

## 20.1 RELEASE NOTES

FOR SOURCING ENHANCEMENTS

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APRIL 6, 2020 - FINAL VERSION



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# WELCOME

The **20.1 JAGGAER One Product Release** will be available in the production environment starting April 6, 2020. The purpose of Release Notes is to prepare administrators for the upcoming release from an application standpoint.

This document provides 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 **20.1 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.

## FEATURE ICON KEY

Features may be added after publication of the Release Preview document. Additionally, in some cases, a feature may be included with a specific Product group for the Release Preview, but moved to another Product group for the full Product Release Notes. If there is a noteworthy change to a feature, the release note will be marked with one of the following icons:

<b>New!</b>	Indicates that the feature release note was added since the initial version of the release notes was published with the push to the test environment.
<b>Updated!</b>	Indicates that the feature release note has had a major update since the initial version of the release notes was published with the push to the test environment.
<b>Moved!</b>	Indicates that the feature release note has been moved to a different document since the initial version of the release notes was published with the push to the test environment.

# SOURCING

## Enhanced Event Evaluations with Price Component Fields

Price component fields support an itemized view of price factors, such as fixed freight costs and import duties, that affect the total bid prices submitted against sourced items. As a result, price components provide pricing details that are useful in the deconstruction of submitted bids during event evaluation. Previously, the Sourcing solution didn't allow buyers to independently capture price components used in the calculation of total supplier bids.

With this enhancement, a new page called **Price Components** has been added to the **Settings and Content** area of events for configuring price-impacting fees and allowances that enable users to compare the total landed cost of sourced items. Buyers have the option to create price component fields from scratch or to select them from a library, and they can apply the price components at the individual item level or restrict them to specific item groups. The price components that are configured for event items will apply to alternate items submitted by suppliers. Buyers are presented with a more granular view of supplier bids when they leverage these new price component fields.

If suppliers are unable to break down their bids for any event items to the level specified by the price component fields, they can by-pass the price components and submit an **All-In** bid for those items. Suppliers can also propose up to 5 alternates for each item that is configured with price components.

When buyers evaluate supplier bids, pricing comparisons are based on the **Total Calculated Price** for each item. The **Total Calculated Price** is equal to the **Unit Price** plus **Price Components** multiplied by the item quantity.


**Note:** Price component fields are not available for use in reverse auction events.

### Customer Impact

- Related Solutions: Sourcing, eProcurement, Contracts+
- 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

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- A new **Price Components** page is available directly above the **Items** page in event **Settings and Content**. The page contains an **Item Price Components** tab for configuring price components that are applied at the individual item level.
- The **Create Item Price Component**  drop-down on this page allows users to **Create Item Price Component** from scratch or to **Add Price Component from Library**.

## Creating Price Components from Scratch

1. Navigate to an event that has pricing components enabled in the event's **Settings and Content**.
2. Click **Pricing Components** in the event's **Settings and Content** to open the page.
3. Expand the **Create Item Price Component** drop-down and select **Create Item/Header Price Component**.
4. Fill in the components **Name** (mandatory).
5. Optionally, fill in a **Description** for the price component.
6. If a **Supplier Response** is required, select this checkbox.
7. Expand the **Adjustment Type** drop-down and choose whether the price component is a **Fee**(debit) or an **Allowance** (credit). Expand the drop-drop located to the right of this field and choose whether the adjustment is measured in the event currency or as a % of the price.
8. Select the appropriate **Applicable To** button to indicate if the price component applies to **Product Line Item**, **Service Line Item**, or **Both**.
9. Click to **Save Changes**.

## Creating Price Components from a Library

1. Navigate to an event that has pricing components enabled in the event's **Settings and Content**.
2. Click **Pricing Components** in the event's **Settings and Content** to open the page.
3. Expand the **Create Item Price Component** drop-down and select **Add Price Component From Library**. The **Add Price Components from Library** overlay opens.
4. Expand the **Library** drop-down and select the library that contains the appropriate price component (s).
5. Select the checkboxes for the price component(s) that will be added.
6. Click the **Add Selected Price Components** button.

## Restricting Pricing Components to Item Groups

- Pricing components can be restricted so they apply to some of the event items, but not to others.
  1. Expand the **Edit** drop-down beside the appropriate price component and select **Restrict to Item Groups**. A **Select Item Groups** overlay appears.
  2. Select the checkbox(es) for the appropriate item group(s) on the overlay.
  3. Click **Save Changes**.

