

## 17.1 PRODUCT RELEASE NOTES

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

MARCH 17, 2017 - INITIAL VERSION



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# Welcome

The **17.1 JAGGAER Product Release** will be available in the production environment starting April 9, 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
  - Supplies Manager
  - 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 16.3 and release 17.1 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 17.1 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 17.1 – available in your production environment on Sunday, April 9, 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.

# 17.1 Scheduling

To help prepare our customers for the upcoming 17.1 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 17.1 Product Release\*.

Event	Date and Time	Description and Details
Release Promotion: Test Sites Unavailable	Beginning March 17, 2017, 8am ET	The 17.1 release will be promoted to the Test (usertest) environment from Friday, March 17, 2017, 8am ET through Sunday, March 19, 2017 12 pm ET. An email will be sent when the promotion is complete.
Release Validation in Test Environment	March 19, 2017 - April 7, 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 April 7, 2017, 9pm ET through April 9, 2017, 12pm ET	The 17.1 release will be promoted to the Production environment from Friday, April 7, 2017 9pm ET through Sunday, April 9, 2017 12pm ET. An email will be sent out when the promotion is complete.
Release available on Production Sites	Sunday, April 9, 2017	This date indicates when the features and functionality associated with 17.1 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 17.1 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 February 24, 2017 on the Product Release Library	The pre-recorded video will present a preview of all features coming in release 17.1.
eProcurement (pre-recorded video)	Available March 17, 2017 on the Product Release Library	This pre-recorded video will present details about eProcurement features coming in release 17.1.
Accounts Payable (pre-recorded video)	Available March 17, 2017 on the Product Release Library	This pre-recorded video will present details about Accounts Payable features coming in release 17.1.
Portfolio Savings Manager (pre-recorded video)	Available March 17, 2017 on the Product Release Library	This pre-recorded video will present details about Portfolio Savings Manager features coming in release 17.1.
Spend Radar (pre-recorded video)	Available March 17, 2017 on the Product Release Library	This pre-recorded video will present details about Spend Radar features coming in release 17.1.
Total Supplier Manager (pre-recorded video)	Available March 17, 2017 on the Product Release Library	This pre-recorded video will present details about Total Supplier Manager features coming in release 17.1.
Total Contract Manager (pre-recorded video)	Available March 17, 2017 on the Product Release Library	This pre-recorded video will present details about Total Contract Manager features coming in release 17.1.
Sourcing Director (pre-recorded video)	Available March 17, 2017 on the Product Release Library	This pre-recorded video will present details about Sourcing Director features coming in release 17.1.



# The Feature Snapshot for 17.1

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.
- **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 April 9, 2017.

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Updated Commodity Code Display	eProcurement, Accounts Payable Director, AP Express	End Users	None			
Shopping Home Page Changed to Default Configurable Dashboard	eProcurement	End Users, Admins	None			
Admin Home Page Changed to Default Configurable Dashboard	All SelectSite Products	End Users, Admins	None			
New Online Searchable Help Widget	All SelectSite Products	End Users, Admins	None			
New Printed Handbooks Widget	All SelectSite Products	End Users, Admins	None			
New Solutions and Help Links Widget	All SelectSite Products	End Users, Admins	None			
New System Message Widget	All SelectSite Products	End Users, Admins	None			
My Approvals Widget Updated to Include Sales Orders	Supplies Manager, Chemical Inventory with Sales Orders	End Users	None			
Product Search Widget Updated to Allow Advanced Search Directly from a Dashboard	eProcurement	End Users	None			
Enhancement to Inactive Address and Contacts Display in	All SelectSite Products	End Users	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Manage Associated Addresses Overlay for Locations						
Supplier Import Notification Updates	All SelectSite Products	End Users	None			
Support Canadian Social Insurance Number (SIN) Format in Supplier Profile / Registration	All SelectSite Products	End Users	None			
Supplier Actions Added to Supplier 360 Page	All SelectSite Products	End Users	None			
Ability to Perform Trade-In Transactions	SpendDirector, Accounts Payable, AP Express	Admins, End Users	Low			
New Credit Memo Request Form	eProcurement, AP Director	Admins, End Users	None			
Ability to Hide Form Request Sections from End Users	eProcurement	Admins, End Users	None			
Ability to Set a Form Request Field as a Product Attribute	eProcurement	Admins, End Users	None			
Ability to Set Default Responses for Questions and Fields on Form Requests	eProcurement	Admins, End Users	None			
Ability to Include Instructions at Specific Points within Form Request Form Field and Question Groups	All SelectSite Products	Admins, End Users	None			
Ability to Capture Tax 2 on Check Request Forms	eProcurement, AP Director	Admins, End Users	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Form Request Multi-Currency	eProcurement	Admins, End Users	None			
Ability to Configure New Payment Methods for Accounts Payable	Total Supplier Manager with Onboarding	Admins, End Users	None			
eSignature Available for Supplier Registration Documents	Total Supplier Manager	Admins, End Users	None			
Ability to Invite Registered Suppliers with a Different Form	Total Supplier Manager	End Users	None			
Bank Address Fields Optional for Direct Deposit and Wire Transfer Payment Types	Total Supplier Manager with Onboarding	Admins, End Users	None			
Canadian Bank Account Validation for Direct Deposit (ACH) Payment Type	Total Supplier Manager with Onboarding	Admins	None			
Language Support for Supplier Registration Custom Profile Field Configuration	Total Supplier Manager	Admins, End Users	None			
Duplicate Supplier Check in Supplier Request Process	Total Supplier Manager	End Users	None			
Ability to Map Point of Title Transfer and IncoTerms for Tax Integration	Accounts Payable Director, AP Express	Admins	Low			
Non-PO or PO Flag on Line Items Included in Tax Callout Message	Accounts Payable Director, AP Express	None	Medium			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Contract Number Included in DMR/OCR Invoice Import	Accounts Payable Director and AP Express with Digital Mailroom or OCR Invoice Import	Admins, End Users	Medium			
Ability to Prevent Receipt Submission for Over-Received Purchase Orders	Accounts Payable Director, AP Express, Order Manager, Receipt Manager	Admins, End Users	Low			
Invoice Export DTD Includes Tax Fields	Accounts Payable Director, AP Express	Admins	Medium			
Digital Mailroom Report Link Can Point to Organization-Specific Address	Accounts Payable Director and AP Express with Digital Mailroom or OCR Invoice Import	Admins, End Users	None			
Trustweaver General Enhancements	Accounts Payable Director	Admins, End Users	High			
Trustweaver Enhancements for Internationalization	Accounts Payable Director	Admins	High			
Miscellaneous AP Enhancements	Accounts Payable Director, AP Express	Admins, End Users	Low			
Cost Analysis & Auto-Scoring Added to Event Line Items	Sourcing Director	End Users, Admins	None			
New Conditional Visibility Controls for Additional Item Fields	Sourcing Director	End Users, Admins	None			
Ability to Make Additional Item Fields Required for Suppliers	Sourcing Director	End Users, Admins	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Response Field Type Added to Additional Item Fields	Sourcing Director	End Users, Admins	None			
Changes to 'Add Contact' Option on Sourcing Event Suppliers	Sourcing Director	End Users, Admins	None			
Ability to Add an Attachment to a Q&A Board Entry	Sourcing Director	End Users, Admins	None			
Allow Q&A Board Activity Beyond the Event Close Date	Sourcing Director	End Users, Admins	None			
Enhancements to Public Site Reverse Auction Event Presentation	Sourcing Director	None	None			
Ability to Upload Documents to Public Sites on Canceled Events	Sourcing Director	End Users, Admins	None			
Panel Questionnaire Comment Field Expanded	Sourcing Director	End Users	None			
Ability to Reopen a Panel Questionnaire	Sourcing Director	End Users, Admins	None			
New Option to Copy an Event Template	Sourcing Director	End Users, Admins	None			
New Return to Evaluator Workflow Action	Sourcing Director	End Users, Admins	None			
Enhancements to PR Import/Export and PR Validation XML Files	Sourcing Director	End Users, Admins	High			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Ability to Edit Second Party or Supplier on Contracts	Contract Compliance Tracker, Total Contract Manager	End Users, Admins	None			
Call Attention to Comments Entered on the Contract	Contract Compliance Tracker, Total Contract Manager	End Users, Admins	None			
Menu Change to the 'For selected line items' Field on Invoices	Contract Compliance Tracker, Total Contract Manager	End Users, Admins	None			
Ability to Automate Internal Review Workflow	Total Contract Manager	End Users, Admins	None			
New General Contract Setting for Internal Review Rounds	Total Contract Manager	End Users, Admins	None			
New Options for Viewing Contract Workflows	Total Contract Manager	End Users, Admins	None			
New Option to Set Default First Party by Project	Total Contract Manager	End Users, Admins	None			
Ability to Delete a Contract Checked Out to Logged In User	Total Contract Manager	End Users, Admins	None			
Ability to Edit Contracts in Approval Workflow	Total Contract Manager	End Users, Admins	None			
New Contract Approval Workflow Reminder Email/Notification	Total Contract Manager	End Users, Admins	None			
View Contract Link in Email Notifications Updated	Total Contract Manager	End Users, Admins	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Contract Request Names Displayed on Approvals Dashboard Widget	Total Contract Manager	End Users, Admins	None			
Savings Initiative Custom Fields	Portfolio Savings Manager	End Users, Admins	None			
Initiative Types	Portfolio Savings Manager	End Users, Admins	None			
Advanced Search Enhancements	Portfolio Savings Manager	End Users	None			
Choose Secondary Savings Type when Creating and Copying Savings Initiatives	Portfolio Savings Manager	End Users	None			
Allow Savings Initiative Managers to Re-Open Completed Savings Initiatives	Portfolio Savings Manager	End Users, Admins	None			
Copy Dates When Copying a Savings Initiative	Portfolio Savings Manager	End Users	None			
Current Deliverable Highlighted on Deliverables Progress Page	Portfolio Savings Manager	End Users	None			



# General SelectSite Enhancements including User Interface Updates

This section details enhancements that are available in 17.1 that are general to most products in SelectSite. Features in this section include updates to the user interface, system email updates and updates to saved search functionality.

## Updated Commodity Code Display on PR, PO and Invoice Documents

Previously, if a commodity code was greater than 50 characters, there were potential issues when communicating with third party systems such as OneSource tax integration. With the 17.1 release, the commodity code description field can now properly display the full description. Hover text will display for commodity codes with a description of more than 30 characters allowing the user to see the full description and select the correct code.

**Note:** The functionality for displaying commodity codes via search or in a dropdown list has not changed. Commodity codes are displayed on documents in list format unless the number of codes exceeds the organization limit for dropdown lists.

### Impact

- Products Affected: Spend Director, eProcurement, Accounts Payable Director, AP Express
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: Low

### Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- When viewing a commodity code description in a requisition, purchase order or invoice, hover text will display if the description is greater than 30 characters. The hover text will allow the user to see the full description so that the correct code can be selected.

## Product Home Page Updates

The Source-to-Pay suite contains various home pages that provide access to tasks for specific features or products. Over the past several releases, JAGGAER has been changing

these home pages from static content to content that is configurable. In 17.1, we have made this update to the Admin Home and Shopping Home pages.

## Shopping Home Page Changed to a Default Configurable Dashboard

The Shopping Home Page allows shoppers to quickly access shopping tasks. Previously, the Shopping Home page is a static page that cannot be modified. As of 17.1, the static page has been replaced by a default configurable dashboard. This will allow organizations to make updates to the Shopping Home page to better suit their needs. The system default dashboard can be replaced by a new or updated Shopping dashboard. This can be accomplished by creating a copy of the default dashboard and making modifications or by creating a new Shopping dashboard.

### Impact

- Products Affected: eProcurement
- End User Impact: Low
- 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 static Shopping Home page has been replaced by a system default configurable dashboard. The information available on the system dashboard is similar to the content that was available on the static page. The primary difference is that the information is presented via dashboard widgets. The following widgets are available on the default dashboard.
  - My Resources
  - Organization Message
  - Quick Links
  - Shop
  - Showcases
- On the Shopping Home page, the Configure this Dashboard link displays to users with the *Manage Organization Dashboard* or *Catalog Management* permission. This link allows the user to manage the dashboard being displayed on the Home page.
  - If the dashboard being displayed is the system default dashboard, clicking on this link will open an overlay for copying the dashboard. Once the copy is configured and made active, it will replace the system default dashboard on the Home page.

- If the dashboard being displayed is not the system default, clicking on this link will open the dashboard for editing. Once changes are made and published the dashboard will be updated on the Shopping Home page.
- On the **Manage Organization Dashboards** page, the system default page is indicated by **System Default**.
- When a new dashboard is created, it replaces the system default. If multiple dashboards are active and assigned the Shopping dashboard type, users with access to more than one of the dashboards will be able to toggle between them. Users who do not have access to any of the replacement dashboards will see the system default.

## Admin Home Page Changed to a Default Configurable Dashboard

The Admin Home Page allows administrators quick and easy access to SelectSite administrator tasks and information. Previously, the Admin Home page was a static page that could not be modified. In 17.1, the static page has been replaced by a default configurable dashboard. This allows organizations to make updates to the Admin Home page to better suit their needs. The system default dashboard can be replaced by a new or updated Admin dashboard. This can be accomplished by creating a copy of the default dashboard and making modifications or by creating a new Admin dashboard.

### Impact

- Products Affected: All SelectSite Products
- End User Impact: Low
- 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 static Admin Home page has been replaced by a system default configurable dashboard. The information available on the system dashboard is similar to the content that was available on the static page. The primary difference is that the information is presented via dashboard widgets. The following widgets are available on the dashboard. **Note:** Several of these widgets are newly available in release 17.1. For additional information about the new widgets please see [Dashboard Widget Updates](#).

- Action Items
- Approvals
- Document Search
- Managing Catalogs and Suppliers

- Managing Users
  - Managing Workflow
  - Miscellaneous (manage fields, manage terms and conditions, etc.)
  - My Draft Carts
  - My Requisitions
  - Online Searchable Help - *New widget available in 17.1*
  - Organization Message
  - Printed Handbooks - *New widget available in 17.1*
  - Reporting and Analysis
  - Search for a Solution - *New widget available in 17.1*
  - System Message - *New widget available in 17.1*
- On the Admin Home page, the Configure this Dashboard link displays to users with the *Manage Organization Dashboard* or *Administration* permission. This link allows the user to manage the dashboard being displayed on the Home page.
    - If the dashboard being displayed is the system default dashboard, clicking on this link will open an overlay for copying the dashboard. Once the copy is configured and made active, it will replace the system default dashboard on the Home page.
    - If the dashboard being displayed is not the system default, clicking on this link will open the dashboard for editing. Once changes are made and published the dashboard will be updated on the Admin Home page.
  - On the **Manage Organization Dashboards** page, the system default page is indicated by **System Default**.
  - When a new dashboard is created, it replaces the system default. If multiple dashboards are active and assigned the Admin dashboard type, users with access to more than one of the dashboards will be able to toggle between them. Users who do not have access to any of the replacement dashboards will see the system default.

