

19.2 RELEASE NOTES

FOR SOURCING ENHANCEMENTS

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 release notes for the **Sourcing** solution. General release notes, additional solution-specific release notes, and other supplemental information such as a Feature Snapshot, are available on the Product Release Library:

<https://library.jaggaer.com>

Note: Please see the **19.2 Release Notes for General Enhancements** for information about key release dates and training opportunities.

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.

Sourcing

Enhancements to Express Bid/Quick Quotes Event Creation and Administration

The development of the Quick Quote event process has continued in 19.2 with the following UI enhancements designed to simplify the Express Bids experience further:

- Ability to filter the **Sourcing Event Templates** view for Quick Quote templates
- Inclusion of Auction data point defaults in the **Quick Quote Event** template
- Simplified view of Quick Quote event creation pages for novice users
- Establishment of protections within the post-bid evaluation workflow to account for Quick Quote events with calculated values and assessments, which involve a more complex evaluation process.
- Automatically-generated purchase requests (PRs) from awarded Quick Quote events
- Ability to filter for Quick Quote events in Sourcing Advanced Search

Note: Event-originating purchase requests can now be pushed forward in Requisition Workflow automatically. See additional information about this feature in the Sourcing section of the 19.1 **Maintenance Release Notes** document located in the JAGGAER Product Release Library.


These enhancements are especially beneficial for customers who need an event process that either bypasses or automates operational steps that are typically associated with the administration of a sourcing event.

Customer Impact

- Related Solutions: Sourcing and eProcurement
- Feature Activation: This feature is **On** by default but optional for use. **Note:** Quick Quote sub-type workflows are **OFF** by default and must be enabled by JAGGAER.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

FILTERING FOR QUICK QUOTE TEMPLATES

- A new **Filter Templates** link has been added to the top of the **Sourcing**  **> Templates and Libraries > Event Templates** page. A box containing filter options is

expanded when the link is clicked. Included within the options is a Template Type drop-down containing the following options:

- **All**
 - **Quick Quote**
 - **Standard**
- A sortable **Template Type** column has been added to the page to indicate if each sourcing event template is a **Standard** or **Quick Quote** template.

AUCTION SETTINGS IN QUICK QUOTE TEMPLATES

- The following auction-specific fields can be configured with default values through Quick Quote templates with an auction format selected as the **Event Type**:
 - **Auction Open Date/Time Offset** (Offset from the event Open Date/Time)
 - **Auction Close Date/Time Offset** (Offset from the Auction Open Date/Time)
- The **Auction Settings** page can be accessed and configured within Quick Quote templates that have been established with an auction **Event Type** assignment.

SIMPLIFIED VIEW FOR NOVICE USERS

- A new option to **Go to Event after Creation** has been added to the *Create Quick Quote Sourcing Event* screen overlay. The default for this action is **Yes**. This option replaces the action button labeled **Create & Go to Event**, which no longer appears on the screen overlay.
- Users are now taken directly to the *Review and Submit* page of their Quick Quote sourcing event when they click the **Create Sourcing Event** button on the *Create Quick Quote Sourcing Event* screen overlay.
- The following configuration pages and sections have been collapsed for Quick Quote events with *Draft* status:
 - Pages with administrative data - Collapsed if required data is complete. Expanded if required fields must be addressed.
 - *Setup* - All sections are collapsed except for **Dates**.
 - *Description* - **Stage Description** section is collapsed.
 - *Prerequisites* - For consistency, the **Add Prerequisites** button has been moved above the results set.
 - *Questions* - Groups are collapsed.
 - *Additional Item Fields* - Collapsed if required data is complete. Expanded if required fields must be addressed.
 - *Items* - The **Item Details** section of the *Edit Product Line Item* overlay is collapsed.

PROTECTIONS WITHIN THE POST-BID WORKFLOW PROCESS

- If configured, a new workflow robot and post-bid workflow attribute have been developed to automatically analyze Quick Quote events that contain disqualifying questions or additional field items.
- The new workflow robot and attribute ensure that the automatic workflow process will proceed only if the event is a Quick Quote event with a default award scenario to which a default award has been approved.

AUTO-GENERATING PURCHASE REQUISITIONS FROM AWARDED EVENTS

- A new template setting called **Automatically Create Awarded PR** provides users with the option to have a purchase requisition auto-generate from an awarded Quick Quote event. **Note:** PRs can only be generated from awarded events that were initiated from a PR.
- See **Auto-Generate PR from Awarded Quick Quote Event** in the eProcurement release notes for additional information.

