



## 22.1 Release Notes

### For General Solution Enhancements

Version: 1.1

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## 22.1 Release Notes Revision History

Version	Date	Description
1.0	February 21, 2022	Initial Version
1.1	February 25, 2022	Update to Feature: <ul style="list-style-type: none"><li>• <b>Supplier Profile - Globalization Enhancements</b> - Feature is ON by default.</li></ul>

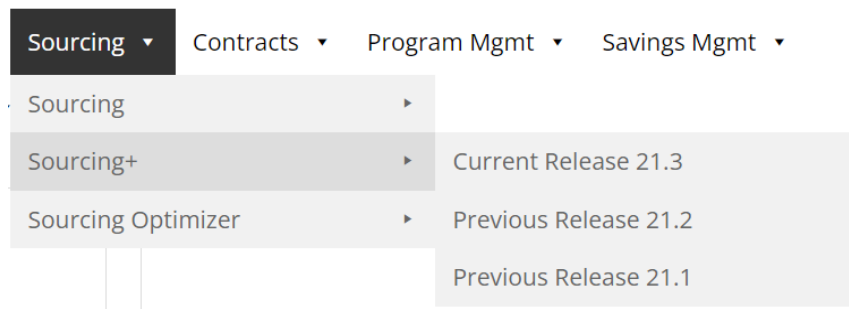
# Welcome

The **22.1 JAGGAER One Product Release** will be available in the production environment starting March 21, 2022. The purpose of Release Notes is to prepare administrators for the upcoming release from an application standpoint.

This document provides **general release notes** related to basics and administration for the following JAGGAER One solutions:

- Contracts+
- eProcurement
- Inventory Management
- Invoicing
- Savings Management
- Sourcing
- Supplier Management

**Important!** Solution-specific Release Notes are available on the release page for each solution on the Product Release Library. The image below is an example of how to access a specific page for a solution.



Please see the main 22.1 page on the Product Release Library to access the Feature Snapshot.

<https://library.jaggaer.com>

**Login Required for Product Release Library: Please see the Home page of the Online Searchable help for credentials.**

## 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.

## Online Help Redesign

Customers and suppliers have access to Online Searchable Help that contains all of the information available in printed handbooks for each solution. Beginning with 22.1, JAGGAER has updated the look and feel of the online help. Highlights include:

- Navigate to solutions easily by selecting a 'tile' from the Home Page.
- Find feature information in a collection of 'articles' with easy navigation to important points and related articles.
- Easily navigate to other articles, solutions and back to the home page.

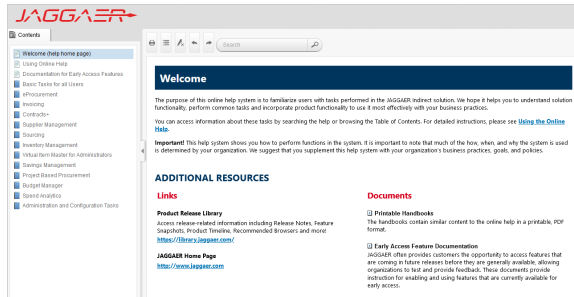
## Customer Impact

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

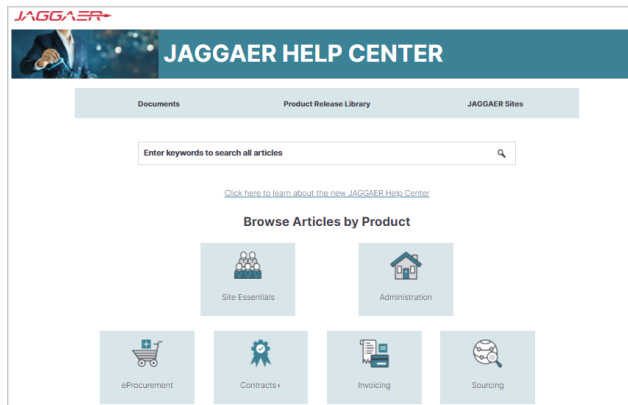
## User Impact

- When accessing the online help, users will see an updated look and feel. The content of the online help is much the same. A slide show on the Home page explains the differences in format.
- **The Home Page** - The Online Help Home page looks different, but continues to provide access to information by product.