## Dashboard Widget Updates

As JAGGAER continues to replace static home pages with configurable dashboards, it is necessary to add and update dashboard widgets to maintain the home page functionality. These new and updated widgets can also be used on personal and organization dashboards and, in some cases, on the Supplier 360 dashboard. In 17.1, we have added and updated several dashboard widgets.

## New Online Searchable Help Widget

In 17.1, a new **Online Searchable Help** widget is available for configurable dashboards. This widget allows users with appropriate permissions to access the online searchable help. The widget is included automatically on the Admin Home page default dashboard (also new in 17.1) and can also be added to any other configurable dashboard.

## Impact

- Products Affected: All SelectSite Products
- 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
- In order to view the widget, a user must have one of the following permissions:
  - **Administration** (Permission Settings > Administration > System Administration).
  - **Administer My Business Unit** (Permission Settings > Administration > Business Unit Administration).
  - **Access Self Help Tools** (Permission Settings > Administration > System Administration).
- The widget is included by default on the Admin Home page. It can be added to both organization and personal dashboards.
- Users who do not have the appropriate permissions cannot add the widget to a personal dashboard. Dashboard administrators who do not have the appropriate permissions can add the widget to an organization dashboard but cannot view the content.
- The widget can be selected from the **All** or **General** widget categories.
- Users can access the online searchable help in one of the following ways:
  - To search the help directly from the widget, enter a term in the search field and click the search icon. The search topic will open in a separate browser window.
  - To browse the online searchable help topics, click the **Browse the Table of Contents** link. The online searchable help will open in a separate browser window.
- Detailed instructions for configuring and using the Create Invoice widget can be found in [General Widgets](#) in the online help or **Site Basics Handbook**.

## New Printed Handbooks Widget

In 17.1, a new **Printed Handbooks** widget is available for configurable dashboards. This widget allows users with appropriate permissions to access the PDF end-user handbooks. The widget is included automatically on the Admin Home page default dashboard (also new in 17.1) and can also be added to any other configurable dashboard. **Note:** The end-user handbooks that are available to an organization vary based on that organization's licensed products.

## Impact

- Products Affected: All SelectSite Products
- 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
- In order to access printed handbooks from the widget, a user must have one of the following permissions:
  - **Administration** (Permission Settings > Administration > System Administration).
  - **Administer My Business Unit** (Permission Settings > Administration > Business Unit Administration).
  - **Access Self Help Tools** (Permission Settings > Administration > System Administration).
- The widget is included by default on the Admin Home page. It can be added to both organization and personal dashboards.
- Users who do not have the appropriate permissions cannot add the widget to a personal dashboard. Dashboard administrators who do not have the appropriate permissions can add the widget to an organization dashboard but cannot view the content.
- Adding a widget to the dashboard:
  - The widget can be selected from the **All** or **General** widget categories.
  - The widget can be auto-sized.
- To access a handbook from the widget, simply click on the handbook name you would like to access. The handbook opens in a separate browser window.
- Detailed instructions for configuring and using the Create Invoice widget can be found in [General Widgets](#) in the online help or **Site Basics Handbook**.

## New Solutions and Help Links Widget

In 17.1, a new **Solutions and Help Links** widget is available for configurable dashboards. This widget allows users with appropriate permissions to access the various customer solutions available in the site. Solutions include access to the Product Release Library, the Solutions Knowledgebase, incident reporting and more. The widget is included automatically on the Admin Home page default dashboard (also new in 17.1) and can also be added to any other configurable dashboard. **Note:** In some cases, clicking on a solution from the widget will take you to a log in page for the solution. A separate log in may be required to access the actual solution.

## Impact

- Products Affected: All SelectSite Products
- 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
- In order to view the widget, a user must have one of the following permissions:
  - **Administration** (Permission Settings > Administration > System Administration).
  - **Administer My Business Unit** (Permission Settings > Administration > Business Unit Administration).
  - **Access Self Help Tools** (Permission Settings > Administration > System Administration).
- The widget is included by default on the Admin Home page. It can be added to both organization and personal dashboards.
- Users who do not have the appropriate permissions cannot add the widget to a personal dashboard. Dashboard administrators who do not have the appropriate permissions can add the widget to an organization dashboard but cannot view the content.
- Adding a widget to the dashboard:
  - The widget can be selected from the **All** or **General** widget categories.
  - The widget can be auto-sized.
- To access a handbook from the widget, simply click on the handbook name you would like to access. The handbook opens in a separate browser window.
- Detailed instructions for configuring and using the Create Invoice widget can be found in [General Widgets](#) in the online help or **Site Basics Handbook**.

## New System Message Widget

In 17.1, a new **System Message** widget is available for configurable dashboards. This widget displays how much organization space is being used. Items reflected in space usage include attachments, document search exports and administrative imports/exports. The widget is included automatically on the Admin Home page default dashboard (also new in 17.1) and can also be added to any other configurable dashboard.

## Impact

- Products Affected: All SelectSite Products
- 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
- In order to access printed handbooks, a user must have the **System Configuration** permission (Permission Settings > Administration > System Administration) AND one of the following:
  - **Administration** (Permission Settings > Administration > System Administration)
  - **Administer My Business Unit** (Permission Settings > Administration > Business Unit Administration).
- The widget is included by default on the Admin Home page. It can be added to both organization and personal dashboards.
- Users who do not have the appropriate permissions cannot add the widget to a personal dashboard. Dashboard administrators who do not have the appropriate permissions can add the widget to an organization dashboard but cannot view the content.
- Adding a widget to the dashboard:
  - The widget can be selected from the **All** or **General** widget categories.
  - The widget can be auto-sized.
- Detailed instructions for configuring and using the Create Invoice widget can be found in [General Widgets](#) in the online help or **Site Basics Handbook**.

## My Approvals Widget Updated to Include Sales Orders

The **My Approvals** widget displays pending approvals that are located in approval folders to which the user viewing the dashboard is assigned. Previously, pending sales orders were not included as part of the pending approvals. In 17.1, pending sales orders are now included.

## Impact

- Products Affected: Supplies Manager, Chemical Inventory with Sales Orders
- 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



- Sales orders displayed in the widget are only those that are pending for the user viewing the dashboard.
- For additional information about this widget, please see [General Widgets](#) in the online help or **Site Basics Handbook**.

## Product Search Widget Updated to Allow Advanced Search Directly from a Dashboard

The **Product Search** widget gives users access to product search on a dashboard. Previously, the widget contained an Advanced Search link that took the user to a separate page to perform the advanced search. In 17.1, the link opens the advanced search on the dashboard. The widget is automatically re-sized to display the search criteria.

### 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
- For additional information about this widget, please see [Shopping Widgets](#) in the online help or **Site Basics Handbook**.

# Supplier Management Enhancements

This section focuses on enhancements in the 17.1 release related to Supplier Management activities.

## Enhancement to Inactive Addresses and Contacts Display in Manage Associated Addresses Overlay for Locations

During the supplier registration process, or when updating the supplier profile, **Associated Addresses** can be selected for a contact or location. Previously, users could not differentiate between active and inactive addresses in the **Manage Associated Addresses** overlay.

With 17.1, the **Manage Associated Addresses** overlay displays inactive addresses in a different format from active addresses, so users are immediately aware of the active addresses from which to select. The functionality has not changed, in that an inactive address can still be selected. The functionality for adding and editing locations, addresses and contacts has not changed.

Suppliers will also see the inactive address and contact indication when viewing locations in the Customer Branded Portal.

### 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 add or edit an address or contact in the Locations tab of the supplier profile, inactive addresses and contacts are displayed in a lighter italicized font and have an (*inactive*) indication. The address or contact can still be selected if appropriate.
- The inactive indications display in the supplier profile view, as well as a customer's proxy registration view of the supplier profile.
- Suppliers will see the inactive indications for associated addresses and contacts when viewing locations in the Customer Branded Portal.

# Supplier Import Notification Updates

When the Supplier Import integration was initially developed, only organizations with the Total Supplier Manager and Onboarding licenses could enable the integration. As more customers without the TSM license required a supplier import integration, however, the license restriction was removed. However, the email notifications associated with Supplier Import failures and warnings have continued to display the TSM prefix, and only organizations with the Onboarding license could enable the notifications.

With the 17.1 release, all customer users who utilize the Supplier Import integration can now enable the notifications for failures and warnings. Also, the notification names have been updated by removing the specific TSM reference.

## 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, but the notification preferences must be set for a user in order to be received
- New Permissions related to this Feature: None
- With the 17.1 release, a customer user for an organization that utilizes Supplier Import integration can enable notification preferences for:
  - **Supplier XML Import Failure Notice**
  - **Supplier XML Import Warning Notice**
- The notifications were previously named **TSM Supplier XML Import Failure Notice** and **TSM Supplier XML Import Warning Notice**. They are located under the **Notification Preferences: Administration & Integration** section of the user profile. The notifications are not new to the application, but are now available to any organization utilizing the integration.
- A user must have the notification enabled for Email, Notification, or Email & Notification in order to receive the failure or warning.

# Support Canadian Social Insurance Number (SIN) Format in Supplier Profile / Registration

When a supplier's Legal Structure is indicated as Individual / Sole Proprietor, a Tax ID Number Type must be selected. Previously, the options were Social Security Number and Employer Identification Number. Canadian entities, however, utilize a Social Insurance

Number (SIN) instead of a Social Security Number, and the SIN value must meet different requirements than a Social Security Number for U.S. entities. With the 17.1 release, the **Social Security Number** field has been renamed to **Social Security Number / Social Insurance Number**, and may also be referenced as **SSN/SIN**. If Canada is selected as the Country of Origin and the Tax ID Number Type is designated as Social Security Number / Social Insurance Number, validation will now be performed for the required Social Insurance Number format.

## 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
- The values for **Tax ID Number Type** in the supplier profile are now: **Employer Identification Number** and **Social Security Number / Social Insurance Number**. This supports customers who may have suppliers based out of Canada, and require a Social Insurance Number for tax purposes.
- When **Canada** is selected as the **Country of Origin** and **Social Security Number / Social Insurance Number** is selected as the **Tax ID Number Type**, the Tax Identification Number will be validated for the required Social Insurance Number format. There is no change to the validation if another country is selected as the **Country of Origin** and **Social Security Number / Social Insurance Number** is selected as the **Tax ID Number Type**. In that instance, the Tax Identification Number will continue to be validated for the required Social Security Number nine-digit numeric value.
- This change is reflected in the Supplier Profile, as well as when viewing the supplier's registration in Proxy view.
- Suppliers will see this change reflected in the Network Portal, as well as in each Customer Branded Portal.
- If a change is made to the Country of Origin, Legal Structure, or Tax ID Number Type and the customer requires that pending changes on a supplier profile be reviewed, the information for these fields must be accepted or declined as a group.

## Supplier Actions Added to Supplier 360 Page


The **Supplier 360** screen gives you insight in to your organization's relationship with the supplier by providing important information in a single location. Previously, the Supplier

Actions dropdown was not available from the **Supplier 360** page. With the 17.1 release, the **Supplier Actions** dropdown displays on the Supplier 360 page in the supplier profile.

## 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
- The **Supplier Actions** dropdown is now available when viewing the **Supplier 360** page in the supplier profile (**Suppliers**  **> Manage Suppliers > Search for a Supplier: Supplier Profile**).
- The actions available from the Supplier Actions dropdown have not changed, and are the same as on other pages of the supplier profile (depending on user permissions).

# eProcurement Enhancements

This section details enhancements that will be available in 17.1 related to the SelectSite eProcurement products.

## Ability to Perform Trade-In Transactions


Many customers may need to make purchases for equipment when there is a used piece of equipment they can trade in to offset the cost of a new purchase. Currently, this type of transaction can only be handled by adjusting the net price of the new equipment and noting the reason for the adjustment within the purchase order. With the 17.1 release, customers now have the ability to conduct a **Trade-In** transaction to make such a purchase. By designating the transaction specifically as a trade-in, customers will have additional visibility into these types of transactions and the savings realized. Having this information will also give the customer additional information for fixed asset tracking and tax assessments.

When enabled for the organization, users with the appropriate permission will see the option to add a trade-in in the shopping quick links as well as on the shopping cart, requisition, purchase order, and invoice. Trade-in items are included in PR and PO exports and imports. The budget check also accounts for trade-in items. Organizations will have the ability to route workflow based on trade-in items.

### Impact

- Products Affected: Spend Director, AP Director, AP Express
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

### Key points of Feature


- This feature is **OFF** by default and can be enabled by an administrator
- New Permissions related to this Feature: **Add/Edit Trade-Ins**
- With the 17.1 release, a new menu option for **Trade-In Configuration** is available when selecting **Setup**  **> General Site Settings**. A user must have the **System Configuration** (User Profile > Permissions > Administration) permission to see this configuration option. This option is OFF by default. When this menu option is selected, the user is navigated to the **Trade-In > Trade-In Configuration** page.
- The **Trade-In Configuration** sub-tab contains the following settings (select **Override Default Values** to change the value):
  - **Enable trade-in entry**: Enable this option to allow trade-in item entry by users with the appropriate permission. When this option is turned on, additional configuration options display.

- **Allow trade-ins by default for all suppliers:** By default, no suppliers will have the ability to allow trade-ins unless you enable it on a supplier's profile. Enable this option if you want to allow trade-ins for all of your suppliers by default. If enabled, all suppliers can have trade-in items associated and the option can be disabled for individual suppliers within the supplier profile. If this setting is disabled, the option can be enabled for specific suppliers within the supplier profile.
- **Integration Distribution Type:** This setting 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.
  - **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.
- **Supplier Selection** options (at least one of these options must be selected):
  - **Allow users to choose from a list of known suppliers:** When adding a trade-in item, the user will have the ability to search from active suppliers enabled for trade-in.
  - **Allow users to manually enter ad-hoc suppliers:** When adding a trade-in item, the user will see the option to manually enter supplier information which will include Supplier Name, DUNS No., Supplier Email, Supplier Phone, and Supplier Fax Number. The user will also have to enter Distribution methods for the manually entered supplier.
  - **Allow users to not specify a suppliers:** The user will have the ability to select **Unknown** as a supplier for the trade-in item. This option will likely not be commonly used, but is available if needed by your organization.
- **Product Configuration** options:
  - **Allow empty catalog number:** If this option is enabled, the Catalog Number will not be required when adding a trade-in item.
  - **Show product size:** If this option is enabled, the Product Size field will be available for entry when adding a trade-in item, but will not be required.
  - **Show packaging amount:** The Packaging UOM is displayed by default for a trade-in item. However, if this field is enabled, a numeric value for the packaging amount will also be available.
- The **Trade-In History** sub-tab captures changes made to the **Trade-In Configuration** page.
- A new permission is available at the role and user level to **Add/Edit Trade-Ins** (Permissions > Shopping, Carts & Requisitions). The permission is OFF by default. Therefore, even though the functionality may be configured for the organization, a user does not have the ability to conduct a trade-in transaction unless the permission is enabled at the user role or profile level.

