

20.3 RELEASE NOTES

FOR SUPPLIER MANAGEMENT ENHANCEMENTS

NOVEMBER 9, 2020 - FINAL VERSION



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WELCOME

The **20.3 JAGGAER ONE Product Release** will be available in the production environment starting November 9, 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 **Supplier Management** 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 **20.3 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:

New!	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.
Updated!	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.
Moved!	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.

SUPPLIER MANAGEMENT

Following are updates to features in the JAGGAER ONE Supplier Management solution. Features in this section do NOT apply to the general supplier management that is bundled with other solutions.

Manage Document Attachments Permission Includes Supplier Request Attachments

With the 20.3 release, the **Manage Document Attachments** permission now applies to attachments in Supplier Requests, which will allow users to remove attachments from documents regardless of where the document is in workflow. See **Manage Document Attachments Permission Includes Form Requests** in the **General** section of Release Notes for details about this feature.

Requester Contact Information Included in Supplier Requests

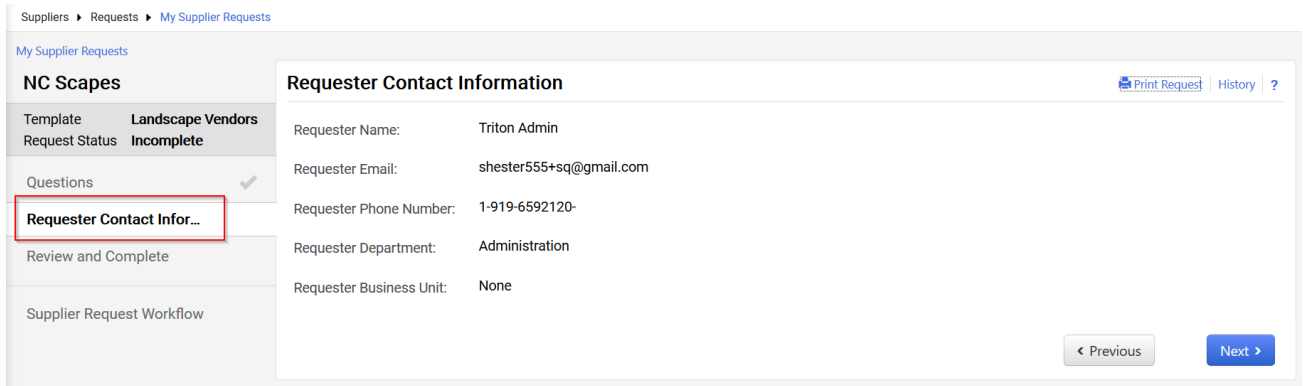
When viewing **Supplier Request** search results, the requester name is displayed. Previously, no other information was available about the requester in the event that a user reviewing the request, had questions or required clarification. With this release, a new page for **Requester Contact Information** is available when configuring Supplier Request Templates. The requester name, email and other identifying information can be enabled to display. If at least one field of the **Requester Contact Information** is enabled, a new page will display on the **Supplier Request** form that presents the information. The user's Department and Business Unit, if applicable and selected, will display to users according to the organization and user profile configurations. **Note:** External requests will not display contact information.

Customer Impact

- Related Solutions: Supplier Management
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- When a user creates a **Supplier Request** (**Suppliers**  > **Requests** > **Search Supplier Requests**), the **Review and Complete** page will display if configured for the associated template.



Suppliers > Requests > My Supplier Requests

My Supplier Requests

NC Scapes

Template	Landscape Vendors
Request Status	Incomplete

Questions

Requester Contact Infor...

Review and Complete

Supplier Request Workflow

Requester Contact Information

[Print Request](#) | [History](#) | [?](#)

Requester Name: Triton Admin


Requester Email: shester555+sq@gmail.com

Requester Phone Number: 1-919-6592120


Requester Department: Administration

Requester Business Unit: None

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- The **Requester Contact Information** page displays the Contact information as configured for the associated template. The information is read-only.
- **Requester Contact Information** is listed as a section on the Review and Complete page. No fields are required to submit the request
- When selecting the **Print Request** link, the Requester Contact Information is included at the bottom.
- When a user views a **Supplier Request** (**Suppliers**  > **Requests** > **Search Supplier Requests**):
 - The **Requester Contact Information** page will display if at least one field is enabled on the associated template. The information is read-only.
 - When selecting the **Print Request** link, the **Requester Contact Information** is included at the bottom.
 - If the request is **External** and the associated template is configured to display contact information, a message will display instead, indicating that no contact information is available.