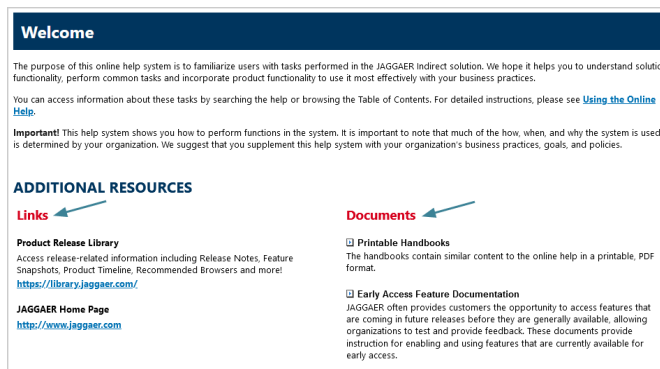
- Each product is listed in a tile instead of a list on the left side of the page.
- Links printed documents and other JAGGAER sites are provided in the dropdown selections in the Top Menu
- **Previous Home Page - Access to Products**



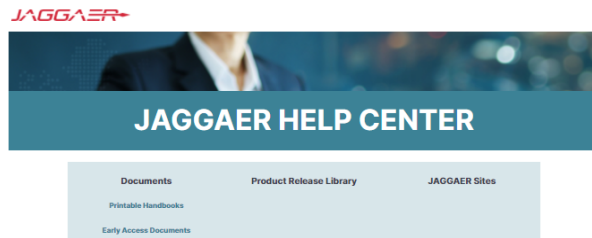
- **New Home Page - Access to Products**



- **Previous Home Page - Links and Documents**

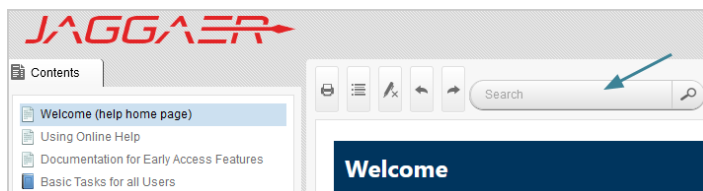


- **New Home Page - Links and Documents in Top Menu**



- **Search** - Search for topics by entering keywords in the indicated text box available on any page.

- **Previous Help - Search Box Above Content Panel**

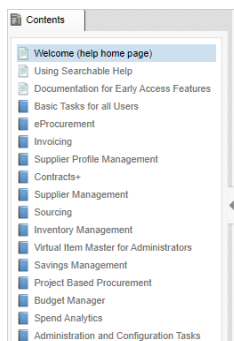


- **New Help - Keywords Search Field**

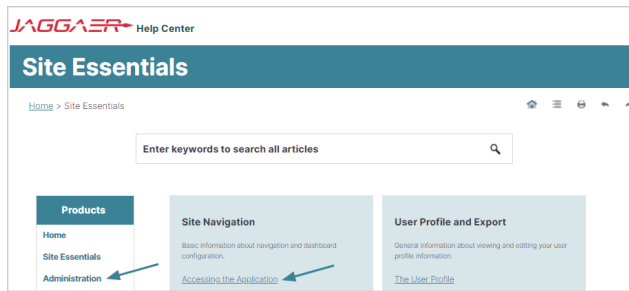


- **Access Articles by Product** - Click a product tile on the Home Page to open the list of articles related to that topic.

- The product pages contain links to articles about the selected product.
  - Click an item in the left menu to go to a different product page.
  - Click a link in a tile to open an article.
- **Previous Help - Expanded the product folder to see many individual topics**



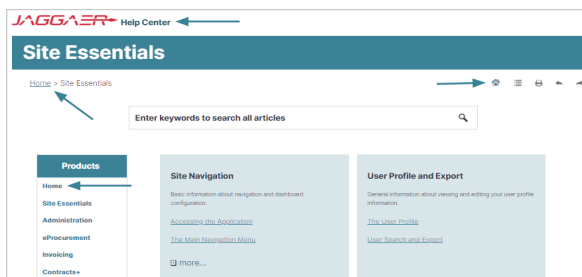
- **New Help - Feature information in 'article' form with easy navigation to topics within that article**