- A new supplier setting for **Allow trade ins** is available on the **About > System Settings** page of the supplier profile.
  - This configuration will only show if the organization has selected to **Enable trade-in entry** for the organization.
  - If the organization configuration is enabled to **Allow trade-ins by default for all suppliers**, this setting will show a green check in the supplier profile. If the setting to **Allow trade-ins by default for all suppliers** is not enabled at the organization level, this setting will show a red x.
  - To change the setting for the specific supplier, select to override the setting, and select to enable or disable.
- When enabled, users with the appropriate permission will see the ability to add a trade-in item in the following locations:
  - As a **Shortcut** in the **Shop** widget.
  - In the **Shop: Shopping** navigation fly-out as a **Go to:** options
  - As a **Go to:** option under the **Shop** bar when viewing product search results.
  - In the **Quick Links** widget, if added to the widget by the organization administrator or by a user on a personal dashboard.
  - In the **Shopping Cart** , **Requisition** and **Purchase Order** as an **Add Trade-In** button, or within a supplier group as a link **Add trade-in for this supplier...**
- A Trade-In item must always be linked to another item in the cart **from the same supplier**. This allows budget checks to be run correctly, by indicating that the trade-in item is reducing the net cost of the purchased item. The linked item can be one from product search results, a punch-out item, a non-catalog item, or a form item. The user may add the new item to the cart first, or may start with adding the trade-in item. To add a trade-in item:
  - Select the **trade-in item** link from the Shopping page, under the Shop bar of search results, from the Shop navigation menu, or Quick Links widget. Or, select the **Add Trade-In** button or supplier group link from the active shopping cart. The **Add Trade-In** overlay displays.
  - Options display based on the **Trade-In Configuration** settings (explained above).
    - Choose from the **supplier selection** options. When selecting a supplier, you can choose a specific fulfillment center. When manually entering a supplier, you will have to enter basic identifying information for the supplier. **Note:** If you select the link **Add trade-in for this supplier...** in the cart supplier group, the supplier information will be pre-populated.
    - Review or edit/enter **Distribution Methods**. If a supplier is selected via search, the default **Distribution Methods** display for the supplier. Expand the section, and check to override any of the default methods (based on user permissions). If the supplier is manually entered, you will need to enter the distribution information. If **Unknown** is selected, no distribution method section is provided. **Note:** The option to edit Distribution Methods is only available if the user has **Modify Order Distribution Information on Forms & POs** permission.
    - Enter **Trade-In Details** for the item. The Description, Quantity, Price and a Packaging UOM are required. The Catalog Number is required by default, but



can be configured as optional. Product Size and a Packaging quantity can be optionally displayed. Additional fields include **Asset Tag Number**, **Serial Number**, **Taxable** flag, and **Capital Asset** flag. **Note:** You may need to update your document configuration to include new fields for trade-in items.

- Save and close the overlay.
- The trade-in item will display in the cart with an icon , and an error message indicating the item must be linked to another item from the supplier.
  - If the item to be linked is not in the current cart, add it to the cart from product search or as a non-catalog item.
  - Select the trade-in item in the cart, and choose **Add Link to Item** from the **For selected line items** dropdown, then click **Go**.
  - In the **Add Link to Item** overlay, the supplier's items in the cart display. Click the **Select** button for the appropriate item to be linked to the trade-in item. The overlay closes, and the cart refreshes indicating the two linked items.
- Proceed through the checkout process as normal. The trade-in item and linked item information are copied to all documents
- To ensure the budget check is run correctly, the user will see error messages if any of the following are not true:
  - A trade-in item must be linked to a positive line item. Multiple trade-ins can be linked to one positive line item, but a positive line item can only be linked to one trade-in.
  - Accounting codes must be the same on any linked trade-ins and positive line items.
  - The total for each supplier must be positive.
- **Note:** If the organization is configured to **Split PO on mixed taxable line status**, the linked item and trade-in item must contain the same taxable flag status. If this happens, the user will receive an error message and will not be able to place the order, to prevent the creation of a PO with a negative total. For example, if the trade-in item is marked as not taxable and the linked item is marked as taxable, the requisition would be split into two purchase orders and the link would no longer be in effect. This setting is available at **Setup > Hosted Catalog and Ordering Configuration > Default Ordering Settings > Tax**.
- **Note:** When items are linked, the accounting codes cannot be split by amount of price. Percentage splits by price or quantity are still supported. This is to ensure budget checks are run correctly
- To support the new trade-in item information, **Asset Tag Number** and **Serial Number** are two new fields available to be added to document configurations.
  - The fields are not enabled for any documents by default, but can be added under a new configuration by an administrator.
  - The fields are available for the following documents: Requisition, Purchase Order, Purchase Order Fax, Sales Order, Buyer Invoice.
- Trade-in items are supported in the following integrations (Contact JAGGAER with questions about updating your integration):

- PR Import - the line will show as a new "Trade-In" product type. The item does not require a negative value, as designating the product type will associate the negative value for the item. **Note:** An updated PR DTD is required.
- PR Validation and Budget Check (Banner) - The amount encumbered for the budget check is the net amount of the linked line items. For example, if the item purchased is \$5,000 and the trade-in item is -\$1,000, the total amount encumbered will be \$4,000 plus tax and shipping.
- PO Export
- PO Import
- Invoice Export
- **Note:** If an export is being sent to an ERP system that will parse the message and store the information in a database, the ERP system must have the ability to receive the negative symbol (-) and interpret the monetary values as negative.
- New Advanced Dynamic Workflow objects are available to define workflow rules at the document or line level.
  - New ADW rules are available for Requisition, Purchase Order, Sales Order, Buyer Invoice.
  - Document level ADW Rule - The document has trade-in items or does not have trade-in items.
  - Line level ADW Rule - The line is a trade-in item or is not a trade-in item; the trade-in line has a serial number; the trade-in line has an asset tag number
  - The Line Total Amount ADW rule now supports negative numbers
  - A system administrator with appropriate permissions can add the new rules. However, you may need to contact JAGGAER to add a new rule group to your workflow configuration.
- Standard workflow rules for Purchase Requisitions or Purchase Orders can be updated based on trade-in items at the document or line level. Rules are available to assess whether or not a document has a trade-in item, whether or not a document line is a trade-in item, and whether or not a product type is a trade-in item. Contact JAGGAER to update standard workflow process.
- A new status flag is available in the **Advanced Search** for Requisitions, Purchase Orders, Invoices, Sales Orders and Sales Invoices. Users can select the **With Trade-In Items** option from the **Status Flags** section to see documents that include trade-in items. For Sales Orders, the **Has Trade In** flag is available for selection under **Item/Product Information**. For Sales Invoices, the **Has Trade In** flag is available for selection under **Invoice Information**.
- In reports, the link between items is used to account for the trade-ins as a reduction on the original amount for the line/document.
- Suppliers will see the trade-in indication and linked item information on the Sales Order in the portal. A supplier cannot add a trade-in item to a Sales Order in the portal. The supplier can choose to not include a trade-in item on an invoice.
- If negative amounts are included in cXML invoices from suppliers, and it matches to a trade-in item on the PO, then the trade-in will be copied to the buyer invoice.

# Form Request Updates

In 17.1, we will be adding a new Credit Memo Request form and making several updates to the existing form request functionality.

## New Credit Memo Request Form

In 17.1, a new **Credit Memo Request** form is available. This form request allows users to create a credit memo and send it through form request workflow for approval.

### Impact

- Products Affected: Spend Director, AP Director
- 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
- Users can use the form to submit a credit memo request that goes through approval workflow. The credit memo request form must be created by a forms administrator and saved to a user's forms or favorites folders.
- In order to submit a credit memo request a user needs to provide, at a minimum, the supplier name, supplier invoice number and amount of the credit being issued.
- When a credit memo request form template is created, a default set of questions is included on the **Questions** screen to gather information about the request. Additional information:
  - The default questions cannot be removed from the template. The only exceptions are the **Tax 1** and **Tax 2** questions.
  - The **Supplier Invoice Number** and **Amount** questions are required fields; meaning the user submitting the form must answer those questions.
  - The default questions can be edited. This includes updates to the question text, adding help text, moving the location of the question and making the response required.
  - A new feature in the 17.1 release allows the forms administrator to set default value for the question responses. For additional information, please see [Ability to Set Default Responses for Questions and Fields on Form Requests](#).
- For additional information about creating a credit memo request form, please see [Creating a Credit Memo Request Form](#) in the online searchable help.

# Ability to Hide Form Request Sections from End Users

Form requests are filled out in a wizard-like interface. The form request steps an end user through entering the form data. Each step, or section, has different types of information users must enter to complete the request. In many cases, there are sections of the form request that may not necessarily require information be entered. Previously, there was no way to hide these optional sections. As of 17.1, we have added the ability for template creators to hide these sections. When a section is hidden it does not display to end users submitting the form.

## Impact

- Products Affected: All SelectSite Products
- 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
- Sections hidden by the template creator do not display to the end user when filling out and submitting the form.
- The following sections can be hidden on all form requests:
  - **Template Setup** (this section displays as Details to the end user).
  - **Attachments**
- The **Item Attributes** section can be hidden on the Procurement form request for non-catalog items.
- The **Product Line Items** and **Service Line Items** sections can be hidden on the Quick Quote request form.
- When configuring a template a **Hide Section** checkbox displays in each section that can be hidden. Click the checkbox to hide the section.
- When a template is finalized, the **Hide Section** checkbox is replaced by the label **Hidden Section**.
- For additional information about configuring forms and form requests, please see [Form Request Setup and Configuration](#).

# Ability to Set a Form Request Field as a Product Attribute

Form fields capture important information about a procurement form request. Previously, form fields did not display on a requisition. This required the approver to access the form in

order to view the information. In 17.1, forms administrators now have the ability to set a form field as a product attribute. This means that the form field data will display on the requisition as a product attribute, giving the approver visibility of the information.

## 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
- This feature applies to form fields on Procurement Request forms, both catalog and non-catalog.
- Form fields are added and configured in the **Fields** section of the form. A new setting has been added to the **Add Field** overlay. Click the **Product Attribute** checkbox to set the field as a product attribute.


# Ability to Set Default Responses for Questions and Fields on Form Requests

Form request questions and fields can be included on form requests in order to gather additional information about the goods or services being requested. The forms administrator adds a question or field to a form template and the end user enters a response when submitting the form. As of 17.1, forms administrators are able to set default responses for the questions and fields when creating a form request template. This can help to save the end-user save a few steps by "pre-filling" the fields and questions with the suggested or most common response. The value can be changed by the end user when filling out the form. **Note:** Administrators have the ability to make the default value "read only". When this is the case, the end user cannot change the value.

## Impact

- Products Affected: All SelectSite
- 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 feature allows administrators to set default responses to questions and fields on a form request.
- Fields and questions are configured on the **Fields** or **Questions** screen of the form request template.
- To set the default value for a field, click the drop-down arrow on the Edit button associated with the field . Select **Set Default Value**.
- The default response value that can be configured is based on the response type for the field or question (e.g. date value, text, etc.).
- When setting a default value, clicking the **Read Only** checkbox makes the value read only for the user. **Important:** When a default value is read only it CANNOT be changed by the end user filling out the form.
- Default values can be set for most fields but there are some exceptions. For example, a default value for **Currency** cannot be set in the template. The **Set Default Value** option is not available from the edit button for fields that cannot have a default value.
- For additional information about creating form request templates, please see [Form Request Setup and Configuration](#) in the online searchable help.

## Ability to Include Instructions at Specific Points within Form Request Form Field and Question Groups

Form fields and questions are often grouped by similarity. For example, fields related to shipping information may be grouped together within the Form Fields screen. Previously, instructions could only be provided for a group in general. However, in some cases it may be necessary to provide instructions at certain points within the group. As of 17.1, forms administrators will have this ability. A new "Add HTML Area" option is available that allows the administrator to provide read only instructions at any point within the question group.

## Impact

- Products Affected: All SelectSite
- 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

- This feature allows forms administrators to provide instructions at any point within a group of questions or fields on a form request. Questions are configured in the **Questions** section of a form request. Fields are configured in the **Form Fields** section of a form request.
- To add instructions:
  1. Create or open a form request template and go to the Questions or Form Fields section.
  2. Create or locate the question or field group.
  3. Click the **Add** button and select **Add HTML Area**.
  4. Configure the instructions. Enter a name in the **Name** field and enter the actual instructions in the HTML area. Several formatting options are available.
  5. Click **Save Changes**.
- As with other question and field types, conditional visibility can be configured for HTML instructions. The order of the instructions can be managed as well.
- For additional information about configuring form requests, please see [Form Request Setup and Configuration](#) in the online searchable help.

## Ability to Capture Tax 2 on Check Request Forms

As of 17.1, a **Tax 2** field is available on the Check Request form. This allows organizations to gather additional tax information for a check request.

### Impact

- Products Affected: eProcurement, AP 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
- A new **Tax 2** field is available on the Questions screen of the form request.
- The field is displayed by default but can be deleted by a forms administrator before the template is finalized.
- As with other form request questions, a forms administrator can set conditional visibility, make a response required and change the location of the field within the question group. In addition, a default value can be set for the field (new feature in 17.1).
- For additional information about creating form request templates, please see [Form Request Setup and Configuration](#) in the online searchable help.

# Form Request Multi-Currency

Organizations that use the multi-currency feature now have the ability to capture a currency different from the base currency on form requests. As of 17.1, end users are able to choose a currency on specific form request types; Credit Memo, Check Request, Procurement and Quick Quote (when entering quotes from suppliers). In addition, forms administrators can select a currency on a Procurement request template. When a currency is selected on a template, end users are not able to overwrite the currency when filling out a 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.
- New Permissions related to this Feature: None
- An end user must have access to multiple currencies to select a currency other than the base currency. The supplier must be configured to accept the currency.
- For Procurement requests, a forms administrator can select a specific currency when creating the template. A new **Currency** drop-down field is available on the **Template Setup** screen. If a forms administrator selects the currency for the template, it cannot be changed by an end user filling out the form. For additional information about creating form request templates, please see [Form Request Setup and Configuration](#) in the online searchable help.
- End users have the ability to change the currency on specific form requests. Details:
  - **Procurement Requests** - A **Currency** drop-down field is available on the **Details** screen. **Note:** If a currency was selected when the template was created, this option is not available. The form request simply displays the template's selected currency.
  - **Credit Memos and Check Requests** - A **Currency** drop-down field has been added to the default questions included in the **Questions** screen.
  - **Quick Quote Requests** - Currency is determined when entering quotes from suppliers on the **Enter Quotes** screen. A new **Currency** field displays for each supplier invited to quote.
- For additional information about using form requests, please see [Forms and Non-Catalog Purchasing](#) in the **Shopping Handbook** or the online searchable help.



