

20.1 RELEASE NOTES

FOR EPROCUREMENT ENHANCEMENTS

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.

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.

This document provides release notes for the **eProcurement** 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.

EPROCUREMENT

SHOPPING AND ORDERING

Budget Manager Enhancements **Updated!**

In 20.1, we continue to add functionality to the Budget Manager module and refine the features within it. In this release we have added new options to make the timing of the spend collection more flexible and added a new setting that allows organizations to ensure that all document lines are associated with a budget.

Customer Impact

- Related Solutions: eProcurement, Budget Manager, Invoicing
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator. Additional setup by JAGGAER may be required.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- If the **All Document Lines Require a Budget** setting is enabled for your organization, when a document is submitted into workflow, the system will check every line on the document. If a line has account codes that do not match a budget, or if the budget does not have sufficient funds for the purchase, the workflow step will stop and require some action from an approver.
- If configured for your organization, the **Budget Date** field on a requisition can be used to enter a date that determines which date range of a budget is impacted by spend collection for the document. If there is a value in the Budget Date field, the system will use that date to determine which date range on a budget that document spend is applied to. If the field is left blank, spend will be applied to a budget based on organization settings.

ADMINISTRATOR IMPACT

- The following updates have been made to **General Budget Settings** (Budget Manager  > Administration > General Budget Settings). Please see **General Budget Settings** in the online searchable help for more information:
 - A new **All Document Lines Require a Budget** setting can be enabled to require that all lines on a PR, PO or invoice must have account codes that match a budget. When a document is submitted into workflow, the system will check every line on the document. If a line has account codes that do not match a budget, or if the budget does not have sufficient funds for the purchase, the workflow step will stop and require some action from an approver.

- A new **Date to Associate with Document Spend** section allows organizations to choose which document dates will be used to apply collected spend to budget date ranges. They can choose whether collected spend will be applied to budget date ranges based on when a document is submitted into workflow or when it completes workflow. Purchase orders and invoices also have the option to use dates from the previous document. For example, on purchase orders, the date used to apply collected spend to budget date ranges can be populated from the associated requisition.

Note: The **Budget Date** field on a requisition can also be used to enter a date that determines which date range in a budget is impacted by spend collection. A value in this field will override the **Date to Associate with Document Spend** settings. To enable this feature, the Budget Date field element must be added to the active Requisition document configuration.

- The **Collect Requisition Spend in Pending Workflow** setting has been removed and replaced with the settings above.
- We have updated the way spend collection and budget checks work for budgets. New **Spend Collection-Budget Check** workflow robots have been created for use with requisitions, purchase orders, and invoices. They can be added to any point in the requisition, purchase order and invoice approval workflow. They can and can be added multiple times to an approval workflow. Please contact JAGGAER to configure your workflow. Here is an overview of how it works:
 - Spend is collected from a document and applied to a budget when:
 - A spend collection-budget check workflow robot executes on a PR, PO or invoice document in workflow.
 - When a document reaches the Complete workflow step.
 - When a **spend collection-budget check** workflow step is reached, the system will first **collect spend** from the document. It will calculate the total amount of purchases on a document, then update the appropriate budget amounts to provide an accurate picture of the Held, Committed, Expensed and Remaining amounts on a budget. The system will encumber the spend until the next spend collection-budget check robot executes, or the document completes the approval workflow.
 - Next, the **Budget Check** will compare purchases on the document to the remaining budget amount, and if the budget does not have sufficient funds for the purchases, the workflow step will stop and require some action from an approver.
- A new **Show Budget Details** option has been added to the Available Actions menu. If users want to find out if purchases on a document are within a budget limit before reaching a spend collection-budget check workflow step, they can select Show Budget Details to open an overlay that will show budget information and indicate whether a document is over or under budget.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Virtual Item Master Enhancements

We have been updating the Virtual Item Master feature and expanding the type of information that can be linked to item master items. In recent releases we have added the ability to include custom field information on virtual items and made changes to requisition and search settings so that this information can be displayed on carts and requisitions.

In 20.1, updates include the ability to make an Item Master ID number searchable for non-catalog items and the addition of item Commodity Code Types to item master items.