- **The Toolbar** - The toolbar is visible on all pages.
  - Click the Home icon to return to the Home page.
  - Click the expand/collapse icon to expand or collapse all elements in an article, such as togglers, drop-down effects, and expanding text effects.
  - Click the Print icon to open the Print dialog and send an article to the printer

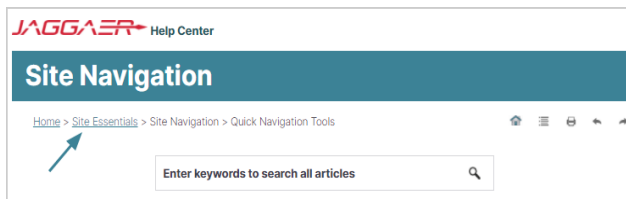


- **Return to Home Page** - Return to the Home page by clicking the JAGGAER logo, the icon in the toolbar, the Home link in the breadcrumb, or the link in the left menu.

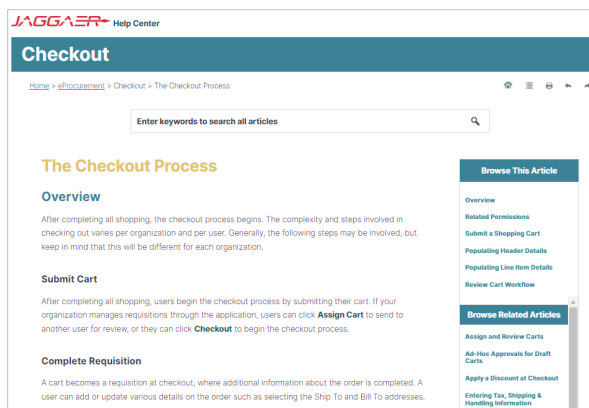




- **Breadcrumbs** - Use active links in the breadcrumbs to navigate to previous pages in the help.



- **Articles** - You might notice some articles in the help are longer than they used to be. If there were many short topics about the same subject in the older version of the help, we combined them into one article so all the information is in one place. Scroll down to view text.
  - Click an item under **Browse This Article** to jump to that section in the article that is open.
  - Select an item in the **Browse Related Articles** menu to open a different, but related article. It will open in a new page. Not all articles have a Browse Related Articles section.



## Administrator Impact

This feature does not impact administrators.

## Third-Party Integration Impact

This feature does not impact any third-party integrations.

## Additional Key Points About the Feature

- If you have questions or suggestions regarding the content and format, contact [documentation@jaggaer.com](mailto:documentation@jaggaer.com).
- There are no changes to how the online help is accessed from within the solution.

## Supplier Impact

- Suppliers will also see the updated help format.

# Supplier Profile - Globalization Enhancements

As JAGGAER moves to a more unified model, there is a need for supplier data to be aligned across applications. This requires not only the ability to create and manage suppliers within each module, but also the ability to have that data saved in a consistent format. In 22.1, the supplier profile identifying information is enhanced to support a global supplier identifier and field requirements consistent across solutions.

## Customer Impact

- Related Solutions: All
- 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 "JAGGAER Supplier ID" on the supplier profile is now labeled **JAGGAER Indirect Supplier ID**.

General Supplier Information	
Supplier Name	Discount Office Supplies, Inc.
Doing Business As (DBA)	Discount Office East
JAGGAER Indirect Supplier ID	100018382
Contract Party Types	Supplier
Active for Shopping	✓
Supplier Classes	➔ ✓ ✨
Web Site URL	<a href="http://www.discountofficesupplies.com">http://www.discountofficesupplies.com</a>
Order Acknowledgment	✗

- The fields for Company Name, DBA and ERP Number fields now support UTF8 coding.

## Administrator Impact

This feature does not impact administrators.

## Third-Party Integration Impact

- The fields for Company Name, DBA and ERP Number fields now support UTF8 coding.

## Supplier Impact

This feature does not impact suppliers.

# Business Analytics - Sourcing Event Data Added

Business Analytics Dashboards are used to explore data and create reports. In 22.1 we have added Sourcing Event data to Business Analytics Dashboards.


