Link Token** button. The Link Token is displayed. Select and copy the token.
 4. Login to Sourcing Optimizer.
 5. Navigate to the **SSO User Linking** page by clicking the **SSO User Linking** button in the pop-out menu.
 6. Paste the link token generated in JAGGAER Indirect into the **Link ASO User to SelectSite User** section, and click **Link SelectSite User** button. You receive a confirmation that the accounts are linked.
 - To generate the token from Sourcing Optimizer:
 1. Navigate to the **SSO User Linking** page by clicking the **SSO User Linking** button in the pop-out menu.
 2. The **ASO LinkToken Retrieval** section contains a link. Click the **Copy to Clipboard** button to capture the token.
 3. Login to JAGGAER Indirect.
 4. Navigate to your user profile, and go to the **Update Security Settings > Link to ASO Account** page.
 5. Paste the copied token into the **ASO User Link Token** field, and click the **Link Accounts** button.
 6. You receive a confirmation that the accounts are linked.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Updates as of March 25, 2020

RFI Scorecard

This release introduces a new step under RFI configuration called Scorecard, which allows buyers to assign scores to RFI answers, allowing those scores to be used to evaluate events as part of scenario analysis.

Buyers have the option to calculate total or average scores for both the RFI questions overall, and by section. Some, or all, RFI answers may also be manually scored while reviewing supplier responses.

RFI Scores can be reviewed under **Monitor > RFI Scores**. Depending on the Scorecard options selected, total or average scores can be viewed by section or overall in order to compare scores per supplier.

Buyer Impact

- Feature Activation: This feature is **ON** by default but optional for use.

USER IMPACT

- To configure RFI Scorecard:
 1. Ensure the RFI option is enabled for the event under **Configure >Options**.
 2. Navigate to **Configure > RFI** on the event and proceed with RFI configuration as normal. The new Scorecard step appears after the Configure step.
 3. Select the **Scorecard Configuration** checkbox on the Scorecard step. Configuration options appear.
 4. You can select either or both of the following calculation score options: **Calculate overall score**, and/or **Calculate scores per section**. This determines how total scores are viewed on the Monitor RFI Scores page.
 5. For each scoring option, select to calculate **total score** or **average score**.
 6. Select a section from the **Select Section** dropdown. The list of available questions for that section appears.
 7. Select a question you want to configure scoring for. Scoring options appear for the question.

8. Add scoring for the available answers to the question. Scoring options vary depending on the field type for the question.
 - Individual scores can be set for answers to yes/no, select-one, and multi-select questions. Ranges can be set for number fields. Text fields can have scores for specified text contained within answers.
9. Continue to add scoring for RFI questions as needed.
10. Click **Next** to continue with RFI configuration.
 - RFI Scores can be reviewed under **Monitor > RFI Scores**. Depending on the Scorecard options selected, scores can be viewed by section or overall.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Updates as of March 2, 2020

Business Center Integration

This release introduces Sourcing Optimizer integration with the JAGGAER Business Center solution.

Once users perform a one-time account link, they can view a combined event list and navigate between Sourcing Optimizer and Business Center. Events may be created from either Business Center or Sourcing Optimizer.

Creating an event in Sourcing Optimizer:

- The Sourcing Optimizer event creation wizard includes an option to leverage Business Center data. When creating an event in Sourcing Optimizer, users with linked accounts can select "I want to Import from my Business Center data" to use Business Center data as a starting point for their event.
- The user selects the pieces of data in the master data set to come across as fields in the Sourcing Optimizer event. If the user also links to a supplier management module, that can also be leveraged to bring suppliers across.
- Sourcing Optimizer result data can be mapped into an existing rate structure or used as the basis for a new rate structure in Business Center. Data may be rolled up as needed for desired rate structure.
- Events created in Sourcing Optimizer are also listed in the Business Center.

Creating an event in Business Center:

- The user enters event information and picks a rate structure. A Sourcing Optimizer event is automatically created from those selections.
- The user can bring desired event attributes, items, and suppliers into Sourcing Optimizer.
- The event is run in Sourcing Optimizer. Suppliers are invited and bid, and scenario analysis is performed. Award data can be imported from Sourcing Optimizer.
- Events created in Business Center are listed in both Business Center and Sourcing Optimizer.
- From the Business Center events list, users can access the Sourcing Optimizer side of an event and its optimization by clicking the links listed for the event. They can click the Edit button for an event to edit the event from Business Center.

Buyer Impact

- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER.

