

## 17.2 PRODUCT RELEASE NOTES

### FOR ALL SELECTSITE PRODUCTS IN THE SOURCE-TO-PAY SUITE

JULY 30, 2017 - FINAL VERSION



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# Welcome

The **17.2 JAGGAER Product Release** will be available in the production environment starting July 30, 2017. The release includes features related to the **following JAGGAER products**:

- **All SelectSite Products:** This document focuses on the features for SelectSite products including:
  - eProcurement Products: Spend Director, Order Manager, Requisition Manager
  - Contract Lifecycle Management
  - Total Supplier Manager
  - Sourcing Director
  - Accounts Payable Products
  - Data Manager/Spend Radar
  - Portfolio Savings Manager
- **Contract Director (SaaS Version): Note:** Contract Director features are not included in this document. Information about Contract Director enhancements made between release 17.1 and release 17.2 can be found in the Maintenance Release Notes on the Product Release Library.
- **Advanced Sourcing Optimizer (ASO): Note:** ASO features are not included in this document. Product Release Notes that are specific to ASO are available on the Product Release Library.

## Objectives

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming release from a scheduling and application standpoint. There are two main goals of this document.

- To provide a list of **key dates** associated with the upcoming release, including release availability in both the test and production environment.
- To provide an overview of **key features** that are planned and committed for delivery with the 17.2 release.

As a reminder, please refer to the Product Release Library at any time for updates and additional information regarding the release:

<http://library.sciquest.com>

### This document will help you:

- Prepare for SciQuest products version 17.2 – available in your production environment on Sunday, July 30, 2017.

- 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.

# 17.2 Scheduling

To help prepare our customers for the upcoming 17.2 release, a list of KEY DATES is provided below. Please review the information and mark your calendars accordingly.

## Key Dates

The table below provides a list of key dates for the JAGGAER 17.2 Product Release\*.

Event	Date and Time	Description and Details
Release Promotion: Test Sites Unavailable	Beginning July 7, 2017, 8am ET	The 17.2 release will be promoted to the Test (usertest) environment from Friday, July 7, 2017, 8am ET through Sunday, July 9, 2017 12 pm ET. An email will be sent when the promotion is complete.
Release Validation in Test Environment	July 10, 2017 - July 28, 2017 (Three Weeks)	Three weeks prior to General Availability, release enhancements can be viewed and tested in the Test environment. Draft documentation is provided at this time (Release Notes, Online Searchable Help and Handbooks).  <b>Recommendation:</b> It is recommended that clients perform testing of functionality critical to your business as soon as possible during this period - ideally during the first week. If any issues are encountered, this will allow time for application adjustments and re-testing.
Production Unavailable (Begin Release Upgrade)	Beginning July 28, 2017, 9pm ET through July 30, 2017, 12pm ET	The 17.2 release will be promoted to the Production environment from Friday, July 28, 2017 9pm ET through Sunday, July 30, 2017 12pm ET. An email will be sent out when the promotion is complete.
Release available on Production Sites	Sunday, July 30, 2017	This date indicates when the features and functionality associated with 17.2 will be available on customer Production sites. Final documentation provided at this time (Release Notes, Online Searchable Help and Handbooks).

\* Planned deviations to this schedule will be communicated to customers at least two weeks in advance. JAGGAER is not liable for any system or data issues encountered during the recommended period of system unavailability listed above (release promotion period).

# Training Opportunities

To help prepare you for the 17.2 release, various educational opportunities are provided by JAGGAER. Each of these opportunities is detailed below.

Webinar Name	Date and Time	Description and Details
Preview Webinar (pre-recorded video)	Available June 16, 2017 on the Product Release Library	The pre-recorded video will present a preview of all features coming in release 17.2.
Product Webinars (pre-recorded videos)	Available July 10, 2017 on the Product Release Library	Product-specific pre-recorded videos presenting a preview of features coming in release 17.2.



# The Feature Snapshot for 17.2

The product release provides features that directly impact requisitioners, approvers, administrators, and other system users. These features are listed in summary form in the Feature Snapshot below.

## Snapshot Key

There are seven columns in the **Feature Snapshot**. Each of these is explained below:

- **Feature Name** –The feature title matches the heading found in the Preview Release Notes (this document). For more information on the feature, locate the feature via the table of contents. The features are listed in the order presented in the document.
- **Related Products** – The product or products associated with the enhancement. Use this information to determine if the change impacts your organization. For example, if the change is for AP Director, only those organizations using this product will be affected by the change.
- **Impacted Users**– The user role or roles PRIMARILY affected by the enhancement. For example, if a change is made to the way that a shopper selects a supplier, end user would be listed in this column. For more details, such as level of impact (low, medium, or high), please refer to the feature description. **Note:** This information will be available with the Product Release Notes which will be published prior to the 17.2 release in the Test environment.
- **Integration Impact** - Indicates if the feature may have impact on integration between SelectSite and other third-party systems used by your organization. Examples would be changes to import or export files or features developed expressly for integration. We recommend that administrators review all of these features to determine if there is any integration impact.
- **On by Default** – Indicates that the feature is turned on (enabled) by default and no configuration is required to take advantage of the new functionality.
- **Requires Setup** – Indicates that some type of setup or configuration is required. In most cases, this is simply enabling one or more configuration options and enabling permissions for the appropriate users.
- **Contact JAGGAER**– Indicates that someone at JAGGAER (Customer Support, Customer Success Manager, or Sales) must be involved in order to enable and take advantage of the feature. A new license may be required, workflow changes, etc.

# Feature Snapshot

The following table provides a summary of features available starting July 30, 2017.





Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Simple Cart Updates	eProcurement	End Users	None			
Ability to Apply Discounts when Shopping	eProcurement, Accounts Payable	Admins, End Users	Medium			
Ability to Define Financial Approval Limits for a Specific Currency	eProcurement, Accounts Payable	Admins, End Users	Medium			
Ability to Bundle Items into Kits on a Catalog Item Procurement Form	eProcurement	Admins, End Users	None			
New Shopping Cart Management Page	eProcurement	End Users	None			
PO Change Order Functionality	eProcurement	Admins, End Users	None			
Ability to Manage Brands and Associate with Supplier Profiles	Total Supplier Manager, Accounts Payable Director, Total Contract Manager, Sourcing Director	Admins, End Users	Low			
New Diversity Classifications	All SelectSite Products	Admins, End Users	Low			
Enhancements to Associating Attachments in Supplier Profile Fields	All SelectSite Products	End Users	None			
Updates to Adding and Inviting New Suppliers	Total Supplier Manager, Sourcing Director, Contract Manager Repository, Total Contract	End Users	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
	Manager					
Supplier Registration Field Updates and Instructional Text	Total Supplier Manager, Sourcing Director, Accounts Payable Director, Contract Manager Repository, Total Contract Manager	End Users	None			
Language Support and Enhancements to Configuration Registration Page Enhancements	Total Supplier Manager, Sourcing Director, Accounts Payable Director, Contract Manager Repository, Total Contract Manager	Admins	None			
Language Support and Enhancements to Supplier Portal Configuration Messages	Total Supplier Manager, Sourcing Director, Accounts Payable Director, Contract Manager Repository, Total Contract Manager	Admins	None			
Supplier Invitation Information Update in Supplier Profile	Total Supplier Manager, Sourcing Director, Contract Manager Repository, Total Contract Manager	Admins, End Users	None			
Warning Displays When Attempting to Navigate Without Saving Supplier Profile	All SelectSite Products	End Users	None			
General Enhancements to Supplier Request Functionality	Total Supplier Manager	End Users	None			
Supplier Portal Enhancements for Customer Registrations	Total Supplier Manager	End Users	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Search for Suppliers by Registration Type	Total Supplier Manager	End Users	None			
Enhancements when Returning Registrations to Suppliers	Total Supplier Manager	Admins, End Users	None			
Ability to Select Unsolicited Registration Type	Total Supplier Manager	Admins	None			
Registration Help Pages Separated for Entity Registration Help and Individual Registration Help	Total Supplier Manager	Admins	None			
New Cyber Liability Insurance Type Available	Total Supplier Manager	Admins, End Users	Low			
Ability to Delete Tax Information Record	Total Supplier Manager with Onboarding	Admins, End Users	None			
Evaluated Receipt Settlement from a Purchase Order	Accounts Payable Director, Receipt Manager, Evaluated Receipt Settlement	Admins, End Users	None			
Ability to Include Custom Fields / Codes in OCR/DMR Invoice Import	Accounts Payable Director or AP Express with Digital Mailroom or OCR Invoice Import	Admins	Medium			
Custom Field Enhancements for Invoice Exports	Accounts Payable Director, AP Express	Admins	Medium			
Contract Payment Terms for Non-PO Invoices	Accounts Payable Director and AP Express with Contract Compliance Tracker or Total Contract Manager	Admins, End Users	Medium			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
New Trade-In Configuration Option for Invoice Export Integration	Spend Director, Accounts Payable Director, AP Express	Admins	Medium			
Contract Payment Terms	Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director, Invoice Manager	Admins, End Users	Low			
Ability to Make a Custom Field Visible to Suppliers	Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director, Invoice Manager	Admins, End Users	Low			
Ability to Create ERS Invoices from Contracts	Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director, Invoice Manager	Admins, End Users	Low			
Search Updates	Contract Compliance Tracker, Total Contract Manager	Admins, End Users	None			
New Contract Type Filter on Contract Alerts Widget	Contract Compliance Tracker, Total Contract Manager	Admins, End Users	None			
Comment Field Added to Configure Contract Summary	Contract Compliance Tracker, Total Contract Manager	Admins, End Users	None			
New Fields on Contract Export	Contract Compliance Tracker, Total Contract Manager	Admins, End Users	Low			
Updates to Contract Cycle Time Report	Total Contract Manager	Admins, End Users	None			
New Contract Approval Workflow Option Based on	Total Contract Manager	Admins, End Users	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Account Codes						
New Notification for eSignature Contracts	Total Contract Manager	Admins, End Users	None			
Deliverables & Tasks Libraries	Portfolio Savings Manager	Admins, End Users	None			
Additional Deliverable and Task Enhancements	Portfolio Savings Manager	End Users	None			
Date Validation Removed from Savings Initiatives	Portfolio Savings Manager	End Users	None			
Detailed Savings Report	Portfolio Savings Manager	End Users	None			
Savings Summary Report Updates	Portfolio Savings Manager	End Users	None			
Start Savings Date Editable on Open Initiatives	Portfolio Savings Manager	End Users	None			
Perform Partial Search on Custom Fields	Portfolio Savings Manager	End Users	None			
Ability to Use Product Brand Data with Sourcing Events	Sourcing Director, Total Supplier Manager, eProcurement	Admins, End Users	Low			
Change Event Type by Round for Multi-Stage Events	Sourcing Director	End Users	None			
Create Internal Review Stages for Multi-Stage Events	Sourcing Director	End Users	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Ability to Disqualify Suppliers	Sourcing Director	Admins, End Users	None			
Ability to Assign Groups to Panelist Added to a Published Panel Questionnaire	Sourcing Director	Admins, End Users	None			
Panel Questionnaire Enhancement	Sourcing Director	Admins, End Users	None			
Include Ship-To Address on Events Created from Requisitions	Sourcing Director	Admins, End Users	Low			

# eProcurement Enhancements

This section details eProcurement enhancements that will be available in the 17.2 release.

## Simple Cart Updates

To accommodate some of the new eProcurement features, we have made some minor changes to the simple cart interface. The intention of these updates is to provide a cleaner view of the line items in a cart by consolidating available line options into a single menu.

### Impact

- Products Affected: eProcurement, Accounts Payable
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

### Key Points of Feature

- This feature is **ON** by default.
- New Permissions related to this Feature: None
- Previously, within each line item there were three buttons on the left; **Add to Favorites**, **Remove** and **More Actions**. The More Actions was a drop-down button that contained additional options for managing the line item (*Move to Another Cart*, *Line Item History*, etc.). In 17.2 the buttons on the left have been removed. A single **More Actions** button is now available on the right, directly under the **Update** button. This is a drop-down button that contains all available actions for the line item. Options include *Remove*, *Add to Favorites* and all of the actions that were available from the button on the left.

## Ability to Apply Discounts when Shopping

Often, suppliers will offer discounts on items or groups of items. Previously, there was no mechanism for users to apply the discounts when they were shopping. In 17.2, we have added functionality that allows shoppers to enter manual discounts in the shopping cart and at checkout. Discounts can be applied on both the supplier level (applying a discount to all products from a specific supplier) and the line level. A discount can be an amount or a percentage.

### Impact

- Products Affected: eProcurement, Accounts Payable



- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: Medium

## Key Points of Feature

- This feature is **OFF** by default. Please contact JAGGAER to enable.
- New Permissions related to this Feature: None
- It is important to note that this feature is used for applying MANUAL discounts. While there is an option to include a discount code, there is no validation of that code at this time. Discounts are not calculated by the application. The shopper is required to enter all of the details. It will be important for organizations to establish best practices for using the feature to avoid erroneous discounts.
- **Adding Discounts on the Line Level** - Discounts can be applied for specific line items. **Note:** The following information describes how to access the discount feature for the document type. Please see below for information about applying the discount.
  - **Cart/Draft Requisition** - A line level discount can be applied in the draft requisition.
    - To add a discount in a simple cart, locate the **More Actions** drop-down button. Click the button and select **Add Discount**.
    - To add a discount in a configurable (advanced) cart, locate and click the **Add Discount...** link.
  - **Checkout** - Line level discount can be applied during checkout. To add a discount, locate and click the **Add Discount...** link.
- **Adding Discounts on the Supplier Level** - Discounts can be applied at the supplier level. The discount is taken on all items for that supplier within the document. **Note:** The following information describes how to access the discount feature for the document type. Please see below for information about applying the discount.
  - **Cart/Draft Requisition** - Supplier level discount can be applied in a draft cart/requisition. Supplier items are grouped together in the cart. Locate the supplier group and click the **Add Discount** button in the supplier group header.
  - **Checkout** - Supplier level discounts can be applied at checkout. Supplier items are grouped together on the **Requisition > Summary** tab. Locate the supplier group and click the **Add discount for this supplier...** link.
- **Entering the Discount** - When you add a discount for a line item or supplier, a configuration overlay displays. The overlay displays the supplier name, the discounted line(s) and the price subtotal for the discounted item(s). Configure the following discount fields:
  - **Pricing Code** (optional) - If there's a code associated with the discount, enter it in this field. **Important Note:** This field is optional and is not used to calculate the discount, which is done manually in the following fields.
  - **Apply Discount** (required)- Select **Before Tax Calculations** to apply the discount before taxes or **After Tax Calculation** to apply it after. **Note:** If your organization does not have the tax estimate feature enabled, this field does not display.