## Customer Impact

- Related Solutions: Sourcing
- Feature Activation: This feature is **ON** by default for organizations with the Sourcing license.
- 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

- Sourcing event data has been added to Business Analytics Dashboards. To explore Sourcing data:
  1. Navigate to **Reporting**  > **Operational and Site Usage Reports > Business Analytics Dashboards**.
  2. Click the **Explore** button and select one of these options:
    - **Sourcing - Event Details** (from Setup, User and Supplier sections)
    - **Sourcing - Approval Workflow**
    - **Sourcing - Evaluation Workflow**
- The following Sourcing Event data is not included at this time: item details, evaluation details, custom questions or answers that are associated with the events.

## Third-Party Integration Impact

This feature does not impact any third-party integrations.

## Supplier Impact

This feature does not impact suppliers.

# Business Analytics - Supplier Management Data Added

Business Analytics Dashboards are used to explore data and create reports. In 22.1 we have added Supplier Management data fields to Business Analytics Dashboards.


## Customer Impact

- Related Solutions: 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

This feature does not impact end users.

## Administrator Impact

- Supplier Management data has been added to Business Analytics Dashboards. To explore supplier data:
  1. Navigate to **Reporting**  > **Operational and Site Usage Reports > Business Analytics Dashboards**.
  2. Click the **Explore** button and select one of these options:
    - **Supplier - Registration Workflow**
    - **Supplier - Review Workflow**
- We have added standard diversity fields that are available to every customer with the appropriate license, and several new fields, such as Supplier Classes, Related NAICS and Commodity Codes.
- Supplier data does not include all of the fields that are associated with a supplier registration at this time.

## Third-Party Integration Impact

This feature does not impact any third-party integrations.

## Supplier Impact

This feature does not impact suppliers.

# Contract Type Assistance Selection Enhancement for JAGGAER Assist

In the 21.3 release, we added guided assistance in the selection of the Contract Type, a key contract building block. In the 22.1 release, we are expanding this functionality to allow for the import and export of Contract Type properties. This feature makes it more efficient for organizations to administer Contract Type properties that are used in support of this selection assistance function.


## Customer Impact


- Related Solutions: JAGGAER Assist, Contracts+
- Feature Activation: This feature is **ON** by default, but JAGGAER Assist must be enabled separately.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.

## User Impact

This feature does not impact users.

## Administration Impact

- In order to use this feature, perform the following procedure:
  1. Navigate to **Contracts**  > **Contract Administration** > **Contract Type Search Properties**.
  2. Create category, keyword, and location property options that can be used to effectively characterize the Contract Types established within the module.

3. Once all categories, keywords, and locations have been configured, click the Import/Export button at the top of the page. This will open the **Contract Type Search Property Export** overlay.
4. Use the drop-down menu to select the desired **Action**. The default setting is **Export**.
  - a. If **Export** is selected:
    - i. Click the **Submit** button to proceed.
    - ii. The Contract Type properties are saved as an Excel file. A green **Success** notification will appear on screen. Use the **Click here** link to proceed to the Contract Import/Export Results page. Alternately, navigate to **Contracts**  **> Contracts > View Import/Export Results**.
    - iii. The list of export files is displayed at the bottom of the page. Locate the exported file, which will be labeled "Export of Contract Type Search Property Export" in the **Details** column of the list.
    - iv. Click on the name of the file in the **File** column to download it.
    - v. Open the file using Excel to view it. Each export file is divided into three tabs: Instructions, Properties, and Mappings. Instructions provides detailed information on how the export file is structured and how it can be edited and managed for import.

**Note:** It is best to establish properties within the application prior to export. It is not necessary to modify the Excel file to perform an import.

- b. If **Import** is selected:
  - i. The **File Name** field appears.
  - ii. Click the **Choose File** button to select a properly formatted Excel file to import. **Note:** It is most efficient to use a previously exported Contract Type Search Property file.
  - iii. Click the **Submit** button.

**Important Note:** When performing an import, the entire document is validated before changes are made in the application. If the validation passes, all pre-existing properties and mappings are deleted from the module before the import begins, with the deleted content being replaced by the content of

the import document. The import process is a **complete** replacement process. If the validation fails, the import is not performed, and an error report is generated.

- iv. A green Success notification will appear on the screen, and the user will be automatically redirected to the Contract Type Search Properties page.