ADMINISTRATOR IMPACT

- When configuring Supplier Request Templates (**Suppliers**  > **Configuration Settings** > **Manage Supplier Request Templates**), administrators will see a new **Requester Contact Information** page available for configuration.
 - Select the information to display to users reviewing a **Supplier Request** associated with the template. No information is enabled to display by default:
 - Requester Name
 - Requester Phone
 - Requester Email
 - Requester Department (if configured for organization)
 - Requester Business Unit (if configured for organization)
 - When selecting the **Print Preview** link for the template, the **Requester Contact Information** will display at the bottom.


This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Ability to Create and Manage Custom Fields for Supplier Fulfillment Centers

Custom fields can be associated to documents (requisitions, purchase orders, invoices) and contracts. Within a customer's ERP system, custom fields may exist for suppliers to provide a more complete supplier management view. With the 20.3 release, buyers now have the ability to configure and manage custom fields and groups at the supplier fulfillment center level.

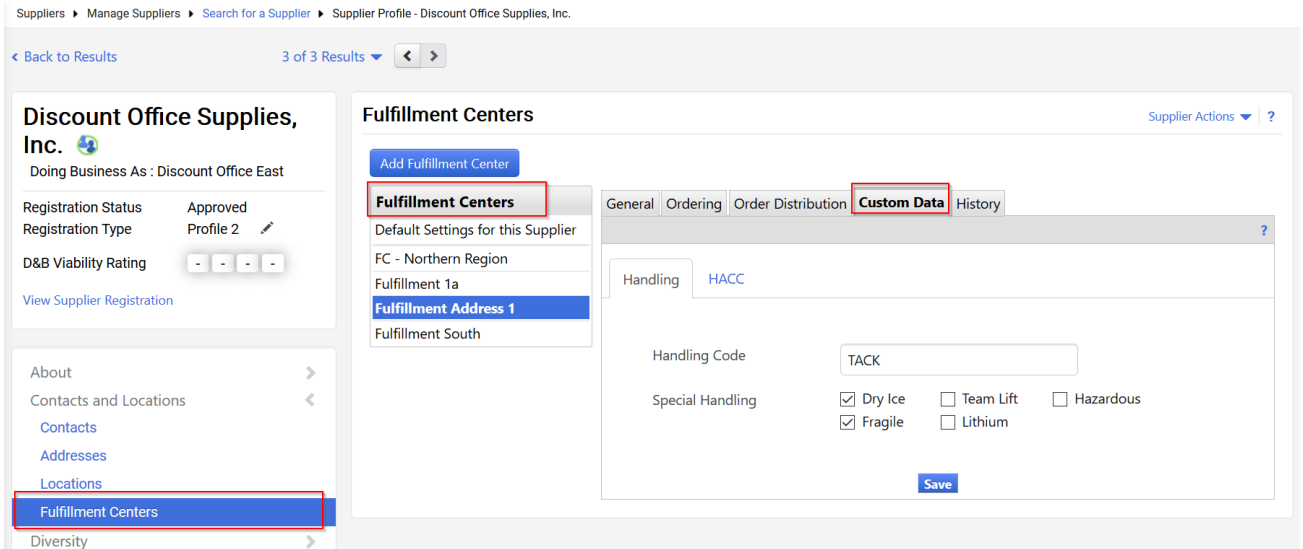
A new permission is available that allows granted users to manage **Fulfillment Center Custom Fields** and **Fulfillment Center Custom Groups**. Once configured, Custom field groups and fields will be available on a new **Custom Data** tab within **Supplier Profile Fulfillment Center** settings (**Suppliers**  **> Contracts and Locations > Fulfillment Centers**). Groups show in the order configured, and each group displays the fields in the order configured. Various field types are available such as text box, date, yes/no, multi-select, etc. Administrators have the ability to import values via the TSM Supplier Import, and values can be exported via XML.

