

20.3 RELEASE NOTES

FOR EPROCUREMENT 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.

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 **20.3 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.

EPROCUREMENT ENHANCEMENTS

SHOPPING AND ORDERING

Document Search Enhancements - Live for All Users With 20.3

For the past several releases, JAGGAER has been rolling out a new search interface. Previously, users had the ability to opt in to the new search via a user profile setting for requisitions, purchase orders, and change requests. In 20.3, **the new search experience will be active for all users**. See the [Document Search Enhancements - New Search Live for All Users With 20.3](#) release note in the General section for more information.

Payment Term Enhancements

In 20.3 we have updated how payment terms work and added new payment term features. See the [Changes to Payment Terms](#), [New Payment Term Types](#), and [New Standard Payment Terms](#) release notes in the General section for more information.

Support Parent-Child Relations for Non-Splittable Custom Fields

With the 20.3 release, JAGGAER has begun the work of updating the account code custom field logic to better support the requirements for accommodating splittable account codes in a parent-child hierarchy. Administrators will see updated options when configuring custom fields to allow combinations of splittable and non-splittable parent and child custom fields. This change affects how **Account Code** custom fields are available for requisitions, purchase orders and invoices, as well as document configuration options. See the [Support Parent-Child Relations for Non-Splittable Custom Fields](#) release note in the General section for more information.

Ability to Remove Attachments from Requests

The [Manage Document Attachments](#) permission allows users to remove attachments from documents regardless of where the document is in workflow. These permissions previously applied to traditional documents (PR, PO, Invoice, Legacy Forms) but did not apply to any type of form requests. Many form requests frequently contain attachments with sensitive information, such as Social Security Number or Tax ID.

With the 20.3 release, the [Manage Document Attachments](#) permission has been expanded to apply to regular attachments and file uploads in all types of Form Request attachments. See [Manage Document Attachments Permission Includes Form Requests](#) in the General section for more information about this feature.

Taxonomy/Unit Changes

As part of our standard process of keeping our Taxonomy (part of the JI eProcurement solution, US and EU instance) as current as possible, we will synchronize it with the latest UNSPSC code set, v23.0701. This work has been performed as part of the 20.3 release and allows suppliers and customers to handle products using the latest UNSPSC codes in our eProcurement solution. See the [Product Release 20.3 Taxonomy/Unit Changes](#) release note in the [Resources > Taxonomy/Unit Changes](#) section of the Product Release Library [here](#) for more information.

Commodity Code Tree Enhancements

In 20.1, we created a new commodity code tree structure that allowed customers to import a hierarchical classification structure for commodity codes into the application and use it for commodity code searches in Shopping Advanced Search. When users are searching for items, it allows users to drill down into a tree structure to select a commodity code, or to find a commodity code in the hierarchy by entering a commodity number or description. In 20.3 we have extended this functionality to line items on requisitions, purchase orders, change requests and invoices in the New shopping experience, New PO experience and New invoice experience views.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **ON** by default for organizations that have enabled the commodity code tree structure feature.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- If the commodity code tree structure has been enabled for your organization, the commodity code tree search is available in Shopping Advanced Search, and on requisitions, purchase orders, change requests, and invoices. This is available in the New shopping experience, New PO experience and New invoice experience views only.
- In the **Commodity Code** field on a line item, users can:
 - **Use the tree to find a commodity code** - Click the search icon next to the Commodity Code field. The Commodity Code search window opens, and the commodity code tree structure is displayed below the search field. Navigate through the tree structure and click the radio button next to a commodity code to select it.
 - **Search by commodity code number or description** - Type a commodity code number or description in the search field to find matches in the tree structure.
- Once a commodity code is found and selected, it is applied to the line item. Only one commodity code can be selected for each line item.

ADMINISTRATOR IMPACT

- If the commodity code tree structure has been enabled for your organization, the commodity code tree search is available in Shopping Advanced Search, and on requisitions, purchase orders, change requests and invoices. This is available in the New shopping experience, New PO experience and New invoice experience views only.
- See **Commodity Code Tree Structure** in the online searchable help for instructions on how to implement the commodity code tree structure feature.

INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Delivery Lead Time for Contract Non-Catalog Items

In 20.1, we added the ability for the system to calculate an Estimated Delivery Date for catalog items, based on a lead time provided by the supplier. In 20.3 we have added this functionality to contract non-catalog items. Customers can include a delivery lead time that has been negotiated with a supplier on contract non-catalog items. When the item is processed on requisitions and purchase orders, the delivery date for the item is automatically calculated by the system so that buyers know when to expect delivery.

Customer Impact

- Related Solutions: 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

- If this feature is enabled for your organization, a delivery lead time can be entered on contract non-catalog items. When a contract non-catalog item with a delivery lead time is on a requisition or purchase order, the system will calculate an estimated delivery date for the item so that buyers know when to expect delivery. Please note that this is an *estimated* delivery date that does not take into consideration weekends, local holidays, and shipping methods.