### Third-Party Integration Impact

This feature does not impact third-party integrations.

### Supplier Impact

This feature does not impact suppliers.

## Expanded Intent Functionality for JAGGAER Assist

In the 22.1 release, we have further enhanced some of the currently available Assist functionality functional intents. Users are now able to use JAGGAER Assist to filter invoices by due dates, missing receipts, and price/quantity mismatches. Additionally, users can now use Assist to filter POs by missing receipt. Finally, users can filter for approval assignments/opportunities for contracts, purchase orders (POs), purchase requisitions (PRs), sourcing events, and certain form requests, with user-tailored approvals being foregrounded within the smart assistant chatbot.

### Customer Impact

- Related Solutions: JAGGAER Assist, eProcurement, Contracts+, Sourcing
- Feature Activation: This feature is **ON** by default, but JAGGAER Assist must be enabled separately.
- New Permissions related to this feature: None.
- New Notifications related to this feature: None.



## User Impact

- Users may now filter invoices by due dates, missing receipts, and price/quantity mismatches. Sample requests to return results include:
  1. "Show invoices due by March 30," "find invoices due in March"
  2. "Show invoices missing a receipt," "find invoices missing a receipt," "find invoices that need a receipt"
  3. "Show invoices that are over price," "find invoices with over price exception"
  4. "Display my invoices over qty," "display my invoices with an over quantity mismatch"
- Users may now filter POs by missing receipt and change requests. Sample requests to return results include:
  1. "Show POs missing a receipt," "display purchase orders that need a receipt," "find POs missing a receipt"
  2. "Show POs with a pending change request," "find POs with a draft change request," "show POs with no change requests,"

**Note:** Supported change request statuses are: Draft, Pending, Withdrawn, Completed, Returned, Rejected, Canceled, and No (i.e., "no change request").

- Users can now filter for approvals for the following objects: contracts, POs, PRs, sourcing events, and certain form requests (AP, budget transfers, contracts, procurement requests, sourcing events, and suppliers).
  1. When filtering for approvals, users may specify the desired approval type: "show my PR approvals," "find my sourcing event approvals"
  2. If no approval-type is specified, Assist will display all available types as suggestion chips.
    - a. When approval suggestion chips are displayed, users will be presented with "My assigned approvals" first. Selecting this option will direct them to approvals that the user has been assigned, if any. This selection chip will be followed by folders containing approvals that have not yet been assigned directly to the user.
    - b. When a suggestion chip has been selected, a table view will be presented containing the related documents for approval. A maximum of five (5) documents can be concurrently displayed, but clicking the **View All** link will redirect the user to the appropriate approvals page to view all available approval documents of that type.
    - c. Selecting a document within the smart assistant chatbot will redirect the user to that document for appropriate disposition.

## Administration Impact

This feature does not impact administrators.

## Third-Party Integration Impact

This feature does not impact third-party integrations.

## Supplier Impact

This feature does not impact suppliers.

# New Experience View Updates

We have been working hard on updates to the new experience view. Here are some of the enhancements we have made for the 22.1 release:

- We have added the **Supplier Management Home** page to the new experience view to give it a new, modern look. For details about this enhancement, please see [Supplier Dashboard - New Experience](#) in the **22.1 Release Notes for Supplier Management Enhancements**.
- **Drop-down experience selection updated** - The drop-down selection in the new experience view has been updated so that users can now tab, key down and type ahead to jump through a list of values in a drop-down list.
- **Dashboard Updates** - Delete, cancel and editing capabilities have been added to personal dashboards. We have also updated the look and feel on dashboard widgets to match the new experience view.
- **Ability to Create Invoice from the Invoice Summary page** - Create Invoice fields have been added to the Invoice Summary window so that users who have created an invoice can immediately create another invoice without navigating away from the page.
- **Expand/Collapse Line Items - Expand All and Collapse All** options have been added to line items on requisition, purchase order and invoice documents.

## Customer Impact

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

## User Impact

Users will see these updates in the new experience views.

### Supplier Management Home Page Added to New Experience View

- We have added the **Supplier Management Home** page to the new experience view. For details about this enhancement, please see [Supplier Dashboard - New Experience](#) in the **22.1 Release Notes for Supplier Management Enhancements**.