Customer Impact

- Related Solutions: Supplier Management
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: Yes - **Fulfillment Center Custom Field Administration** (Permission Settings > Administration > Fulfillment Centers)
- New Notifications related to this feature: None

USER IMPACT

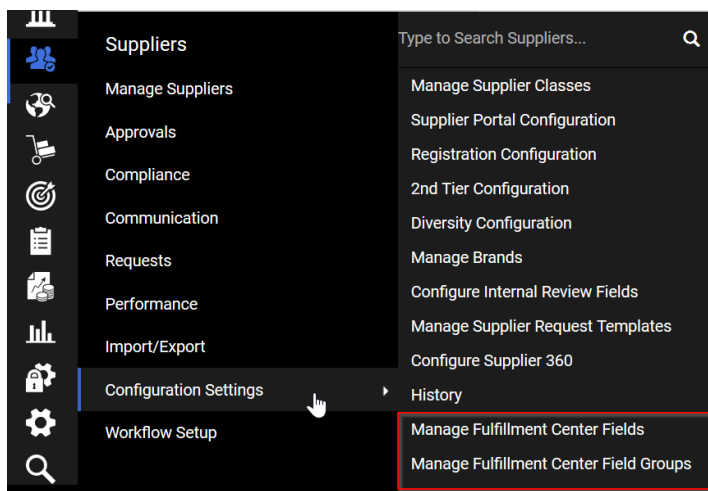
- Users with permission to view Supplier Profile Fulfillment Centers will see a new **Custom Data** tab for each fulfillment center.



- Each Fulfillment Center Custom Field Group and Field is displayed as configured by the organization for each supplier profile fulfillment center.
- Users enter values for the custom fields as appropriate, and click Save.
- If a Group is inactive, a message displays. Values can be removed, but cannot be changed to another value.

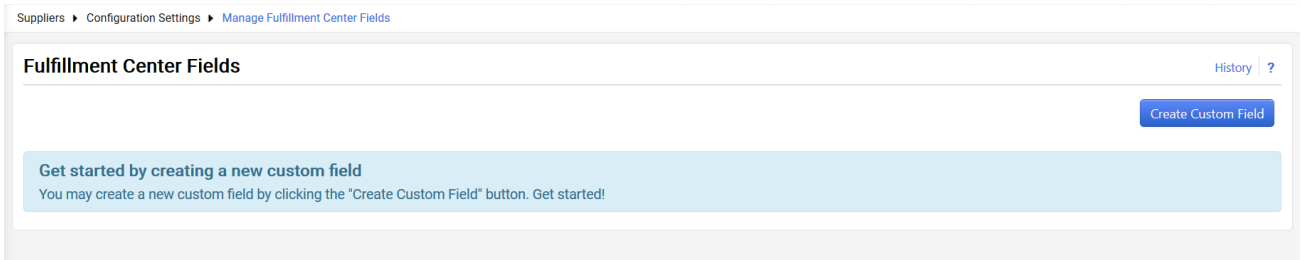
ADMINISTRATOR IMPACT

- Administrators must enable the new permission at the role or user level. **Permission Settings > Administration > Fulfillment Centers** section: **Fulfillment Center Custom Field Administration**.
- Users with the permission will see two new pages under the **Suppliers > Configuration Settings** options: **Manage Fulfillment Center Fields** and **Manage Fulfillment Center Field Groups**. Fields must be created in order to add them to Groups.



Manage Fulfillment Center Fields

- Initially, a user will see a message display when no Fulfillment Center fields have been created:



- To create a new Fulfillment Center Field:
 - Click **Create Custom Field**. A **Create Custom Field** overlay displays.
 - Enter the following information:
 - Name** - Enter a name for the custom field. This is the name that will appear on the Group and Supplier Fulfillment Centers. If multiple languages are supported by the site, this name will be considered the default name.
 - Add/Edit Translations** - If the site supports multiple languages, this button will allow you to enter in a new name for each supported language. These translations will only be shown when the site is being viewed in the corresponding language. If no translation is added, the default name will be displayed. If the organization does not support multiple languages, this button will not be visible.
 - Internal Name** - Enter an internal name for the field. This is the name referenced by the system for the field. The internal name cannot have spaces or special characters and must be unique in the system. You cannot change the internal name once the custom field is saved. If you are updating a custom field, this will be read-only.
 - Response Type** - Choose the type of custom field you want to create. If you are updating a custom field, this will be a read-only field. Depending on the field type you select, additional fields may display for configuration:
 - Text (Single Line)** - The response is a single line of text, up to 100 characters.
 - Text (Multi-Line)** - The response is text, and is entered into a text box that can accept up to 2000 characters.
 - Numeric Text Box** - The response must be a number.
 - Yes/No** - The supplier response is to select Yes or No for the question.
 - Dropdown List (Pick One)** - Allows the user to choose one response from a list of responses presented in a dropdown list. When you choose this option, the **Values to Pick From** field will display. You are required to configure the responses for the dropdown menu. To configure responses, enter a response in the field then click the **+** to add it. Continue this process until you have added all responses.
 - Multiple Choice (Pick One)** - Allows the user to choose one response from a list of responses presented as a multiple choice list. When you choose this option, the **Values to Pick From** field displays. You are required to configure the responses. To configure responses, enter a response in the field then click the **+** to add it. Continue this process until you have added all responses.