- How it works:

Note: The Delivery Lead Time and Delivery Lead Time fields mentioned below are only displayed if they have been added to the active requisition and purchase order document configurations. See the Administrator Impact section for more information.

- On **contracts** - A new **Delivery Lead Time (Days)** field has been added to the Contract Non-Catalog Item overlay. When adding a non-catalog item to a contract, users can enter the lead time that has been negotiated with the supplier for that item in the new **Delivery Lead Time (Days)** field.
- On **carts** - Users who are adding a contract non-catalog item from a contract in *Executed: In Effect* status to their cart can see the delivery lead time in the **Delivery Lead Time** field on item details.
- On **draft requisitions** - Fields relating to the delivery date are displayed on a contract non-catalog line item as follows:
 - 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 there is a delivery lead time entered for a contract non-catalog item, "Estimated by Delivery Lead Time" is displayed in the Delivery Date Type field by default. When a purchase order is created, the estimated delivery date will be calculated by the system. This option is not displayed if there is no delivery lead time entered for the contract non-catalog item.
 - **User Specified Date** - Users can choose this option from the Delivery Date Type drop down to specify an estimated delivery date in the delivery date field. If there is no delivery lead time entered for a contract non-catalog item, this is the only option available.

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



- The **Delivery Lead Time** field shows the delivery lead time that has been set for the contract non-catalog item, i.e., 5 days. When a purchase order 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 **Requested Delivery Date** field on draft requisitions shows "no value" as the date is not calculated yet.

Note: The name for the field where the delivery date is displayed is named "Requested Delivery Date" by default. The field may be renamed and displayed as "Delivery Date" or "Estimated Delivery Date" in your application.

- On **submitted requisitions** - The estimated delivery date is calculated when the purchase order is created and it will populate the delivery date field on the requisition. For example, if a requisition was submitted on May 1, and the delivery lead time for a contract non-catalog item is 5 days, the estimated delivery date would be May 6.

- On **purchase orders** - The estimated delivery date is calculated when the purchase order is created, and recalculated for each PO revision. Using the example above, if the PO was created on the same day that the requisition was submitted, the delivery date would not change, it would be May 6. However, if the PO was created at a later date, such as May 7, the delivery date would be changed to May 12 (PO creation date + 5 days delivery lead time).
- On **invoices** and **change requests**, the delivery date fields are populated from the purchase order.

ADMINISTRATOR IMPACT

- To enable this feature, the **Delivery Date Type**, **Delivery Lead Time**, and **Requested Delivery Date** field elements must be on the 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 as "Line only" elements to the document configuration. Select the placement, display order and validation options for each field.
 5. Ensure that the **Requested Delivery Date** field is set to "Line Only".

Important Note: If this feature is enabled, we highly 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" or "Estimated Delivery Date".

6. Save, finalize, and activate the PR or PO document configuration.

INTEGRATION IMPACT

- Contract Non-Catalog Item Import/Export has been updated to include the **Delivery Lead Time (Days)** system attribute, and it has also been added to the Contract Non-Catalog Item Import/Export template.
- **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

- If a customer has enabled this feature and if a contract non-catalog item on a customer order has a delivery lead time, the delivery date for the item will be automatically calculated by the system so that customers know when to expect delivery.

Ability to Add Attachments to ASNs

Previously, it was not possible to add attachments to Advanced Shipping Notices (ASNs) and suppliers could not provide additional information such as product certificates, detailed carrier or shipping schedules, or other useful information on an ASN. In 20.3 we have added the ability for suppliers to add attachments to Advanced Shipping Notices in the supplier portal, and buyer users can view them when they receive the notice.

Customer Impact

- Related Solutions: eProcurement, Supplier Management
- Feature Activation: This feature is **ON** by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- Attachments that have been added to an Advanced Shipping Notice by a supplier are displayed on the **Shipments** tab and **Attachments** tabs (New PO experience view) or in the **Shipping** information section (Classic experience view) of a purchase order.
 - Users can click on the attachment link to view the file or to be taken to the URL, but they cannot remove attachments added to an ASN by a supplier.
 - When users click on a shipment number, they will see the attachment names listed along with the other ASN details.
 - In the Attachments tab, the visibility is listed as "External (Supplier Uploaded)". ASN attachments are not sent out with PO distributions.
- Users need the **PO Line Item Ship Notice** notification enabled to be notified of Advanced Shipping Notices.

ADMINISTRATOR IMPACT

- ASN attachments will respect customer settings for the size of attachments but the system does not validate for the number of attachments permitted by an organization.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

- A new **Attachment** field and **Add Attachment** option has been added to the ASN creation screen in the supplier portal. Suppliers can click **Add Attachment** to upload attachments. Standard attachment types are supported.