Customer Impact

- Related Solutions: eProcurement, Virtual Item Master
- 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

- The **Commodity Code Type** field will be displayed on item master items if configured by the organization.

ADMINISTRATOR IMPACT

- The following new fields have been added to item master items. They can be found under **Contracts**  **> Item Master Management > Item Master Items**, on the **Item Details** tab:
 - **Commodity Code Type** - Determines if an item master item that has been assigned to a commodity code is a Product, Service, or neither (None). This field is only displayed on item master items if the **Select to use Commodity Code Type functionality** setting is selected for the Commodity Code configuration.
 - **Selectable for Non-Catalog Item** - Select the checkbox to include the item in the Item Master ID search on non-catalog items. The setting is Off by default. If enabled, when a user creates a non-catalog item and searches for items in the Item Master ID field, the search results will only show Item Master IDs that have this setting enabled. This setting can also be updated via CSV and XML import.

INTEGRATION IMPACT

- The **Commodity Code Type** and **Selectable for Non-Catalog Item** fields have been added to imports and exports.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

This feature does not impact suppliers.

System Calculated Estimated Delivery Date

In 20.1 we have added the ability for the system to automatically calculate an estimated delivery date for hosted catalog items on orders based on estimated lead times provided by suppliers. The estimated date does not take into account things like holidays or shipping methods, but it will provide useful information for customers when they are sending orders to suppliers.

Customer Impact

- Related Solutions: eProcurement
- 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

- If this feature is configured for an organization, the system can calculate an estimated delivery date for a hosted catalog item and display it in the Estimated Delivery Date field. Please note that this is an *estimated* delivery date that does not take into consideration weekends, local holidays, and shipping methods.
- How it works:
 - Users searching for an item can see the delivery lead time entered by a supplier in the **Delivery Lead Time** field on item details.
 - On requisitions and purchase orders, **Delivery Lead Time** and **Delivery Date Type** fields are displayed on hosted catalog line items:
 - The **Delivery Lead Time** field shows the delivery lead time for the item that has been entered by the supplier. When a PO is created the system will add the delivery lead time to the PO creation date to calculate an estimated delivery date for an item.
 - The **Delivery Date Type** field shows how the estimated delivery date will be calculated. It will show one or two options:
 - **Estimated by Delivery Lead Time** - If a delivery lead time has been provided by the supplier, this option is displayed and selected by default. When a purchase order is created, the estimated delivery date will be calculated by the system.
 - **User Specified Date** - Users can choose this option to specify an estimated delivery date in the Requested Delivery Date field.

Users can change the selection at any time, even after the date has been calculated.

Note: If there is no delivery lead time for an item, the Delivery Date Type field is not displayed and the **User Specified Date** field is the only option available.

ADMINISTRATOR IMPACT

- To enable this feature, the **Delivery Lead Time** and **Delivery Date Type** field elements must be added to PR and PO document configurations:
 1. Choose one of the following navigation paths:
 - PR - Setup  > **Configure Documents** > **Configure Requisition Document**.
 - PO - Setup  > **Configure Documents** > **Configure Purchase Order Document**.
 2. Open the **Draft** version of the PR or PO document configuration.
 3. Open the **Layout Details** tab (PR) or the **Summary Page** tab (PO).
 4. Add the **Delivery Date Type** and **Delivery Lead Time** field elements to the document configuration. Select the placement, display order and validation options for the field. Note that these fields are only editable for line items.
 5. Save, finalize, and activate the PR or PO document configuration.
- We recommend changing the name of the **Requested Delivery Date** field in field management to indicate that the field contains a system-calculated delivery date, such as "Delivery Date".
- A new **Delivery Lead Time** system attribute has been added to customer self-managed catalogs and supplier hosted catalogs. The attribute can be updated manually or through XML or CSV imports. It can be manually updated in customer self-managed catalogs as follows:
 1. Navigate to **Contracts**  > **Hosted Catalog Items and Price** > **Hosted Catalog Items**.
 2. Open an item and click the **Basic** tab.
 3. In the **Delivery Lead Time** field, enter a numeric value that represents the **number of days** that it will take for delivery of the item, from the time a supplier receives an order to the time that they'll have it delivered to customer.

Note: There is an existing Lead Time field that is available for suppliers to provide an estimated *shipping* time for an item. This is a text-only field and cannot be used in date calculations.