- **Discount** (required) - Click the appropriate radio button to determine if the discount will be based on a percentage or amount.
  - **Percentage** - Select this option and enter a value in the field to apply a percentage discount. For supplier-level discounts, the percentage applies to each item. For example, if you apply a 50% discount, each item will be discounted 50%.
  - **Amount** - Select this option and enter a value in the field to apply an amount discount. For supplier-level discounts, the amount is divided among all items and is weighted based on the cost of the item. The discounts for each item add up to the total discount amount. You are able to adjust the amount of the discount per line. To do so, click the **More Actions** button and select **Edit Discount**. **Important Note:** The discounts per line item must add up to the total discount amount for the supplier. You will get an error if you attempt to submit a cart or document with mismatched amounts.
- **Preview Calculations** - Select this link to see a preview of the discount before applying it.
  - If you chose to apply the discount before tax calculations, the information includes the extended price subtotal, discount amount calculated from the extended price subtotal, discounted extended price subtotal, taxes estimated for the discounted extended price subtotal, shipping and handling, and a total.
  - If you chose to apply the discount after tax calculations, the preview will display the extended price subtotal, tax calculated against the extended price subtotal, discount amount calculated on the extended price, shipping and handling, and then a total. For multiple items discounted on the supplier level, the preview shows the totals for all items.
- Discounts applied on the cart or at checkout can be edited on a requisition or purchase order.
  - To edit a line-level discount on a PR or PO, locate and click the **Edit discount...** link for the item.
  - To edit a supplier-level discount on a PR or PO, locate and click the **Edit discount for this supplier...** link for the line
- Discount amounts will carry over from document-to-document. For example, a discount on a PR will be passed to a PO. A discount on a PO will be passed to an invoice, etc. Discount information is also passed to Sales Orders and Sales Invoices.
- Import and Export Impact:
  - The following export types have updated DTD versions available to handle export of discount information: *Purchase Requisition Export XML, Purchase Order Export XML, Invoice Export XML*.
  - The following import types have updates DTD versions available to handle import of discount information: *Purchase Requisition Import XML, Purchase Order Import XML, Invoice Import XML*.
  - Purchase order and requisition document search exports have been updated to include discount information in the export file. It will be included in the transaction and full exports. Discount options are available to be included when creating a custom export template.

- **Important:** Many organizations use exports from SelectSite to integrate with other internal or third-party systems. It's important that you analyze and test updated import files to determine what, if any, impact the updates will have on those integrations. You will need to contact JAGGAER to have the updated DTD versions enabled for import and export.

## Ability to Define Financial Approval Limits for a Specific Currency

Many organizations set financial limits for requisition, order and invoice approval. Approval limits are generally set at the role level and can be overridden at the user level. There are two types of financial approval limits that can be set for a role or user:

- Financial limits for *required approval* (if the document or a line item is above a certain amount it must be approved).
- Financial limits for *approving* a document or document line (the amount up to which a user can approve a document or line item).

In some cases, an approver may be in a location that uses a different currency than the location from which the document originated. Previously, the application could only evaluate approval limits in the default currency for the organization. The limit had to be entered at the exchange rate for the user's currency if it was different than the default. This meant that if the exchange rate fluctuates, the limit amount in the role or user profile had to be manually updated to reflect the new rate. If this action was not taken, a user could potentially approve something above the limit or a document that should require approval could potentially not be sent for approval. In 17.2, we have added a feature that allows organizations to set approval limits for a role or user based on a currency other than the default currency. The limit can then be set in the appropriate currency without the need to periodically update the limit because of fluctuations in exchange rates.

**Note:** This feature is applicable only to organizations using the multi-currency feature.

### Impact

- Products Affected: eProcurement
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Medium.

### Key Points of Feature

- This feature is **OFF** by default. Please contact JAGGAER to have it enabled.
- New Permissions related to this Feature: None
- Approval limits are automatically calculated in the default currency for the organization. This new feature allows the approval limits to be changed to a different currency.

- Approval limit currency applies to all approval types, both for required approval and limits for approving. You cannot set different currencies for different approval types.
- **Role Level Setup:** Approval currency can be set on the role level. The role settings are inherited by users assigned to the role. **Note:** Users must have the currency enabled in the user profile to inherit the currency setting. Please see **User Level Setup** for additional information. To change the currency at the role level:
  1. Access the role for which you want to make the update. Click on **Purchasing** and then **Approval Limits**.
  2. Click the **Edit Section** link in the top-right corner of the screen.
  3. In the **Limits Based On** field, select the new currency. Available options depend on which currencies are enabled for the organization. If there are existing values in the limit fields, those values will automatically be updated to the exchange rate for the new currency.
  4. Click the **Save** button to save the new currency. For additional information about setting purchasing and approval limits on the role level, please see [Managing Roles](#) in the online searchable help.
- **User Level Setup:** A user automatically inherits the currency set on the role level provided the currency is enabled in the user profile. To change the currency at the role level:
  1. Access the appropriate user profile.
  2. To determine if the currency is enabled click on **Order and Approval Settings**, then click on **Currency Access**. If you do not have the appropriate permission to update currency, please contact your system administrator.
  3. Click on **User Purchasing and Approval Limits**.
  4. Click the **Edit Section** link in the top-right corner of the screen.
  5. In the **Limits Based On** field, select the new currency. Available options depend on which currencies are enabled for the organization. If there are existing values in the limit fields, those values will automatically be updated to the exchange rate for the new currency.
  6. Click the **Save** button to save the new currency. For additional information about setting purchasing and approval limits on the user level, please see [Managing Financial Approvers and Approval Limits in the User Profile](#) in **Site Basics Handbook** or the online searchable help.
- Workflow elements have been updated to allow for approval evaluation based on the user's configured approval currency.
- User import and export processes have been updated to be able to pass the financial limit currency. This includes the XML User Import and the XML, CSV and Advanced Tab-delimited user export. **Important:** Some organizations utilize the user export to integrate with other third-party applications. It is important that you review any integrations to be sure the changes to the exports do not impact them.

# Ability to Bundle Items into Kits on a Catalog Item Procurement Form

In some cases, your organization may have the need to bundle products together for ordering. In 17.2, we have added a feature that allows items to be bundled together to create kits. Shoppers can then order multiple kits at a time. For example, you may have to order the same ten items for every new employee. The items could be bundled together in to a "new hire kit". This functionality is available using the Catalog Item Procurement Request Form.

## Impact

- Products Affected: eProcurement
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key Points of Feature

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None
- The new feature is available through the Procurement Request form for catalog items. On this type of form request, the form template creator includes catalog items on the template, which are often groups of related items. Previously, to order multiple "groups" the form would need to be submitted multiple times. The Kit feature allows the shopper to order multiple quantities on a single form.
- In order for this capability to be available to the shopper, it must be turned on by the user who creates the form template. The **Catalog Items** form screen now contains a **Show Kit Quantity** field. Enable this checkbox to make the function available on forms created from the template. For additional information about creating catalog item procurement form request templates, please see [Form Request Setup and Configuration](#) in the online searchable help.
- When the Kit feature is enabled, a **Kit Quantity** field displays to the shopper on the **Catalog Items** screen in the form. The shopper enters a quantity in the field and it multiplies the number of items when added to the cart. **Important Note:** When the quantity is changed in the form, it does not reflect on the Catalog Items screen. The quantities are only multiplied when the form is added to a cart. For additional information about filling out a catalog item procurement form request, please see [Forms and Non-Catalog Entry](#) in the **Shopping Handbook** or online searchable help.
- A decimal quantity can be entered in the **Kit Quantity** field for instances when a partial order of the kit is appropriate. **Note:** If a supplier that does not support decimal quantities receive a kit order with partial quantities, they will be rounded up to the nearest whole number.


# New Shopping Cart Management Page

Often, users within large organizations have multiple carts to manage. Previously, all carts in draft state were displayed in list format on the **Draft Cart** screen, making it necessary to scroll through a large list to locate a cart. In 17.2, we have added a new **View Carts** screen. This screen organizes the view of a user's draft carts. It contains separate tabs for **Draft Carts** (draft carts that have not been assigned to an approver), **Assigned Carts** (draft carts that have been assigned to an approver) and **Shared Carts** (draft shared carts for which the user is part of the shared cart group). You will have the ability to filter carts on each tab. An indicator displays the tab that contains the *Active* cart.

## Impact

- Products Affected: eProcurement
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key Points of Feature

- This feature is **ON** by default.
- New Permissions related to this Feature: None
- The new View Cart page is available by accessing **Shop > My Carts and Orders > View Carts**.
- The View Carts page has three tabs:
  - **Draft Carts** - This tab displays all draft carts that have not been assigned to an approver.
  - **Assigned Carts** - This tab displays all draft carts that have been assigned to an approver.
  - **Shared Carts** - This tab displays all carts for which the user is part of the shared cart user group.
- Filter criteria is available for each tab. The filter criteria varies based on the tab.
- The tab that contains the user's active cart is indicated by the  icon.
- For the UIT period, the **View Draft Carts** page is still available. It will not be available when 17.2 goes to Production.
- For additional information about the new page, please see [The View Carts Screen](#) in the **Shopping Handbook** or the online searchable help.

# PO Change Order Functionality

Currently, in order to do a change order on a PO, a PO revision must be created. The change order cannot be made to the original PO. Over the next two releases, we will be

adding the ability to do a change order without creating a PO revision. Full functionality for this is estimated to be delivered in release 17.3. In 17.2, we are providing an interim solution that allows change information to be entered into a text field on the original PO. The information about the change can then be emailed to selected users.

**Important Note:** The interim functionality is primarily intended to give our customers an opportunity to provide feedback on access controls (permissions, etc.) for the full functionality coming in 17.3. The 17.3 feature will completely replace the 17.2 feature. Please contact JAGGAER to have this feature enabled.

## Impact

- Products Affected: eProcurement
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key Points of Feature

- This feature is **OFF** by default. Please contact JAGGAER to enable.
- New Permissions related to this Feature: The new permissions are located **Permission Settings > Orders > Change Requests**. **Note:** The permissions are not available your site is not enabled for this feature.
  - **Create a Change Request for My Orders** - Allows users to create change orders only for their own orders.
  - **Create a Change Request for Orders in My Department** - Allows users to create change orders for all orders created for their department.
  - **Create a Change Request for Orders within my Department Access** - Allows users to create change orders for all orders for which they have Department document search access.
  - **Create a Change Request for Orders in My Business Unit** - Allows users to create change orders for all orders created for their business unit.
  - **Create a Change Request for Orders within my Business Unit Access** - Allows users to create change orders for all orders for which they have Business Unit document search access.
  - **Create a Change Request for All Orders** - Allows users to create change orders for all orders within the organization.
- For the 17.2 release, change order functionality allows users to provide a text description of the change that needs to be made to the order. When a change is submitted the information is added to the comments section of the document. In addition, it is emailed to users selected on the change request.
- Change orders can be created for purchase orders that have completed PO workflow but still have an open AP Status (for organizations that use JAGGAER invoicing) or PO Status.

- Follow the steps below to create a change request:
  1. On the purchase order, locate the **Available Actions** menu. Select the **Create Change Request** option and click **Go**. The **Create Change Request** overlay displays.
  2. Configure the email recipients. The screen will automatically display the Prepared By user, users who have approved workflow steps and users who have made comments on the PO. You can select from those users and/or click the **add email recipient...** link to include more users. Email recipients will automatically receive a system email with the change order text configured in the next field.
  3. Enter a description of the change in the text field.
  4. Add and configure any attachments.
  5. Click **Create Change Request**.
- The change request is stored in the **Comments** tab of the purchase order. It can be distinguished from the general comments by the **Change Request Created Date** that displays.



# Supplier Management Enhancements

This section focuses on enhancements in the 17.2 release related to Supplier Management activities.

## Ability to Manage Brands and Associate with Supplier Profiles

Many organizations would like the ability to associate brands with suppliers in their network. These brands assist customers with the shopping and sourcing processes. With the 17.2 release, customers now have the ability to upload and manage a brand list, and to associate brands with supplier profiles.

With this feature enabled, a new **Manage Brands** page is available under the **Suppliers > Configurations** section. There, users can import a file or add/manage brands through the UI. A list of the Brands can be exported as well. A new **Brands** field displays in the Supplier Profile under the Products/Services section on the **About > General** page, where you can manage the brands associated with the specific supplier. Customers with the Sourcing Director product can use product brand data during the administration of sourcing events.

The brands field has been added to the Supplier XML Import/Export message. Also, a new Supplier Brands option is available for selection when requesting a Supplier CSV Export from supplier search results.

Also with this feature, the advanced supplier search contains new criteria in order to search for suppliers based on available Brands.

**Note:** Brands are displayed to suppliers in the Customer Branded Portal as read-only. The supplier cannot make any changes to the Brands field; values are managed only by the customer organization.

### Impact

- Products Affected: Total Supplier Manager, Accounts Payable Director, Contract Manager Repository, Sourcing Director
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: Low

### Key points of Feature

- This feature is **OFF** by default and you must contact JAGGAER to enable.
- New Permissions related to this Feature: None
- With the 17.2 release, contact JAGGAER to enable the Brands feature. Enabling the setting allows access to:

- New **Manage Brands** page under **Suppliers > Configurations** page.
- New **Brands** field on supplier profile (customer internal view).
- New **Brands** field on supplier advanced search.
- New page available: **Suppliers > Configuration Settings > Manage Brands**. The **Manage Registration Configuration** permission (Permissions > Administration > Supplier Administration) is required to see and manage values on this page. All Brands available to the organization are listed on this page. Only those values listed are available to associate with suppliers.
  - You can add Brands individually through the UI, or via an import file.
  - Select **Add Brand** to add a new brand name to the list in the UI. In the **Add Brand** overlay, enter a **Brand Name** and click **Save Changes**.
  - To import a list of brand names in bulk, select **Brands Import/Export** from the **Add Brand** dropdown:
    - In the **Brands Import/Export** overlay, select **Import CSV** from the dropdown and provide a **Description** of the file you are importing.
    - Select the **Browse...** button, and choose the .csv file with the brand information. Click the **Submit** button.
    - The results of the import can be found at **Administer > Administration > View Import and Export Results**. You can access the error file on that page to view what values were not imported and why.
    - The import file format is a single column with the heading "Brand Name" and saved as a .csv file.
  - To export a list of brand names, select **Brands Import/Export** from the **Add Brand** dropdown:
    - In the **Brands Import/Export** overlay, select **CSV Export** from the dropdown and provide a **Description** of the export request. Click the **Submit** button.
    - A confirmation message displays that your request is processing. The export file can be found at **Administer > Administration > View Import and Export Results**.
  - When Brands are added via the UI or via Import:
    - The value cannot exceed 100 characters.
    - Capitalization is ignored, and special characters and spaces are removed when evaluating for duplicate values. For example, "Dell" and "dell" are considered duplicates, but "Dell Corporation" and "Dell" are not considered duplicates. "Jones & Company" and "Jones Company" are duplicates, while "Jones & Company" and "Jones & Co." would not be considered duplicates.
    - If an exact match is found to the entry, an error message displays indicating the duplication and you must enter another value.
    - If an exact match is not found to the entry, the new Brand Name is added to the list.
  - Once added to the list, a **Brand Id** is displayed with the Brand name. The **Brand Id** is system-generated and cannot be changed.