- Once an Advanced Shipping Notice has been sent to the customer, the attachments can be viewed but cannot be removed.

Item Master ID Added to Item Types

We have been expanding the type of information that can be linked to item master items in Virtual Item Master to include commodity codes and custom field values. In 20.1, we added the ability to make an Item Master ID number searchable on hosted catalog and contract non-catalog items. In 20.3, we have expanded this functionality to make the Item Master ID available for other item types, including punchout items, classic forms, and form requests.

Customer Impact

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

USER IMPACT

- The Item Master ID field is displayed on punchout items, classic forms, and form requests if it has been set up for your organization. Users can use the type ahead or the search options to select an item master item. If an item master item is selected:
 - Any commodity codes linked to the item master item are displayed in the Commodity Code field.
 - At checkout, any custom field values associated with the item master item will populate the Account Code fields.
 - Commodity code or custom field values populated from the item master item can be overridden by the user.

ADMINISTRATOR IMPACT

- The Item Master ID field is displayed on punchout items, classic forms, and form requests if it has been added to the active requisition and purchase order document configurations.
- See the **Virtual Item Master for Administrators** section in the online searchable help for information about configuring item master items to include commodity code and custom field values.

THIRD-PARTY INTEGRATION IMPACT

- PR and PO XML exports have been updated to include the Item Master ID.
- **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.


Updates to the New Shopping Experience

In the last few releases we have been updating our shopping cart, checkout, requisition and purchase order user interfaces to streamline, simplify, and modernize the user shopping experience. Customers have been able to try the new user interface by enabling Early Access Participation options, which allow users to switch between the new and classic views.

JAGGAER will be progressively phasing out the old user experience views and would ask customers to start proactively switching their users over to the new user experience as soon as possible. In 20.3 we have implemented a number of options to facilitate this transition:

- We have enabled the **Choose your experience**  toggle on our TEST environment (UIT) for all customers that have not yet enabled the new experience views. This allows end-users to switch from the classic user experience view to the new one while creating carts, PRs, POs and invoices. This gives our customers and their users an opportunity to start testing the new user experience view in the TEST environment. This toggle will not yet be automatically enabled on the Production environment so that customers can plan thoroughly before they make the switch. Customers can have our Customer Support team turn off the toggle in UIT if necessary.
- We have implemented an **Early Adopters Feedback Program** for existing customers. The Early Adopters Feedback Program allows for organizations wishing to have an impact on the final development of the new shopping experience to provide feedback directly to the development team, and to have a seat at the table for monthly touch points to address any issues they are having with the interface or experience.

To give us the opportunity to capture gaps in functionality and to give users the opportunity to thoroughly learn the new experience before the old one goes away, when the Early Adopters Feedback Program is enabled,

the application defaults to the new experience views and the **Choose your experience** icon  is not available. If it is necessary to complete a process in the classic view, an organization's administrative user can enable the **Choose your experience** option for a user or user role so they can switch between the classic and new experience views. The administrative user will be prompted to provide detailed feedback, and this will create a record in our application for the development team to review.

- We have created the infrastructure needed to make only the new experience views available for new customers.

Additional enhancements to the new shopping experience include increasing the efficiency of the workflow sidebar, adding more functionality to close gaps between the new and old experience features, modernizing overlays, and making several line-level updates to improve the user experience.


Customer Impact

- Related Solutions: eProcurement, Invoicing
- Feature Activation: Contact JAGGAER to enable the Early Adopters Feedback Program. Additional updates are **ON** by default.

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

USER IMPACT

- **Choose Your Experience**

- For customers that have not yet enabled the new experience views, a **Choose your experience** toggle has been enabled in the UIT test environment so that users can try the new UI:
 - In the UIT environment, shopping and purchase order and pages will open to the classic view as usual, but there will be a **Choose your experience** icon  displayed on these pages. Users can click the icon to switch between the classic and the new experience views at any time.
 - In addition, a **Try the new user experience!** callout in the classic views will direct users to the new experience. The callout displays each time a page is opened until the user selects **Don't show this again**.
 - To help users get started, quick guides to the new experience views are available in the online searchable help under **Documentation for Early Access Features**. Topics in the online searchable help have been updated to include instructions for both the new and classic views.
 - This is only available in UIT! The **Choose your experience** icon will not be available in production unless the Early Access Participation options are enabled.

- **Early Adopters Feedback Program**

- If your organization has signed up for the Early Adopters Feedback Program, only the new experience views are available. Users must contact their administrative user if they cannot complete a function in the new view.