USER IMPACT

To perform the one-time account link between Sourcing Optimizer and Business Center:

1. Log into Business Center.
2. Click your user account link in the top right corner to open the User Profile page.
3. Open the **SSO Link** tab on the User Profile page.
4. Copy the **User Link Token** that appears on the tab.
5. Log into Sourcing Optimizer.
6. Navigate to the Sourcing Optimizer **pop-out menu** and click the **SSO User Linking** link to open the page.
7. Paste the token copied from Business Center into the field under **Link ASO User to JCS User**.
8. Click the **Link JCS User** button. Your user accounts are now linked.

To create an event in Sourcing Optimizer using Business Center data:

1. On the **Start** step of event creation, select the event type.
2. Under **To create your event, what do you want to use as a starting point?**, select **I want to import from my Business Center data**.
3. Continue event creation on the Start step and click **Create Event and Continue to Labels**. The Import Configuration step is added before the Labels step, and this step opens.
4. The **Import Configuration** event creation step lists available Business Center fields for import.
 - a. Select the appropriate rate structure and language for the field data you want to import.

- b. To select all field data for import, click the **Import All Data** button.
 - c. To select only some field data for import:
 - i. Click the **Select Values** button for a field you want to import into the event. The Select Values overlay displays.
 - ii. Search for and select each value you want to import from the checklist. Click **Add All Values in Dataset** to select all listed values.
 - iii. Click **Close**. The overlay closes and you are returned to the Import Configuration page.
 - iv. Continue to select field values as required. Fields with no values selected will not be created in the event.
 - d. Once all required field data is selected, click **Save and Continue to Labels**.
5. Continue event creation as normal.

To create an event in Business Center using Sourcing Optimizer data:

1. In Business Center, navigate to **Sourcing > Manage Events**.
2. Click **Add New Event**. The Manage Events — Add Event page opens.
3. Select the **Sourcing Optimizer** event template.
4. Enter an event name and event description. Select a folder and rate structure.
5. Click **Add New Event**. The event is created and the Manage Events — Edit Event page opens, displaying the task list for the event.
6. Continue creating the event as normal using the event task list. The event task list provides a list of configuration decisions for events in Business Center.

Note: Selecting additional information in the **Additional Info** column of the **Manage Event Attributes** step helps with adding items to the event, as those additional attributes become filters in the Manage Items step.

INTEGRATION IMPACT

- This feature adds Business Center integration to Sourcing Optimizer. Other integrations are not impacted.

Supplier Impact

This feature does not impact suppliers.

Updates as of December 19, 2019

RFI Extended Configuration

This release introduces a new step under RFI configuration called Extended Configuration, which allows buyers to change how RFI questions are presented to bidders

When RFI extended configuration is used, buyers can change the layout of questions to make repetitive questions easier to see and answer. This is done by creating and configuring data tabs on the RFI responses template, and adding formulas linking the question fields to the appropriate values in the additional tabs.

When using extended configuration, it is strongly suggested that buyers provide additional detailed instruction to the bidders, protect the workbook once complete to prevent accidental configuration changes, and create a test supplier and validate that the created template results in desired bid data.

Buyer Impact

- Feature Activation: This feature is **On** by default but optional for use.

USER IMPACT

- To use RFI extended configuration:
 1. Ensure the RFI option is enabled for the event under **Configure > Options**.
 2. Navigate to **Configure > RFI** on the event and proceed with RFI configuration as normal. The new Extended Configuration step appears after the Availability step.
 3. Select the **Extended Configuration** checkbox on the Extended Configuration step. Extended configuration instructions and options appear.
 4. Click the **Download New RFI Template in Excel** button to download the template.
 5. Make the needed changes in the downloaded Excel template.
 - Data tabs may be added after the RFI sheets.
 - The only changes that should be made to the question sheets is to add the formulas linking the fields to the appropriate values in the additional tabs.
 - Information needed for analysis is captured as RFI questions. Information housed solely in the configured tabs and not captured in a question is not available for scenario optimization.
 - Any changes to the template require bidders to download a new, blank version to start over.
 6. Upload the updated template using the **Upload Complete RFI Template** button.

7. Click **Next** to continue to the **Confirm** step.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

The appearance and functionality of the Excel RFI Workbook may change, depending on buyer configuration of RFI Extended Configuration.

Updates as of October 24, 2019

Advanced Gating

Advanced Gating Option

This release introduces the **Advanced Gating** option to Gating configuration. Advanced gating allows buyers to configure multiple gating stages for an event. Suppliers must then complete each gating stage in linear order.