- To delete a value, select **Delete Brand** from the dropdown in the Actions column:
  - A confirmation message will display. Select Yes or No to proceed with the delete action.
  - When a Brand is deleted, the value is removed from all suppliers profile to which they are associated.
- To edit a value, select **Edit Brand** from the dropdown in the Actions column.
- You can search the brand list by entering a term in the search box on the Manage Brands page.
- The **History** page for the **Configuration Settings** section captures changes to the **Manage Brands** page.
- The **Advanced Supplier Search** contains a new **Brands** criteria under **Products and Services** section. When one or more values are entered, the search will return suppliers with any of the values.
- A new **Brands** field displays in the Supplier Profile under the **Products/Services** section on the **About > General** page.
  - Select the **Edit** button to display the Brands overlay.
  - Begin entering a brand name or select the search icon to see a complete list. Select the appropriate Brands for the supplier. If a large list is available, you can select to Filter By brand name or to show only selected brands. You can also manage the number of brands displayed per page in the overlay.
  - Once saved, the Brands field displays the number of Brands selected. Click the link to see a hover list of the values, up to 50. If more than 50 brands are associated, the user will have links to navigate the list. If only one brand is associated, that Brand is displayed instead of the link.
  - History for the Supplier Profile captures the changes made to the Brands field. Supplier Profile History is not logged if a Brand is removed from the organization Brands list that was associated with the supplier.
  - Only those values in the Brands list are available to be associated with suppliers.
  - Suppliers see the Brands field in the Customer Branded Portal as read-only and cannot make edits.
- Customers with the Sourcing Director product can use product brand data during the administration of sourcing events. See [Ability to Use Product Brand Data with Sourcing Events](#) for more information.
- Brands are included in the **ERP Sync** message.
- The new Brands field in the supplier profile has been added to the **Supplier XML Import/Export**.
  - If the XML file includes a valid Brand Name, the import will update the supplier record appropriately.
  - If no match found, an error will result and the Brand value will not be loaded to the supplier record.
  - Brands information is included in the Supplier XML export message.
- A new Supplier Brands selection is available when **requesting an export of suppliers** from supplier search results.

- When selecting to request an export of supplier search results, the **Request Export** overlay contains a **Supplier Brands** selection under the **Supplier Related Information** section.
- When this section is selected, the Supplier Brands information will display in the Excel export file as a separate datasheet.
- The information provided for the Supplier Brands sheet includes: JAGGAER Supplier ID, Supplier Name, Supplier Number, Brand ID (pipe delimited), Brands (pipe delimited).

## New Diversity Classifications Available

JAGGAER continues to address customer needs related to tracking important diversity information for suppliers by adding new classifications from time to time. With the 17.2 release, several new **State of Oregon** diversity classifications are available. Also, several other miscellaneous classifications will be added that are included in a new **Other Diversity Classifications** section. Customers with the Total Supplier Manager, Sourcing Director, Accounts Payable Director, or Total Contract Manager license must enable the new classifications in order for them to be visible in the customer's supplier portal. All other customers have the new classifications available by default for selection on the supplier profile.

### Impact

- Products Affected: All SelectSite Products (additional configurations needed in Total Supplier Manager, Sourcing Director, Accounts Payable Director, and Total Contract Manager)
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

### Key points of Feature

- This feature must be enabled for supplier use by customers with Total Supplier Manager, Sourcing Director, Total Contract Manager, or the Accounts Payable Director license. It is on by default for all other customers.
- New Permissions related to this Feature: None
- There are new **State Diversity Classifications** are available for selection on the supplier profile. The new classifications are:
  - State of Oregon Minority/Women Business Enterprise (OR-MWBE)
  - State of Oregon Emerging Small Business (OR-ESB)
  - State of Oregon Service Disabled Veteran (OR-SDV)

- There is a new **Other Diversity Classifications** section available when configuring the visibility of classifications, and when selecting a type of classification to add for a supplier profile. New classifications in this section are:
  - Any Fed, State or Local Agency (EUS)
  - Education Institution, not MIT (LED)
  - Hospital/Health Agency (LHO)
  - MIT, any Inter-org. activity (EMT)
  - Non-Profits, not ED or HO (LNP)
- TSM, Sourcing Director, Total Contract Manager, and AP Director customers can select the new diversity classifications to be available to suppliers in the Customer Branded Portal via **Suppliers > Configuration Settings > Diversity Configuration** in the **State Diversity Classifications** section (assuming that Diversity is configured to show in the Branded Portal under Registration Configuration).
- Suppliers will have the ability to select the new classifications in their network supplier profiles, but can select it for customer specific profiles only for those customers who have made the new classification visible.
- A customer user with appropriate permissions may choose to enable the new classification for the supplier in their view of the supplier profile.
- The new state classifications are listed on the **Supplier Dashboard** in the **Supplier Diversity Dashboard** section. Customers can choose to hide the classifications from display within the application via field management.
- The new section and classifications are available in the Diversity Classification search criteria in advanced supplier search.
- The new classifications can be included in the TSM Supplier Import/Export.
- For more information about diversity selections, see [Diversity Classifications](#), and [Managing Diversity Selections in the Supplier Profile](#).

## Enhancement to Associating Attachments in Supplier Profile Fields

In other areas of the application such as Sourcing Events, users have the ability to "drag and drop" attachments instead of clicking to browse for and upload a file. With the 17.2 release, this functionality is also available for associating attachments in supplier profile fields. This includes attachments associated with Diversity Classifications, Insurance Certifications, Tax Backup Withholding, Certificates or other documents. Suppliers will see this same functionality in the Customer Branded Portal when completing registration information or updating profile fields.

Also, the attachment reference will now show as a link in the supplier's **History** log. Previously, the **History** log only captured when a change was made to an Attachment field, and listed the document name. With this release, the attachment displays in History as a link so that a user can download/view it.

## Impact

- Products Affected: All SelectSite Products
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- When selecting to include an attachment in a supplier profile field, the user can associate the attachment in either of these ways:
  - Click the **Select file** button, and choose the appropriate file from your computer or device.
  - Drag and drop the file on your computer or device into the gray area next to **Select file**.
- You may choose to give the document a different name than the actual file name by simply editing the value once it has been associated. This does not change the underlying document name itself. For example, you may load up a document that is "RequestedReferences.docx". Once associated, you can edit the document name to be "References" only. When the document is downloaded or opened, it will have the title RequestedReferences.docx.
- Attachment references are now captured in the **History** log for the supplier. A user can select the attachment reference to download and open it.

## Updates to Adding and Inviting New Suppliers

Customers with Total Supplier Manager, Sourcing Director, Contract Manager Repository or Total Contract Manager have the ability to add new suppliers and invite suppliers to register with the organization. Currently, there are two separate actions for adding or inviting a new supplier. With the 17.2 release, a supplier can be invited at the same time a new supplier is added.


The underlying functionality for adding and inviting suppliers has not changed. Also, a user can continue to invite a supplier from search results or from the supplier profile record.

## Impact

- Products Affected: Total Supplier Manager, Sourcing Director, Contract Manager Repository, Total Contract Manager
- End User Impact: Low
- Admin User Impact: None

- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- When selecting to **Add Suppliers** from the **Suppliers**  > **Manage Suppliers** menu, an **Add Supplier** overlay displays. After completing the required information, the user will see the option **Do you want to send the supplier an invitation to register?**
  - The default response selected is **No**, in which case the user can proceed with simply adding the supplier record without inviting the supplier at the same time.
  - If the user selects **Yes**, additional fields display in order to send the invitation to the supplier user at the time the supplier record is added to the system.
  - **Note: Total Supplier Manager** customers can select from different **Registration Types** in the **Add Supplier** overlay.

## Supplier Registration Field Updates and Instructional Text

The **Additional Products and Services** field on the supplier profile is a field that can contain keywords associated with the supplier's products or services. These terms are factored into product search results. With the 17.2 release, the **Additional Products and Services** field has been renamed to **Keywords**. This change is reflected in the supplier profile in both the customer and supplier views. The **Keywords** field will also be available on the Advanced Supplier Search.

Previously, **Instructional Text** could be included with three fields in the registration forms: Dun & Bradstreet, Legal Structure, Annual Revenues/Receipts. With the 17.2 release, **Instructional Text** is configurable in multiple languages by the customer for these three fields as well as all standard fields in the following sections:

- Company Overview
- Business Details
- Certify and Submit
- Custom Profile Fields (**Total Supplier Manager** customers)


**Note:** The current default Instructional Text available for **Dun & Bradstreet**, **Legal Structure**, and **Annual Revenues/Receipts** fields will be migrated to new fields and saved as default English text.

## Impact

- Products Affected: Total Supplier Manager, Sourcing Director, Accounts Payable Director, Contract Manager Repository, Total Contract Manager

- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- The **Additional Products and Services** in the supplier profile has been renamed to **Keywords**. The stored values for the field have not changed. This field is displayed in the following locations in the supplier profile:
  - The **Products and Services** widget on the **Supplier 360** page.
  - Under the **Products/Services** section on the **General** page.
- The **Keywords** field has been added to **Advanced Supplier Search** under the **Products/Services** section. A user can enter multiple keyword values to return suppliers with any of the values. Also, the **Keywords** field is now a filter in the supplier search results.
- **Instructional Text** can now be configured for many standard fields and custom profile fields in the registration configurations for fields in the following sections:
  - Company Overview
  - Business Details
  - Certify and Submit
  - Custom Profile fields (Available to customers with the Total Supplier Manager license)
- To enable **Instructional Text**, select a **Help Style** for the field. The default value is None, meaning no instructional text will display to the supplier.
  - **Inline** help is displayed above the field in a blue informational bar.
  - **Icon** help will display when a user hovers over the blue help icon  for the field.
  - Once you have selected a Help Style, click the **Edit Instructional Text** button to enter the text and apply formatting. Select from your organization's configured **Languages** to also enter instructional text in a different language. Click **Save** to save your text. Click **Save** for the field on the registration profile configuration.
- The previous default Instructional Text available for **Dun & Bradstreet**, **Legal Structure**, and **Annual Revenues/Receipts** fields has been migrated to the new fields and saved as default English text. If you had help for these fields enabled, you do not need to enable it for these fields again.



# Language Support and Enhancements to Configuring Registration Page Messages


Currently, customers can configure a Registration Welcome message, Registration FAQ, and Registration Create Account Page message that display for suppliers registering for a Customer Branded Portal. However, the messages were previously configurable in a single language only. With the 17.2 release, the **Registration Help** page has been renamed to **Entity Registration Help**. Customers have an enhanced UI that allows configuration of the Registration Welcome Message, Registration FAQ and Registration Create Account Page in multiple languages enabled for the organization.

An enhanced UI supports better usability and the ability to preview the messages in the configured multiple languages. Suppliers viewing the pages will have the option to select a different language if the message has been configured as such.

## Impact

- Products Affected: Total Supplier Manager, Sourcing Director, Accounts Payable Director, Contract Manager Repository, Total Contract Manager
- End User Impact: None
- Admin User Impact: Admins
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- The Registration Help page located at
- The Registration Help page available under **Suppliers**  **> Configuration Settings > Registration Configuration** has been renamed to **Entity Registration Help**.
  - **Note: Total Supplier Manager** customers will see a separate **Individual Registration Help** page. See [Registration Help Pages Separated for Entity Registration Help and Individual Registration Help](#) for additional information.
- The **Entity Registration Help** page contains the configuration for the organization's Registration Welcome, Registration FAQ, and Registration Create Page message. With 17.2 go-live, the messages will contain the same information as the organization had saved in the Registration Help page messages prior to 17.2.
- Previously, the content for the message was displayed and editable on the page. With this release, an **Edit Message** button is selected to create or make edits to the content.
- When the **Edit Message** button is selected, an overlay displays for editing content in the organization default language. Select from the organization's configured Languages to create/edit content for the message in other languages.

- Select the **Preview Message** link for any of the messages to see how it will appear to suppliers. The Preview overlay also allows you to see the message in other configured languages.

## Language Support and Enhancements to Supplier Portal Configuration Fields


Customers can configure the display, messages, and options for their Customer Branded Portal Login and Home pages. Previously, the messages on this page could only be configured in a single language. With the 17.2 release, customers can configure the Supplier Portal options and messages in multiple languages that the organization supports. Also, an enhanced UI allows the user to preview the messages in the configured multiple languages.

Suppliers viewing the pages will have the option to select a different language if the message has been configured as such.

### Impact

- Products Affected: Total Supplier Manager, Sourcing Director, Accounts Payable Director, Contract Manager Repository, Total Contract Manager
- End User Impact: None
- Admin User Impact: Admins
- Integration Impact: None

### Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- The Supplier Portal configurations for Login Message, New Suppliers Message, and Supplier Home Page message are configured at **Suppliers  > Configuration Settings > Supplier Portal Configuration**. With the 17.2 release, these messages can be configured in multiple languages.
  - Select **Edit Message** to view the Edit Translations overlay. Enter or edit the message, using the formatting tools. The ability to compose a message with the formatting tools is not new.
  - Select from the **Languages** options to compose the message for that language.
  - Click to **Save** the message content.
- Click **Preview Supplier Portal Login Page** or **Preview Supplier Portal Homepage** links to view the configured messages. Select a different language from the language button to view the page in other configured languages.

# Supplier Invitation Information Update in Supplier Profile

Currently in the **Supplier Profile**, the **Summary** page lists the **Invitation Sent By** information including the user who sent the invitation, along with the date and time the invitation was sent. With the 17.2 release, **Invitation Sent To** information is also now listed. The last supplier user to whom the invitation was sent, date and timestamp is displayed. Hovering over the Sent By or Sent To user's name displays the email address and phone number for that user.

## Impact

- Products Affected: Total Supplier Manager, Sourcing Director, Contract Manager Repository, Total Contract Manager
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- On the Supplier Registration, **About > Summary** page in the **Supplier Registration Information** section.
  - **Invitation Sent to** is displayed along with a timestamp. Hovering over the name displays the provided email address and phone number.
  - **Invitation Sent by** was displaying prior to 17.2. With this release, however, the timestamp displays.
- The information displayed is for the most recent type of invitation sent and by whom.

# Warning Displays When Attempting to Navigate Without Saving in Supplier Profile

Previously if a user entered data in the supplier profile and navigated away from the page before saving, the user's changes would be lost. With the 17.2 release, a user will now see a warning if they attempt to navigate away from a supplier profile page that has not been saved. The user will see a confirmation for **Do you want to leave this site?** and have the option to **Leave** the page or **Stay** on the page. If the user chooses to leave, any changes made to the page will be lost.

## Impact

- Products Affected: All SelectSite Products
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- A warning message now displays to users when attempting to navigate away from a supplier profile page where changes have not been saved.
- The user will see a warning for **Do you want to leave this site?**
- The user has the option to **Leave** the page or **Stay** on the page.
  - If **Leave** is selected, the message closes and the user is navigated away from the page and any changes will not be saved.
  - If **Stay** is selected, the message closes and the user remains on the page. The data can be saved and the user can navigate to another page without the warning.

# Total Supplier Manager

This section focuses on enhancements to the Total Supplier Manager product, in addition to general enhancements.

Please note that several features explained in other sections of this document also impact Accounts Payable products. Select a link for more information about:

- [Supplier Management](#)
- [eProcurement](#)

## General Enhancements to Supplier Request Functionality

Supplier Requests help to automate the process of creating a new supplier and reduce manual work required for supplier managers. Now that this feature has been available for some time, we have identified ways to streamline the process and reduce the time required to complete the request, while increasing adoption and usage of the feature.