- **New Experience Updates**

The following updates have been made to the new experience views:


General

- Users can change their shopping persona by selecting the **Change Shopping Persona** option on their user profile.
- We have added a message to indicate that a user is viewing a document assigned to another user.
- The document configuration has been updated to render the document configuration layout correctly in the new experience views.
- Yes/no checkboxes have been updated to display a green check if they have been selected, and red x if they are not selected.


Sidebar

- The sidebar has been updated to scroll independently from page content.
- Workflow validation warnings have been updated – errors will show colors along the sidebar (red, yellow, green) during submission.
- Change requests have been updated to show Assign, Approve, and Reject actions in the sidebar.
- Workflow performance has been improved for requisitions, purchase orders and invoices.


Search results and carts

- In the product search results grid view , the full item description is now displayed in search result tiles.
- The **Order from Supplier** link for punchout items is displayed if the **Display PunchOut in Product Search Results** setting is enabled for a supplier. We have also updated the list view so the **Retrieve Price** button is displayed after a user goes to a punchout and returns to the application.
- Supplier details entered manually on a non-catalog item are displayed in carts.
- IE 11 performance has been improved and we have added ability to access grid views.




Requisitions and Purchase Orders


- An option for viewing account codes only has been added to the filter view. When users click the filter view icon  in the top right corner of the page, they can choose to **View All** (header and line items), **View Line Items Only** or **View Accounting Codes Only**.
- Error messages for minimum/maximum limits on contract items are displayed at the line level.
- On line items associated with a contract, the contract number is displayed in the Item Details section. Clicking the contract number will open the Contract Summary page.
- Users can view and edit tax, shipping, and handling information at the line-level of a PO.
- Carrier and tracking number information is displayed on the Shipments tab of a PO.

ADMINISTRATOR IMPACT

- **Choose Your Experience**
 - For customers that have not yet enabled the new experience views, in the UIT test environment *only*, a **Choose your experience** icon  is visible on shopping and purchase order pages. Users can click the icon to switch between the classic and new experience views at any time.
 - In addition, a **Try the new user experience!** callout in the classic views will direct users to the new experience. The callout displays each time a page is opened until the user selects **Don't show this again**.
 - Please contact JAGGAER if your organization needs to turn off the **Choose your experience** toggle in UIT.

- **Early Adopters Feedback Program**

- Please contact JAGGAER Professional Services if you wish to participate in the Early Adopters Feedback Program and switch your default experience to the new UI.
- Once the switch occurs, the application defaults to the new experience views and the **Choose your experience** icon  is not available.
- If there is a process that cannot be completed in the new experience view, organization administrative users with the **Edit All User Profiles/Roles/Permissions** or **Edit All User Profiles Only** permissions (Permission Settings > Administration > User Administration) can enable the **Choose your experience** toggle for a user or user roles as follows:
 1. Go to **Administer**  > **Manage Users** > **Search for Users** or **Setup**  > **Organization Structure and Settings** > **Manage User Roles** and open the user profile or user role.
 2. Click **User Profile and Preferences** in the left menu and select **Early Access Participation**.
 3. Go to the **Enable Shopping Experience Toggle**. Select the **Override** and **Yes** radio buttons, then click **Save Changes**. A feedback form opens. Complete and submit the feedback form to help JAGGAER to identify missing functionality. **Note:** A minimum of 24 characters must be entered in the feedback field before it can be submitted.

The **Choose your experience** icon  is displayed for the user or user role and they can switch between the classic and new experience views.

- The **Exclude from new experience** options have been removed from the Requisition and Purchase Order document configurations.
 - Previously, document configurations showed a "**Exclude from new experience**" option at the field, section and group level for elements that were not available in the new experience view. If enabled, the elements were excluded from the new experience views and a link directed users to the Classic view to complete the process.
 - In 20.3, all the excluded elements are now available in the new experience views and the "exclude" options have been removed from the document configurations. Elements on a document configuration that were previously excluded can be successfully edited in the new experience views.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Business Analytics Dashboard Enhancements

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

In 20.3 we have added receipt-related data to the Business Analytics Dashboards. This includes cost and quantity receipt-related data for purchase orders and invoices, and workflow and cycle time data for receipts.

Customer Impact

- Related Solutions: eProcurement, Invoicing
- 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

Receipt-related data has been added to the Business Analytics Dashboard **Explore** feature:

- A new **Receipt - Workflow** Explore option allows organizations to report on receipt workflow and cycle time data. The Receipt Manager license is needed and Receipt Workflow must be enabled to view this data.
- A new **Accruals** Explore option allows organizations to use purchase order, receipt and invoice data to report on accrual balances. The Order Manager license plus either the Receipt Manager, AP Manager or Invoice Manager license is needed to view this data.
- Receipt data has been added to the **PO - Spend** Explore option. **PO/Receipt Line Level** field groups contain dimensions and measures for receipt data. The Receipt Manager license is needed to view this data.

INTEGRATION IMPACT

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.