## Creating Price Components for Alternate Items

- **Alternate Item** fields are independent from group-level price component controls. This accommodates any unique qualities that may be assigned to alternate items. An **All-In Price** checkbox is available when alternate items are configured to define if each alternate item will have this pricing feature available:

The screenshot shows the 'Edit Alternate Product Line Item' interface. At the top, there's a title bar with a close button. Below it, the 'Unit Price' is set to 100.00 USD. The 'Estimated Delivery Date' field is empty. The 'All-In Price' checkbox is checked, and a red arrow points to it. Underneath, the 'Price Components' section is expanded, showing several fields: 'Fee USD' (20.0000 USD), 'Fee %' (empty), 'Allowance USD' (-20.0000 USD), 'Allowance %' (empty), 'Prod only' (empty), and 'Group P1' (20.0000 USD). Each field has a plus/minus icon and a unit indicator.

## Evaluating Supplier Bids

**Note:** Primary bid pricing comparisons consider the **Total Calculated Price** for each item.

- **Total Price = (Unit Price + Price Components) \* Item Quantity**
- **Total Calculated Price = Unit Price + Price Components**
- On the **Items** page, the text "*All-In Pricing Used*" appears in the **Price Components** header to identify items for which **All-In** pricing was used. If the supplier's bid contains itemized price components, the **Price Components** header is empty and the section is expanded to display the price component fields.
- Details of Price Component configuration are available during event evaluation on the **Price Components** page. Price components can be copied from one stage to the next in multi-stage events.
- Price components are included in **Evaluation** export files.
- Price component fields comply with **Confidential Pricing** and **Hide Event Prices** settings.

**Note:** If **Confidential Pricing** is enabled for an event, users who are **not** included in the **Event Price Viewers** access group for the event see the word "*Confidential*" anywhere a price would be displayed. This includes PDF and evaluation exports.

- Price components are not displayed on the **Scenario Evaluator** page. The **Total Unit Price** is used throughout this page for comparisons. When necessary, buyers can click on an item to launch a screen overlay that contains comparative data for all of that item's pricing fields.
- A **Price Components** drop-down section has been added to the **Scenario Savings** page only for events in which price component fields are configured. This section contains all the price component fields that have been configured for the event. All price component fields are deselected by default.
  - When price component fields are selected, a column is added for each field selected. If suppliers submitted responses to price component fields, the responses are displayed within the appropriate column; otherwise, the column shows a dash.

## Awarding

- The **Total Unit Price** is used in the **Supplier Award Summary** report and the **Cost Savings** report. It is transferred to contracts, purchase requests, and shopping carts that are created from sourcing events configured with price components.

## ADMINISTRATOR IMPACT

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- This feature does not impact administrators.

## INTEGRATION IMPACT

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- This feature does not impact integration.

## Supplier Impact

- If at least one product or service item includes price component fields, a **Total Unit Price** column is displayed on the event's **Items** page. This number is the **Unit Price** plus any additional price adjustments that are introduced via price component field content. The value in the **Total Unit Price** is used in bid total calculations on the event's **Evaluation** page.

Group P1 (1 - 1 of 1 items)

#	Item Name, Description, Etc	Brand	Qty	UOM	Requested Delivery	Unit Price (USD)	Total Unit Price (USD)	Total Price (USD)	Estimated Delivery
P1.1	Candy Bars ★	-	1	Each	-	200.00	250.00	250.00	12/09/2020 mm/dd/yyyy

Comment:  997 characters remaining

Price Components

Fee USD \*

+  USD

Fee %

+  %

Allowance USD \*

-  USD

- Price component fields may be designated as mandatory; however, suppliers can by-pass these fields. This is a necessary element for suppliers that cannot segment their bids to the elements defined by the price component fields.
- An **All-In** checkbox is available on group headers for an entire group of items, and on price component headers for individual items. By checking these boxes, suppliers can by-pass the price component field(s) and submit an all-in price for the associated item(s):

Group P1 (1 - 2 of 2 items) Use All-In Pricing for Group

#	Item Name, Description, Etc	Brand	Qty	UOM	Requested Delivery	Unit Price (USD)	Total Unit Price (USD)	Total Price (USD)	Estimated Delivery
P1.1	Prod	-	1	Each	-	<input type="text"/>	-	-	02/29/2020 mm/dd/yyyy

Comment:  1000 characters remaining

Price Components Use All-In Pricing

List Price

+  %

- The checkboxes act as toggles; price component sections are collapsed when a corresponding checkbox is selected and expanded when a checkbox is not selected.
- If a supplier selects a checkbox after entering values into the related price component field (s), the values in these field(s) are erased.