The **Monitor Gating** report provides a list of suppliers and their gating statuses. If advanced gating is used, the report provides an overall gating status for each supplier, as well as gating status by stage.

Gating Workflow Updates

Additionally, we have introduced several changes to improve workflow flexibility related to gating.

Previously, buyers were required to contact support to add or update gating configuration once an event was open for bidding.

With this release, buyers can now add or update gating mid-event, including adding gating stages. Bidding must be suspended while gating is updated.

Buyer Impact

- Feature Activation: This feature is **On** by default but optional for use.

USER IMPACT

- To configure Advanced Gating on an event:
 1. Navigate to **Configure > Gating** on the event. Gating (including Advanced Gating) is only available when the gating question on the Options page of the event is set to Yes or Not Sure.

2. Activate advanced gating by selecting the **Use Advanced Gating** checkbox at the top of the **Gating** page. The **Add Stage** button appears on the page.
3. Click the **Add Stage** button to add an additional gating stage. Users can add multiple gating stages, and can click the **Remove Stage** button on a stage to remove it.
4. Configure each gating stage as with normal gating. Gated areas that have not been selected in an earlier stage cannot be selected in a following stage.
5. Click **Save** to save the gating configuration.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

If advanced gating is configured for an event, suppliers will need to complete each gating stage in the order configured by the buyer.

Updates as of September 26, 2019

Auction Console Updates

This release introduces a number of updates to the Auction Console, including new Control Panel and Bid Graph functionality, as well as UI updates.

Buyer Impact

- Feature Activation: This feature is **On** by default.

USER IMPACT

- Changes to the Control Panel page of the Auction Console include:
 - The Auction Activity bar now appears across the top of console.
 - Bid History is replaced with a simplified view of a heat map. Clicking the heat map takes users to the Bid Graph page, with an expanded heat map.
 - A new simplified bid graph. Clicking it takes the user to the Bid Graph page with a collapsed heat map.
 - The heat map on the Control Panel shows bid activity per supplier/item. Users can see hot spots and areas of little or no activity.
 - The bid graph on the Auction Console can be toggled to show cost or savings.

- Changes to the Bid Graph page of the Auction Console include:
 - A collapsible detailed heat map at the top of the page. This heat map can show bid count, percent from historic price, and percent from reserve price. Options are available to show all items or just those that have bids.
 - The Total Cost and Savings graphs now include a slider to control timeframe, and totals are now displayed if historics have been uploaded.
 - Drilling down to individual items shows bidder details, cost, and savings information.
 - Reserve and historic prices can be displayed on the graph for reference. The last bid price for the item is also displayed as a quick reference.
 - If the auction has lots configured, the lots may be selected for this view as well. If they are, the last bid price becomes a stacked chart showing the breakdown of each item in the lot.

INTEGRATION IMPACT

- These changes will also apply to the Sourcing auction integration.

Supplier Impact

This feature does not impact suppliers.

Updates as of August 29, 2019

Auction Lots

The new Auction Lots feature allows buyers to collect bids for individual auction items, and then award the items in lots based on the best overall price for the lot. Auction lots can only be used in reverse auctions.

Users create lots by designating select-one and yes-no item fields to comprise the lot definition. Items are then grouped into lots based on the data in those fields.

Buyer Impact

- Feature Activation: This feature is **On** by default but optional for use

USER IMPACT

- To enable auction lots for a reverse auction, select **Yes** on the **Auction Lots** line of the **Options** page. Enabling auction lots for an event disables conditional offers and supplier item visibility.
- To configure auction lots on an event:

1. Navigate to **Configure > Auction Lots**, or click the Configure link beside Auction Lots on the Configure page. The Auction Lots configuration page opens, which lists available item types for configuration.
 2. Click the **Configure** button beside the item type you want to configure lots for. The lot configuration overlay displays with the list of select-one and yes-no item fields.
 3. Click the **Select** button beside each applicable field.
 - Items are grouped into lots based on the available options in those fields.
 - If multiple fields are selected, lots are configured based on the combinations of options for those fields.
 - Up to 10 fields can be selected.
 4. Click **Save**. The overlay closes.
 5. Continue to configure item types as needed.
 6. Click **Save** on the Auction Lots configuration page to save the configurations.
- Lots are listed as items on the **Manage Items** page. Lots, including their names, are automatically generated, and cannot be edited like other items.
 - Users can view item-level and lot-level bid information on the Bid Graph tab of the Auction Console. There is also a report for winning lot items available under **Reports > Winning Lot Items**.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

When using auction lots, suppliers still see and bid on individual items. However, they also see their lot bid information (lot price and lot feedback). Their lot bid information updates as they bid on items.