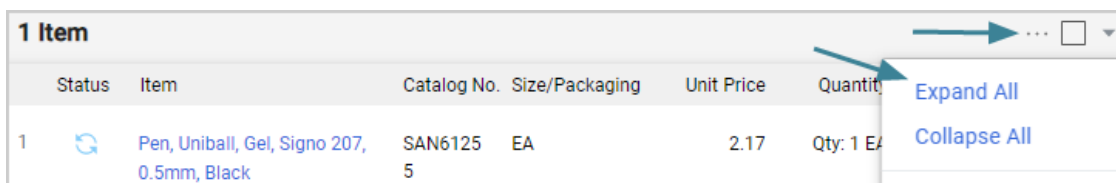
### Drop-down Experience Selection Updated


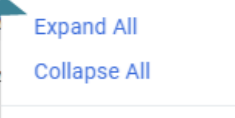
- In 22.1 the drop-down selection in the new experience view has been updated so that users can now tab, key down and type ahead to jump through a list of values in a drop-down list. This is particularly useful when selecting from a large list of account codes.

**Note:** A search box may be displayed in place of a selector in a drop-down field. Users can type in the search box to display matches to the first few characters entered. The search box is displayed based on a pre-set number of values in a drop-down list that is set by your organization (typically 50 drop-down menu items or more).

### Ability to Expand/Collapse Line Items

- **Expand All** and **Collapse All** options have been added to line items on requisition, purchase order and invoice documents.



1 Item						
Status	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	
1	 Pen, Uniball, Gel, Signo 207, 0.5mm, Black	SAN6125 5	EA	2.17	Qty: 1 EA	


### Dashboard Widgets Updated

- The look and feel of these dashboard widgets have been updated to match the new experience view: Draft Carts (My Draft Carts), Purchase Order Summary (My Purchase Orders), Approvals.

### Personal Dashboards Updated

- Editing options have been added to personal dashboards. A new **Cancel** button allows users to return to the previous layout without saving changes. A **Delete** option allows users to remove unsaved dashboards:

#### Edit a Personal Dashboard


1. Open a personal dashboard by selecting the **Dashboards** option on your user profile.
2. On a personal dashboard, click the edit icon  to make changes. Add and rearrange widgets as needed.
3. While in edit mode, click the new **Cancel** button to return to the previous layout. Click the **Save Changes** button when the dashboard is ready to go.

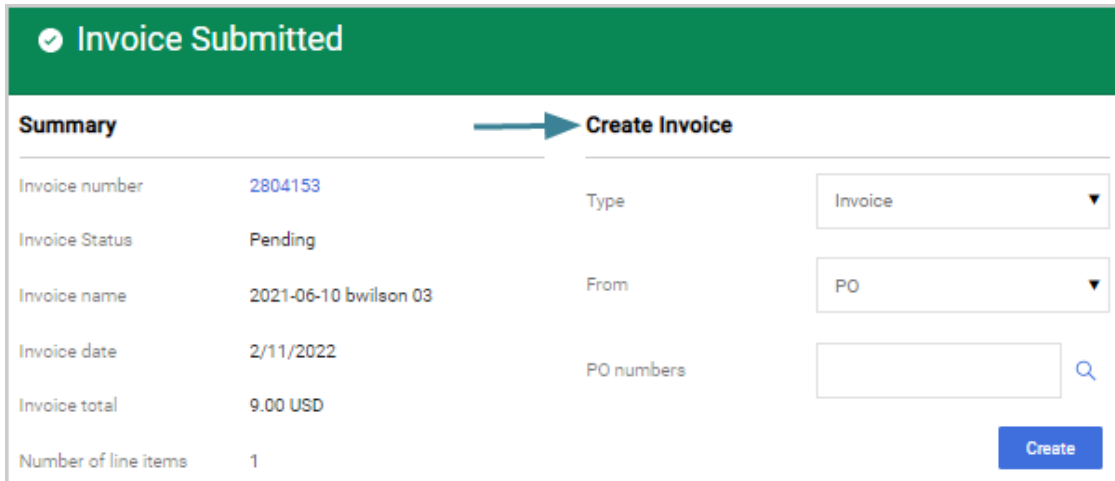
#### Delete an Unsaved Personal Dashboard

1. Go to an unsaved dashboard at the top of a dashboard page.
2. Click the **Delete** button.
3. Click **Yes** in the confirmation window.