- **Multiple Select (Pick Many)** - Allows the user to choose multiple responses from a list of responses presented as a multiple choice list. When you choose this option, the **Values to Pick From** field will display. You are required to configure the responses. To configure responses, enter a response in the field then click the **+** to add it. Continue this process until you have added all responses.
 - **Date** - The response is a date. An example may be the expiration date of a quote, or the date when services can begin.
 - If you choose **Dropdown List (Pick One)**, **Multiple Choice (Pick One)**, **Multiple Select (Pick Many)**, enter the items for the list by clicking the **+ Add Option** field. If the site supports multiple languages, translations for responses may be included by clicking the **Add/Edit Translations** button. These translations will only be shown when the site is being viewed in the corresponding language. If no translation is added, the default option will be displayed. If the organization does not support multiple languages, this button will not be visible.
 - **Add Help Text** - Choose **Yes** to include help text that appears when users click the information icon ⓘ next to the custom field. Choose **No** if the field should not have help text available. If you choose **Yes**, a field will appear where you can enter the custom help text.
 - **Show on Advanced Search** - This option controls the display of the field on the Supplier Advanced search. Select **Yes** to include the field as a filter on advanced supplier search. Click **No** if you do not want the system to include the field as an advanced search filter. **Note: This option is not enabled for 20.3.** It will be updated to respect the selected setting after 20.3.
 - **Active** - Choose **Yes** to activate the field and make it available for use in the system. Click **No** to deactivate the field. Only Active fields can be selected for Groups.
3. Click **Save**. **Note:** You cannot delete a custom field once it is saved, but you can make it inactive to hide it.
 4. Once you have created a Fulfillment Center Field it can be added to a Fulfillment Center Field Group.
- Once **Fulfillment Center Fields** are created, they are listed on the **Fulfillment Center Fields** page.

Suppliers > Configuration Settings > Manage Fulfillment Center Fields

Fulfillment Center Fields History ?

🔍

Create Custom Field

Show Fields Unavailable for New Fulfillment Centers

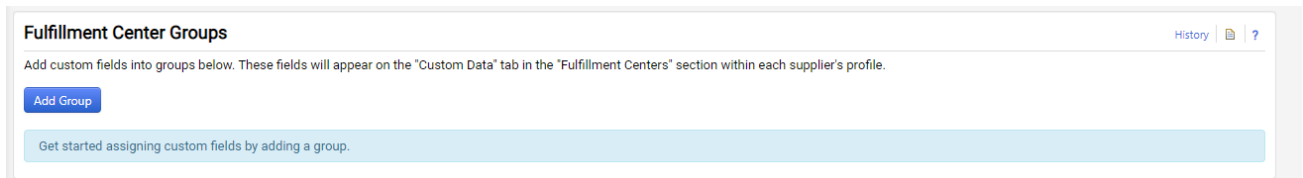
Field Name ▲	Data Type ▲	Active ▲	Show on Advanced Search ▲	Last Updated ▲	Edit
FC Code	Numeric Text Box	Yes	No	9/11/2020 2:00 PM	Edit
Federal Reportable Flag	Yes/No	Yes	Yes	9/30/2020 6:37 PM	Edit
Region	Multiple Choice (Pick One) (Show Field Options)	Yes	Yes	9/30/2020 6:37 PM	Edit
Special Handling	Multiple Select (Pick Many) (Show Field Options)	Yes	No	9/11/2020 1:55 PM	Edit

- Select to search for fields by entering text in the search box and select the search icon 🔍.
- By default, only **Active** fields are shown. Click **Show Fields Unavailable for New Fulfillment Centers** to display inactive fields.
- Click the **History** link to see the audit log for Fulfillment Center Field creation and management.