Updates as of June 20, 2019

Event Explorer Report Management and Pivot Table Enhancements

Event Explorer is a cross-event data exploration tool. Event Explorer allows buyers to configure and define reports using date ranges, search parameters, groupings, and metrics for allocation (scenario award) data across events.

With this release, we are introducing additional report handling options and pivot table functionality to Event Explorer.

- From the new Report Management dropdown on the Event Explorer page, users now have access to report management features for loading saved reports, saving changes to reports, saving reports as new reports, and resetting changes made to reports.
- In addition to the ability to configure the grid view and charts for Event Explorer reports, users can now configure pivot tables. Pivot tables provide a summarized view of the data in the report. Pivot tables can also be exported in Excel file form.

Note: Event Explorer must be enabled by JAGGAER for use. Contact ASO support for more information. When enabled, Event Explorer is accessed from the Event Explorer link in the pop-out menu of ASO.

Buyer Impact

- Feature Activation: Event Explorer is **Off** by default and must be enabled by JAGGAER. These enhancements are **On** by default for customers who have Event Explorer enabled.

USER IMPACT

- To open Event Explorer, navigate to the ASO **pop-out menu** and click the **Event Explorer** link.
- Clicking the new Report Management dropdown on the Event Explorer page now provides access to the following report management features:
 - **Manage Reports** - Provides a list of public reports and reports created by you. You can select and deselect available tags to filter the list. For reports created by you, you can also add and remove tags and delete the reports.
 - **Load Report** - Load existing public reports and reports created by you.
 - **Save Report** - Save changes you've made to the report.
 - **Save Report As** - Save changes made to the report as a new report, or select and save over an existing report.
 - **Reset Report** - Reset changes made to the report since the last time it was saved.
- To configure a pivot table for a report:
 1. Customize the Event Explorer report as needed.
 2. From the menu on the left of the page, click **Pivot Builder** to expand the menu.
 3. Select an **aggregator**. The available aggregators are based on the types of metrics selected for the report.
 4. Add rows and columns to the pivot table. The available rows and columns are based on the types of groupings selected for the report under Query Builder.
 - To add a column to the pivot table, click the + button beside **Columns**, and select a column from the dropdown that appears.

- To add a row to the pivot table, click the + button beside **Rows**, and select a row from the dropdown that appears.
5. Continue to add rows and columns as needed. You can reorder columns and rows using the arrow buttons beside them, and remove them using the X buttons beside them.
 6. Click **Apply**. The view changes to the **Pivot** tab, and a pivot table is displayed using the settings you entered.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Updates as of May 23, 2019

Item Consolidation Additional Fields

Using the **Item Consolidation** event type, buyers are able to consolidate items to streamline the supplier's bidding experience while preserving the details necessary for analysis.

In Item Consolidation events, buyers have the ability to group items by matching properties for selected fields for each item type. Users can select up to 10 fields for consolidation definitions. Suppliers are then able to place bids on consolidations rather than each item individually.

With this release, a third step has been added to item consolidation configuration that allows buyers to include additional fields with consolidations. This allows users to provide additional information about the underlying items in an event than they have room for in the 10 definition fields.

Additional fields provide additional information to bidders, but are not part of consolidation definitions.

Buyer Impact

- Feature Activation: This feature is **On** by default but optional for use.

USER IMPACT

- To configure additional fields for a consolidation on an item consolidation event:
 - Navigate to the Item Consolidation page from the **Configure** page by clicking the **Configure** link next to the **Item Consolidation** option.

- Click the **Configure** button beside the item type you want to configure consolidation for. The item consolidation configuration overlay opens to step 1 of the configuration process.
- On step 3, **Select Additional Fields**, click the **Select** button beside each additional field you would like to provide as an informational field. You can search for fields by entering text in the **Filter** field. To remove a selected field, click the **Remove** button beside it.
- Additional fields provide additional information to bidders, but are not part of consolidation definitions.
- Differences in field values do not create unique consolidated items for bidding. Additional fields are brought across as informational fields only. If the values differ for items in the same consolidation, the application picks one for the consolidation.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

When configured by buyers, additional fields are visible to bidders on the bid builder and bid sheet.

Updates as of April 25, 2019

Directional Feedback

With this release, an additional bid field feedback configuration option has been added to allow for directional feedback.