### Ability to Create an Invoice from the Invoice Submission Window


- When an invoice is submitted, the **Invoice Submitted** confirmation window shows information about the recently created invoice. In this release, **Create Invoice** fields have been added to this window so that users who have created an invoice can immediately create another invoice without navigating away from the page.
- In the **PO numbers** field, users can begin typing a PO number if they know it, or click the


search icon  and complete the search fields to find a PO number.

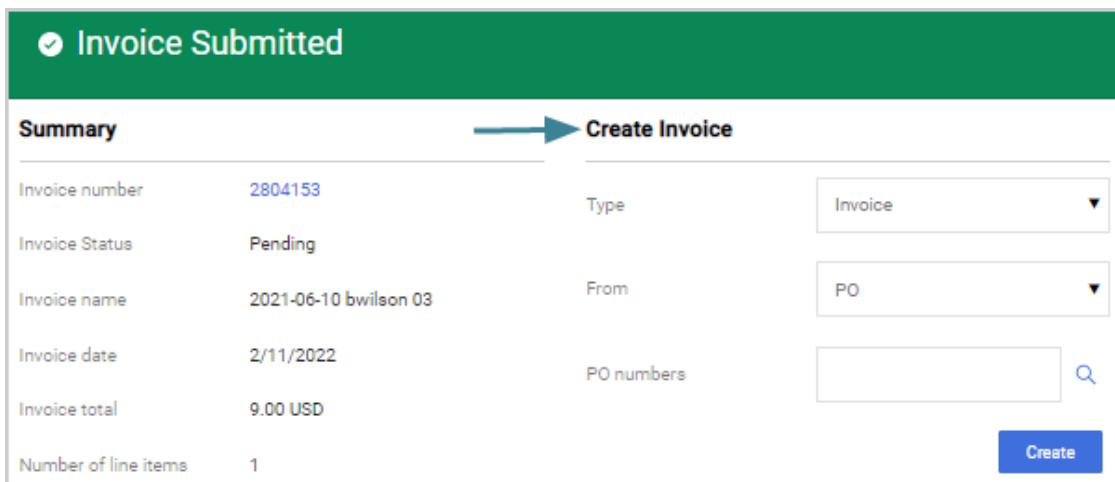


**Invoice Submitted**

**Summary** → **Create Invoice**


Invoice number	2804153	Type	Invoice ▼
Invoice Status	Pending	From	PO ▼
Invoice name	2021-06-10 bwilson 03	PO numbers	<input type="text"/> 
Invoice date	2/11/2022		
Invoice total	9.00 USD		
Number of line items	1	<b>Create</b>	

- In the **PO numbers** field, users can begin typing a PO number if they know it, or click the search icon  and complete the search fields to find a PO number.





**Invoice Submitted**

**Summary** → **Create Invoice**

Invoice number	2804153	Type	Invoice ▼
Invoice Status	Pending	From	PO ▼
Invoice name	2021-06-10 bwilson 03	PO numbers	<input type="text"/> 
Invoice date	2/11/2022		
Invoice total	9.00 USD		
Number of line items	1	<b>Create</b>	

## Administrator Impact

- In the 21.3 release, the following pages were added to the new experience view and a **Choose Your Experience** button  allowed users to switch between the new and classic views at any time. In this release, the Choose Your Experience toggle has been removed and these pages are only displayed in the new experience view:

- **Approvals** search pages
  - **Draft Invoice** and **Draft Receipt** pages
  - **View Draft Invoices** and **View Draft Receipt** search pages
  - **Cost Receipt** and **Quantity Receipt** pages
- The **New Shopping Experience** option has been removed from the **Shop**  > **Shopping** menu.

### **Third-Party Integration Impact**

This feature does not impact any third-party integrations.

### **Supplier Impact**

This feature does not impact suppliers.

## **Credit Card Data Tokenization**

In the 22.1 release, the **Credit Card Data Tokenization** feature will affect eProcurement, Invoicing and Supplier Management. For details about this enhancement, please see **Credit Card Data Tokenization** in the **eProcurement** release notes.