- Suppliers can propose up to 5 alternate items for each item configured within the event.
- When **All-In Price** fields are used in an event, they are included in Excel import/export files, as well as a calculated **Total Unit Price** column. For these events, the **Total Unit Price**, rather than the **Unit Price**, is the multiplier for the **Total Price** column:

Item Name, Catalog Number, Brand, Description	Qty	UOM	Community Code	Request of Delivery Date	Request of Delivery Alt	Unit Price \$/SES	Total Unit Price \$/SES	Total Price \$/SES	Estimate of Delivery Date	Estimate of Delivery Alt	All-In Price	Fee 0001	Fee 01	Allowance 0001	Allowance 01	Pool only	Group 001	Group 02
Cardi Pac, 550 and	1	Each				200.00	200.00	200.00			Yes	20.00	20.00	20.00	20.00			
Valve Pac, 550-1, 3 zone high powered beam	1	Each				200.00	200.00	200.00			Yes	20.00	20.00	20.00	20.00			

- The calculated **Total Unit Price** is subject to the regular minimum and maximum validation checks, which are performed when suppliers submit bids.

**Note:** Negative value validation is applied to the **Total Unit Price** column to aid suppliers in detecting data entry errors.

## Ad-Hoc Approvers for Forms Workflow


Previously, the ad-hoc approver feature was available only on requisitions, invoices, and contracts to accommodate situations where a one-time approval is needed from a user who is not in the regular approval workflow. In 20.1, we have expanded the ad-hoc approver feature to the Form Request workflow, where it can be used to add, edit, and delete an ad-hoc approver steps anywhere in the Sourcing Requests workflow.

### Customer Impact

- Related Solutions: Sourcing, Contracts+, Supplier Management , Invoicing, eProcurement
- Feature Activation: This feature is **OFF** by default but can be configured by an administrator
- New Permissions related to this feature:
  - **Add Ad-Hoc Approver for Contract Approval (Permission Settings > Approvals > Contract Approvals)**
  - **Perform Ad-Hoc Approve/Reject/Return Request (Permission Settings > Approvals > Contract Approvals)**
- New Notifications related to this feature: Yes


### USER IMPACT

- When the organization's configuration allows ad-hoc approval for form requests, users with the appropriate permission can add an ad-hoc approver to a Sourcing Request workflow process (**User Profile > Permission Settings > Approvals: Form Request Approvals**).

- User must have **Add Ad-Hoc Approver for Request approval** permission in order to add an ad-hoc approver.
- User must have **Perform Ad-Hoc Approve/Reject/Return Request** permission in order to be selectable as an ad-hoc approver.
- To **add an ad-hoc approver step** to a Sourcing Request in workflow:
  1. Navigate to a Sourcing Request in workflow at **Sourcing**  **> Approvals > Sourcing Event Requests to Approve** OR navigate to **Sourcing > Requests > Search Sourcing Requests** and note any that are **Under Review**.
  2. Select the appropriate Sourcing Request.
  3. Select the **Form Request Actions** dropdown, and select **Add Ad-Hoc Step**. An overlay displays:
    - a. **After Step** - Select the workflow step after which the ad-hoc approver step should take place. If only one workflow step exists, this field is read-only.
    - b. **Ad-Hoc Approvers** - Begin entering a user's name or select the search icon to search all users with the permission to **Perform Ad-Hoc Approve/Reject/Return Request**. You can add more than one ad-hoc approver.
    - c. **Comments** - Enter any comments for the ad-hoc approver.
    - d. Click **Save**. A confirmation message displays that an ad-hoc step has been added.
  4. Click the **Form Approvals** link in the left navigation of the request to confirm that the ad-hoc step has been inserted. Each ad-hoc step that is inserted is noted numerically (Ad-hoc 1, Ad-hoc 2, etc.)
- To **edit an ad-hoc approver step** that has not yet occurred, select the **Request Actions** dropdown, and select **Edit Ad-Hoc Step**.
  1. Select the **Ad-Hoc Step** to edit from the dropdown.
  2. Edit the **Ad-Hoc Approvers**, if needed.
  3. Edit the **Comments**, if needed.
  4. Click **Save**.
- To **delete an ad-hoc approver step** that has not yet occurred, select the **Request Actions** dropdown, and select **Delete Ad-Hoc Step**.
  1. Select the **Ad-Hoc Step** to delete from the dropdown.
  2. Click **Save**.

## ADMINISTRATOR IMPACT

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- Administrators must enable the setting **Allow users to add ad-hoc approvers for form request** (**Setup**  **> Workflow Setup > General Workflow Settings: Workflow Options** section).

## INTEGRATION IMPACT

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- This feature does not impact integration.