4. Save changes.

INTEGRATION IMPACT

- XML and CSV Exports have been updated to accommodate the new Delivery Lead Time system attribute.

- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

- A new **Delivery Lead Time** system attribute has been added to supplier hosted catalogs. It can be updated by suppliers in the supplier portal, either manually or through XML or CSV imports.
- On customer orders, when a PO is created the system will add the delivery lead time to the PO creation date to calculate an estimated delivery date for an item.

New Commodity Code Tree Structure

Currently, commodity codes in our system use a 'flat' search format, where users search for commodity codes by entering at least part of a commodity code number or definition. To search efficiently, users need to already know a little of what they are looking for.

In 20.1, we have created a new commodity code tree structure that allows customers to transform their flat commodity code structure into a hierarchical one. Customers can import the hierarchical classification structure that they want to use for commodity codes into the application, and it will be available for use in commodity code searches in Shopping advanced search. This will allow users to drill down through an organization's classification system in the search fields to find the commodity codes they are looking for.

This is the first phase of development that will span more than one release.

Customer Impact

- Related Solutions: eProcurement
- 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

- If this feature is enabled for your organization, users can search for commodity codes using the commodity code tree structure in Shopping Advanced Search:
 1. Navigate to **Shop**  > **Shopping** > **Advanced Search**.
 2. Click the search icon next to the **Commodity Code** search field. The Commodity Code search window opens, and the commodity code tree structure is displayed below the search field.
 3. Navigate through the tree structure and click the checkbox next to a commodity code to select it, or type a commodity code or description in the search field to find matches in the tree structure.
 4. Click **Save Changes**.

- Enable the feature as follows:
 1. Enable the commodity code tree structure setting:
 - a. Navigate to **Setup**  > **Hosted Catalog and Ordering Configuration** > **Category, Commodity and UOM Taxonomy Sets** > **Commodity Code** > **Configuration**.
 - b. In the left menu, expand a taxonomy set and select the **Commodity Code** subheading.
 - c. In the right panel, click the **Configuration** tab.
 - d. Select the **Use group level tree for commodity codes** checkbox.
 - e. Click **Save Changes**.

Note: This setting controls the visibility of the tree structure only and does not affect other imports and exports related to commodity codes.

2. Upload a commodity code tree structure via Import/Export. Commodity codes must already exist in the system to create a commodity code tree:

Note: There is no template for commodity code tree structure imports. Users must first perform an export, make edits within the Excel file and import the file again. Every import replaces the entire commodity code tree structure.

- a. Navigate to **Setup**  > **Hosted Catalog and Ordering Configuration** > **Category, Commodity and UOM Taxonomy Sets**.
- b. In the left menu, expand a taxonomy set and select the **Commodity Code** subheading.
- c. In the right panel, click the **Import/Export** tab.
- d. In the Request panel, expand the **Type** field and select the new **Commodity Group Levels** option.
- e. Perform an export and complete the downloaded Excel file.
 - The exported file contains a Commodity Code Value column and Group Level Name 1, 2, 3, 4 columns. The initial export will list all existing commodity code values and blank Group Level Name columns. Each Group Level Name column represents a level in the commodity code tree structure, up to four levels.
 - For each commodity code, enter where it lands in the commodity code tree structure by entering the name of the top level and sub-levels in the Group Level Name columns.
 - At least one Group Level Name is required for a commodity code to appear in the tree

structure, but not all Group Level Name columns need to be completed.

- Levels must be completed sequentially, i.e., users cannot enter a level 1 group, skip level 2 and populate level 3.
- f. Validate and import the completed Excel file. The imported commodity code tree structure is immediately available in the **Commodity Code** field in the Shopping Advanced Search.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Ability to Update Canceled POs and PO Lines **New!**

Previously, updates were not allowed on purchase orders that are canceled, purchase orders that contain canceled lines, or purchase orders that are closed. In this release we have added a new configuration setting that permits updates to these types of purchase orders.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **OFF** by default
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- If this feature is enabled for your organization, canceled POs, POs with canceled lines and closed POs can be updated.