# Total Supplier Manager

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

## Ability to Configure New Payment Methods and Alternate Display Names for Accounts Payable

Clients need additional payment types to collect specific data needed for supplier payment in their system that align with their financial institutions. Previously, customers were limited in the type of payment options they could choose to include on a supplier's registration and to associate with the supplier in the organization's supplier profile.


With the 17.1 release, **ePayable** and **PayMode** will be available as new payment methods when editing the **Accounts Payable** section of a supplier's profile. The two new options are available to be included on all forms in **Entity Registration** and **Individual Registration**. Supplier administrators must update their organization registration configuration to display one or both methods in order for suppliers to select from the new options.

Also, all payment methods now have a new field for **Alternate Display Name** in the registration configuration options. The value displays in the **Payment Type** drop-down in the supplier's registration view.

### 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 **OFF** by default but can be configured by an administrator
- New Permissions related to this Feature: None
- When configuring the Accounts Payable section for supplier registration ( **Suppliers**  **> Configuration Settings > Registration Configuration: Entity Registration or Individual Registration**), two new payment methods are available for including in your registration configuration:
  - **ePayable** and **Paymode** now display as two new selections under the Accounts Payable section.
  - The new payment types are not visible on any registration types by default. Select which profile(s)/form(s) on which you would like the new payment methods to display for Entity Registration and for Individual Registration. The new payment

methods will only display for suppliers who are assigned to complete the forms on which the fields are enabled.

- If you do not select the payment methods to be visible on any form, they will be available in the supplier profile view for customer internal use only.
- As with other payment methods, fields that are required by default are indicated with green checks. Select what other fields you would like to be required for either of the payment methods.
- When a supplier completes information for the **PayMode** method, an **Account Id** and **Account Holder Name** must be provided to save the payment method information. The **Account Id** field accepts up to 40 characters, including numeric, text and special characters.
- **ePayable** and **Paymode** can now be included as payment methods in the **Supplier XML Import/Export**. The new payment methods will also display in the **Supplier CSV Export** as appropriate.
- While the new methods will only show in Customer Branded Portals where configured, suppliers will see the new payment methods by default in their Network Profile.
- If your organization has selected to **Require Review of Subsequent Edits to the Supplier Profile**, a change to any field for the payment method will trigger a pending change for review.
- For all payment method options under Accounts Payable, a new **Alternate Display Name** can be indicated. This allows customers to display a different name from the default payment method name that may be more familiar to the supplier.
  - When viewing the available payment methods in the Customer Branded Portal, suppliers will see the Alternate Display Name, if provided, with the default name indicated in parenthesis. For example, if a customer indicates "ePay" as an Alternate Display Name for the ePayable method, suppliers will see "ePay (ePayable)" displayed as the payment method in the portal.
  - If an **Alternate Display Name** is indicated, it will apply to all registration types. For example, the Alternate Display name cannot be different for Entity vs. Individual registration forms.
  - Integrations will continue to use the internal name for the payment method.

## eSignature Available for Supplier Registration Documents

During supplier registration process, vendors can submit a self-certification form to meet various criteria (i.e. insurance, diversity, etc.) set by the customer. These signed forms help customers make onboarding and sourcing decisions. There are many documents in our system that collect some form of signature, but previously no way for the supplier to electronically sign the document.

Electronic signature provides efficiency in uploading certifications, contracts, forms, requests that require a signature. Clients might also require a signed form from the vendors before they become active for business. Without a way to electronically sign the document, there are multiple paper trails and data residing outside our solution.



With the 17.1 release, organizations now have the ability to use **DocuSign** to include document templates for electronic signature in supplier registrations. A new **eSignature Settings** tab is available, where **DocuSign** credentials can be saved. When configuring supplier registration, a new custom profile field is available for **eSignature Document** that allows the user to attach a DocuSign template and define other field settings. **Note:** A user must have an account set up with DocuSign, and templates are managed within the DocuSign application.

When added to a supplier registration, suppliers will see the new **eSignature** custom profile field, and have the ability to access the document, review within DocuSign, complete and sign the document as indicated, and submit the signed document as part of their supplier registration.

## Impact

- Products Affected: Total Supplier 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 configured by an administrator
- New Permissions related to this Feature: None
- A new **eSignature Settings** tab is available under **Suppliers**  **> Configuration Settings > Registration Configuration**.
  - The **eSignature Service Provider** field has a default value of **None**. To enable the feature select the **Change Provider** link:
    - Select **Change Provider** link. The **eSignature Setup** overlay displays.
    - Select **DocuSign** as the **eSignature Service Provider**.
    - Enter the **DocuSign User Name** and **Password** for accessing the templates to be used for the eSignature document custom field.
    - When saved, the **DocuSign Settings** section displays the **User Name** and masked **Password** on the page. Select **Test Connection** to test the login credentials and verify you can sign into **DocuSign** as expected.
    - Click the **Edit** link to change the login credentials.
  - When eSignature settings are enabled, a new custom profile field is available for **eSignature Document** when configuring supplier registration (**Suppliers**  **> Configuration Settings > Registration Configuration: Entity Registration or Individual Registration**).
    - When this type of field is added, options are available for display order, whether or not it is required for registration, conditional visibility, which registration types should display the field, and other options can be set, as per existing custom profile field functionality.

- Click the **Select** button for **eSignature Template** to see the list of available templates from your DocuSign account. If you do not see a template as expected, you may need to log into **DocuSign** separately to verify the template is available. **Note:** The dropdown will list all templates available in all folders, regardless of folder structure in DocuSign.
- You can configure some standard fields to auto-populate to make it easier for the supplier when completing the form:
  - Select the **Template Auto-populate Help** link to see an overlay of some of the most common labels you may want to include in your template so that SelectSite fields are automatically populated from the data stored on the supplier profile.
  - The placeholders are configured in the template in **DocuSign**. For example, you may choose to include **SupplierName** as a label on the template, which will be automatically populated with the stored **Supplier Name** for that supplier when they access the document for review and signature.
- Templates are managed by the customer in **DocuSign**. SelectSite simply accesses those templates when the organization configures the **eSignature Document** custom profile element in supplier registration.
- If the **eSignature Document** custom profile field is configured as searchable, the field will display in the **Custom** section of advanced supplier search with options **Yes** and **No**. Selecting **Yes** for a search will return all the suppliers who have that eSignature document initiated.
- In the supplier registration, the supplier user will see the field displayed under **Additional Questions** for the registration section.
  - Initially, **No Signed Document** is indicated, with a button to **Sign Document**.
  - When the supplier clicks to **Sign Document**, the connection to **DocuSign** is made. The supplier must agree to use electronic records and signatures to proceed. Other actions are available to decline to sign the document, or to finish the process later.
  - The document displays, with fields auto-populated as configured by the organization. The user can complete the remaining information, and click to **Sign** the document. An overlay for **Adopt Your Signature** displays.
  - The supplier user selects options for signing the document, and clicks to **Adopt and Sign**.
  - The document now displays in **DocuSign** with the supplier user's signature. The supplier will click **Finish** to return to the portal.
  - On the registration page, the user now sees **Signed Document** displayed under the custom field. **Actions** available include **Download**, **Sign New Document**, and **Delete**.
  - If the supplier did not complete the signing process, a **Complete Signing** dropdown displays with actions to complete the signing or to discard the actions down so far.
  - Supplier and customer users will see an icon displaying a status message if there are communications issues with DocuSign, or a status of waiting to get the document from DocuSign. If the document is removed from the configuration, an error will display as well.

- Once the supplier has signed the document, the customer can view the signed document when reviewing the supplier's registration in proxy view.
- A customer can sign the document on behalf of the supplier in proxy registration view. A customer user can also complete the document in the normal internal supplier profile view.
- If the organization has the field configured to require review of pending changes and the supplier deletes the signed document or changes something about the signed document, the customer will have the opportunity to accept or decline the changed document.
- For additional information on setting up templates in DocuSign and other eSignature configurations, see [eSignature Documents for Supplier Registration](#) in the **Total Supplier Manager Handbook** or online searchable help.

## Ability to Invite Registered Suppliers to Register With a Different Form

Previously, a supplier profile could not be converted from Profile 2 (long form) to Profile 1 (short form) because the process did not allow for the transfer of all information. Customers may have instances where the wrong form was used to invite the supplier, or may utilize the multiple profile forms in different ways, creating the need for greater flexibility with registered suppliers.

With the 17.1 release, a supplier who is already registered can be invited to complete a different profile form. Users will see the option to invite with a different form for suppliers with registrations that are **In Process**, **Approved**, or **Profile Complete**. Users will see an indication of the previous form sent to or completed by the supplier.

When viewing the supplier's registration in Proxy view, a customer user can select a different form for completion, without having to send a new registration invitation.

### 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 but is optional for use
- New Permissions related to this Feature: None
- A customer user can now send a registration to a supplier who has already been invited to complete or has completed a different registration form.

- When selecting to invite the supplier, the **Current Registration Status** and **Current Registration Type** will display in the **Invite Supplier** overlay. If the supplier has not been invited to register before, the Current Status and Type fields will not display in the overlay.
- The registration email is the same registration email that is sent for all supplier invitations.
- Users with permission to complete proxy registrations for suppliers can change the registration form without sending a new invitation:
  - When viewing a supplier's profile in the Proxy Registration view, a button is available to **Change Registration Type**. Selecting the button will display an overlay where a different Registration Type can be selected.
  - A warning message will display in the overlay if the supplier is in workflow.
  - Selecting a different form in the proxy view will not generate another invitation to the supplier.
- A supplier's registration form can be changed via proxy view or an invitation if their previous registration is: **In Process**, **Approved**, or **Profile Complete**.

## Bank Address Fields Optional For Direct Deposit and Wire Transfer Payment Types

Previously when configuring **Direct Deposit** or **Wire Transfer** payment methods for supplier registrations (**Suppliers**  **> Configuration Settings > Registration Configuration: Entity Registration** or **Individual Registration, Accounts Payable** section), the bank address fields were required to be completed by default, and could not be disabled. This means that a supplier had to provide the bank address information for those payment methods in order to submit the completed registration form. Based on customer feedback, many supplier users do not have this information readily available at the time the registration is being completed.


With the 17.1 release, the address fields for Direct Deposit and Wire Transfer payment types will not be required by default. However, customers can still configure the address fields to be required for completion for these payment methods.

### 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 configuring the **Direct Deposit** and **Wire Transfer** payment methods under the Accounts Payable section for supplier registration ( **Suppliers**  > **Configuration Settings** > **Registration Configuration: Entity Registration** or **Individual Registration**), the following fields will not be required to complete the registration by default:
  - Address Line 1
  - Address Line 2
  - Address Line 3
  - City/Town
  - State/Province
  - Postal Code
- If you want to require this information to be completed to submit the payment method, you must enable it for the desired payment method under Entity Registration and/or Individual Registration configuration. Beginning with the 17.1 release, suppliers will not be required to provide the bank address information for these payment types unless you specify otherwise in your organization's configuration.


## Canadian Bank Account Validation for Direct Deposit (ACH) Payment Type

Canada supports a Transit Number for banking institutions instead of the routing number used by U.S. organizations. With the 17.1 release, the Routing Number field for the Direct Deposit (ACH) payment type has been renamed to **Routing / Transit Number**. If the country for the payment method is set to Canada, the Routing/Transit Number will be validated against the required Transit Number format. Additional Transit Number help text is also displayed depending if the country is Canada or the United States.

### Impact

- Products Affected: Total Supplier Manager with Onboarding
- 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
- When configuring the **Direct Deposit (ACH)** payment method under the Accounts Payable section for supplier registration ( **Suppliers**  > **Configuration Settings** > **Registration Configuration: Entity Registration** or **Individual Registration**), the

following Routing Number field has been renamed to Routing / Transit Number to support Canadian banking institution information.

- When completing supplier profile / registration information for the Direct Deposit (ACH) payment method, the Routing / Transit Number will be validated based on the Country selected for the banking institution.
  - If **Canada** is selected as the **Country**, the **Routing/Transit Number** value will be validated against the required Transit Number format. The **What is This?** hyperlink will display help information about Transit Number.
  - If **United States** is selected as the **Country**, the **Routing/Transit Number** value will be validated against the required Routing Number format (nine-digit numeric value). The **What is This?** hyperlink will display help information about Routing Number.
  - If the country is any value other than United States or Canada, there is no validation on the Routing/Transit Number field.
- This validation will also apply to Direct Deposit (ACH) payment information provided in the supplier xml import.
- This change is reflected in the Supplier Profile, as well as when viewing the supplier's registration in Proxy view.
- Suppliers will see this change reflected in the Network Portal, as well as in each Customer Branded Portal.

## Language Support for Supplier Registration Custom Profile Field Configuration

The majority of standard fields in the SelectSite application support translations to other languages. Because custom profile fields in the supplier registration configuration is defined by each customer organization, the fields are not available to be translated by the JAGGAER system. With the 17.1 release, customers can configure custom profile fields to be displayed in multiple languages currently supported by JAGGAER. A new **Edit Translations** button is available when configuring a custom profile field in supplier registration (**Suppliers**  **> Configuration Settings > Registration Configuration: Entity Registration or Individual Registration**). When selected, the user can choose which languages should be supported for the field, and enter the appropriate text for each.

### Impact

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



## Key points of Feature

- This feature is **ON** by default but requires setup by an administrator
- New Permissions related to this Feature: None
- When configuring a custom profile field in a section of **Entity Registration** or **Individual Registration**, an **Edit Translations** button is available to enter the appropriate text for selected languages.
  - Select from the languages currently supported by JAGGAER.
  - When a language is selected, a text box displays for you to enter the appropriate translation and save your changes. If you select a Language, you must enter a value for the field.
  - Updates to the translations are captured in **Configuration Settings > History**.
  - Supplier and customer users viewing the supplier profile / registration will see the custom profile field displayed in their selected language with the appropriate translation, if configured. If there are no translations for the field, the user will see the custom profile field displayed in the customer organization's default language.
  - Available languages for translation are all those supported by JAGGAER: French, German, Italian, Polish, Spanish, Japanese, Chinese, Dutch, English.
- The translations will display to customer users in the supplier profile view, as well as the Supplier Registration (Proxy) view.
- The translations will display to suppliers in the Customer Branded Portal.