With the 17.2 release, several enhancements have been made to the supplier request process, including:

- Renaming the Manage Supplier Requests page to **My Supplier Requests**, and adding two new columns to the page for Registration Status and Supplier Profile. Some columns have been removed or renamed as well.
- The **ability to request a supplier** when a supplier cannot be found while in another activity, such as a sourcing event or placing a non-catalog order.
- The **Form Request Actions link** visible to approvers is now present on each page of the Supplier Request once it is submitted into workflow.
- Upon Supplier Request Approval, a **link to invite the supplier to register** displays in the approval confirmation message. This makes it easier to invite the supplier at the point a supplier request is approved, and not have to navigate to invite the supplier separately. A link to return to the supplier request is available to easily navigate back to the supplier request page.
- Including the Supplier Request information on the **Summary** page of the supplier profile.

### Impact

- Products Affected: Total Supplier Manager
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- The Manage Supplier Requests page (**Suppliers**  **> Requests**) has been renamed to **My Supplier Requests** to better reflect the information on the page.
  - The **Filter Supplier Requests** is expanded by default when you land on the page. Previously, the filter was collapsed. Select or deselect **Request Status** and click **Apply** to see results.
  - The Supplier Name column has been renamed to **Requested Supplier**.
  - The **Requested By** column has been removed. Since the page only displays the logged-in user's requests, this information is not needed.
  - A new **Supplier Profile** column displays in results. If a profile has been created, click the link to navigate to the Supplier Profile. If the supplier has not yet been created in the system, no information will be displayed
  - A new **Registration Status** column displays in results.
  - When selecting the **Supplier Name** link to view the request details:
    - A new link displays to **View Supplier Profile**, if one exists, under the requested supplier name. Select this link to navigate to the supplier profile page.
    - A new link displays to navigate to **My Approvals** to see the workflow for the supplier request. This link will not display if the request has not been submitted to workflow.
    - The link for Back to Manage Supplier Requests now displays as **My Supplier Requests** in the top left to navigate back to **My Supplier Requests** page.
- Users will see a link to **request a new supplier** while in the process of completing other activities when a supplier cannot be found. Message that no matching supplier found and link to create a new supplier request. Areas where the link will show are:
  - Non-catalog item
  - Trade-in
  - Sourcing Event (suppliers tab)
  - Contract Creation
  - Contract request
  - Check request/credit memo
- If the user selects to proceed with creating the new supplier request, a confirmation message displays indicating the user will be navigated away from the current page and changes may be lost. If the user confirms (selecting Yes), the **Request New Supplier** overlay displays. There are no changes to the actual supplier request process.
  - User selects from the available supplier request forms.
  - The **Supplier Name** is pre-populated with the value that was searched for in the previous activity.

- Upon **Submit**, the user is navigated to complete the request information as defined by the organization.
- In order for the link to **request a new supplier** to display:
  - The organization must have the **Total Supplier Manager** license and must have an active supplier request template.
  - The user must have **Request New Supplier** permission (Permissions > Administration > Supplier Administration) to enter a supplier request.
- The **Form Request Actions** link is now visible to Approvers on every page of the Supplier Request once the request has been submitted into workflow. Previously, the link was only available on the Supplier Request Workflow page. This will allow the request to be approved from any page.
- Upon final approval of a supplier request (the last step in workflow), a new link displays in the confirmation message: **Click here to invite supplier to register**. If selected, the **Invite Supplier** overlay displays, and the user selects/confirms the **Registration Type** and **Contact Information** in order to invite the supplier to register. A confirmation message displays that the supplier was invited; the user is not navigated away from the Supplier Request page.
- Supplier Request information has been added to the **Summary** page of the supplier profile under the **Supplier Registration Information** section.
  - **Supplier Requested by** will display when a supplier is originated from a supplier request.
  - The field displays the user who submitted the request, along with a date and timestamp. When hovering over the user's name, the user's contact information displays.
  - A link displays to **View Supplier Request Form** to navigate to the actual supplier request.



## Supplier Portal Enhancements for Customer Registrations

The Supplier Portal allows buyer and supplier organizations to communicate and manage data between them. With the 17.2 release, we are continuing to improve this experience for suppliers by updating several features. Many of these features are the result of new customer features for 17.2, so configuration may be required for suppliers to take advantage.

### Impact

- Products Affected: Supplier Portals, Total Supplier Manager, Accounts Payable Director, Sourcing Director, Total Contract Manager,
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- These features are **ON** by default
- New Permissions related to this Feature: None
- The login page for both the Supplier Network Portal have been updated with the JAGGAER color scheme, font, and general look and feel. The Customer Branded Portal will continue to reflect your organization's configuration settings, but the font and spacing styles have been updated.
- Different registration types available when potential suppliers navigate to register and create an account for your Customer Branded Portal. See [Ability to Select Profile Types for Unsolicited Supplier Registrations](#) for the related customer feature.
- Streamlined way of associating attachments in the registration profile form. See [Enhancement to Associating Attachments in Supplier Profile Fields](#) for more information on the customer use of this feature.
- Supplier users can now see a new **Need Help?** box at the bottom of the Customer Branded Portal browser window. When selected, users see the portal contact information configured for your organization (**Suppliers**  **> Configuration Settings > Supplier Portal Configuration: Contact Information for Supplier**). If you do not have portal contact information configured, your organization's site contact and phone number will show (**Setup**  **> Site Appearance and Behavior > Organization Message and Site Logos: Message and Resource Settings**).
- Supplier users now have the option to send new user account registrations when adding new sales or corporate contacts in the Customer Branded Portal. While there is no customer action required, you may notice that new contacts are added in the supplier's profile.
- Suppliers can choose to view Supplier Portal or Registration Help messages configured by your organization in different languages. See [Language Support and Enhancements to Configuring Registration Page Messages](#) and [Language Support and Enhancements to Supplier Portal Configuration Fields](#) for additional information.

## Search for Suppliers by Registration Type

With the 17.2 release, a new criteria for **Registration Type** is available in the **Advanced Search for Suppliers**. When one or more Registration Types is listed, the user will see results for suppliers with the defined values. A new filter is available in supplier search results to refine results by Registration Type as well.

Also, Total Supplier Manager customers will see an update to the registration invitation information listed on the **Summary** page of the supplier profile. See [Supplier Invitation Information Update in Supplier Profile](#) for more information.

## Impact

- Products Affected: Total Supplier Manager
- End User Impact: Low



- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- A new **Registration Type** field is available in **Advanced Supplier Search (Suppliers > Manage Suppliers > Search for a Supplier > Advanced search)**
  - The new field is under the **Registration Information** section of advanced search.
  - Begin entering a value or select the search icon so see an overlay of all values for selection by selecting the checkbox and clicking the **Add** button.
- When supplier search results display, **Registration Type** is listed as a filter for refining results.

## Ability to Select Profile Types for Unsolicited Supplier Registrations

Organizations can choose to enable unsolicited, or cold, registration for suppliers. This allows a supplier to register directly with a customer organization in order to access the Customer's Branded Portal. Previously, the registration form for an unsolicited registration is not configurable. With the 17.2 release, customers can choose which profile form is available to suppliers who submit an unsolicited registration. In addition, if the organization has Accounts Payable Director and allows unsolicited registrations via invoice verification, a profile form can be selected for suppliers registering by that method.


The options for unsolicited registration will be updated on the **Suppliers > Configuration Settings > Supplier Portal Configuration** page to allow for selecting an Entity Registration Type, the option for enabling the Individual Registration Type, and selecting an Entity Registration Type for Invoice Verification.

## Impact

- Products Affected: Total Supplier Manager
- End User Impact: None
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None

- On the **Suppliers**  > **Configuration Settings** > **Supplier Portal Configuration** page, when the option to **Enable Unsolicited Supplier Portal Access** is enabled, there are now two additional options for configuration:
  - **Entity Registration Type** - Select the form from the dropdown that will be used for suppliers registering as an entity. See [Supplier Registration Types](#) for additional information about the different forms available for registration.
  - **Enable Individual Registration Type** - Enable this checkbox if you would like to give suppliers the option to register as individuals (with a Social Security / Social Insurance Number). If this option is enabled, the login page will display an initial question to the supplier on the login page: **Which of the following applies to you?:**
    - **I represent a company with a non-SSN/SIN tax id** - If a supplier chooses this option, they will be directed to the Entity Registration Type form configured for the organization.
    - **I am or represent a person with an SSN/SIN** - If a supplier chooses this option, they will be directed to the Individual Registration Profile form.
- For organizations who currently have **Enable Unsolicited Supplier Portal Access** enabled, the default settings upon 17.2 go-live will be as follows, and can be changed by an administrator:
  - **Entity Registration Type** - Profile 1
  - **Enable Individual Registration Type** - Disabled
- For organizations who currently have **Enable Unsolicited Supplier Portal Access with Invoice Verification** enabled, the default settings upon 17.2 go-live will be as follows, and can be changed by an administrator:
  - **Entity Registration Type for Invoice Verification** - Profile 1

## Registration Help Pages Separated for Entity Registration Help and Individual Registration Help

Previously, the Registration Welcome, Registration FAQ, and Registration Create Account Page messages that display for suppliers registering for a Customer Branded Portal were configured on a single Registration Help page. Suppliers registering as Individuals or as Entities saw the same registration help messages, even though the registration profile fields may be different for individuals vs. entities. With the 17.2 release, the Registration Help page under **Suppliers > Configuration Settings > Registration Configuration** has been separated into two pages for **Entity Registration Help** and **Individual Registration Help**.

Information previously saved for the Registration Help messages has been migrated to the Entity Registration Help page. The messages on the Individual Registration Help page must be configured by the organization after 17.2 go-live. Going forward, organizations will make edits to the messages separately for the different registration types.


Other enhancements have been made to the functionality related to configuring the registration help messages. See [Language Support and Enhancements to Configuring](#)

[Registration Page Messages](#) in the **Supplier Management** section of the Release Notes for additional information.

## Impact

- Products Affected: Total Supplier Manager
- End User Impact: None
- Admin User Impact: Medium
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- The Registration Help page available under **Suppliers**  > **Configuration Settings** > **Registration Configuration** has been separated into two pages for **Entity Registration Help** and **Individual Registration Help**.
- Both the **Entity Registration Help** and **Individual Registration Help** pages contain a Registration Welcome, Registration FAQ, and Registration Create Page message.
- With 17.2 go-live, content on the new **Entity Registration Help** and **Individual Registration Help** pages is as follows:
  - The **Entity Registration Help** messages contain the same information as the organization had saved in the Registration Help page messages prior to 17.2.
  - The **Individual Registration Help** messages **must be configured** by the organization in order to display to suppliers registering with the Individual profile.
- Edit the messages that suppliers will see when registering as individuals on the **Individual Registration Help** page.
- Edit the messages that suppliers will see when registering with one of the Entity profile forms on the **Entity Registration Help** page.
- When the Edit Message button is selected, an overlay displays for editing content in the organization default language. Select from the organization's configured Languages to create/edit content for the message in other languages. See [Language Support and Enhancements to Configuring Registration Page Messages](#) in the **Supplier Management** section of the Release Notes for additional information.
- Select the Preview Message link for any of the messages to see how it will appear to suppliers. The Preview overlay also allows you to see the message in other configured languages.

# Enhancements to Returning a Registration to a Supplier

Previously when an organization returned a registration to a supplier, the user returning the registration had to manually compose a separate email to the supplier that included a reason for the return. With the 17.2 release, when a customer user selects to return a registration, an overlay allows the user to enter comments about the reason for return. When the registration is returned, the user who submitted the registration will receive an email indicating the registration was returned, along with any note provided by the customer. Two new system emails are available that can be customized to your organization's needs.

**Note:** This feature applies to registrations that are submitted after 17.2 go-live. If you submitted to return a registration that was in workflow prior to 17.2, you will need to continue to manually notify the supplier of the return action.

## Impact

- Products Affected: Total Supplier Manager
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- New Notification Preference related to this Feature: **Supplier Registration Workflow Returned** (User Profile > Notification Preferences > Supplier Management). This notification preference is OFF by default.
- When returning a registration to a supplier, a **Return Registration to Supplier** overlay will display.
  - The overlay contains the **Supplier Name**, and the **Supplier Contact** who is the user who submitted the registration form. You can hover over the Supplier Contact name for additional information about the contact. **Note:** If a registration was submitted prior to 17.2 go-live, the hover contact information will not display.
  - The customer user can enter an optional **Note to Supplier**, indicating the reason for returning the registration.
- Confirm the return by clicking the **Return Registration to Supplier** button. The registration is returned and the supplier (or customer) user will receive an email/notification if they have the notification preference enabled.
- The system email that is sent to the user is based on if the registration was submitted from a supplier user, or from a customer user on behalf of the supplier. The two new emails are : **Supplier Registration Workflow Returned to Customer** and **Supplier**

**Registration Workflow Returned to Supplier.** The system emails are located under the **Supplier Management** section at **Administer**  **> Email Management > System Emails.**

- If a customer user submitted the registration on behalf of a supplier, and the registration is returned to that customer user, the Notification Preference **Supplier Registration Workflow Returned** must be enabled in order for the submitting user to receive the notification.
- Supplier users have a new notification preference that must be enabled in order to receive the email as well. The notification preference is enabled by default for some supplier users.

## New Cyber Liability Insurance Type Available

With the 17.2 release, a new Insurance Type is available when customer users or suppliers are adding insurance information. **Cyber Liability** is now available as an insurance type. Customers with the Total Supplier Manager must enable the new type in the Entity and/or Individual Registration configuration in order for it to be visible in the customer's supplier portal. Suppliers will see the new type available in their Network Profile by default.

### Impact

- Products Affected: Total Supplier Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

### Key points of Feature

- This feature is **OFF** by default but can be configured by an administrator
- New Permissions related to this Feature: None
- There is a new **Cyber Liability** insurance type available when adding Insurance information in the supplier profile.
- TSM, Sourcing Director, Total Contract Manager, and AP Director customers can enable the new insurance type to be available to suppliers in the Customer Branded Portal on the Entity and/or Individual Registration.
- Suppliers will have the ability to select the **Cyber Liability** insurance type in their network supplier profiles, but can select it for customer specific profiles only for those customers who have made **Cyber Liability** visible as an Insurance Type.

## Ability to Delete Tax Information Record

Previously, Tax Information entries provided by a customer user or supplier could not be deleted. This might result in long lists of tax records that are no longer relevant or needed.

With the 17.2 release, customers and suppliers can choose to Delete a tax information entry. Suppliers will see this functionality for tax information in the Network Profile as well as Customer Branded Portals.

## Impact

- Products Affected: Total Supplier Manager with Onboarding
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- When viewing an entry on the Tax page of the supplier profile, customers will now see a **Delete** button. Click the **Delete** button to remove the tax information record from the supplier's profile. A confirmation message will display, allowing the user to proceed with the deletion or cancel the request.
- The ability to delete a tax entry is available in the customer's view of the supplier profile, as well as the Proxy Registration view for the supplier. Suppliers also have the ability to Delete a tax information entry in the Customer Branded Portal.
- The action is recorded in the **History** log for the supplier profile.

# Accounts Payable Enhancements

This section details enhancements that will be available in 17.2 related to the SelectSite Accounts Payable products.