The Target step of configuring feedback for bid fields now includes the new **Feedback target calculation direction** field, where users can select from the following options:

- Standard feedback - The lowest bid is considered best for target feedback calculations
- Reverse feedback- The highest bid is considered best for target feedback calculations

Additionally, the text editor used on pages such as Configure Welcome Message has been updated to include additional formatting options, including the ability to add tables.

Buyer Impact

- Feature Activation: This feature is **On** by default but optional for use.

USER IMPACT

- To select feedback target calculation direction:
 - Navigate to **Configure > Feedback** and click the **Bid Field** tab.

- Ensure the **Enable Bid Field Feedback** checkbox is selected.
- Add new bid field feedback or edit existing bid field feedback and navigate to the Target step of configuration.
- On the new **Feedback target calculation direction** field, select from the following options:
 - Standard feedback (lowest is best)
 - Reverse feedback (highest is best)

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

Bidders see the bid field feedback rank, range, and tier for their bids on the Bid Builder page and Excel Bid Sheet.

Updates as of March 14, 2019

Feedback Enhancements

With this release, bid-level feedback has been enhanced with tier grades for competitive ranges and bid comments.

Buyers can define three competitive ranges (competitive, not competitive, and significantly not competitive) to indicate to suppliers where their bids rank in comparison to the target rate.

With this release, buyers can add up to a total of ten tier grades within these ranges. Tier grades are viewable to suppliers on the Bid Builder page and Excel Bid Sheet, and indicate how competitive a bid is within its range.

Additionally, buyers can now add feedback comments to bids. Bid comment feedback is enabled on the **Bid Field** tab of the **Configure Feedback** page.

Once enabled, buyers can add comments to bids by navigating to **Monitor > All Bids** and editing available bids, either individually or through the Edit Bids Excel sheet. Bid comments are viewable to suppliers on the Bid Builder page and Excel Bid Sheet.

Buyer Impact

- Feature Activation: This feature is **On** by default but optional for use.

USER IMPACT

- To add tier grades within competitive ranges for an event:
 - Navigate to **Configure > Feedback** and click the **Bid Field** tab.
 - Ensure the **Enable Bid Field Feedback** checkbox is selected.
 - Add new bid field feedback or edit existing bid field feedback.
 - Competitive ranges are configured on step 4.
 - Click the **+** button beside a range to add a tier grade.
 - Enter the desired percentage value for the grade.
- To enable bid comment feedback:
 - Navigate to **Configure > Feedback** and click the **Bid Field** tab.
 - Select the **Enable Bid Comment Feedback** checkbox.
- To add bid comment feedback, navigate to **Monitor > All Bids** and edit available bids, either individually or through the Edit Bids Excel sheet.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

Bidders see the bid field feedback range and tier for their bids on the Bid Builder page and Excel Bid Sheet. A tier grade of 1 is the best grade in a given range.

Bidders also see bid comments on the Bid Builder page and Excel bid sheet download.

Updates as of February 14, 2019

Event Explorer

This release introduces the Event Explorer, a new cross-event data exploration tool. Event Explorer allows buyers to configure and define reports using date ranges, search parameters, groupings, and metrics for allocation (scenario award) data across events.

Data is displayed in searchable, sortable grid form, and visual charts can be built from it. Buyers can also export the report results.

Event Explorer uses one scenario per event, and the scenario needs to be a preferred or communicated one.

Note: Event Explorer must be enabled by JAGGAER for use. Contact ASO support for more information.

Buyer Impact

- Feature Activation: This feature is **Off** by default and must be enabled by JAGGAER.

USER IMPACT

- To open Event Explorer, navigate to the ASO **pop-out menu** and click the **Event Explorer** link.
- See the ASO buyer help files and handbook for additional information on how to use Event Explorer.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Currency Conversion Rate Bulk Upload

ASO allows buyers to create sourcing events with a single currency, or multiple currencies. If buyers use multiple currencies, they must establish which bidding currencies they will accept, and conversion rates for those currencies.

Previously, conversion rates could only be updated on the Currencies page of an event. With this release, buyers can also update them in bulk through an Excel .xlsx file.

Buyer Impact

- Feature Activation: This feature is **On** by default.

USER IMPACT

- To update conversion rates in bulk on an event using multiple currencies:
 - Navigate to **Configure > Currencies** on the event.
 - Click the **Download** button beside the Conversion Rates heading to download the Excel file.
 - Enter the bidding and historic conversion rates in the spreadsheet and save the changes.
 - Upload the file using the **Upload** button beside the Conversion Rates heading.

- Conversion rates can be changed at any time. However, buyers cannot remove a currency used in an event after bids have been uploaded.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.