## Duplicate Supplier Check in Supplier Request Process

When creating a new supplier by adding that supplier or inviting the supplier to join the organization network, a user is alerted if there is a potential existing supplier. However, the Supplier Request process did not previously support checking for duplicate suppliers. With 17.1, the Supplier Request process will check for duplicate suppliers with the provided supplier name, tax identification number, and DUNS number. If there are existing In-Network suppliers that match any of the criteria, a blue information bar is displayed, indicating the match.

## 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

- When the Request New Supplier process is initiated, a duplicate check is performed against the provided Supplier Name, tax identification number, and DUNS number. If a match is found, a blue message bar indicates that potential matching suppliers have been found.
- The user can select a "Click here to view the list of potential matching suppliers" link to see all the suppliers that match the criteria.
- The check is only against in-network suppliers for the organization. It does not validate against out-of-network or global supplier profiles.
- The message is informational only, and does not prevent the user from continuing with the supplier request.
- The workflow process for identifying duplicate suppliers will continue to function as before.

# Accounts Payable Enhancements

This section details enhancements that will be available in 17.1 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:

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

## General Accounts Payable Enhancements

The 17.1 release includes several general enhancements related to invoicing in Accounts Payable Director. Updates will include:

- The **Invoices** tab of a purchase order can now be sorted by different columns, and has a default sort order by Invoice Number.
- The **OCR** invoicing integration DTD now includes the response message for the invoice status and buyer invoice reference.
- The **Role** option has been removed from **Document Level Dynamic Matching Rules and Tolerances**.
- The **Commodity Code** field on the Invoice Document will display the full description as hover text to allow for commodity code descriptions greater than 30 characters.
- The options under **For selected items** on Invoices have been re-ordered.

### Impact

- Products Affected: Accounts Payable Director, AP Express
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

### Key points of Feature

- These features are **ON** by default
- New Permissions related to this Feature: None
- When viewing the **Invoices** tab of a purchase order, users will now see a default sort order on the **Invoice Numbers** associated with the purchase order. Users also have the ability to sort the invoices by **Invoice Number**, **Invoice Date**, and **Due Date**.
- For customers utilizing **OCR** invoicing integration, the DTD now includes the response message for the invoice status and buyer invoice reference.

- The **Role** option has been removed from **Document Level Dynamic Matching Rules and Tolerances**. The option is not applicable to Matching Rules and Tolerances.
- The **Commodity Code** field on the Invoice Document will display the full description as hover text to allow for commodity code descriptions greater than 30 characters. See [Updated Commodity Code Display on PR, PO and Invoice Documents](#) in the [General Enhancements](#) section for additional information on this feature. Impacts Carts, Requisitions, POs, Invoices, Sourcing Events.
- The list of options under **For selected line items** when viewing an invoice has been updated to the order they were listed previous to the 16.2 release. Per customer feedback, the previous order offered better usability for common user tasks. See [Menu Change to 'For selected line items' Field on Invoices](#) in the Contract Lifecycle Management section of the release notes for more information.

## Trustweaver General Enhancements

Trustweaver allows companies to validate their electronic invoices against a government transaction registry and registers the buyer transaction with government tax authorities to increase invoice compliance. In addition to being available in Chile for 17.1, several updates are available for all customers utilizing the Trustweaver integration.

A new permission is available for viewing the Trustweaver Archive site. When enabled, users can select a menu navigation link that will open a new window for the organization's Trustweaver site.

Also with this update, suppliers now have the ability to upload a DTE version of the invoice in the current cXML invoice import format. The DTE can be sent to Trustweaver for validation and storage on behalf of the buyer.

### Impact

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

### Key points of Feature

- These feature are **ON** by default but optional for use. Also, you must contact JAGGAER to update the integration fields.
- New Permissions related to this Feature: **View Trustweaver Archive**
- Users with the permission **View Trustweaver Archive** (Permission Settings > Accounts Payable > Accounts Payable) can see a new menu navigation for Accounts Payable > Reports > View Trustweaver Archive. Selecting this link will open a new window and log the user into the external Trustweaver page (are they logged in or navigated to the login page)

- **Note:** The organization must be configured with the appropriate Trustweaver Integration settings in order to see the View Trustweaver Archive menu option.
- Suppliers can now upload a DTE version of the invoice (XML) within the document tag of the current cXML Invoice Import. The DTE is sent to Trustweaver for validation and storage on behalf of the supplier.
- The **Organization Tax ID** can be added to the integration.
- The **Buyer Primary VAT** is captured for post-audit countries.
- After validation occurs, a Supplier Message displays on the message tab of the invoice indicating that it was validated. Messages will display for the validation and signing actions. Buyers and suppliers can see supplier messages on an invoice.

## Trustweaver Enhancements for Internationalization

Trustweaver allows companies to validate their electronic invoices against a government transaction registry and registers the buyer transaction with government tax authorities to increase invoice compliance. Trustweaver was initially made available in the 16.3 release to buyers in the U.S., Canada, and European Union. With the 17.1 release, Trustweaver integration is now available to Chile. With this addition, buyers can be registered with Trustweaver via their tax ID and SII certificate in order to obtain a key from Trustweaver for signing invoices on the buyer side. Invoice history captures the validation on the buyer invoice.

### Impact

- Products Affected: Accounts Payable Director
- End User Impact: None
- Admin User Impact: Low
- Integration Impact: **High**

### Key points of Feature

- This feature is **OFF** by default and must be enabled by JAGGAER
- New Permissions related to this Feature: None
- With the Trustweaver license enabled, Trustweaver validation is now available for buyers in Chile. Contact JAGGAER to configure the appropriate integration options.
- Buyers will provide:
  - Chile Tax ID
  - Chile SII Certificate and certificate key that will be used for validation.
  - Customer email address
- The SII Certificate is issued by the Chilean government and allows for a single archive registration for all Chilean invoices. After uploading a certificate, Trustweaver will respond and JAGGAER will store the signing key used for all signatures Trustweaver provides to the buyer. **Note:** The actual certificate is not stored by JAGGAER.

- Buyer VAT is captured for post-audit countries.

## Ability to Map Point of Title Transfer and IncoTerms (Delivery Terms) for Tax Integration

Commercial customers who have cross-border transactions need the ability to designate the appropriate tax authority for tax collection purposes. Customers also need the ability to designate delivery term (IncoTerm) codes for invoices. With the 17.1 release, two new mapped integration fields are available for **Point of Title Transfer** (to designate tax authority) and **Delivery Terms (IncoTerms)** so customers can now include this information in their integration messages. Customers can create and manage the list values through the organization's custom field list, and work with JAGGAER to map the custom fields to the integration.

### Impact

- Products Affected: Accounts Payable Director, AP Express
- End User Impact: None
- Admin User Impact: Low
- Integration Impact: Low

### Key points of Feature

- This feature is **OFF** by default and must be enabled by JAGGAER
- New Permissions related to this Feature: None
- Two new mapped integration fields are available to be included in the tax integration message:
  - **Point of Title Transfer** can be used to designate the appropriate tax authority
  - **Delivery Terms** (IncoTerms) can be used to designate specific codes related to the international delivery terms
- You must contact JAGGAER to configure the mapping for one or both of the new fields.
- Customers create and manage the list values for the fields through custom fields ( **Setup > Configure Documents > Manage Custom Fields** )
- Once created as custom fields and assigned placement, the organization may choose to include the fields on the requisition, purchase order, and or invoice document via document configuration.

## Non-PO or PO Flag on Line Items Included in Tax Callout Message

Previously, the tax integration callout message to OneSource did not indicate if an invoice line item came from a purchase order or not. With the 17.1 release, a new integration attribute is included in the tax callout message indicating if the line is a PO or Non-PO line. You must contact OneSource in order to for them to accept the new attribute in the integration message.

### Impact

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

### Key points of Feature

- This feature is **ON** by default but requires setup with OneSource for use
- New Permissions related to this Feature: None
- A flag indicating if an invoice line is a PO or Non-PO line is now included in the tax callout message to OneSource.
  - The element **Integration Attribute 41** will now pass a flag as **True** (PO line) or **False** (Non-PO line).
  - The element is included in the tax callout message by default. However, you will need to contact OneSource in order for them to accept the new attribute in the integration message.

## Contract Number Included in DMR/OCR Invoice Import

The Digital Mailroom is available as an add-on product for Accounts Payable Director customers. Digital Mailroom offers organizations the ability to route paper, fax and email invoices directly to JAGGAER for scan and capture. Once final visual verification is completed to ensure accuracy, the invoices are available to the organization for matching and approval in AP Director.

Previously, the scan process did not allow for capturing contract information, which many suppliers included on physical invoices at the buyer's request. With the 17.1 release, the DMR and OCR Invoice Imports can include contract information. If the contract number is included at the header level of the import, it will be applied to all lines on the imported invoice unless a line level contract number exists.

## Impact

- Products Affected: Accounts Payable Director and AP Express with Digital Mailroom or OCR Invoice Import
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Medium

## Key points of Feature

- This feature is **ON** by default but setup is required for use
- New Permissions related to this Feature: None
- Contract number is a new optional field at the header and line level of the DMR/OCR import:
  - If the contract number is included in the header, it will be applied to all lines on the imported invoice unless a line level contract number is specified.
  - If the contract number is included at the line level of the invoice, it will be applied to that line on the imported invoice.
- Upon import, the contract number will be validated against all appropriate applicability rules. Invoice Notifications will alert the user in invoice workflow that there are issues with the contract number provided on the import.
- While the contract number is included in the DMR/OCR import by default, you must contact JAGGAER to implement this feature so that the integration can be updated with the DMR vendor. Also, you may want to update the organization workflow to address validation issues with the contract number.

## Digital Mailroom Report Link Can Point to Organization-Specific Address

A user with the **View Digital Mailroom Reports** permission can navigate to view a report on Digital Mailroom exceptions. The default address for the exception information is the Electronic Digital Mailroom (EDM) portal that JAGGAER uses for digital mailroom information. Previously, this portal link could not be changed, so customers using their own Digital Mailroom integration were unable to access the report information.

With the 17.1 release, the Digital Mailroom/OCR portal address can be customized for the organization. Contact JAGGAER to update the address link.

The functionality for viewing DMR reports has not changed. Only those users with permission to view DMR reports will see the link in the Accounts Payable reports menu.



## Impact

- Products Affected: Accounts Payable Director and AP Express with Digital Mailroom or OCR Invoice Import
- 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 change the default EDM portal address
- New Permissions related to this Feature: None
- The link to view a report of digital mailroom exceptions can be customized for your organization if you are managing your own DMR integration. By default, the link will navigate to the EDM portal. Contact JAGGAER if you need the address updated for your specific organization.
- The functionality for viewing the report has not changed.
  - The **View Digital Mailroom Reports** permission is required.
  - Navigate to **Accounts Payable > Reports > View Digital Mailroom Exceptions**. A separate window will open for the EDM portal or specific address you have designated.
    - If you are viewing the EDM portal, you will enter your username and password for EDM.
    - If you are managing your own integration with digital mailroom, you will enter the login criteria as defined by your organization

## Invoice Export DTD Includes Tax Fields

As an additional enhancement for customers utilizing OneSource tax integration, several new tax elements have been added to the Buyer Invoice DTD. Contact JAGGAER if you would like to update your organization's DTD in order to include these elements: Initial Use Tax, Current Tax, and Engine Tax.

## Impact

- Products Affected: Accounts Payable Director, AP Express
- End User Impact: None
- Admin User Impact: Low
- Integration Impact: Medium

## Key points of Feature

- This feature is **OFF** by default and you must contact JAGGAER to update to version 1.14 Buyer Invoice Export DTD with the new elements.
- New Permissions related to this Feature: None
- An updated version 1.14 Buyer Invoice Export DTD now includes the following elements:
  - Tax2HeaderChargeDetail
    - InitialUseTax
    - CurrentTax
    - EngineTax
- Contact JAGGAER to enable DTD version 1.14 to include these fields in your invoice export integration.


## Ability to Prevent Receipt Submission for Over-Received Purchase Orders

Currently, organizations can enable AP Configuration options to warn users if there is an over-received purchase order when creating a receipt. The warning, however, does not prevent the receipt from being submitted. With the 17.1 release, a new configuration option is available to prevent a user from completing a receipt if it is associated with an over-received purchase order.

## Impact

- Products Affected: Accounts Payable Director, AP Express, Receipt Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

## Key points of Feature

- This feature is **OFF** by default and can be enabled by an administrator
- New Permissions related to this Feature: None
- A new configuration option for **Prevent Receipt Submission if Over Received** is available at **Accounts Payable**  **> AP Administration > Configure AP Settings** under the **Accounts Payable Settings** section.
  - When enabled, an error message will display when a user attempts to create a receipt for a purchase order that is over-received. The user will not have the ability to submit the receipt.

# Contract Lifecycle Management Enhancements

This section details enhancements that are available in 17.1 related to the CLM products Contract Compliance Tracker (CCT) and Total Contract Manager (TCM). Please note that changes made to Contract Compliance Tracker will also affect Total Contract Manager.

## General CLM Enhancements

In 17.1, the following enhancements are available for all CLM products.

### Ability to Edit Second Party or Supplier on Contracts

Previously, when eProcurement was enabled for the contract type used by a contract, the primary second party or supplier could not be changed once the contract header was saved. On non-eProcurement contracts, it was cumbersome to change the second party or supplier.

17.1 updates allow the second party or supplier to be changed on both eProcurement and non-eProcurement contracts after the contract header is saved, while in Draft status.

#### Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager
- 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
- For both eProcurement and non-eProcurement contracts:
  - Suppliers or second parties can be changed or deleted while a contract is in **Draft** status.
  - If there are two suppliers or second parties, deleting one record will make the remaining one Primary.
  - If there are three or more records, the first remaining supplier or second party will be made Primary.

- The Primary supplier or second party can be changed by selecting **Actions > Make Primary** next to the record desired as Primary supplier or second party.


## Call Attention to Comments Entered on a Contract

With 17.1, when entering comments on a contract, users can select who to direct the comments to, and that person will receive an email notifying them that a comment has been posted.

### Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager
- 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
- On the contract Comments page, a new **Send Notification To** field is available in the **New Comment** window, allowing contract managers to alert internal users of comments they may need to view.
- As soon as a comment is saved, individuals in the **Send Notification To** field will receive an email with the comment included in the body of the email. They will receive the email notification regardless of their user profile settings.
- The email also contains a link to the comment thread on the contract. Access works as follows:
  - Any internal user can be selected to receive the email with the comment, however, the link in the email will only work if the user has access to the contract at the time the message is created.
  - If a user does not have access to the contract they will get an error message.
  - We recommend that the person being notified be added as a contract stakeholder. Contract stakeholders are able to view the contract summary only or full contract details based on organization settings. With full contract details, they will be able to view the Comment page and reply if necessary.
- **New Contract Discussion Thread** and **New Contract Discussion Reply** emails have been added to system emails (Administer  > Email Management > System Emails > Contracts).