Please note that several features explained in other sections of this document also impact Accounts Payable products. Select a link for more information about:

- [Supplier Management](#)
- [eProcurement](#)

Contract features that impact customers with Accounts Payable Director or AP Express include:

- [Ability to Make Custom Field Visible to Suppliers](#)
- [Contract Payment Terms](#)
- [Ability to Create ERS Invoices from Contracts](#)

## Evaluated Receipt Settlement

Many organizations would like to invoice suppliers upon receipt of goods. With the 17.2 release, a new Evaluated Receipt Settlement (ERS) license is available for organizations with the Accounts Payable Director license. The ERS license allows the organization to simplify business processes by having the system generate invoices automatically from receipts, saving the user from having to create the invoices from the purchase order. Once a completed receipt is submitted into the system, an invoice is automatically created.

With the new license enabled, some of the components of this new feature include:

- A **supplier class** to associate to suppliers with whom you have an agreement to invoice upon receipt of goods. This will label suppliers as ERS enabled.
- A **permission** so users can flag Requisitions and Purchase Orders as ERS.
- An ERS field available on **requisition and purchase order document configuration**.
- **Advanced search option for requisitions, purchase orders and invoices** to return documents with the ERS flag.
- **Advanced Dynamic Workflow (ADW) rules** available to evaluate ERS supplier class, and/or the ERS flag on the document.

When a Quantity or Cost Receipt is created from a PO that is flagged as ERS, the invoice will automatically be created once that receipt has been submitted. The receipt information is copied to the invoice, and the invoice will submit into workflow automatically. Since no separate creation of the invoice is required, **users will not have the ability to create an invoice from a purchase order flagged as ERS**. Likewise, suppliers will not have the ability to create and submit a sales invoice to a customer from the supplier portal if the purchase order is flagged as ERS.

**Note:** This feature does not apply to Credit Memos. A user can continue to create a credit memo from a PO that is flagged as ERS.

## EVALUATED RECEIPT SETTLEMENT FROM A CONTRACT

Also with this release, customers with Contract Manager Repository and Contract Compliance Tracker with the Evaluated Receipt Settlement License will have the ability to flag contracts with an Evaluated Receipt Settlement option. This would be useful when creating an invoice from the contract and not based on a purchase order. See [Ability to Create ERS Invoices from Contracts](#) in the Contract Lifecycle Management section of the release notes for additional information on this feature.

### Impact

- Products Affected: Accounts Payable Director, Receipt Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

### Key points of Feature

- This feature is **OFF** by default and you must contact JAGGAER to enable the ERS license and make the new supplier class available. Additional setup will be required by an administrator as well.
- New License: **Evaluated Receiving Settlement**. This license can only be enabled for organizations with the **Accounts Payable Director** license.
- New Permissions related to this Feature:
  - **Edit Evaluated Receipt Settlement** (Permissions > Shopping, Carts & Requisitions) – Allows users to edit the ERS field on the Requisition and the Purchase Order.
  - **Edit Evaluated Receipt Settlement** (Permissions > Contracts) - Allows users to edit the ERS flag on the Contract (See [Ability to Create ERS Invoices from Contracts](#) for additional information).
- **New Supplier Class** for **Evaluated Receiving Settlement Enabled** – This is a standard class that will be available for organizations that have Evaluated Receiving Settlement License enabled. The class must be made available to your organization by JAGGAER. Once it has been made available, you can select the supplier class to associate to a supplier’s profile, for workflow, and in advanced supplier search/filters.
- **New field on Requisition and Purchase Order Document Configurations** - A new standard field “**Evaluated Receipt Settlement**” is available to be configured on the Requisition and Purchase Order documents.
  - The Field is Supplier Level only for the Requisition document, and Header Level only on the Purchase Order document. The field can be set on both the Status and Summary pages of the Purchase Order document.



- For Requisitions, the field will display at the Supplier Group level if the supplier has the **Evaluated Receiving Settlement Enabled** supplier class.. This means you can have a requisition with multiple suppliers who may not all have the ERS class associated.
- There is no document configuration validation for this field.
- If the field is on the document, a user must have the **Edit Evaluated Receipt Settlement** permission in order to edit the field.
- When a Requisition or Purchase Order includes a supplier who has the **Evaluated Receiving Settlement Enabled** supplier class, an invoice is automatically generated when a receipt is created.
  - An invoice cannot be created manually or via import from a Purchase Order that is flagged as ERS:
    - The Create Invoice selection in Document Actions is not availability.
    - An invoice cannot be created in the AP Dashboard for the associated Purchase Order. An error message will display, letting the user know that the Purchase Order is not eligible to have an invoice created.
    - A supplier cannot create an invoice from the associated sales order. The supplier will not see the option to create an invoice in the portal, and they will see an error message if they attempt to create an invoice from a sales order flagged as ERS. **Note:** If a supplier sends invoices electronically, they can send an invoice associated with a Sales Order flagged as ERS. However, it is recommended the customer organization configure a workflow rule for invoices that will stop such invoices in workflow.
  - You cannot include ERS and non-ERS purchase orders on an invoice.
  - You cannot have more than one Purchase Order for an ERS invoice.
  - The ERS Flag can be imported in the PO Import message.
  - This feature also applies if Receipts are imported. Upon successful import of the receipt for a PO flagged as ERS, an invoice will be automatically created for the PO.
- The information on the invoice is taken from the receipt as follows:
  - The Receipt date is used as the Invoice Date. This is the date the goods were actually received, not necessarily the date the receipt was created. The date is used with the Due Date calculation logic based on payment terms.
  - If a Packing Slip No is provided on the receipt, that is used as the Supplier Invoice Number. If there is no packing slip number provided, the Supplier Invoice Number will be "Receipt Number + ERS" (e.g. 306650-ERS).
  - When an invoice is created on the Buyer side from the receipt, a corresponding sales invoice is created in the supplier portal. The ERS Invoice Number is listed in the Invoice tab of the supplier side sales order
  - Only the lines with Net Received or Received Status will transfer to the invoice.
- New **Advanced Dynamic Workflow (ADW)** rules available - Requisitions and Purchase Orders
  - Document Level - **Evaluated Receipt Settlement** - true/false: This rule can be triggered if the ERS field exists (or not) on the document.

- Line Level - Supplier Class of **Evaluated Receiving Settlement Enabled** does or does not exist.
- New **Advanced Dynamic Workflow (ADW)** rules available - Buyer Invoice
  - Document Level - Invoice Source is already available as an ADW rule; however, with this release you can create a rule based on the **From Receipt** Invoice Source.
  - Line Level - **Has Evaluated Receipt Settlement PO** - true/false; This rule can be triggered if the PO line is flagged for ERS or not.
  - Line Level - Supplier Class of **Evaluated Receiving Settlement Enabled** does or does not exist
- Advanced Document Search field for:
  - Requisitions and Purchase Orders: **With Evaluated Receipt Settlement** in the **Status Flags** section.
  - Invoices: **Evaluated Receipt Settlement** in the **Invoice Source** section.
  - Receipt: **Invoice from Receipt Error** in the Receipt Flags section.
- When **Creating and Managing Export Templates** for Purchase Orders or Requisitions (Documents > Document Search > Create and Manage Export Templates) , you can now include **Evaluated Receipt Settlement** as a field in the export.
- When viewing the **Cycle Time Reports** (Accounts Payable > Reports), the Source Type now includes a selection option for Evaluated Receipt Settlement.

## Ability to Include Custom Fields/Codes in OCR/DMR Invoice Import


The OCR / DMR Invoice Import integration has been updated with the 17.2 release to include support for custom fields and account codes. Two new settings are available for the customer to choose whether or not to overwrite purchase order custom fields and/or account codes from the OCR/DMR Invoice Imports. If enabled, the information in the import message rather than what is present on the associated purchase order is used for the invoice. Header and line level custom fields/codes are supported. Notifications have been updated to support the new import fields.

### Impact

- Products Affected: Accounts Payable Director with OCR or DMR Invoice Import
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Medium

### Key points of Feature

- This feature is **ON** by default but is optional for use
- New Permissions related to this Feature: None

- With the 17.2 release, the OCR /DMR Invoice Import format can now include custom fields codes and code splits. This allows customers to import invoices with custom field codes and code splits for invoice lines.
  - A new <CustomFieldValueSet> section can be included in the invoice message that includes the custom fields internal name, display name, value and description.
  - Both Header and Line Level custom fields can be included.
  - The fields can be included for both PO and Non-PO Invoices.
- In addition to custom field codes, the import format can also include service start and end dates.
- To support this functionality, two new settings have been added to the **Invoice Import/PO Total Tolerance** section of the **AP Configuration** page (**Accounts Payable**  **> AP Administration > Configure AP Settings**):
  - **Overwrite Purchase Order Custom Field Values with Values from Invoice/DMR Imports:** If enabled, it doesn't matter what custom fields are on your POs, it will pull the value that is specified on the import; if not enabled, it will only pull the values from the import if there is no value on the PO.
  - **Overwrite Purchase Order Codes with Values from Invoice/DMR Imports:** If enabled, it doesn't matter what's on your PO for codes, it will pull the values that is specified on the import; if not enabled, it will only pull the values from the import if there is no value on the PO.
- New validations at the header and line levels will occur to support this functionality, including:
  - The **custom field/code** that is not on the invoice document configuration.
  - The **distribution type** is not valid. There are three distribution types available: Percent of Price, Quantity of Price, and Amount of Price. If the message does not contain one of these types, a notification will display.
  - Invalid **context** - Context refers to the different components on the invoice like the Discount, Tax1, Tax2, Shipping, Handling, etc., for which individual alternate distributions can be set up. "Line" refers to the default context.
  - Invalid **split index**- Split index refers to the number of split distribution values for a particular context. For example, if the context is split by PercentOfQuantity by 40% and 60%, the split index is 0 and 1 respectively in the import file.
  - The **distribution value** does not equal to 100% or to the document subtotal.
  - Notifications are for informational purposes. The import will not include the invalid information. The line fails to import if one part of it is invalid. The lines that pass validation will be imported.

## Custom Field Enhancements for Invoice Exports

Many customers must use configurations such as Webmethods to define integration mapping for invoice export or other integration points. With the 17.2 release, JAGGAER is providing an easier method of defining attributes for custom fields that will be passed in an invoice export. JAGGAER users now have access to a tool to identify attributes to apply to custom fields. The organizations can then apply mapping to those custom fields for specific

integration points. A new invoice export DTD is available that contains updated custom field and code layouts that more closely resemble what is seen on the document.

## Impact

- Products Affected: Accounts Payable Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Medium

## Key points of Feature

- This feature is **OFF** by default and you must contact JAGGAER to enable the new DTD version
- New Permissions related to this Feature: None
- A new Invoice Export DTD (2.0) is available that allows for custom fields and custom attributes to be included in the invoice export message. The new DTD must be enabled by JAGGAER.
- JAGGAER can define attributes for custom fields that will be passed in the invoice export message to identify the integration mapping. This removes the need for complicated configurations in Webmethods. JAGGAER will work with the customer to define the specific attribute mappings to the customer's custom fields.

## Ability to Associate Contract Payment Terms for Non-PO Invoices

When invoices are created from purchase orders, the payment terms on the PO are copied to the invoice. Currently when creating a non-PO invoice from a contract, the payment terms must be manually added to the invoice. With the 17.2 release, the payment terms on a contract will be copied to the invoice when creating a non-PO invoice from the contract. Also, if a supplier creates a sales invoice in the portal from a contract with payment terms, those terms will be applied to the invoice and copied to the buyer-side invoice.

For additional information about defining contract payment terms, see [Contract Payment Terms](#) in the **Contract Lifecycle Management** section of the **Release Notes**.

## Impact

- Products Affected: Accounts Payable Director with CCT, TCM
- End User Impact: Low
- Admin User Impact: Low

- Integration Impact: Medium

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- For Non-PO Invoices created from a contract by the buyer or supplier, the contract payment terms can now be applied to the invoice.
- For Invoice Import, the system will use the payment terms based on the organization setting **Use Organization Payment terms (Accounts Payable > AP Administration > Configure AP Settings)**.
- See [Contract Payment Terms](#) in the **Contract Lifecycle Management** section of the **Release Notes** for additional details on how contract payment terms are applied to invoices.


## New Trade-In Configuration Option for Invoice Export Integration


With the 17.2 release, customers could include trade-in items as part of a transaction. With this feature, customers that had invoice export integrations could choose how they wanted the trade-in items represented in the integration message. However, some customers have learned that certain integrations do not support negative numbers, or otherwise could not accept the current options available. With the 17.2 release, you can update your invoice export integration to send the trade-in items as a discount.

### Impact

- Products Affected: Spend Director, AP Director, AP Express
- End User Impact: None
- Admin User Impact: Medium
- Integration Impact: Medium

## Key points of Feature

- This feature is **OFF** by default
- New Permissions related to this Feature: None
- The **Integration Distribution Type** setting (**Setup  > General Site Settings > Trade-In Configuration**) developed in 17.1 controls how the trade-in monetary values will be sent in XML integration points: PR Export, PO Export, Invoice Export, PR Validation, SCT Banner Finance Budget Authorization. These options are unchanged and are still valid for selection.

- **Send with negative monetary values** (default): If the ERP system can receive negative values, this option should be chosen so that negative values are sent.
  - **Send with positive monetary values**: If the ERP system cannot receive negative values, but can parse the new product type of "TradeIn", then select this option.
  - **Do not send**: If the ERP system cannot receive negative values and cannot parse the product type, choose this option. **Note**: Choosing this option will mean that the ERP system will not match the SelectSite application totals.
- The integration distribution type settings are now available for individual export connections, as managed in **Setup  > General Site Settings > Document Export Settings > connection mgt**:
    - For PR and PO connections, the same options above can be selected for the individual export integrations as are available on the trade-in configuration page.
    - When you select the Support Invoices option for a connection, the three previous selections display, as well as a new selection:
      - **Send Trade-In Value as a Discount**: If the ERP system cannot receive negative values and cannot parse the new product type, this option should be selected in order to send the trade-in item value as a discount.

# Contract Lifecycle Management Enhancements

This section details enhancements that will be available in 17.2 related to the CLM products Contract Compliance Tracker (CCT) and Total Contract Manager (TCM).

## Contract Compliance Tracker and Total Contract Manager Enhancements

In 17.2, the following enhancements are available for organizations with the Contract Compliance Tracker product only, or both the Contract Compliance Tracker and Total Contract Manager products.

### Contract Payment Terms

A new feature in 17.2 allows organizations to add payment terms to contracts, and view the potential savings available if all invoices associated with a contract are paid using early payment savings.

Once a contract with payment terms reaches Executed: In Effect status, its payment terms can be used on invoices or invoice items generated from the contract. If contract payment terms have been negotiated at the contract level, users creating invoices can use the contract payment terms instead of organization or supplier default payment terms.

This feature may require configuration by JAGGAER and system administrators.

#### Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director, Invoice Manager
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: Low

#### Key points of Feature

- This feature is **On** by default. Organizations may need to contact JAGGAER to optimize their invoice workflow and invoice import settings for use with this feature. **Please contact JAGGAER for further information.**
- New Permissions related to this Feature: None.
- **Requirements**
  - The Contract Compliance Tracker and Invoice Manager licenses are required. **Organizations with the Total Contract Manager license must also have CCT.**

- The Payment Terms section is displayed on the contract eProcurement page when the following elements are in place on contracts:
  - CCT - The contract has a supplier assigned.
  - TCM - The contract uses a **contract type** with the **Use for eProcurement** option set to **Yes**, and has a primary second party assigned.
- **Payment Terms on Contracts**
  - **eProcurement Setup** - Contract payment terms are entered in the **Payment Terms** section on the **eProcurement Setup** page of a contract in the following fields:
    - **Discount** - The value of the discount that will be applied to the invoice total if payment is made before the number of days indicated in the Days field. This is a percentage or a specific amount, as defined in the Discount Type field.
    - **Discount Type** - Indicates that the value in the Discount field will be applied as a percentage of the invoice total or a specific amount.
    - **Days** - The number of days after receipt of the invoice that the discount can be applied. After this number of days, the Net amount is due.
    - **Net** - The number of days after receipt of the invoice that the net amount is due.
  - Once contract payment terms are saved, a **Potential Early Payment Savings** section is displayed next to the payment terms. It shows the amount that could *potentially* be saved if early payments are made for all invoices created from the contract using the contract payment terms.
    - **This Version** shows amounts for the current version of the contract only.
    - **My Lifetime** shows amounts for all versions of the contract.
    - Click on an amount to open the Budget and Spend page.
  - **Placeholders** - For organizations with TCM, a new **Payment Terms** placeholder has been added to the JAGGAER Contract Authoring for Word App so that contract payment terms can be inserted as a placeholder into clauses, templates and main documents on contracts.
  - **Sourcing Events** - Contracts created from a sourcing event will display payment terms from the sourcing event by default. They can be overridden on the contract.
  - **Amendments, Copies, Renewals** - Contract amendments, renewals and copies will display payment terms from the original contract by default.
  - **Contract Summary** - On the **Configure Contract Summary Screen**, a new **Payment Terms** option has been added to the **Controls** section under the **eProcurement, Budget, and Spend** heading. It is used to define how payment terms are displayed on the Contract Summary page.



- **Consortiums**

- For **parent** consortiums, contract payment terms display the total potential savings for their organization only, not for all members of the consortium.
- For **member** consortiums, contract payment terms display the potential savings for their organization only. **Payment terms are not editable on shared contracts in a member org.** Member organizations must have the Invoice Manager license to use payment terms.

- **Contract Payment Terms on Invoices**

- Businesses usually have a payment term hierarchy in place to determine which payment terms are applied when either supplier or organization default payment terms can be used. Here is how contract payment terms are applied to buyer and sales invoices within that hierarchy:

- **Buyer Invoices**

- For **non-PO invoices**, contract payment terms are used when a non-PO invoice is created from a contract, or, for non-PO invoices created from the AP dashboard, when a contract is associated with an invoice line item.
- For **PO invoices**, payment terms are populated from the purchase order. If all lines on the requisition used to create a purchase order point to one contract, contract payment terms are used.
- For both PO and non-PO invoices, when **line items are associated with a contract that has payment terms**, the system will check to see if payment terms on the invoice are different from payment terms on the contract line item. If they are different, it will apply contract payment terms from the line item to the invoice and a message will indicate that the payment terms on the invoice have been updated.

**Note:** If multiple line items on an invoice are assigned to different contracts with different payment terms without saving after each change, contract payment terms from the first changed invoice line item are applied to the invoice on Save.

- If an invoice has one line item assigned to a contract, and a **manual change** is made to the payment terms, the system will ask if the user wants to use the contract payment terms or the modified payment terms when the invoice is submitted to workflow, and apply the user's selection.
- Otherwise, supplier or organization default payment terms are used as determined by the organization's payment terms logic.

**Note:** ADW workflow options can be set up to stop the workflow where there may be more than one set of payment terms on an invoice, and a decision needs to be made about which ones to use. See the Workflow section below.

- **Sales Invoices**

- Here is how contract payment terms are applied when a supplier creates a sales invoice:
  - From **contracts** - Contract payment terms are used.
  - From **sales orders** - Payment terms are populated from the sales order, based on payment terms from the originating purchase order.
  - When **line items are associated with a contract that has payment terms**, the same logic used for buyer invoices applies – contract payment terms from the line item are applied to the invoice and a message will indicate that the payment terms on the invoice have been updated.
- The **Use Organization Payment Terms** setting determines how payment terms are applied once the sales invoice is sent to the customer and becomes a buyer invoice:
  - If the setting is **On**, the organization's payment term logic is used:
    - If all lines on a sales invoice are assigned to one contract with payment terms, contract payment terms are used on the buyer invoice.
    - If line items on a sales invoice are assigned to different contracts, the organization's payment term logic is used on the buyer invoice.
    - If a sales invoice has been created from a sales order, the buyer invoice will use payment terms from the original purchase order, even if the payment terms were changed on the sales invoice.
  - If the setting is **Off**, the buyer invoice will reflect whatever payment terms are on the sales invoice:
    - If a supplier has changed the original SO/PO payment terms or the contract payment terms on a sales invoice, the **changed values** will be on the buyer invoice created from the sales invoice.

- **Buyer and Sales Invoice Imports**

- **Buyer Invoice Imports**

- If an imported buyer invoice **does not** have payment terms - Contract payment terms are used if all lines on the invoice point to one contract with payment terms. Otherwise, supplier or organization default payment terms are used as defined by the organization's payment terms logic.
- If an imported buyer invoice **does** have payment terms - Payment terms from the buyer invoice are used and override contract payment terms.

- **Sales Invoice Imports**

- Buyer invoices are generated from the sales invoice import. The **Use Organization Payment Terms** setting determines how contract payment terms on imported sales invoices are applied to buyer invoices created from them:
  - If the setting is **On** - The organization's payment term logic is used, regardless of what is on the sales invoice. This means that contract payment terms are used if all lines on the invoice point to one contract with payment terms. Otherwise, supplier or organization default payment terms are used as defined by the organization's payment terms logic.
  - If the setting is **Off** - The buyer invoice will reflect whatever payment terms are on the sales invoice. If the sales invoice *does not* have payment terms, contract payment terms are used if all lines on the invoice point to one contract with payment terms. Otherwise, supplier or organization default payment terms are used as defined by the organization's payment terms logic.

- **Workflow**

- New Advanced Dynamic Workflow (ADW) Document-level rules are available to create workflow steps that can be used to compare payment terms on invoices, and if there are differences, trigger a stop so that approvers on the rule can evaluate and apply the appropriate payment terms:
  - A new **Payment Terms Differ from Contract** ADW Document-level rule has been added to **Invoice Workflow** and **Purchase Order Workflow**. This rule compares invoice payment terms and line item payment terms. It will stop the workflow when there is at least one contract on the invoice and there are different payment terms on the invoice and contract line items.

**Note:** This rule may be used as an additional check for the validation that occurs when buyer invoices are submitted to workflow, so that if there are differing payment terms on the invoice, the workflow will stop and the approver on the rule can adjust the payment terms.

- The "**Has Contract**" ADW Document-Level rule has two new options on **Invoice Workflow** that check invoice line items for discrepancies:
  - **Multiple Contracts** - Will stop the workflow if an invoice has line items from more than one contract.
  - **Has Contract and Non Contract Lines** - Will stop the workflow if an invoice has both contract line items and a non-contract line items.

- **CSV and XML Import/Exports**

- The following columns have been added to the **Contract CSV** and **XML** import/export files to allow payment terms on a contract to be updated via import:
  - **DiscountType**
  - **Discount**

- **Days**
- **Net**

**Important!** If an organization uses contract 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.

## Ability to Make a Custom Field Visible to Suppliers

In 17.2, organizations have the option to display a custom field to suppliers creating an invoice from a contract. For example, if an account code custom field is made visible to suppliers, they could select the appropriate account code for invoice items to make the routing of sales invoices more efficient.

Organizations can configure one custom field that may be made visible to suppliers for all contracts in the system. On each contract, users can choose whether or not to make the field visible to suppliers and also indicate whether suppliers are required to complete the field before submitting an invoice.

### Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director, Invoice Manager
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: Low

### Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- Organizations can configure a custom field so that it is visible to suppliers who are creating an invoice from a contract. The selected custom field is displayed on all contracts in the system, where contract managers have the option to make that field visible to suppliers for each contract. Suppliers creating a non-PO invoice from a contract with the setting enabled will be able to view the field on invoice line items and enter a value.
- **Contract Administration Setup**
  - In **Contract Administration**, a new **Supplier Visible Custom Field** section has been added to the **General Contract Settings** page. This is where contract administrators select the custom field that will be displayed on contracts:
    - The **Select the Custom Field the Supplier will provide if the contract setting is enabled** field is used to choose the custom field that can be made visible to

suppliers. The custom field selected here is displayed on all contracts in the system by default.

- The custom fields available for selection in the field are **line-level** custom fields (that are not child custom fields) populated from the organization's active buyer invoice configuration document and are unique for each organization.
- **Important Note:** *All* values that can be selected for the custom field are visible to suppliers on the contracts designated to be exposed.
- For organizations that have the Contract Compliance Tracker and Invoice Manager licenses only, a new **General Contract Settings** page has been added to the **Contract Administration** menu to accommodate the Supplier Visible Custom Field feature.
- **Contract Setup**
  - A new **Supplier Visible Custom Fields** section has been added to the contract **eProcurement Setup** page. The following fields on a contract determine if the custom field is visible to suppliers for that contract only, and whether it is required:
    - **Available Custom Field** - The custom field that an organization has permitted to be made visible to suppliers is displayed as a read-only field.
    - **Do you want portal invoicing enabled Suppliers to complete the selected Custom Field on Invoices created from this contract?** - Select **Yes** to make the custom field visible to suppliers creating invoices from the contract and allow them to enter a value in the field on sales invoice line items. They will also be able to copy lines with the field. **No** is the default setting.
    - **Is this required to be completed by the Supplier?** - This field is displayed if Yes is selected in the field above. Select **Yes** if suppliers must complete the field before they can submit an invoice. **No** is the default setting.
- **Consortiums**
  - Parents and members of a consortium can choose their own supplier custom visible fields.
- **Suppliers Creating Invoices from a Portal**
  - If a custom field has been made visible for suppliers on a contract, suppliers creating a non-PO invoice from the contract in a network or branded portal will be able to view the field on invoice line items and select a value:
    - The custom field from the contract is displayed under **Line Item Details** on the second line of the row selected:
      - It is displayed as a **drop down** field if there are fewer than 25 values to select. *All* values that can be selected for the custom field are visible to suppliers on the contracts designated to be exposed.
      - It is displayed as a **text box** if there are more than 25 values to select. Suppliers enter a code and the supplier-entered values will be validated against organization codes. A message will be displayed if the code is not valid.

- Suppliers can copy lines with the field on an invoice and select a different value for the field on each line. They can copy a single line by clicking **Actions > Copy Line** or select **Actions for Selected Items** to copy multiple lines at once.
- **Buyer Invoices**
  - Custom field values entered by a supplier on a sales invoices will be transferred to **buyer invoices** created from the sales invoice, where the system rules for applying account codes to invoices are applied. These rules have been updated to include supplier-entered values.
- **CSV and XML Import/Exports**
  - The following columns have been added to Contract CSV and XML import/export files to allow the Supplier Visible Custom Field settings on contracts to be updated via import.
    - **CustomFieldEnabled** - Indicates whether or not the Supplier Visible Custom Field enabled for an organization is visible to suppliers when they are creating invoices for a specific contract. It corresponds to the **Do you want portal invoicing enabled Suppliers to complete the selected Custom Field on Invoices created from this contract?** field on the contract eProcurement Settings page.
    - **CustomFieldRequired** - Indicates whether or not suppliers are required to complete the custom field before submitting an invoice created from the contract. The **CustomFieldEnabled** field must be set to **Yes** before a value can be entered.
  - **Important!** If an organization uses contract 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.

## Ability to Create ERS Invoices from Contracts

As part of the [Evaluated Receipt Settlement](#) feature for Accounts Payable Director, 17.2 provides the ability to flag contracts so that non-PO invoices created from contracts can be used for Evaluated Receiving Settlement (ERS).

If enabled for your organization, this allows non-PO invoices to be generated from a contract for non-catalog goods or services that have already been received.

This feature requires configuration by JAGGAER and system administrators.

### Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director, Invoice Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

## Key points of Feature

- This feature is **OFF** by default and must be enabled by JAGGAER. Administrator setup is also required. **Please contact JAGGAER to enable this feature.** See [Evaluated Receipt Settlement](#).
- New Permissions related to this Feature: **Edit Evaluated Receiving Settlement** (Permission Settings > Contracts > Contracts Permissions). If an organization has the Evaluated Receiving Settlement feature enabled, this permission allows a user to modify the **Evaluated Receipt Settlement** (ERS) field on the contract eProcurement page to indicate that the contract can be used for evaluated receiving settlement. ERS allows invoices to be generated for non-catalog items on a contract based on goods or services already received.

- **Requirements**

The following elements must be in place before the **Evaluated Receipt Settlement** option is available on a contract:

- Organizations must have the following licenses: Contract Compliance Tracker, Total Contract Manager, AP Director, Invoice Manager, and Evaluated Receiving Settlement. Organizations with the Total Contract Manager license must also have CCT.
- The **Evaluated Receipt Settlement** field must be enabled on the organization's active requisition or purchase order configuration documents.
- For organizations using TCM, the contract type must have **Use for eProcurement** enabled.
- The primary second party (TCM) or supplier (CCT) on the contract must have the Evaluated Receiving Settlement class enabled. This indicates that an agreement is in place with the supplier to invoice for goods or services already received.

**Note:** For TCM, if there are multiple second parties on the same contract and each one has a different setting, then the Evaluated Receipt Settlement field is not displayed on the contract.

- The user has the **Edit Evaluated Receiving Settlement** permission. Users without this permission will be able to view the field only.
- **Contract Setup**
    - The **Evaluated Receipt Settlement** field is displayed on the contract **eProcurement** page if your organization has the Evaluated Receiving Settlement feature enabled, the second party (TCM) or supplier (CCT) on the contract is in the ERS supplier class, and the user has permission to modify the field.
    - Selecting **Yes** allows non-PO invoices to be generated from the contract for non-catalog goods or services that have already been received. **No** is the default setting and indicates that ERS invoices cannot be generated from the contract.
    - Users without the **Edit Evaluated Receiving Settlement** permission are able to view the field only.

- **Create a non-PO ERS Invoice from a Contract**
  - When the **Create Invoice** option is selected on contracts flagged to allow ERS, the Create Invoice window displays an **Invoice for Goods or Services received** checkbox under the **Invoice** section.
  - If the checkbox is selected, a draft non-PO invoice is created with the invoice source flagged as **Evaluated Receipt Settlement**. See [Evaluated Receipt Settlement](#) for information about ERS invoices.
  - The draft invoice can be found by navigating to **Accounts Payable > View Draft Invoices**, or by searching Accounts Payable using the **Evaluated Receipt Settlement** filter under **Invoice Source**.
- **Receiving**
  - If you are receiving against an ERS contract, if a purchase order is tied to a contract, the settings from the purchase order are used, but if a non-PO invoice has been created from a contract, the contract settings, including ERS invoice settings, are used.
- **Contract Advanced Search**
  - On Contract Advanced Search, a new **Evaluated Receipt Settlement** filter in the **eProcurement** section allows users to search for contracts that have been flagged to allow evaluated receipt settlements. See [Search Updates](#).
- **CSV and XML Import/Exports**
  - A new **Evaluated Receipt Settlement** column has been added to Contract CSV and XML import/export files to allow the Evaluated Receipt Settlement field settings on the contract eProcurement page to be updated via import.
  - **Important!** If an organization uses contract 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.