## Supplier Impact

This feature does not impact suppliers.

## Public Event Export

A new event export is available for transporting public event data from the Sourcing module to external systems. With this export, for example, customers can expose their public sourcing events on third-party websites, while administering the events within the Sourcing platform.

## Customer Impact

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


## USER IMPACT

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- The following fields are included in the export function:
  - Setup
    - Event Number
    - Event Type
    - Event Type Name (Internal)
    - Event Title
    - Event Status
    - Work Group
    - WorkGroupCode
    - Stage Number
    - Stage Title
    - Business Unit Associations
    - Business Unit
    - Description

- Event Dates
  - Time Zone
  - Release Date
  - Open Date
  - Close Date
  - Question Answer Close Date
- Commodity Codes
  - Reporting Commodity Code
  - Additional Commodity Codes
  - Code
- Payment Details
  - Currency
  - Estimated Value
  - Payment Terms
- Custom Fields
  - Internal Name
  - Value
- Users
  - Creator
  - Contacts
  - Name
  - Email
  - Phone
- Prerequisites
  - Prerequisite Type
  - Content
  - Text
  - Text Title
  - Supplier Instructions
  - Certification Text
  - Supplier Must Upload a File

- Buyer Attachments
  - Attachment
    - Name
    - File Name
    - URL
    - Base64
- Questions
  - Question
  - Question Required
- Items
  - Production Item
    - Name
    - Description
    - Quantity
    - Required
    - Commodity Code
    - Alternates Allowed
    - Brand
    - Catalog Number
    - Requested Delivery Date
    - Requested Delivery Days
  - Service Item
    - Name
    - Description
    - Quantity
    - Required
    - Commodity Code
    - Alternates Allowed
    - Requested Delivery Start Date
    - Requested Delivery End Date
    - Requested Delivery Days After Award
- Awards

- Pending Awards
  - Awarded Supplier
  - Supplier Name
  - Award Amount
  - Award Comment
  - Award Attachments
  - No Award
- **Field Type** and **Size** for each field are included in the export.
  - A standard system email notification can be activated to notify users when public event exports fail. An in-app notification can also be displayed in the UI banner.
    - Users can activate **Sourcing Event Document Export Failure Notice** in the **My Profile > Notification Preferences > Administration & Integration** area.
  - Notification messages contain links to a new **Find and Fix Errors** page for users with the **Manage Integration Export Failures** permission. On this page, users can view errors, re-queue errors for export, delete export errors, and view the last 20 successful exports.
  - The Find and Fix page can also be accessed by navigating to **Administration  > Find and Fix Errors > Sourcing Event Document Export Queue**.

## ADMINISTRATOR IMPACT

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- Administrators can set up a new **Document Export Setting** for public events:
  1. Navigate to **Setup > General Site Settings > Document Export Settings** and select the **Connection Management** tab.
  2. Click the **New Connections** button, which is located above the list of existing connections.
  3. Select the **Supports Sourcing Event Export** checkbox in the new Selected Connection configuration options. A **Sourcing Event Options** drop-down is displayed under this field.
  4. Select **Public Events** from the **Sourcing Event Options** drop-down.
  5. If relevant, select the Include Attachments in Export checkbox, which is located below the

## Sourcing Event Options drop-down.

Setup > General Site Settings > Document Export Settings > Connection Management

- Supports Org Catalog
- Supports Contract Director Supplier Export
- Supports Contract Director User Export
- Supports TSM Real Time Vendor Export
- Supports TSM Vendor Export
- Supports External Vendor Check
- Supports TSM Multi ERP Vendor Export
- Supports TSM Real Time Multi ERP Vendor Export
- Supports Contracts Export
- Supports External Contract Validation
- Supports PSM Export
- Supports GSK Catalog Export
- Supports Invoices
- Supports Banner
- Supports PR
- Supports Contract Director Contract Export
- Supports Receipts
- Supports User Export
- Supports Inventory Adjustment
- Supports Sourcing Event Export
  - Sourcing Event Options: Public Events
  - Include Attachments in export:

[Save](#)

6. Finish configuring the other fields and save the new connection.
- After administrators have configured the document export settings, they can schedule exports for public events:
    1. Navigate to **Setup > General Site Settings > Document Export Settings** and select the **Scheduling Mgt** tab.
    2. Click the **New Schedule** button, which is located above the list of existing schedules, or select an existing schedule from the list.
    3. Expand the **Doc Type** drop-down and select **Sourcing Event Export**.
    4. If more than one option appears under the **Connections** checkbox, choose the appropriate option for Sourcing event exports:

Configuration | License | number wheel | **document export** | non-catalog item | trade-in | image management | currency configuration | service integration configuration | alias mgt. | certificate mgt. | shared secret

dashboard | connection mgt | **scheduling mgt** | trigger mgt | General Export Config | History

**New Schedule**

Schedules	Selected Schedule
PO Export Schedule	Name
PRExport Schedule	Internal Name
Sourcing Doc Export Schedule	Doc Type: Sourcing Event Export
Supplier Export	Connections: Sourcing Event Doc Export Conn
User Export	Transmit Frequency: Interval
Violysa_Test	Transmit every: null minutes
	Number of Retries: null
	Retry Interval: null minutes

[Save](#)

5. Select the **Transmit Frequency - Interval** or **Specific Times**. Configure the appropriate intervals or times on the resulting screen overlay.
  6. Finish configuring the other fields and save the new connection.
- Administrators can configure the triggers to control the occurrence of public event exports:
    1. Navigate to **Setup > General Site Settings > Document Export Settings** and select the **Trigger Mgt** tab.
    2. Click the **New Trigger** button, which is located above the list of existing triggers.
    3. Expand the **Document Type** drop-down and select **Sourcing Event Export**.
    4. Expand the **Event** drop-down and select the appropriate trigger, such as event workflow status change, event amendment, or event extension. Configure the specific changes relevant to the selected trigger.
    5. Click the relevant checkboxes to enable the **Schedule** and **Connections** relevant to the Trigger.

6. Finish configuring the other fields and save the new connection.
- The document's audit trail contains a log of export success or failure.

## INTEGRATION IMPACT

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- Your IT personnel should work with your JAGGAER Technical Consultant to configure your site with the required connection details, the run schedule of the associated export Job, and establishment of the appropriate event export triggers, based on your organization's needs.

## Supplier Impact

- This feature does not impact suppliers.



# Full Export Format Available for Sourcing Request Results

Previously, the **Sourcing Requests** export feature only provided a data export of the columns that appeared on the page. In 20.1, a new **Full Export** request type is available in CSV format. The **Full Export** format includes the following information:

- Request approval history, including the workflow step and approver information.
- Request questions with provided answers.
- Request data similar to what is displayed on the screen.


The option to export a Screen Layout (Excel format) of the search results continues to be available.

## Customer Impact

- Related Solutions: Sourcing, Contracts+, Supplier Management
- Feature Activation: This feature is **ON** by default but is optional for use
- New Permissions related to this feature: None
- New Notifications related to this feature: None

## USER IMPACT

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- When choosing to export from the **Sourcing Requests** results page (**Sourcing**  **> Requests > Search Sourcing Requests**), a **Full Export** is available for selection.
  1. Search for Sourcing requests.
  2. When desired results are displayed, select the **Export** button.
  3. In the overlay, note the **Type** field is now a dropdown containing **Screen Layout** (default) and **Full Export**.
    - The **Format** field is read-only:
      - When **Type** = **Screen Layout**, the **Format** is **Excel** (no change from previous functionality)
      - When **Type** = **Full Export**, the **Format** is **CSV**
- The export is available on the **Manage Exports** page (no change to current functionality). The **Full Export** format is provided in a **.zip** archive containing three separate CSV files:
  - Approval History
  - Request Questions
  - Request Data

## ADMINISTRATOR IMPACT

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- This feature does not impact administrators.

## INTEGRATION IMPACT

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- This feature does not impact integration.

## Supplier Impact

This feature does not impact suppliers.

# Supplier Registration Updates for Sourcing Event Invitations

Previously, when organizations manually invited new supplier users to a sourcing event, the new invitees were often not given timely access to the events to which they were invited. Delay in event access / participation was also often experienced by new supplier respondents who expressed an interest in an event posted on the customer's Public Event site. With the 20.1 Release, the Registration process has been enhanced to eliminate the access delays that have hindered these supplier users' ability to interact with the client's event in a timely manner. These enhancements help to ensure that these suppliers will be able to effectively compete for the business offered via the client's sourcing events. There is no change to the functionality of how the supplier responds at the point they are given event access via the Branded Portal.

## Customer Impact

- Related Solutions: Sourcing
- 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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This feature does not impact users.

## ADMINISTRATOR IMPACT

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This feature does not impact administrators.

## INTEGRATION IMPACT

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This feature does not impact integration.

## Supplier Impact

- Supplier users who are invited to a sourcing event and do not have an existing supplier or user account will, upon registration, be granted timely access to the Customer Branded Portal through which they can respond to the targeted sourcing event.