- The **Comments** heading in the contract navigation menu has been updated to show the number of comments (and replies) highlighted in green.

## Menu Change to 'For selected line items' Field on Invoices

On invoices, the order of the options displayed in the **For selected line items** drop down list have been returned to their pre-16.2 order and the **Assign Contract to Selected Lines** or **Remove Contract from Selected Lines** options have been moved to the bottom of the list.

### Impact

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director, AP Express
- 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

## Total Contract Manager Enhancements

In 17.1, the following enhancements are available in Total Contract Manager (TCM).

### Ability to Automate Internal Review Workflow

Previously, contract managers sending contracts for internal review needed to manually create an internal review round and assign reviewers each time.

In 17.1, new workflow options allow organizations to automate their internal review round process. Automation ensures that contracts go through a standard review process that complies with business policy, and reduces the risk of overlooking errors.

Once the internal review workflow is set up by JAGGAER, organizations can set rules and select internal reviewers for each internal review workflow step. When the automated internal review round process is launched on a contract, it will automatically be sent to the assigned reviewers through the internal review round workflow.

Organizations can choose whether they want to use the manual internal review process only, the automated internal review process only, or enable both manual and automated internal review options.


This feature requires configuration by JAGGAER and system administrators.


## Impact

- Products Affected: Total Contract Manager
- End User Impact: Medium
- Admin User Impact: **High**
- Integration Impact: None

## 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.**
- New Permissions related to this Feature: None
- Once the automated internal review workflow is configured by JAGGAER, system administrators may need to configure the following options:
  - Select the **internal reviewers for each internal review workflow step** on the Contract Workflow page (under Setup).
  - Organizations can choose to display or hide the manual internal review round option on contracts. This is done on the **General Contract Settings** page. See [New General Contract Settings for Contract Workflow](#).
- The following (existing) permissions allow users to expedite both automated internal review workflow steps and contract approval workflow steps:
  - **Expedite Contract Through All Workflow Steps** (Permission Settings > Approvals > Contract Approvals) - Allows users with the permission to expedite all internal review and contract approval workflow steps. For the internal review workflow, this means that users with the permission do not need to be a reviewer on a step to expedite it, unlike the permission Expedite Contract through Workflow, where you need to be.
  - **Expedite Contract Through Workflow** (Permission Settings > Approvals > Contract Approvals) - Allows users with the permission to expedite pending internal review and contract approval workflow steps. For internal review workflow, this means that users with the permission can only expedite the internal review workflow steps that **they are a reviewer on**. If a contract manager has only this permission, they will need to be named as a reviewer on a step before they can expedite it.

- Expedited steps are indicated on the automated internal review workflow step and by the status "**Bypassed**" next to the step in the Tracking column in the Review Rounds page.
- Expedited steps are recorded in the audit trail.
- The following (existing) **notification preferences** are sent to internal reviewers if they have opted to receive them on their user profile (Notification Preferences > Contracts):
  - **Contract Internal Review Notification** - Notifies internal users that a contract has been assigned to them for review.
  - **Contract Manager Internal Review Notification** - Notifies contract managers that an internal review round is complete.
- The following new **system emails** have been created (Administer  > Email Management > System Emails > Contracts):
  - **Contract Internal Review Workflow Reminder** - If a contract hasn't been reviewed in a timely manner, this reminder is sent to internal users notifying them that a contract is waiting for their review. Users must opt into the "Contract Internal Review Notification" notification preference to receive this reminder.

**Note:** This notification is sent based on an organization's global settings for **Pending Approval Document Reminder** (Setup  > Workflow Setup > General Workflow Settings). **Internal Review** has been added as an approval type that can be selected under "Which types of approvals should include the manager?".

- **Contract Automated Internal Workflow Error** - Indicates that an error has occurred in the automated internal review workflow. If an error occurs on an automated internal review workflow step, the system automatically ends the round, displays an error status next to the step in the review round table, and sends this notification to the contract manager or contract facilitator. Contract managers and facilitators will receive the notification regardless of their notification settings. Other users will receive this notification if they have opted into the "Contract Approval Workflow Error" notification and have the "Restart/Skip Contract Workflow Steps in Error" permission.
- The following changes have been made to the contract **Review Rounds** page:
  - The definition of an internal review round has changed. Previously, each time a contract was sent to an internal reviewer it was considered one round. Now, each time a contract is submitted for review it is considered one review round. If there are multiple reviewers, the review round is considered complete when the last reviewer is done.
  - The options available to start a review round depend on whether an organization allows automated internal review rounds only, manual internal review rounds only, or both:

- **Automated Internal Round** - This option is only displayed when the automated internal review round feature is enabled. Click to send a contract to the first automated internal review workflow step.
- **Create Manual Internal Round** - This option is only displayed if manual review rounds are enabled. Click to start a manual internal review round. If an organization has enabled both automatic and manual internal review rounds, this option is accessed by clicking **Automated Internal Round > Create Manual Internal Round**. If an organization is using manual review rounds only, this option appears as a button.
- **Start External Round** - This option is always displayed. Click to start an external review round.
- If automated internal review workflow is enabled, a new **View Internal Review Steps** section displays the automated internal review workflow set up for your organization. Click **view reviewers** on a workflow step to display the reviewers assigned to a step. If there are multiple rules on a workflow step, reviewers assigned to the rule are listed under each rule group.
- Each review round is numbered and displayed with the appropriate heading:
  - **Round #[ ] (Internal)** is displayed for automatic internal review rounds.
  - **Round #[ ] (Internal - Manual)** is displayed for manual internal review rounds.
  - **Round #[ ] (External)** is displayed for external review rounds.
- Expand a review round heading to display information about it. A new table shows the following information. Manual review rounds will only show the Tracking and Comments columns:
  - **Step** - The name of the automated internal review workflow step.
  - **Group** - The name of the rule attached to an automated internal review workflow step. A workflow step can have multiple rules assigned to it, with different reviewers for each rule.
  - **Tracking** - Indicates the status of the review.
  - **Reviewer** - Displays the reviewer(s) assigned to the automatic internal review workflow step or manual review round. If multiple reviewers are assigned to an automatic internal review workflow step, the number of reviewers is displayed and clicking the link will open a window that shows reviewer names.
  - **Start** and **End** - The date and time the automatic internal review round started and completed.
  - **Comments** - Displays notes entered by each reviewer at the end of their review.
- The following new statuses may be displayed in the **Tracking** column:



- **Bypassed** - Indicates that an **automated** internal review workflow step has been expedited. "*Bypassed*" is also displayed on the internal review workflow step itself.
- **Skipped** - Indicates that the "Skip Reviewer" action has been performed on a **manual** internal review round.

**Note:** There is no "Skip Reviewer" option on automated review rounds. Users with the appropriate permission (contract manager, facilitator or administrator) can expedite internal review workflow steps if they have the appropriate permissions. On manual review rounds, contract managers can skip a reviewer.

- An **End Round Now** button is displayed to contract managers, administrators and facilitators on both manual and automated review round headings, whether or not they have expedite permissions. Clicking the button ends the review round immediately. The Tracking column will display "**Skipped**" on manual internal review rounds, or "**Bypassed**" for automated internal review rounds.
- Contract managers **initiate an automated internal review round** as follows:
  - A contract can only have one internal review round going at a time. If a system permits both automated and manual internal review rounds, either one automated or one manual internal review can be initiated.
  - The following elements must be in place:
    - Automated internal review rounds must be enabled and an active internal review round workflow must exist.
    - The user must have contract manager, facilitator or administrator permissions.
    - The contract must be in **Draft** status.
    - The contract must be available for check out.
  - Open the contract to review and click **Review Rounds** in the left menu, then click the **Start Automated Internal Round** button.
    - The system will automatically check the contract out to the person who initiated internal review step and send it to reviewers on the first step of the internal review workflow.
    - The contract displays an **Internal Review** status while moving through the internal review workflow, and returns to **Draft** status once the internal review round is complete.
  - Click **View the Contract** on the Contract Submitted to Internal Review Workflow confirmation page to return to the contract.
- Reviewers **perform an automated internal review** as follows:

- **Internal reviewers** on a workflow step are notified that a contract needs to be reviewed through internal review emails and notifications.
- Reviewers open and review the contract. They may check out the contract to make changes.

**Important Note: All internal reviewers can edit the contract once they check it out.** This applies to both automatic and manual internal review rounds. We recommend adding comments about any changes made when completing the review.

- When finished reviewing the contract, reviewers click **Done with My Review** from either the **Contract Actions** menu or on the **Review Rounds** page by clicking the **Actions** menu next to their name.
- Comments are added in the **Done with My Review** window. The contract moves to the next internal review workflow step when the **Done with My Review** button is clicked.
- Once the contract has reached the end of the internal review workflow, the review round is complete. The review round is displayed under its own heading on the contract's Review Rounds page.
- The **Cycle Time Report** has been updated to reflect automated internal review workflow steps. Users can click the ⓘ icon to view details about the internal review workflow step.

## New General Contract Setting for Internal Review Rounds


As part of the new automated internal review workflow feature, a new General Contract Setting allows organizations to display or hide the manual internal review round option on contracts. They can choose to use the manual internal review process only, the automated internal review process only, or enable both manual and automated internal review options.

See [Ability to Automate Internal Review Workflow](#).

### Impact

- Products Affected: Total Contract Manager
- End User Impact: Low
- 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 new **Manual Internal Review** setting on the **General Contract Settings** page controls whether the **Create Manual Internal Round** option is displayed or hidden on the contract Review Rounds page.
- Display or hide the Create Manual Internal Option as follows:
  - Navigate to **Contracts**  > **Contract Administration Setup** > **General Contract Settings**.
  - Choose one of the following options next to **Allow the Contract Manager to start a manual Internal Review Round**:
    - Select **Yes** (default setting) to display the **Create Manual Internal Round** option on the Review Rounds page and allow contract managers to start manual internal review rounds:
      - If an organization has enabled both automatic and manual internal review rounds, this option is accessed by clicking **Automated Internal Round** > **Create Manual Internal Round**.
      - If an organization is using manual review rounds only, this option appears as a button.
    - Select **No** to hide the **Create Manual Internal Round** option on the Review Rounds page and use the automated review round process only.
      - For systems with automated internal review rounds enabled, the **Start Automated Internal Round** button will be the only option displayed for internal review rounds.
      - For systems that do not have automated internal review rounds enabled, this will hide the **Create Manual Internal Round** option and contract managers will not be able to initiate an internal review round.

## New Options for Viewing Contract Workflows


As part of the new automated internal review workflow feature, changes to the Contract Workflow Setup page provide new options for viewing either the automated internal review workflow or the contract approval workflow.

### 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
- On the **Workflow Process** tab (Setup  > Workflow Setup > Contract Workflow Setup > Workflow Process tab), a new field displays, **Which active process workflow would you like to see?** The drop down menu provides two options:
  - **Approval** - Displays contract approval workflow steps.
  - **Internal Review** - Displays automated internal review workflow steps.
- The message "There is no active workflow" is displayed if there is no active workflow for the option selected.

## New Option to Set Default First Party by Project

Previously, the contract owner party designated as "Primary" was displayed as the first party on all new contracts by default. Users needing a different first party on a contract had to first remove the default primary party before selecting a new one.


As of 17.1, a new project setting allows organizations to designate a different default first party for each project. If enabled, the contract party designated as "Project First Party" on a project will be the default first party on all new contracts created within the project.

## Impact

- Products Affected: Total Contract Manager
- End User Impact: Low
- Admin User Impact: Medium
- 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
- Users must have administration access to the contract project.

- **Important Note: Existing contract party default settings will not change when 17.1 is released.** Currently, only one contract party can be designated as PRIMARY, indicated by a white star icon  next to a contract owner record. This sets it as the default first party for the entire organization and this is the record that is displayed as first party on all contracts *unless* a different primary first party is selected for a project.
  - Changes to the Project First Party (Primary) setting affect new contracts in the project going forward. Existing contracts will not be changed, and any contracts in Draft status will need to be manually updated.
  - Only **Owner** contract party types can be selected as default primary first parties.
  - Project First Party (Primary) settings on a parent project will cascade down the parent-child hierarchy, but changes on a child project will not affect the parent. Changes do not affect other projects at the same level in the hierarchy.
  - The new setting is displayed under the **Project First Party (Primary)** heading on the **Contract Setup** tab of a project:
    - The current default first party for the project is displayed.
    - The following options are available next to **Select a Different First Party**:
      - **Yes** - Select to choose a new default primary first party for the project. If selected, a **Project First Party (Primary)** field allows users to search for and select a contract party. It must be an Owner contract party type.
      - **No** - Select to use the organization-level setting for the primary first party.
- Note:** If this setting is switched from Yes to No, it will reset the project to use the organization's default setting for primary first party.

## Ability to Delete a Contract Checked Out to Logged In User

Previously, users logged into Total Contract Manager could not delete contracts while they had them checked out – the Delete option was only available when a contract was checked in. As of 17.1, a logged in user can delete a contract while it is checked out to them, if they have permission to do so.

### 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 following users have the ability to delete a contract in Draft status when the contract is not checked out to anyone, or if checked out to them:
  - The **contract manager(s)** explicitly assigned to the contract.
  - The **contract facilitator** assigned to the contract.
  - The **contract administrator** inherited from the contract's project.
  - Any user with the **contract super user** permission.
- Contracts cannot be deleted if they are checked out to someone else.

## Ability to Edit Contracts in Approval Workflow

Previously, contracts in the approval workflow could not be edited. In 17.1, new workflow options allow designated approvers on a contract approval workflow step to edit the contract during that workflow step, but at no other time.

This feature requires configuration by JAGGAER and system administrators.

## Impact

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

## 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.**
- If an active contract approval workflow step is editable, approvers assigned to the step will see a "**Check Out**" option on the **Contract Actions** menu:
  - From the Contract Actions menu, approvers will have the option to: **Check In** or **Check Out, Return to Draft** status, **Assign to Myself** and **Approve**.
  - Approvers check out the contract to make changes.
  - When changes are complete, selecting the contract action **Approve** will automatically check in the contract and move it to the next step in the approval workflow, or the contract can be checked in first and then approved.

- While the contract is being edited in workflow, the contract status will remain as **Pending Approval**.
- If an active contract workflow step is editable, but does not have any approvers on the step, the contract won't be editable while in that step.
- If an active contract workflow step is not editable, the contract cannot be changed by approvers during the approval workflow.



## New Contract Approval Workflow Reminder Email/Notification

A new **Contract Approval Workflow Reminder** email notification can be set up to remind contract approvers that a contract is waiting to be approved. It reduces the need to monitor a contract's status and manually send reminders, improves the efficiency of the contract review process, and results in faster contract approvals.