ADMINISTRATOR IMPACT

A new general document setting allows canceled POs, POs with canceled lines and closed POs to be updated. Enable the settings as follows:

1. Navigate to **Setup**  > **Configure Documents** > **General Document Configuration Settings** > **General Document Configuration**.
2. Select the **Allow PO import to update Cancelled or Closed POs** checkbox. The setting is Off by default. **IMPORTANT NOTE:** If the new setting is enabled, *everything* on a purchase order will be open for editing.
3. Save changes.

INTEGRATION IMPACT

- PO Import, including PO Import and PO Status messages, has been updated to accommodate this feature.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

This feature does not impact suppliers.

New PO Fax Configuration Option

JAGGAER is adding the ability for suppliers to use languages other than English to indicate the unit for a value in the Packaging UOM attribute. A new "Unit Language" attribute identifies the language of the unit used in an item's Packaging UOM attribute, by suppliers, when importing content in their hosted catalog.

For customers, a new **Show Unit Language** setting on the PO Fax document configuration allows organizations to show the unit language selected by suppliers for item packaging and size UOM's on PO distribution documents.

Customer Impact

- Related Solutions: eProcurement
- 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

This feature does not impact end users.

ADMINISTRATOR IMPACT

- A new "Show Unit Language" option is available on the PO Fax document configuration. Organizations can enable the setting if they want to add Unit Language data to their PO distribution documents (fax, email, cXML) as follows:
 1. Navigate to **Setup**  > **Configure Documents** > **Configure Purchase Order Document**.
 2. Click the **Fax** tab.
 3. Open the **Draft** version of the PO Fax document configuration.
 4. Open the **General** tab.

5. Select the checkbox next to **Show Unit Language** to show the unit language selected by the supplier for an item's UOM to be included on PO Fax documents. The language is set to English by default. This setting is Off by default.
6. Save, finalize, and activate the PO Fax configuration.

INTEGRATION IMPACT

- The PO Fax DTD has been updated to include Unit Language.
- **Important!** If an organization uses import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Impact

- A new “Unit Language” attribute can be populated by suppliers when importing content for their hosted catalog.

Updates to New Shopping Experience

In the last few releases we have been updating our shopping cart, checkout, and purchase order user interfaces to streamline, simplify, and modernize the user shopping experience.

In 20.1, the development of the new shopping experience includes many enhancements to the look and feel of the UI, such as new tabs for accessing documents, updated warning and error messages for better impact, and updated address selection options. We have also provided better ease of use for approver users with more accessible approval actions on requisitions, POs, and invoices.

We have also added to the functionality available on carts, PRs, and POs. Enhancements include the ability to edit line items and perform line item actions on POs, a new change request tab that provides options to add and remove change requests, and new document configuration options.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default for users who have enabled the new shopping experience.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

The New Shopping Experience and has been updated with these changes:

- **New and updated tabs** - The following tabs have been added and updated on requisitions and purchase orders. They are displayed along the top of an open document to provide access to additional information and related records:

- On **requisitions**, a new **PO Preview** tab allows users to view purchase orders that would be generated from their requisition prior to placing an order. A new **Attachments** tab provides access to documents associated with the open document.
- On **purchase orders**, new **Status, Revisions, Receipts, Invoices, Attachments** and **Change Requests** tabs provide access to information associated with the open document. The **Change Requests** tab displays change requests associated with a purchase order. New options on the tab allow users to add new change requests and remove draft change requests without going through the document action menu.
- **Error and warning messages** have been revised to provide greater differentiation between an error and a warning. We've also updated the wording for clarity.
- **Address** selection has been updated. We have made the selected address editable and added the ability to remove personal addresses, revert changes to last saved address and save an address to the user's personal addresses.
- The **right sidebar** has been updated and expanded:
 - **Primary actions** have been moved to the right sidebar. These are actions such as **Assign, Approve,** and **Reject** and **Reactivate**. Additional actions are located on the drop down menu next to the header and on line items.
 - **What's next...** actions have been updated and reorganized. Users can click on a workflow step icon or label to display approvers. The workflow inspector can be viewed by clicking on the action menu  next to a workflow step. Users with the appropriate permissions can **expedite** workflow steps.
 - **Related Documents** are now displayed in the right sidebar, with options to open or print the record.
- **Accounting code** functionality has been updated and expanded. We've also restyled the search, select and edit options for account codes. We've added support for non-splittable account code custom fields at the header and line levels of requisitions.
- The **Copy to other line** functionality has been added to Notes.
- The **Catalog Number** is now visible at the line-item level across document types.
- **Discounts, tax, shipping, and handling (DTSH)** can now be updated at the header and line level.
- The **Cart Description** has been added to carts and we've also added the ability to **copy overridden credit card values** to other lines.
- All **Purchase Order elements** are now supported in the New PO experience. On purchase orders, **Line-level functionality** has expanded to include all line action menus and action items, override options and the ability to add and edit discounts at line level.