- Changes to a Fulfillment Center Field are immediately applied to Fulfillment Center Groups and Supplier Profile Fulfillment Centers.
- If a Fulfillment Center Field is made **Inactive**:
 - The field will show as Inactive for any groups in which it is included.
 - It cannot be selected to be added to a group.
 - If left in a group, it will continue to be visible in the Supplier Fulfillment Center. The value can be deleted, but cannot be edited to another value.
 - Inactive fields will not show in a newly created supplier's profile.

Manage Fulfillment Center Groups:

- Before groups are created, a user will see this message:



- Only active fields can be added to a Group.
- To create a new group:
 1. Click the **Add Group** button. An **Add Group** overlay displays.
 2. Enter a **Group Name**.
 3. Choose the **Display Order** of the Group. This is the order in which the group will display in the Supplier Fulfillment Center.
 4. The page refreshes with the newly created Group listed. It is Inactive by default.
 5. For a new group with no fields, click **Group Actions** dropdown to get started:
 - a. Click **Edit Group** to change the group name or display order.
 - b. Click **Activate** to make the group active and add fields. You cannot add fields to an inactive group.
- Adding fields to a group:
 1. Click **Add Field** for the appropriate Group. An **Add Field to Group [Group Name]** overlay displays.
 2. **Step 1 of 2:** Fields are listed, or you can enter a field name in the search box to search for a field. Select the appropriate field to add.
 - You can add a single field at a time.
 - Only those fields that are active and not part of another group are available for selection.

Note: You cannot add an inactive field.
 3. Click **Next**.
 4. **Step 2 of 2:** The field information displays as read only. Indicate if a **Response is Required** for this field, and select the **Display Order**.
 5. Click **Save and Add Another** to add the field to the group and begin the selection of another field to add to the group. Click **Save** to save the selection to the group, close the overlay and return to the Fulfillment Center Field Groups page.
- **Managing fields in a group:**

Suppliers > Configuration Settings > Manage Fulfillment Center Field Groups

Fulfillment Center Groups History | ?

Add custom fields into groups below. These fields will appear on the "Custom Data" tab in the "Fulfillment Centers" section within each supplier's profile.

[Add Group](#)

Group 1: Handling Group Actions ▼

#	Field Name	Data Type	Show on Fulfillment Centers	
1.1	Handling Code	Text (Single Line)	N/A (Inactive)	View Details ▼
1.2	Special Handling	Multiple Select (Pick Many) (Show Field Options)	Yes	Edit ▼

[Add Field](#)

Group 2: HACC Group Actions ▼

#	Field Name	Data Type	Show on Fulfillment Centers	
2.1	Federal Reportable Flag	Yes/No	Yes	Edit ▼

[Add Field](#)

1. Active fields within groups have an **Edit** dropdown.
 - Select **Edit** to update the Response is Required setting, Group and/or Display Order. Click **Save**.
 - Click **Remove** to remove the field from the Group. You will be asked to confirm your selection.
2. Inactive fields within groups have a **View Details** dropdown.
 - Click **View Details** to see an overlay with the configuration for the field within the group (read-only).
 - Click **Remove** to remove the field from the Group. You will be asked to confirm your selection
- Groups cannot be deleted, but can be inactivated. An inactivated group will still show for Supplier Profile Fulfillment Centers to which they have already been associated but not for new suppliers.

Fulfillment Center Custom Data in Supplier Profile Export and Import

- **Export** - The Supplier XML Export will include the Custom Data information.
- **Import** - The Supplier Import process will support the addition of Custom Data fields. For the designated Fulfillment Center, the Custom Field Internal name can be included with the appropriate value.
- Active and inactive fields and groups will be included in the export, along with a flag indicating the field's status.
- Please contact JAGGAER for further details.

THIRD-PARTY INTEGRATION IMPACT

- The **Supplier XML Export** is updated to include Custom Data information.
- The **Supplier Import** is updated to include Custom Data information. Contact JAGGAER for details.