### 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 Approval Workflow Reminder** system email has been created (Administer  > Email Management > System Emails > Contracts). If a contract hasn't been approved in a timely manner, the notification is sent to contract approvers informing them that a contract is waiting for their approval.
- Users must opt into the **Contract Pending Workflow Approval** notification preference to receive this reminder (Notification Preferences > Contracts > Contract - Approval Workflow > Contract Pending Workflow Approval.)
- The notification is sent based on an organization's global settings for **Pending Approval Document Reminder** (Setup  > Workflow Setup > General Workflow Settings).

## View Contract Link in Email Notifications Updated

Previously, the **View Contract** link in contract email notifications directed users to the contract header page of a contract. In 17.1, this link has been updated so that clicking **View Contract** directs users to the Contract Summary page of a 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 **On** by default.
- New Permissions related to this Feature: None
- Users clicking the **View Contract** link in a contract email notification will be directed to the Contract Summary page of the contract. They will be able to view the contract summary only or full contract details based on organization settings.

## Contract Request Names Displayed on Approvals Dashboard Widget

The **Approvals** dashboard widget has been updated to show the name of contract requests that require approval.

### Impact

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

### Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None
- Organizations must have a form request workflow for contract requests.



- The user approving the contract request needs the **Approve/Reject Form Request** permission (Permission Settings > Approvals > Form Request Approvals > Approve/Reject Form Requests).

# Sourcing Event 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.

Click a link below for information about the enhancement:

## Cost Analysis & Auto-Scoring Added to Event Line Items



Previously, Sourcing Director provided the ability to apply auto-score and cost analysis rules to questions at the event level for use when evaluating supplier responses.

In 17.1, auto-score and cost analysis rules can be applied at the line item level, allowing organizations to request information about individual products and services being bid on by suppliers responding to the event. The answers provided are included in scenario calculations, so that event administrators can take them into consideration when analyzing results and awarding Sourcing Director events.

### Impact

- Products Affected: Sourcing Director
- End User Impact: **High**
- 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 following settings must be enabled to use auto-score and cost analysis at the event line item level:
  - Auto-Score and Cost Analysis must be enabled on the project (**Sourcing**  **> Sourcing Administration > Manage Projects > [select project] > Event Setup** tab).
  - Auto-Score and Cost Analysis must be enabled on the event (**Sourcing**  **> Sourcing Events > Search Events > [select event] > Setup > Bid and Evaluation** section (details below).

## Overview

- Here is a summary of how the new auto score and cost analysis rules are applied to event line items. View the sections below for more information:
  - Options on the event **Setup** page are used to both activate the use of auto-score and cost analysis for event line items and to set maximum cost adjustment and bid threshold limits for cost analysis.
  - Auto-scoring and cost adjustment values (which are used for cost analysis) are enabled and assigned to response options on **additional item fields**. Additional item fields tagged as visible to the supplier will be displayed on event line items in the supplier portal.
  - Once the event is open, suppliers enter the requested information in additional item fields when they click **Respond to Item**.
  - Additional item field values entered by suppliers for an item are displayed in the sourcing event on the **Items** page of each supplier response.
  - Calculated line item, auto-score, and cost analysis results are displayed on the event **Evaluation** page, where users can view a breakdown of auto-score and cost analysis calculations. They also have the ability to disallow an applied cost adjustment.
  - **Libraries, templates, and multi-stage events** have been updated to accommodate auto-scoring and cost analysis for event line items.

## Setup

- New checkboxes on the **Setup** page under **Bid and Evaluation** must be enabled to apply auto-scoring and cost analysis to an event's line items:
  - If **Auto Score** is set to **Yes**, a new **Apply Auto Score at the individual line level** checkbox is displayed. Select the checkbox to enable auto-scoring for event line items.
  - If **Cost Analysis** is set to **Yes**, a new **Apply Cost Analysis at the individual line level** checkbox is displayed. Select the checkbox to enable cost analysis for event line items. Once the checkbox is selected, additional control options are displayed and used to define maximum cost adjustment and bid threshold limits:
    - When the **Set maximum Cost Adjustment per line item** checkbox is selected, maximum values can be entered in the **Products** and **Services** fields, either by dollar value or percentage amounts.

**Important Note:** If maximum limits are not defined, no limits will be applied at either the event level (Questions) or item level (Additional Item Fields). If maximum limits are defined, they are honored at both event and additional item levels.

- When the **Apply upper Bid threshold cost adjustment application limits** checkbox is selected, upper bid thresholds for cost adjustments can be entered in the following fields in dollar amounts. Threshold limits are applied against the total bid value of products or services, and/or against the bid value of a single item within an event:
  - Product: Single Unit Bid threshold
  - Product: Total award Bid threshold
  - Service: Annual Item Bid threshold
  - Service: Total award Bid threshold
- If Auto Score and Cost Analysis are enabled for event line items, auto-scoring and cost adjustment values (which are used for cost analysis) need to be assigned to response options defined for additional item fields.

### Additional Item Fields

- Once Auto Score and Cost Analysis are enabled for event line items, the following settings in the **Create Additional Field** or **Update Additional Field** overlays are used to add auto-score and cost adjustment values to response options on an additional item field:

**Note:** You may also choose to **Add Fields From Library**. Auto-score and cost adjustment values on response options must also be configured for these additional item fields on each event.

- The **Supplier Can Respond** field must be set to **Yes**.
- Select the appropriate **Field Type**. The following field types support auto-score and cost analysis for event line items:
  - Numeric Text Box
  - Yes/No
  - Dropdown List (Pick One)
  - Multiple Choice (Pick One)
  - Multiple Choice (Pick Many)
  - Date
- If the field type selected supports auto-scoring and cost analysis, new **Use Response in Auto Score** and **Use Response in Cost Analysis** checkboxes enable the use of supplier responses for auto-scoring and cost analysis on event line items. If the checkboxes are selected, scoring values and/or cost adjustments need to be added to responses in the response options section.
- In the **Response Options** section, responses are configured and auto-score and cost adjustment values are assigned to each response. The fields that need to be completed will vary based on the field type chosen and whether or not the Auto Score/Cost Analysis checkboxes have been selected.
- Up to three levels of conditional visibility controls can be added to additional item fields. See [New Conditional Visibility Controls on Additional Item Fields](#).

## Supplier UI

- When an event is open, suppliers enter the requested additional item field information when they click **Respond to Item**. Additional item fields (with their auto score and cost adjustment values) will also be applied to alternative items entered by suppliers, if alternative items are enabled for the organization.

## Evaluations



- Under Evaluations, the **Auto Score Questions** and **Cost Analysis Questions** pages have been updated to allow event administrators to view or edit auto score and cost adjustment values for both event-level questions and line-level questions. New headings group the two types of questions:
  - Expand the **Event-Level Questions** heading to see a list of event questions that have been added to the Questions page of the event.
  - Expand the **Line-Level Questions** heading to see a list of event line item questions that have been added via Additional Item Fields on the event. These are grouped into **Product** and **Services** categories.
- Users can expand a question to view or change auto-score and cost analysis assignments or view a summary of responses to the question:
  - An **Edit Question Details** button is displayed when events are in **Draft** status, allowing users with the appropriate permission to change auto-score or cost analysis assignments. The changes are saved to the original event question or additional item field.
  - A **View Question Details** button is displayed when events are in any other status (e.g., **Under Evaluation**, **Closed** or **Canceled**). Users can view information about the question, but changes are not allowed.
- Line level cost analysis and auto-score assignments can be **amended** from the Evaluations page on released events so that corrections and adjustments can be made:
  - If changes **do** affect supplier responses (such as a change to the questions), the supplier responses for the items affected are discarded.
  - If the changes **do not** affect existing supplier responses (such as a change to the response scoring), then previously submitted supplier responses are not discarded.
  - Amendments can't be made to locked items that have been added to an event from locked or protected templates.

## Items

- Once suppliers have responded to an item, the values entered by suppliers in additional item fields with auto-score and cost analysis settings are displayed on the **Items** page of each supplier response on the sourcing event. Product items are displayed on the **Product Line Items** tab, and service items are displayed on the **Service Line Items** tab.

## Award Scenarios

**Important Note:** It's the responsibility of the event manager/administrator to ensure that the application of cost analysis evaluation strategies, introduced at both the event and line levels, will not result in a misapplication of cost adjustments to supplier bids on the Evaluations page.

- Auto-score and cost analysis results for event line items are calculated and displayed on the Evaluation page, where **Award Scenarios** are created and evaluated:
  - Expand any line (or select Expand All) to view auto score points and cost adjustment values for individual items.
  - A new **Questions: Line Items** section shows auto score points and cost adjustment values assigned to suppliers based on their responses to line item questions.
  - A summary of applied cost adjustments is displayed on the following lines as a dollar value in **bold** font. Expand a line to view the difference that the cost adjustment represents from the original bid entered by the supplier:
    - **Total Adjusted Bid** - Shows the sum of the supplier bid with cost adjustments from event questions and line level questions applied. It is displayed as a dollar value in bold.
    - **Product Line Items - Adjusted Bid** - Shows the sum of all product line items with cost adjustments applied.
    - **Service Line Items - Adjusted Bid** - Shows the sum of all service line items with cost adjustments applied.
  - A new **Disallow/Reapply** option, next to cost adjusted values, works as a toggle switch to allow event evaluators to override cost adjustments. Changes to the setting cascade down to all related values affected by the change:
    - Clicking **Disallow** removes a cost adjustment from an item. **Disallowed** will be displayed on all related items instead of the cost adjusted value.
    - Clicking **Reapply** will reapply a cost adjustment to an item. Cost adjustments will be recalculated and displayed.
  - An information icon  will display next to an item when maximum adjustment values or bid thresholds have been exceeded and an expected cost adjustment has not been applied. Click the information icon  next to an item to view details.
  - Alternate items are subject to the same line item cost analysis and auto-score controls as any other item sought via the event.
  - Auto score and cost analysis values on additional item fields have been added to **exports** of supplier responses.

## Libraries, Templates, Multi-Stage Events

- Auto-score and cost analysis settings for additional item fields in **event libraries** or **templates** are carried to the sourcing events to which they are added.
- Auto-score and cost analysis settings on additional item fields are included in **copied events** and carried over to new stages of **multi-stage events**.

## New Conditional Visibility Controls for Additional Item Fields

In 17.1, conditional visibility controls have been added to additional item fields so that organizations can define the sequence in which additional item fields are displayed on event line items, or hide fields until they are needed. This will assist suppliers responding to the event as they will only see the fields they need to complete, in the order in which they need to complete them.

### 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.
- The following types of additional item fields support conditional visibility controls. They must also have the **Supplier Can Respond** radio button set to **Yes**:
  - Yes/No
  - Dropdown List (Pick One)
  - Multiple Choice (Pick One)
  - Multiple Choice (Pick Many)
- A maximum of three levels of conditional visibility controls are supported in one hierarchy (i.e., parent, child, grandchild). An additional item field can only belong to one hierarchy. For example, you cannot use one additional item field for three different conditional visibility hierarchies.
- To keep track of conditional visibility controls, a new **Conditional Upon** column on the Additional Item Fields page shows the name of the field that is immediately above it in the conditional hierarchy.
- The **Create Conditional Follow Up** option allows users to either create a new additional item field with conditional visibility, or apply conditional visibility settings to an existing additional

item field. At least one additional item field must exist before the Create Conditional Follow Up is displayed. The option is not available if the field selected is at the grandchild level in a conditional visibility hierarchy:

- To create a new additional item field with conditional visibility controls, click **Create Additional Field**, select **Create Conditional Follow Up** from the drop down menu, then select the **additional item field** that will be immediately above the field being created in the conditional hierarchy.
- To apply conditional visibility controls to an existing additional item field, expand the **Edit** menu next to the appropriate additional item field and select **Create Conditional Follow Up**.
- The following fields in the **Create Conditional Field** window control conditional visibility on the selected additional item field:
  - The **Conditional Upon** field is read only and displays the name of the field that is parent to the field being created (i.e., immediately above it in the hierarchy).
  - The **Conditional Upon Value** field is where to select the value from the parent field that will cause the field being created to display.
  - The **Supplier Can Respond** field must be set to **Yes** to indicate that suppliers are able to respond to the field.
  - One of the following **Field Types** must be chosen: Yes/No, Dropdown List (Pick One), Multiple Choice (Pick One), Multiple Choice (Pick Many).
  - The **Use Response in Auto Score** and **Use Response in Cost Analysis** checkboxes may be selected to use supplier responses for auto-scoring and cost analysis.
  - Responses are configured for, and auto-score and cost adjustment values are assigned to, each response in the **Response Options** section. See [Cost Analysis and Auto-Scoring Added to Event Line Items](#).
- The **supplier UI** has been updated to support conditional visibility settings on item line level fields in supplier item responses.
- On a sourcing event, the values entered by suppliers in additional item fields are displayed on the **Items** page of each supplier response.
- Conditional visibility settings on additional item fields in **event libraries** and **templates** will be carried into sourcing events. When adding a set of additional item fields with conditional settings from a library or template to a sourcing event, only the top level additional item fields (parents) are displayed for selection, but all fields in the hierarchy (child and grandchild) are added to the event when the parent is added.
- When additional item fields on a sourcing event are included in the **Evaluation Actions > Export All Responses** document, **conditionality between fields is not included**.
- If deleting conditional additional item fields, grandchild and child fields in the conditional hierarchy must be deleted before a parent field can be deleted.



# Ability to Make Additional Item Fields Required for Suppliers

When creating or updating additional item fields, a new **Supplier response is required** checkbox allows event creators to make completion of a field mandatory for suppliers participating in an event.

## 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.
- A new **Supplier response is required** checkbox has been added to the **Create Additional Field** and **Edit Additional Field** overlays. When selected, suppliers participating in the event must complete the field before they can submit a bid.
- The checkbox is only displayed when the **Supplier Can Respond** option is set to **Yes**. The checkbox appears directly underneath the Supplier Can Respond field.
- Selecting the checkbox marks the targeted field as a "response is required" field and a star icon (★) is displayed next to the additional item field name wherever it is displayed in the system and on the appropriate line items in the supplier portal.
- The setting is included in copied events.
- Changes to the setting are captured in the audit trail.

# Response Field Type Added to Additional Item Fields

The **Multiple Select (Pick Many)** field type has been added as an option when constructing additional item fields, allowing event creators to create additional item fields that allow users to respond to line-level questions by selecting multiple options from a list of responses.

## 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.
- The **Multiple Select (Pick Many)** option is available on the **Field Type** drop down menu, located in the **Create Additional Field** and **Edit Additional Field** pages. It is also available for selection on the new **Create Conditional Field** overlay.