ADMINISTRATOR IMPACT

- A new **Preview new experience** option on the PR and PO document configuration allows administrators to preview document layouts in the new UI:
 1. Open a draft version of the PR or PO document configuration layout (Setup  > Configure Documents).
 2. Click the **Preview new experience** link in the top right corner of the page. The document configuration as it will appear in the new UI is displayed in a new tab.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Business Analytics Dashboard Enhancements

Business Analytics Dashboards uses Looker to explore data and create reports. Looker is a third-party visualization and data program that is run within JAGGAER ONE.

In 20.1 we have added a new P2P Summary dashboard, and new Overview and Process dashboards to the Global menu, for requisitions, purchase orders and invoices.

- **Overview Dashboards** provide a summary of key KPIs and metrics, as well as a breakdown of the value and number of objects by the main reporting dimensions of time, status, type, owners, etc. Users can filter the data, drill down, or explore the data directly.
- **Process Dashboards** offer key insights into the efficiency of the approval process “workflow”. KPIs and metrics are provided as well as breakdowns by summaries of the overall cycle time and individual approval step times.

New data fields are also available for exploring system data, and the Department field has been added to drill down options.

New dashboards and data fields will continue to be added in future releases.

Customer Impact

- Related Solutions: eProcurement, Invoicing, Contracts+
- 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

- The following dashboards have been added to the Global menu for requisitions, purchase orders, and invoices. They can be viewed as is, or they can be used as a starting point to explore an organization's data and create dashboards and looks. To access the new dashboards:
 1. Navigate to **Reporting**  > **Operational and Site Usage Reports > Business Analytics Dashboards**.
 2. Expand the **Global** menu near the top right corner of the page and select one of these dashboards:
 - **P2P Summary** - The P2P Summary dashboard replaces the Summary Dashboard. It provides a general overview of requisition, purchase order and invoice data. It includes information such as total document amounts, document counts, and the average number days to complete workflow for each document type.
 - **Requisition Overview, Purchase Order Overview** and **Invoice Overview** dashboards provide an overview of data by area. They show information such as document counts and values, the average number of lines on a document, catalog compliance value and percentage, the value and percentage for contract items, and the average number of days to complete workflow. They also include summary reports for: Fiscal Year, Month, Status, Department, Top 10 Owners, Top 10 Suppliers, Item Source, Item Type, and Top 10 Items.
 - **Requisition Process, Purchase Order Process** and **Invoice Process** dashboards focus on approval workflow processes by area. They show information such as the total number of documents, average cycle time, the average approval time, the number of approvers, the number of approvers taking longer than average to approve, and the percentage of documents completing the approval workflow in one day. They also include summary reports for cycle times and approval times.
- The following new options are now available for exploring data:
 - A **Cycle Time Duration** section has been added to **Spend** explore options for PRs, POs and invoices (click Explore and select Invoice - Spend, PO - Spend, or PR - Spend). It contains data fields that can be added to a look to find out how long documents take to process, such as how long it takes to process a document from when it is created to when it completes workflow.
 - A **Grand Total Bucket** dimension has been added to **Workflow** explore options for PRs, POs and invoices (click Explore and select Invoice - Workflow, PO - Workflow, or PR - Workflow). It allows users to determine workflow durations by spend amount groups.
 - The following new data fields have been added to the **Contracts** area: Contract Manager, Business Unit, Department, First Party, Second Party.
 - The **Department** field has been added to Drill Down tables. When users click on a data point to "drill down" into the data, the EXPLORE options allow users to view the related data in a table format. In the table, users can further explore data by clicking on data in a table cell.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.