## Search Updates

Contract Simple Search and Advanced Search have been updated to allow users to search for contracts based on their creation date. Contract Advanced Search has been updated to allow users to search for contracts based on content in the Summary field on the contract header and for contracts flagged for evaluated receipt settlements.



For systems using Total Contract Manager, the Custom Contract Fields search filter has also been updated to perform partial word searches.



## Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- (CCT and TCM) On the **Contract Simple Search** and **Advanced Search** pages:
  - A new **Created Date between** search filter provides the ability to search for contracts based on their creation date. Enter a date range in the calendar fields provided.
- (CCT and TCM) On the **Contract Advanced Search** page:
  - A new **Summary** filter allows users to search for contracts based on words from the Summary field on the contract header.
  - A new **Evaluated Receipt Settlement** filter in the **eProcurement** section allows users to search for contracts that have been flagged to allow evaluated receipt settlements. See [Ability to Create ERS Invoices from Contracts](#).
- (TCM only) On the **Custom Contract Fields** page (Contracts  > Libraries > Custom Fields) and the **Manage Contract Request Templates** page (Contracts  > Libraries > Contract Request Templates, searches can now be done on partial words. For example, searching for the word "Type" in the search field will return all contract custom fields that contain the word "Type", such as "Consulting Type" or "Procurement Type".

## New Contract Type Filter on Contract Alerts Dashboard Widget

A new Contract Type filter has been added to the Contract Alerts widget for contract dashboards, allowing users to filter alerts by contract type.

## Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.

# Comment Field Added to Configure Contract Summary

A new Comments field on the Configure Contract Summary page allows organizations to display comments from the contract on the Contract Summary page.

## Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- A new **Comments** section is displayed at the end of the right column on the **Configure Contract Summary Screen** (Contract Administration > Configure Contract Summary Screen). It allows organizations to display content from the Comments page of a contract on the Contract Summary.
- Comments are displayed on a Contract Summary based on the Admin/Manager, Full, Partial, and Limited visibility settings permitted on the Configure Contract Summary Screen, and the visibility controls set on a contract under Users and Contacts.
- If Comment visibility is permitted, all comments on the Comments page of a contract are displayed on the Contract Summary.

# New Fields on Contract Export

New fields have been added to Contract CSV, XML and Excel import/export files to provide reporting data.

## Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- The following columns have been added to Contract CSV, XML and Excel import/export files to provide reporting data. **These fields CANNOT be updated through import.**
  - **UseForESignature** (TCM) - For organizations using eSignature, displays the selection for the **Use eSignature for this contract?** field on the contract header.
  - **FullyExecutedTimestamp** (TCM) - Displays the date and time a contract reached Executed: In Effect status.
  - **FirstPartySignedTimestamp** (TCM) - Displays the date and time that the first party signed a contract.
  - **SecondPartySignedTimestamp** (TCM) - Displays the date and time that the second party signed a contract.
  - **OutForSignatureTimestamp** (TCM) - Displays the date and time that a contract was sent for eSignature.
  - **Create Date date/timestamp** (CCT and TCM) - Displays the date and time that a contract was created. **Note:** For organizations with the CCT license only, this is the only field that will display values. The other fields are included in the export file but apply to Total Contract Manager features only.
- **Important!** If an organization uses contract 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.

# Total Contract Manager Enhancements

In 17.2, the following enhancements are available in Total Contract Manager (TCM).

## Updates to Contract Cycle Time Report

To help organizations identify bottlenecks and improve the efficiency of their contract processes, the Contract Cycle Time Report has been updated to provide data for all contract statuses.

This includes "in flight" contracts, such as contracts in Draft or Pending Approval status, and granular reporting on actions taken within the contract approval workflow, such as a "Returned to Draft" action performed while a contract was in Pending Approval status.

### Impact

- Products Affected: Total Contract Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

### Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- A new **Contract Status** search filter is displayed when **Created** is selected in the **Contracts** search filter. It replaces the "Include Contracts" search filter and allows users to choose which contract statuses to include in the report. All statuses are available for selection.
- The **Average Status Percentage** pie chart now shows a breakdown of the time a contract spends in each status prior to approval, as a percentage.
- The **Details** table has been updated:
  - A **Contract Status** column has been added.
  - A new **Status Transition** window has been added to the **Total Time** column. Click the information icon ⓘ next to a contract in the column to view the time a contract has spent in a status on its way to approval:
    - It displays the **Transitions**, **Enter Time**, **Exit Time**, **Days** and **Duration** (in days, hours and minutes, i.e., 1d 6h 28m) for each transition step prior approval.
    - The Transitions column includes a breakdown of actions within the **Pending Approval** status, such as Approve, Assign to Myself, Expedite, or Return to Draft.

- The **Export** file has been updated to provide detailed information on status transition data in the exported Excel file:

- A new **Status Transition Details** tab has been added to the exported report file. It contains data for each step that has occurred to move the contract from Draft to Executed: In Effect status:
  - **Contract Number** - The contract number for the status transition. Use the Contract Number filter at the top of the column to view data for a single contract.
  - **Status Transition** - The change in status that occurred to move the contract to the next step in the approval workflow.
  - **Description** - Description of events that occurred within a status transition. For the status transitions **Pending Approval** and **Internal Review**, you will see the ADW workflow step name followed by the rule or folder name.

**Note:** Contracts that have been submitted to automated internal review prior to the 17.2 release will display the folder name and the user who performed the "Done with Review" action for the folder in the Description column. After 17.2 the column will show data similar to the Pending Approval status.

- **Event Entry Action** - The action that occurred to enter a status transition step, i.e., Entered Shared Folder, or Assigned.
- **Event Assigned To** - Who was assigned to perform the Event Entry Action.
- **Start Time** - The time the status transition occurred.
- **End Time** - The time the contract left the status transition and moved to the next step in the workflow.
- **Duration** - The length of time a contract spent in a status transition or event in hours and minutes, i.e., 6h 28m.
- **Event Exit** - The action that was taken to exit the activity/step.
- **Event Exited By** - Who performed the action to exit the event.
- A new **Summary** tab has been added to the exported file. It provides a summary of the time spent in each unique workflow step listed in the Description field on the Status Transition Details tab, for example, the total amount of time a contract spent in Out for Signature step:
  - **Status Transition** - The change in status that occurred to move the contract to the next step in the approval workflow.
  - **Description** - Description of events that occurred within a status transition. For the status transitions **Pending Approval** and **Internal Review**, you will see the ADW workflow step name followed by the rule or folder name.
  - **Duration** - This is displayed in hours and minutes, i.e., 6h 28m.

# New Contract Approval Workflow Options Based on Account Codes

New workflow options allow organizations to create a contract approval workflow step based on account codes. Organizations that do not use requisitions or purchase orders can route contracts to the appropriate financial approvers based on account codes on the contract.

## Impact

- Products Affected: Total Contract Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **OFF** by default but can be enabled by an organization administrator.
- New Permissions related to this Feature: None.
- Two new Advanced Dynamic Workflow (ADW) Document-level rules are available on **Contract Workflow** to create workflow steps that route contracts to approvers based on contract account codes:
  - **Set of Custom Field values** - Will stop the workflow and send to the approver(s) on the rule if account code values on a contract match the ones specified on the workflow rule.
  - **Single Custom Field value or range** - Will stop the workflow and send to the approver(s) on the rule if account code values on a contract fall within the range of values specified on the workflow rule.
- The rules can be applied to **automated internal review** workflow or **contract approval** workflow.
- Contract codes are entered on the **eProcurement Setup** page, in the **Code Defaults on Invoice** section or selected in the new **Supplier Visible Field** section. See also [Ability to Make a Custom Field Visible to Suppliers](#).
- The account code custom fields must be on the organization's active buyer invoice configuration.

# New Notification for eSignature Contracts

A new system email and notification has been created for situations where an organization has eSignature enabled, but a particular contract is not using the feature and requires a "wet" signature. The new notification is sent to contract managers and facilitators when the contract has been approved and is ready for a signed document to be uploaded into the system.

## Impact

- Products Affected: Total Contract Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- The new system email and notification preference is called **Contract Pending Upload of Signed Document** (Notification Preferences > Contracts > Contract - Approval Workflow).
- For organizations using eSignature, it is sent when a contract that has the **Use eSignature for this contract?** option set to **No** on the contract header reaches the Out for Signature step in the workflow. It indicates that the contract has been approved and is ready for a signed document to be uploaded into the system.
- The notification is sent to contract managers and contract facilitators named on the contract who have opted into the notification.

# Portfolio Savings Manager Enhancements


This section focuses on enhancements to the Portfolio Savings Manager product on the SelectSite platform.

## Deliverables & Tasks Libraries

With the 17.2 release, PSM administrators with the new **Create & Manage Deliverable & Task Libraries** permission are able to define library deliverables and tasks for use in savings initiatives.

As managers create savings initiatives, they now have the option to select from created library entries, which automatically populate deliverables and tasks on the newly created initiative. Managers also continue to have the ability to add ad-hoc deliverables and tasks to the initiative.

To create library entries:

- Users navigate to **Portfolio Savings**  > **Libraries** > **Deliverables & Tasks Libraries**. Clicking the **Add Library Entry** button opens the Add Entry overlay. Here, a name and description for the library entry can be entered. Access can be set by project, initiative type, and sourcing method.
- Saving the library entry brings the user to the **Settings** tab of the **Library Entry** page. Here, they can edit the settings they added in the overlay, as well as change the library entry's status from Draft to Published. At least one deliverable must be entered before changing the status from Draft to Published. Published library entries are available for use with savings initiatives.
- Navigating to the **Deliverables and Tasks** tab of the Edit Library Entry page allows users to begin creating the deliverables and tasks for the library entry. Clicking the **Add Deliverable** button on this page provides users with fields for entering the deliverable's name and owner, as well as task names and owners for that deliverable.
- Once the deliverable is saved, additional tasks can be added to the deliverable by using the **Action** dropdown available beside the deliverable and its tasks. Additional deliverables can be added by clicking the **Add Deliverable** button.

There are two ways to add libraries to savings initiatives:

- On the **Create Savings Initiative** overlay, if the project, initiative type, and sourcing method selected match any published library entries, the **Deliverables and Tasks** field will become available, where users can search for and select library entries to include on the initiative.
- Users can also click the **Add From Library** button on the Deliverables and Tasks page of a savings initiative in Draft status. This opens the **Add From Library** overlay, where users can search for deliverable library entries. Selecting a library entry and clicking **Save Changes** will add the library entry's deliverables and tasks to the initiative.



## Impact

- Products Affected: Portfolio Savings Manager
- End User Impact: Medium
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default but optional for use.
- New Permissions related to this Feature: **Create & Manage Deliverable & Task Libraries** (Permissions > Portfolio Savings).

## Additional Deliverable and Task Enhancements

The following additional flexibility has been added to PSM deliverables and tasks:

- Users are now able to do inline edits of deliverables and tasks on the **Deliverables and Tasks** page by clicking the **Manage Deliverable** link on the deliverable line and selecting Edit. Inline editing is enabled for task name, due date, and owner, as well as all deliverable fields. Additional edits to tasks continue to be performed using the edit task option.
- Users are able to add comments to deliverables and tasks throughout the life of the savings initiative. Previously, users could only add comments on tasks after the initiative went through workflow, and they could not add comments on deliverables at all.
- Users are able to re-open completed and canceled deliverables and tasks by clicking the **Reopen** button beside the deliverable or task on the **Deliverables Progress** page of a savings initiative. Reopening a completed or canceled task will re-open its deliverable if it is completed or canceled.
- When creating or editing deliverables, users can now select **Auto complete Deliverable when all its tasks are complete** to auto complete the deliverable when all tasks under it are marked as complete.
- When creating a deliverable or task, there is now a **Save and Add Another** button to make deliverable and task creation more efficient.
- Deliverable due dates are now editable on approved and open initiatives by clicking the edit button beside the due date field when editing the deliverable. This opens a **Due Date Revision Notes** field as well, where users are able to add due date revision notes.

## Impact

- Products Affected: Portfolio Savings Manager
- End User Impact: Low
- Admin User Impact: None

- Integration Impact: None

### Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.

## Date Validation Removed from Savings Initiatives

With this release, date validation has been removed from savings initiatives. Open Date, Deliverables and Tasks, and Savings Start Date are now independent from each other. The only date validation that remains in place is between deliverables and tasks, where tasks have to be completed before a deliverable can be marked complete.

This makes PSM less restricted, as users are able to add open dates, deliverables and tasks, and savings start dates with no dependencies. For example, a deliverable may have a due date that is before the savings initiative open date, and savings may start before deliverables are complete.

### Impact

- Products Affected: Portfolio Savings Manager
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None


### Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.

## Detailed Savings Report


This new report provides PSM managers with the ability to generate an industry-standard report for download that provides both a summarized and a detailed list of savings initiatives based on search criteria.

The report includes savings initiative details, task and initiative statuses, and spend and savings information.

To generate the report, users navigate to **Portfolio Savings**  **> Savings Initiative > Search Savings Initiatives**. They can conduct either a simple or advanced search based on desired criteria.

On the search results screen, users click the export search **Results/Report** button. In addition to setting the download's file name and description, users can now choose between a standard detailed savings report and customized search export.


- Selecting **Standard Detailed Savings Report** provides options to select the reporting period (current year, current +1 year, and next year, for either calendar or fiscal year), and reporting currency for the report.
- Selecting **Customized Search Export** provides the previously available search export options, including the ability to include baseline savings schedule, track savings, and deliverables and tasks tabs in the download.

Once generated, the report is available for download from the **Portfolio Savings**  **> Savings Initiative > View Export Results** page.

## Impact

- Products Affected: Portfolio Savings Manager
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default but optional for use.
- New Permissions related to this Feature: None.
- Once generated, the report is available for download from the **Portfolio Savings**  **> Savings Initiative > View Export Results** page.

## Savings Summary Report Updates


The Savings Summary Graph on the Savings Summary Report is a bar chart which displays savings per project for comparison.

The Savings Summary report has been updated so that it displays information for the current year by default instead of all dates. Additionally, the report target values display as points, rather than a line.

## Impact

- Products Affected: Portfolio Savings Manager
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- To view the Savings Summary Report, navigate to **Portfolio Savings**  > **Reports** > **Savings Summary Report**.

## Start Savings Date Editable on Open Initiatives

Users now have the ability to revise and edit the Savings Start Date in addition to the Target, Capital Investment, and Baseline Spend values on the Track Savings page of open initiatives.

User are able to edit/revise the values here, if, for example, based on the initiative's milestones they realize that they are able to start savings earlier, or push out the savings date if they are waiting on a grant or a law to pass.

## Impact

- Products Affected: Portfolio Savings Manager
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- Navigate to the **Track Savings** page of a savings initiative in Open status. Click the **Edit** link in the Settings section and edit the Savings Start Date as desired.

## Perform Partial Search on Custom Fields

When searching on the **Custom Savings Initiative Field Library** page (Portfolio Savings > Libraries > Custom Fields) or when searching custom fields on the **Initiative Types** page (Portfolio Savings > Administration > Initiative Types), entering partial words now yields search results.

## Impact

- Products Affected: Portfolio Savings Manager
- End User Impact: Low
- Admin User Impact: None

- Integration Impact: None

### Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.