## Changes to 'Add Contact' Option on Sourcing Event Suppliers

Previously, contacts were added to a supplier on a sourcing event by first searching for the supplier and selecting **Add new contact** in the search results page.

In 17.1, the feature has been renamed and added to the Suppliers page for better visibility, making it easier to add contact information to suppliers on sourcing events. In addition, system checks for duplicate contacts have been updated to ensure accurate information.

## 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.
- The **Add new contact** button that was previously displayed in the Action column on the Supplier search results page has been renamed to **Add Contact** and moved to the **Sales and Corporate Contacts** column. It is displayed at the end of the list of existing contacts for each supplier.
- The **Add Contact** button has also been added to the following pages, where it is also displayed in the **Sales and Corporate Contacts** column for each supplier. The functionality has not changed:
  - The **Event Suppliers** tab on the Suppliers page.

- The **Selecting from Group** overlay that is used when adding suppliers from supplier groups.
- System checks for duplicate contacts have been updated so that each supplier contact added to or updated on a sourcing event requires a unique email address. This includes contacts in supplier groups:
  - When adding or updating supplier contact information on a sourcing event, messages will indicate when an email address is in use and direct users to pick a different contact or enter a different email address.
  - When importing suppliers to a sourcing event, contacts found to be duplicates will be removed so that only valid sales and corporate contacts are added to an event.

## Ability to Add an Attachment to a Q&A Board Entry

Buyers and suppliers can use the **Q&A Board** to communicate during a sourcing event. In 17.1, suppliers and buyers are able to add an attachment to Q&A entries, to supplement the information provided during the exchange.

### 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.
- A new **Attachment** field has been added to the Q&A Board's **Ask A Question**, **Answer Question** and **Add Attachment** overlays for suppliers and buyers.
- In the **Attachment** field, suppliers and buyers may upload a document to a question. There is a maximum of one attachment per question or answer. A link to the file will be displayed next to the question or answer on the Q&A Board.
- Anyone who can view a question or answer on the Q&A Board will also be able to view, upload, or download its attachment.
- When a buyer responds publicly to a supplier question that has an attachment, a "**Post to Public Q&A?**" option on the **Answer Question** window allows them to remove the supplier attachment before posting publicly.
- If the event is deleted, attachments are also deleted.

# Allow Q&A Board Activity Beyond the Event Close Date

Previously, the Q&A Submission Close Date had to be at or before the event Close Date. With the 17.1 release, users will have the option to keep the Q&A Board functional beyond the established event Close Date; so that recorded communication can continue with participating suppliers until the event reaches a terminated status (e.g., Awarded).

## 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.

# Enhancements to Public Site Reverse Auction Event Presentation

Auction Start and Auction End dates and times have been made conspicuously visible on client Public Sites for public reverse auctions. It's important to make this information, which is critical to reverse auction events, readily visible to potential event participants.

## Impact

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

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- 'Auction Phase' Start and End time stamps on a reverse auction event have been added to the event summary PDF and also to the public site summary of the event.

- This information is only displayed for public reverse auctions.

## Ability to Upload Document to Public Sites on Canceled Events

In 17.1, the Award Notifications page now provides the ability to upload documents to public sites on public events that have been canceled (e.g., closed without awarding), allowing buyers to provide notification to suppliers as to why the cancellation occurred.

### 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.
- Attachments can be uploaded to the public site for a canceled event. It must be a public event and have a **Closed Without Awarding** status.
- Attachments are uploaded by navigating to **Tools > Award Notifications** and clicking the **Add Attachment** button under the **Public Site Award Attachments** heading. Once the file is uploaded in the **Add Attachment** window, clicking **Publish** will post the file to the public site.
- Attachments can be uploaded, published, and unpublished.

## Panel Questionnaire Comment Field Expanded

The number of characters allowed in the Panel Questionnaire Comment fields has been expanded from 1000 to 2500 characters.

### 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.
- New Permissions related to this Feature: None.
- The number of characters allowed in the Panel questionnaire comment fields have been expanded from 1000 to 2500 characters.

## Ability to Reopen a Panel Questionnaire

A new event action allows event managers to re-open a panel questionnaire and extend the close date to ensure all possible input is captured. Securing the best possible input from the panelists will help to ensure that the most appropriate event award scenario is ultimately adopted.

## 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.
- A new panel questionnaire option, on the **Event Actions** menu, allows event managers to reopen a closed panel questionnaire and extend its close date.
  - Click **Reopen Questionnaire** to reopen and extend the close date of a closed panel questionnaire.
- A new close **date** and **time** is entered in the **Questionnaire Close Date** field. Once saved, a notification is sent to users who have opted into the **A Panel Questionnaire has been published** notification.
- The new system email and notification **An Event panel questionnaire has been reopened** is sent to users who have opted into the **A Panel Questionnaire has been published** notification (Notification Preferences > Sourcing Director).
- Actions taken are recorded in the **Event History** log.


# New Option to Copy an Event Template

The ability to copy sourcing event templates has been added to the list of administrative actions available for event templates. Event administrators can copy an event template and modify it to their specifications, saving them the time required to enter similar information for each event template.

## 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.
- A new **Copy Template** option is available on the **Edit** menu next to a template on the **Event Templates** page (Sourcing  > Templates and Libraries > Event Templates).
- Completing the **Name** and **Description** fields in the **Copy Template** window and saving changes causes a copy of the original template to be created and displayed with the new name and description. Users can modify settings on the new template and continue with the creation of the template.
- Access settings for the new template are copied from the original template.

# New Return to Evaluator Workflow Action

A new workflow action allows approvers of an event's recommended award scenario to return that scenario back to the evaluator. The evaluator can re-examine the event and submit a different award scenario for approval.

## Impact

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

## Key points of Feature

- This feature is **OFF** by default and must be enabled by JAGGAER.
- New Permissions related to this Feature: None.
- This feature requires configuration of the evaluation workflow. **Please contact JAGGAER for setup.**
- Once configured, a new "**Return to Evaluator**" option is available in the **Workflow Actions** drop down menu:
  - The **Approve/Close Without Awarding Sourcing Events** permission is required to perform this action.
  - The event must be in the Under Evaluation status, have a finalized award scenario, and be in a folder assigned to the appropriate approver.
  - The action cannot be performed if contracts have been created from the award scenario.
- Selecting the **Return to Evaluator** workflow action will return the recommended award scenario to the evaluator. The finalized status of the original recommended scenario is removed, but all previously created award scenarios are retained. The evaluator can then re-evaluate the scenario and submit a different recommendation for approval.
- The new **Sourcing Event - Returned to Evaluation** notification is sent to the evaluator if they have opted to receive them on their user profile (Notification Preferences > Sourcing Director > Sourcing Event - Evaluation Workflow). It indicates that an awarded scenario sent for approval has been returned for re-evaluation. It also will include approver comments, if provided, to help direct the evaluator in their effort to rework the award strategy.

## Enhancements to PR Import/Export and PR Validation XML Files

A new control setting for PR Import/Export and PR Validation XML files will allow sourcing event data entered by suppliers to be captured and made available to external systems for downstream processing purposes. It also allows associations to be defined between PR's from which events are initiated, and PR's generated from those initiated events, which can be leveraged to administer, for example, ERP account encumbrances.

### Impact

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



## Key points of Feature

- This feature is **OFF** by default and must be enabled by JAGGAER. Administrator setup is also required. **Please contact JAGGAER for more information on this feature.**
- New Permissions related to this Feature: None.

# Portfolio Savings Manager Enhancements

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

## Savings Initiative Custom Fields

With the 17.1 release, customers can add custom fields to savings initiatives. This enables them to capture and report on additional information that is unique to their businesses, such as baseline spend, current contract expiration, project risks, etc.

The custom fields appearing on a savings initiative are determined by its initiative type, a new property for savings initiatives. On the new Initiative Types page, users are able to display or hide custom fields, as well as set display order, grouping, and whether or not the custom fields are required. See [Initiative Types](#) for more information.


Users with permission to define custom fields are able to set the custom field name and response type (single line text, multi-line text, numeric, yes/no, dropdown list, multiple choice, multiple select, or date). Depending on the response type selected, users are able to further choose response options, and whether the field can be searched on in Advanced Search.

If a custom field or initiative type is edited, changes will appear on new savings initiatives. Existing savings initiatives will not have their custom fields changed.

### IMPACT

- Products Affected: Portfolio Savings Manager
- End User Impact: Medium
- 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: **Manage Custom Savings Initiatives Fields** (Permission Settings > Portfolio Savings > Administration)
- To create a custom field, navigate to **Portfolio Savings**  **> Libraries > Custom Fields**. Click the Create Custom Field button to begin creating a new custom field.
- Enter a Field Name, Internal Name, Response Type, and select if the field is active. Users can also optionally choose to add help text for the field and if the field will be available to search on in Advanced Search.
- The available response types are: single line text, multi-line text, numeric, yes/no, dropdown list, multiple choice, multiple select, and date.

- If the dropdown list, multiple choice (pick one), or multiple choice (pick many) response types are selected, the user will also be prompted to enter options for those response types.
- A savings initiative's initiative type determines the custom fields that will appear on the savings initiative. See [Initiative Types](#) for more information.

## Initiative Types

With the 17.1 release, users have the ability to create and manage initiative types that can then be assigned to savings initiatives. The Initiative Types page is where users are able to select, edit, and manage custom fields that will appear on savings initiatives created with that initiative type.

A required field for entering the initiative type has been added to step 1 of the Create Savings Initiative and Copy Savings Initiative wizards.


The search results page has also been enhanced to allow search by initiative type.

If a custom field or initiative type is edited, changes will appear on new savings initiatives. Existing savings initiatives will not have their custom fields changed.

### 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.
- New Permissions related to this Feature: None.
- To create an initiative type, navigate to **Portfolio Savings**  **> Administration > Initiative Types**. Click Create New to open the Create New Initiative Type wizard. Enter a Name, Internal Name, and Initiative Type Code for the type, and click Save. Child Initiative Types can be added to Initiative Types once they have been created.
- The **About** tab of an Initiative Type allows users to edit the name of the initiative type, and select if the type is active or not.
- The **Custom Data** tab of an Initiative Type allows users to associate custom fields with initiative types. See [Savings Initiative Custom Fields](#) for information on creating custom fields.
  - Click the **Add Group** button to add a group for custom fields.
    - Users can optionally insert a page break before the group. Page breaks cause the custom fields listed under them to appear on separate pages listed under the Setup step of savings initiatives.
    - Groups appearing before a page break will appear on the Setup page of a savings initiative.

- By default, a group is always visible on savings initiatives associated with it. Users can click the **Add Conditional Visibility** button to set visibility for the group, based on user responses to other custom fields not appearing in the group.
- Users can also set the display order of the group.
- Click the **Add Field** button under a group to open the Add Field to Group wizard.
  - Custom fields can be searched or selected from a list. Click Next.
  - Optionally, choose to make the field required.
  - By default, a field is always visible if its group is visible. Users can click the **Add Conditional Visibility** button to set visibility for the field, based on user responses to other custom fields not appearing in the group.
  - Users can also set the display order of the group.
- The custom fields added to the initiative type will be available for new savings initiatives created with the initiative type.

## Advanced Search Enhancements

With this release, customers have additional options to filter savings initiatives on Advanced Search. New options include:

- General Advanced Search filters:
  - Initiative Type
  - Creator (select any, your user, or a chosen user)
- Savings Initiative Information filters:
  - Open, Source By, and Savings Start dates on the Date search field
  - Business Units
  - Departments
- Savings Initiative Persona filters:
  - Manager (any, your user, or a chosen user)
  - Stakeholder (any, your user, or a chosen user)
- Deliverables and Tasks filters:
  - Include savings initiatives options: no deliverables, all deliverables and only current deliverable
  - Deliverable Title
  - Deliverable Date
  - Deliverable Owner (select any, your user, or a chosen user)
  - Task Status
  - Task Owner (select any, your user, or a chosen user)
  - Task Date
- Savings Initiative Value filters:
  - Custom Target Savings and Capital Investment values

- Custom values for Baseline Forecasted Savings, Revised Forecasted Savings, and Projected Savings
- Custom Savings Initiative fields that have been made available for search


The search results page has also been enhanced to show additional savings initiative information, including Initiative Creator, Baseline Forecasted Savings, and To Date Actual Savings.

Users can now choose to include custom fields when exporting search results. The export file also displays search criteria filters.

## 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 **Portfolio Savings**  > **Savings Initiative** > **Search Savings Initiatives** and click **Advanced Search** to perform an advanced search.

## Choose Secondary Savings Type when Creating and Copying Savings Initiatives

Previously, the Secondary Savings Type field was only available on the Setup page of savings initiatives. With the 17.1 release, users are able to choose a secondary savings type when they create or copy a savings initiative.

On step 2 of the **Create Savings Initiative** and **Copy Savings Initiative** wizards, an optional field for entering a Secondary Savings Type is available. Duplicates are not allowed between the primary and secondary savings types selected.

Users may still edit both the primary and secondary savings types after they create a savings initiative while it is in draft and before it is approved.

## 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.
- The Secondary Savings Type field is also still available on the Setup step page of savings initiatives.

## Allow Savings Initiative Managers to Re-Open Completed Savings Initiatives

Previously, completed savings initiatives could not be reopened.

With the 17.1 release, savings initiative managers with the new **Reopen Savings Initiatives** permission can reopen savings initiatives by selecting **Reopen** from the **Initiative Actions** dropdown of a completed savings initiation.

## IMPACT

- Products Affected: Portfolio Savings 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: **Reopen Savings Initiatives** (Permission Settings > Portfolio Savings > Savings Initiatives)

## Copy Dates when Copying a Savings Initiative

Previously, when a user copied a savings initiative, all dates were removed on the new initiative.

With the 17.1 release, users have the option to keep the dates from the original initiative when copying a savings initiative. On the **Copy Savings Initiative** popup, users can select Yes or No on the **Copy Dates** option.

If Yes is selected, once the new initiative is created, all setup, savings forecast, deliverable, and task dates will be identical to the dates from the initiative they are copied from, regardless of whether these dates are in the past or future.

In the copied savings initiative, the Savings Breakdown values on the Baseline Savings Schedule will be recalculated to equal the total forecast divided by the savings initiative reporting intervals, thus they may differ from those on the savings initiative that they were copied from.

## 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.

# Current Deliverable Highlighted on Deliverables Progress Page

The **Deliverables Progress** page has been updated to highlight the current deliverable.

The Current Deliverable is defined as the earliest deliverable (by Due Date) not yet completed on a savings initiative that is in a status of Approved, Open, or On Hold. This may be the first deliverable or the first one after a completed deliverable. Current deliverables may have a status of Not Started, In Progress, Delayed, or Overdue.

## 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.