FILTERING FOR QUICK QUOTE EVENTS IN THE SOURCING ADVANCED SEARCH

- A new **Event Administration** drop-down appears on the sourcing *Advanced Search* page. The null default returns all events. Other choices are **Standard** and **Quick Quote**.
- Quick Quote events can also be identified in sourcing event lists by a new double arrow (i.e., fast-forward) icon ▶ that appears within the Event Details column of Quick Quote events.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.
- JAGGAER Administrators have updated existing Quick Quote sub-type workflows to activate the new workflow protections.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Ability to Associate Line Item Custom Fields to a Specific Group of Items in an Event

Before the 19.2 release, line item custom fields were automatically visible and available for every line item of the type for which it was created, such as product items, service items, or for both.

Now, customers have the ability to assign their **Additional Line Items** to specific item groups.

The ability to assign individual line-item custom fields to specific groups of items within a sourcing event gives customers greater control over the information that they collect and/or expose for items sought within sourcing events.

Customer Impact

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

USER IMPACT

- Users can assign additional line items to specific item groups.
 - If appropriate, select the option to **Restrict Item Group Item Association** from the drop-down menu that appears beside an Additional Line Item's drop-down.

The screenshot displays the 'Additional Item Fields' configuration interface. On the left, a sidebar shows the event details for 'AK Test 2' (ID: 827663), including its type 'Quick Quote' and status 'Draft'. Below this, a 'Settings and Content' menu lists various configuration areas like Setup, Users, Description, Prerequisites, Buyer Attachments, Supplier Attachments, and Questions, each with a status indicator (checkmark or count). The main area is titled 'Additional Item Fields' and contains a table with the following data:

Name	Conditional Upon	Field Type	Applicable To	Restricted To Groups	Supplier Can Respond	
Warranty	-	Multiple Choice (Pick One)	Product Line Item		Yes	Edit

A red arrow points to the 'Edit' dropdown menu for the 'Warranty' field, which is open and shows the following options: Edit, Delete, Create Conditional Follow Up, and Restrict Item Group Association.

- When this option is selected, the **Restrict Field Application to Targeted Groups** overlay appears. The overlay contains a picklist of all Item Groups available within the event. Additional Item Fields may be associated with multiple Item Groups.
- If a custom field has a conditional relationship with other item fields, the related children and grandchildren are automatically restricted to the same group as their parent item.
- Group associations are identified in the following ways:
 - A **Restricted to Groups** column has been added to the *Additional Item Fields* page to identify group associations.
 - Additional Item fields that are not applicable to an item are grayed-out in that item's row in event PDF export and Item export files.
- If import files contain values that are not applicable to items in the file, those values will not be imported.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact any third-party integrations.

Supplier Impact

- If an Additional Item field is associated to a specific group(s), the field appears only within the associated group(s).
- Additional Item fields that are not applicable to an item are grayed-out in that item's row in event PDF export and Item export files.

Sourcing Event Export Enhancements

Previously, the event export file size limit was 1 GB. When the export file size limit was exceeded, the download process was not successful.

With this release, the user experience has been enhanced with the removal of the file size limit for sourcing event file exports and by extending the ability to target the export to specific portions of each event.

Customer Impact

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

- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- Sourcing event exports no longer fail due to file size limitations.
- Users see the following changes on the Export Event screen overlay when they choose **Let Me Pick** from the **Content** pick list:

The screenshot shows the 'Export Event' screen overlay with the following sections and callouts:

- Content:** Radio buttons for 'All Event Sections, Responses, and Attachments' and 'Let Me Pick' (selected).
- Event Sections:** A list of sections with checkboxes. Callout 1 points to checkboxes for 'Prerequisites', 'Questions', and 'Items'.
- Additional Sections:** A list of sections with checkboxes. Callout 2 points to the 'Additional Sections' header, and callout 1 points to the 'Q & A Board' section.
- Supplier Responses:** Radio buttons for 'All Supplier Responses', 'Select Supplier Responses' (selected), and 'None'. Callout 3 points to the 'Supplier Responses' header, and callout 3b points to the 'Select Supplier Responses' option.
- Select Supplier(s):** A dropdown menu showing '-' and an 'Edit' button.
- Include Attachments:** Radio buttons for 'Yes' and 'No' (selected). Callout 4 points to this section.
- Email when export is ready:** Radio buttons for 'Yes' and 'No' (selected), with a 'What's This?' link.
- Footer:** A '* Required' label, a 'Submit' button, and a 'Close' button.

1. Attachments are included in the export only if they are selected specifically for **Prerequisites, Questions, Items, and Q&A Board**.
2. "Responses and Attachments" has been relabeled **Additional Sections**.
3. **Supplier Responses** has been moved to a new section of the overlay. It now contains three options:
 - a. **All Supplier Responses**
 - b. **Select Supplier Responses** (Selection of this option opens a picklist from

which suppliers can be selected.)

- c. **None** (Default value)
4. The "Supplier Response Attachments" field has been moved to the **Supplier Responses** section of the overlay and relabeled **Include Attachments**. The field is now a **Yes/No** field with a default value of **No**.
 - This field appears only if **Select Supplier Responses** is selected in the **Supplier Responses** field.

ADMINISTRATOR 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.