# Sourcing Director Enhancements

This section focuses on enhancements to the Sourcing Director product on the SelectSite platform. It contains updated features related to Sourcing Events for Sourcing Director.

## Ability to Use Product Brand Data with Sourcing Events

In 17.2, Sourcing Director provides the ability to use product brand data during the administration of sourcing events. A preferred product brand can be incorporated with sourcing requests, and event administrators can search for suppliers whose profiles indicate that they can provide products with the identified market brand. Event-participating suppliers have a clear view of the required brand for each sourced product, and can respond accordingly.

Other SelectSite modules have been updated so that brand information can be transferred from related documents such as purchase requisitions. TSM has been enhanced to allow "Brand" associations with each vendor profile.

### Impact

- Products Affected: Sourcing Director, Total Supplier Manager, eProcurement
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: Low

### Key points of Feature

- This feature is **OFF** by default and must be enabled by JAGGAER. Administrator setup is also required. **Please contact JAGGAER to enable this feature.** See [Ability to Manage Brands and Associate with Supplier Profiles](#) for more information.
- If the Brand feature is enabled for your organization, it affects the following areas in sourcing events:

#### Items

- A **Brand** field is displayed in the **Add Product Line Item** and **Edit Product Line Item** overlays, where users can enter the brand of item they are requesting. This field is not available for service items.

**Note:** Type a brand name in the field and the system will check to see if the name matches brands in the system. If there is a match, the name is added to the Brand field. If it does not match, the message **Try Searching Again** is displayed. Brands must be loaded in your system before they can be selected in Brand fields.

- On sourcing events created from a purchase requisition, brand information on line items added from the requisition is transferred into the sourcing event as read-only information.

- Suppliers have read-only visibility of line-item brand information.
- If alternate items are permitted on the event, suppliers participating in the event are able to enter a brand when adding an alternative item.

### Suppliers

- A new **Brand** search filter has been added to simple and advanced supplier search on the **Add Suppliers to Event** tab.
- Select a value in the Brand filter to return a list of suppliers that have an indication within their supplier profile that they can source goods available from the identified market brand, and may be potential providers of the targeted goods. Click the Search icon to display a list of brands that can be selected.

### Templates and Libraries

- Brand information on templates and libraries can be imported into a sourcing event.

### Purchase Requisitions

- On sourcing events created from a purchase requisition, brand information from the purchase requisition is transferred into the sourcing event as read-only information.

### Imports and Exports

- Buyer and supplier export and import documents have been updated to include brand information.
- **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.
- For brand updates in **Total Supplier Manager**, see [Ability to Manage Brands and Associate with Supplier Profiles](#).

## Change Event Type by Round for Multi-Stage Events

Previously, the same event type had to be maintained for every stage of a multi-stage event.

With the 17.2 release, buyers are able to more effectively leverage multi-stage events by allowing them to change the event type as they progress from one stage of an event to the next. When creating a new stage, users now have the option to select the event type for the new stage.

For example, a buyer may start with an RFI stage, where a large group of suppliers are evaluated and screened for potential participation. In the next stage of the event, once the field of suppliers has been adequately reduced via the RFI, the second stage of the event may be initiated as a reverse auction.

## Impact

- Products Affected: Sourcing Director
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default but optional for use.
- New Permissions related to this Feature: None.
- When selecting **Create New Stage** from the **Workflow Actions** dropdown on a multi-stage event, the Create New Stage overlay now includes the **Event Type** as a required field. By default, the previous event type is selected, but the type can be changed by searching for and selecting another event type.
- If a buyer uses an event type that includes items, and then changes the event type in a following round to one that does not include an items section, the items will not be brought forward. If a follow-on stage of the event then allows items again, the original items being sought by this multi-stage event can be efficiently reintroduced to the latest stage using new functionality on the **Items** page of the event.
  - The **Add or Import** dropdown on the **Items** page now has options to import item groups and individual items from previous stages of the event. As well, the **Add Product Line Item** dropdown includes an option to add items from previous stages.

## Create Internal Review Stages for Multi-Stage Events

With this release, buyers are able to incorporate an internal evaluation / review stage during the course of a multi-stage event, so that an event round can be conducted with no direct input from eligible suppliers.

An internal stage can be used to determine event award recipients, or to simply eliminate suppliers from award consideration.

The initial stage of an event is excluded from being designated an internal stage. Additionally, the following differences appear on an internal stage:

- On the **Setup** page:
  - The Stage Title field is required.
  - The Open and Close date fields are displayed with non-editable dashes, as these settings are not required for an internal stage.
  - The sealed bid option is set as read-only, with the value set to No.



- The Q&A Submission Close Date is still required. The Same as Close Date option is removed.
- On the **Description** page, the event description is maintained from the previous stage, and stage description is required.
- Fields on the **Questions, Items, and Additional Items** pages are maintained and displayed as read only.
- Identified **Suppliers** are still a requirement for an internal stage. Only previous stage suppliers (suppliers that submitted a bid) are available for inclusion within these stages.
- As an internal stage does not need any supplier responses or bids, the status and progress on the **Supplier Responses** page is replaced by the text "N/A" for all suppliers. The only formal content taken into account for evaluation during an Internal Stage are responses gathered from panelists via the Panel Questionnaire.
- Event Copy and Copy As Template workflow actions are not available.
- Since an internal stage does not require any direct supplier input, there is no need to flow through all of the usual event states. After the draft version of an internal stage has been approved, the event immediately enters the Under Evaluation state.
- On the **supplier portal**, all the sourcing event sections are hidden even if the sections were populated in the previous stage, except Summary, Q&A Board, and My Exports and Imports.
- When a supplier chooses to export an internal stage event, the only content that is included in the generated PDF is the Summary page information and the Q&A Board activity content.

## Impact

- Products Affected: Sourcing Director
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default but optional for use.
- New Permissions related to this Feature: None.
- When selecting **Create New Stage** from the **Workflow Actions** dropdown on a multi-stage event, the Create New Stage overlay now includes the **Internal Stage** option. By default, No is selected. Changing the selection to Yes will hide the Event Type and Create from Template fields, with any pre-selected content within those fields being irrelevant.

# Ability to Disqualify Suppliers

In 17.2, a new feature allows event administrators to remove (i.e., disqualify) suppliers from consideration when awarding a sourcing event. Event administrators can have this done automatically by configuring a response to an event question or additional item field that will disqualify a supplier if they select it, or the administrator can manually disqualify a supplier during the evaluation process.

This allows event administrators to eliminate bidding suppliers based on specified criteria without requiring them to evaluate each supplier response individually.

## Impact

- Products Affected: Sourcing Director
- End User Impact: Medium
- Admin User Impact: Low
- Integration Impact: None


## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- Suppliers can be disqualified from an event automatically or manually:
  - **Automatically** - Administrators creating an event can configure a response to an event question or additional item field that, if selected, will disqualify a supplier. When suppliers participating in the event select the response, they will be automatically disqualified from award consideration when the event closes.
  - **Manually** - Suppliers can be manually disqualified during the evaluation process of an event. Event managers, creators and owners with access to an event can manually disqualify suppliers. Stakeholders with view only access to the event cannot disqualify suppliers.
- There is no indication to suppliers that a response will disqualify them, or notification that they have been disqualified during the evaluation process.

**Note:** To facilitate the completion of item-level questions, an update to the supplier portal interface allows suppliers to provide event responses directly on the Items page when responding to an item. This includes the ability to expand and collapse the Additional Item Fields section of each item.

- Suppliers can interact with an event while it is open. The **Disqualified** status is only applied to suppliers once an event closes, and disqualified suppliers are not eligible for award consideration during the evaluation phase of an event.

- Disqualified suppliers can be reinstated. Supplier disqualifications and re-instatements are recorded in the Event History tab of the History page. The disqualification history can also be accessed from the Supplier Responses page by clicking the information icon ⓘ next to a supplier and then clicking the [Link to Disqualification History](#) link.
- **Automatic Disqualification**
  - This option requires setup on event questions or additional item fields when creating an event.
  - Both event-level questions and item-level questions (i.e., Additional Item Fields) support disqualifying responses, but disqualifications are an event-level, all-or-nothing designation. Suppliers cannot be partially disqualified. For example, a supplier can't be disqualified from award consideration for specific items.
  - The following **Response Types** (for event questions) or **Field Types** (for additional item fields) support disqualifying responses:
    - Numeric Text Box
    - Yes/No
    - Dropdown List (Pick One)
    - Multiple Choice (Pick One)
    - Multiple Select (Pick Many)
    - Date
  - To make a question or additional item response one that can automatically disqualify a supplier, a new **Set Disqualifying Response** checkbox has been added to the following pages:
    - Add/Edit Question
    - Add/Edit Additional Item Field
    - Add/Edit Conditional Field
  - If the **Set Disqualifying Response** checkbox is selected on an event question or additional item field, a **Disqualify** column is displayed in the **Response Options** section. This is where the disqualifying response is identified by selecting the checkbox on the response option(s) that will cause a supplier to be automatically disqualified. The checkbox is left blank on responses that do not cause a supplier disqualification.
  - Auto-disqualification settings on an event are transferred to event amendments, copied events, and incorporated into event question exports and imports.
  - Disqualifying response options on event questions and additional item fields in event templates and libraries are included when they are copied into an event.
- **Manual Disqualification**
  - **Manual** disqualification excludes suppliers from award consideration during the evaluation process of an event.
  - Event administrators, creators, and owners with access to an event can manually disqualify suppliers once the event is **Under Evaluation**.

- There are two places to manually disqualify a supplier:
  - On the **Supplier Responses** page, a **Disqualify** option is displayed in the **View Response** menu next to a supplier.
  - On an **award scenario**, a **Disqualify** option is displayed by expanding the supplier name.
- **Disqualified Suppliers on Sourcing Events**
  - Suppliers are disqualified after an event closes and when it is in the **Under Evaluation** status:
    - For **automatic** disqualifications, opening the Supplier Responses page after an event has closed will cause the system to run an analysis to find disqualifying supplier responses. This process will take a few seconds and the Supplier Response page will display a message indicating that a supplier disqualification check is in progress. **Disqualified** is displayed next to disqualified suppliers when the analysis is finished.
    - For **manual** disqualifications, the **Disqualify** option is available on supplier responses and award scenarios after the event is closed.
  - A **Disqualified** status is displayed next to disqualified suppliers on the Supplier Responses page:
    - The supplier is excluded from the **Evaluate All Responses** and **Export All Responses** evaluation actions.
    - The **Evaluate Selected Response** checkbox is removed for that supplier.
    - **Saved scenarios** with disqualified suppliers cannot be loaded. A warning message at the top of the Load Saved Scenario page will indicate that there are scenarios with a disqualified supplier. The affected scenario will not have a Load button. Instead, an information icon  is displayed and when clicked, will show the message "This scenario has a disqualified supplier".
  - Suppliers cannot be disqualified from a **pending award** or a **finalized award**. They must be removed from the award before they can be disqualified.
- **Reinstating Disqualified Suppliers**
  - Disqualified suppliers can be reinstated from the **Supplier Responses** page by clicking **View Response**, then **Re-Qualify**. Suppliers do not receive notification that they have been reinstated.
- Buyer question import and export files have been updated to include disqualifying response information, and the buyer event export has been updated to include the qualification status of suppliers.

# Ability to Assign Groups to Panelist Added to a Published Panel Questionnaire

Currently, when a panelist is added to a published panel questionnaire, all panel questions are automatically assigned to that panelist, with all questions, by default, set as needing to be optionally responded to by that panelist.

In 17.2, the process of adding a panelist to a published panel questionnaire has been enhanced so that the event administrator has the ability to assign targeted groups of questions to the new panelist, and can define whether those assigned question responses/assessments will be optional or required by the added panelist. This will, for example, ensure that an added Subject Matter Expert can be directed to evaluate only those questions relevant to their area of expertise.

## Impact

- Products Affected: Sourcing Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- An **Edit Group Assignment** option is available for new panelists added to the **Panelists** page on published **Panel Questionnaires**. When clicked, the Panel Questionnaire Group Assignment window opens and a **Visible** checkbox next to each question group allows users to select the question groups that a panelist can see. If the Visible checkbox is selected, users can also make panelist responses **Optional** or **Required**.
  - Group assignments can be made if the questionnaire is not published, or if the questionnaire is published and the panelist has not started their assessment.
  - Group assignments cannot be made once the panelist has started or the questionnaire is closed.
- The panelist will only see the questions in the groups selected as **Visible** when completing the panel questionnaire. They must complete required questions before they can submit their questionnaire responses. See also [Panel Questionnaire Enhancement](#).

## Panel Questionnaire Enhancement

In 17.2, panel questionnaires have been updated so that when a panelist saves their questionnaire responses, a validation process checks for unrated questions, allowing the system to show a list of any required questions that have not been rated and which require a response rating. Panelists can

click on a question link to navigate directly to the question for the express purpose of completing the missing assessment. Once such a question has received the panelist's response rating, it is removed from the list.

This allows panelists to pinpoint required questions that are missing response ratings when they import or submit panel questionnaires, and eliminates the need to scan through all questions to find which ones were missed.

## Impact

- Products Affected: Sourcing Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- When panelists, responding to a panel questionnaire, click **View Questionnaire** or **Go to Supplier on Questionnaire** on the **My Response** page, a validation process check is performed to see if there are required questions that are missing a response rating. An indication is provided if the questionnaire is **Incomplete** or **Partially Complete**. A list of required questions that do not have response ratings is also displayed.
- Clicking on a question link, identified via the validation process, will redirect users to the corresponding question. Panelists can then rate the question response and save changes. Once the question response has a rating, it is removed from the list of non-addressed questions.
- This validation is also applied when response ratings have been completed on an exported file and are imported back into the event questionnaire.

## Include Ship-To-Address on Events Created from Requisitions

When a sourcing event is created from a purchase requisition, a new option allows the Ship-To-Address on the requisition to be imported into the event and displayed to suppliers participating in the event.

## Impact

- Products Affected: Sourcing Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- When a sourcing event is created from a purchase requisition, a new **Export Ship-To-Address to Event** option on the **Create Sourcing Event** window can be used to import the Ship-To-Address from the requisition to the event by selecting the **Yes** radio button. Yes is the initial default setting.

**Note:** This field has been set so that an applied selection is persistent on a per user basis. This ensures that the option to either include or exclude the Ship-to-Address is effectively defaulted based on the goals of each system user empowered to initiate a sourcing event from an eProcurement document.

- On a **sourcing event**, the requisition Ship-To-Address is displayed in the following locations:
  - **Additional Item Fields** - A read-only **Ship-To-Address** additional item field is automatically created by the system and displayed on the Additional Item Field page. Clicking **View** next to the item displays address information from the requisition.
  - **Items** - The Ship-To-Address is displayed as a read-only field on product line items populated from the requisition. On additional product line items introduced to the PR-generated event, a blank Ship-To-Field allows buyer users to enter an address.
  - **Import/Exports** - The Ship-To-Address from the requisition is included on item import and export files for the event.
- The Ship-To-Address is visible to **suppliers** participating in the event:
  - It is displayed as a read-only field on the **Items** page under the **Additional Item Fields** heading.
  - If alternate items are permitted, the Ship-To-Address is also displayed as a read-only field on the **Alternate Product Line Item** window.