ADDITIONAL KEY POINTS ABOUT THE FEATURE

- Fulfillment Center custom field values are not visible to the supplier.

Supplier Impact

This feature does not impact suppliers.

Dynamic Qualification Enhancements


Qualifying a supplier includes reviewing capabilities, identifying risks and gathering the appropriate documentation in order to make the best decision on which supplier gets the business. The **Dynamic Qualification** feature allows you to automate the qualification process through the use of questionnaires that you create to your company's specifications. This allows you to gather and store the information within **Supplier Management**. With the 20.3 release, several enhancements have been made to the **Dynamic Qualification** feature, including:

- Ability to assign a questionnaire directly to a supplier from the **Scorecard Suppliers** page, instead of navigating to the supplier profile to make the assignment.
- Adding **Due Dates** to Questionnaires.

Customer Impact


- Related Solutions: Supplier Management with Performance Management
- 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: Yes, **Send Due Date for Questionnaire to Supplier**

USER IMPACT

- Users with permission to **Assign Questionnaires** to suppliers for Dynamic Qualification can now do so directly from the Scorecard Suppliers page:
 1. Navigate to **Suppliers**  > **Performance > Scorecards** and select a Scorecard.
 2. Select the **Suppliers** page.
 3. A new **Assign Questionnaire** button displays for each supplier. Click the button for the appropriate supplier. The **Assign Questionnaire to Supplier** overlay displays.
 4. Select Yes or No for **Make Questionnaire Visible to the Supplier**. The overlay expands to display available questionnaires for selection (existing functionality).
- The Questionnaire assignment is logged in the supplier's profile history in the same manner as it is logged when assigned from the supplier profile.
- Questionnaires can continue to be assigned to a supplier from the **Supplier Profile > Legal and Compliance > Questionnaires** page (see **Assigning Dynamic Qualification Questionnaires to Suppliers** in the **Supplier Management Handbook** or online searchable help).

- A new **Due Date** field is available in the **Assign Questionnaire to Supplier** overlay.
 - This field is not required. Select or enter a date as applicable.
 - The **Due Date** will be included in the notification to the supplier.
 - **Due Date** is a new column displayed on the **Supplier Profile > Legal and Compliance > Questionnaires** page. The Due Date column can be sorted.
 - **Due Date** is not available when selecting to Assign Questionnaires to multiple suppliers from search results.

ADMINISTRATOR IMPACT

- A new system email is available: **Send Due Date for Questionnaire to Supplier**. This email can be edited by navigating to **Administer  > Email Management > System Emails** and expanding the **Supplier Management** section. This email is sent to the supplier contact when the Questionnaire is assigned with a due date. The existing **Send Questionnaire to Supplier** system email is sent if no due date is assigned (no change).

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

ADDITIONAL KEY POINTS ABOUT THE FEATURE

- The **Assign Questionnaire** button will display for suppliers in a Scorecard in any status.
- For additional information about Dynamic Qualification, see **Dynamic Qualification** in the **Supplier Management Handbook** or online searchable help.

Supplier Impact

- Suppliers may receive a notification that indicates a Questionnaire has a **Due Date**. The supplier can continue to respond after the Due Date unless the buyer closes the Questionnaire. There is no other change to the process for suppliers receiving or responding to Questionnaires.

Supplier Cold Registration Update - Email Domain Duplicate Handling

When a supplier registers for a new Supplier Network Portal, the system checks for duplicate users by **Email** domain, **DUNS** number and **Tax ID**. If a duplicate exists for any of those fields, the supplier is shown a list of possible matches. However, some domain names could generate many false duplicates that do not apply to the supplier account. With the 20.3 release, if multiple matches exist for the email domain, the user will be redirected to create a new portal account. If a single email domain match is found, the user will be presented with the option to use the existing login to access the Supplier Network or Customer Branded Portal. This updated duplicate handling feature will apply to suppliers registering through a Customer Branded Portal (if cold registration is allowed), the JAGGAER Supplier Network, and when registering for Sourcing Events.

Customer Impact

- Related Solutions: Supplier Management, 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

This feature does not impact end users.

ADMINISTRATOR IMPACT

This feature does not impact administrators.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

- When registering for the Supplier Network Portal or Customer Branded Portal, supplier users will be redirected to create a new portal account or with the option to use an existing login as explained above.