

## 17.3 PRODUCT RELEASE NOTES

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

OCTOBER 22, 2017 - INITIAL VERSION



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# Welcome

The **17.3 JAGGAER Product Release** will be available in the production environment starting November 12, 2017. The release includes features related to the **following JAGGAER products**:

- **All SelectSite Products:** This document focuses on the features for SelectSite products including:
  - eProcurement Products: Spend Director, Order Manager, Requisition Manager
  - Contract Lifecycle Management
  - Total Supplier Manager
  - Sourcing Director
  - Accounts Payable Products
  - Data Manager/Spend Radar
  - Portfolio Savings Manager
- **Contract Director (SaaS Version): Note:** Contract Director features are not included in this document. Information about Contract Director enhancements made between release 17.2 and release 17.3 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 17.3 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 17.3 – available in your production environment on Sunday, November 12, 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.

# 17.3 Scheduling

To help prepare our customers for the upcoming 17.3 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 17.3 Product Release\*.

Event	Date and Time	Description and Details
Release Promotion: Test Sites Unavailable	Beginning October 20, 2017, 8am ET	The 17.3 release will be promoted to the Test (usertest) environment from Friday, October 20, 2017, 8am ET through Sunday, October 22, 2017 12 pm ET. An email will be sent when the promotion is complete.
Release Validation in Test Environment	October 22, 2017 - November 10, 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 November 10, 2017, 9pm ET through November 12, 2017, 12pm ET	The 17.3 release will be promoted to the Production environment from Friday, November 10, 2017 9pm ET through Sunday, November 12, 2017 12pm ET. An email will be sent out when the promotion is complete.
Release available on Production Sites	Sunday, November 12, 2017	This date indicates when the features and functionality associated with 17.3 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 17.3 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 October 6, 2017 on the Product Release Library	The pre-recorded video will present a preview of all features coming in release 17.3.
Product Webinars (pre-recorded videos)	Available October 20, 2017 on the Product Release Library	Product-specific pre-recorded videos presenting a preview of features coming in release 17.3.



# The Feature Snapshot for 17.3

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 November 12, 2017.






Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Ability to Assign a Business Unit to Custom Field Values	All eProcurement for organizations that use the MBU feature.	Admins, End Users	Medium			
Ability to Configure PR, PO, Invoice Documents by Business Unit	All eProcurement and AP for organizations that use the MBU feature.	Admins, End Users	None			
Ability to Configure PR, PO, Invoice Workflow by Business Unit	Requisition Manager, Order Manager, Accounts Payable Director, AP Express for organizations that use the MBU feature.	Admins, End Users	None			
Removing SSL 3.0 Support for Outbound Connections	All					
Ability to Associate Brands with Line Items	All eProcurement Products	Admins, End Users	Medium			
PO Change Request Full Functionality	All eProcurement Products for organizations that have the Change Request feature enabled.	Admins, End Users	High			
Ability to Include Custom Fields and Codes in PR and PO Import/Export	Order Manager, Requisition Manager	Admins	High			
Ability to Configure Invoice Workflow with Supplier Elements	Accounts Payable Director (Total Supplier Manager and Onboarding needed for some supplier	Admins	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
	elements)					
Ability to Configure Receipt Notifications by Business Unit	Accounts Payable Director, Receipt Manager for organizations that use the MBU feature	Admins, End Users				
Ability to Deactivate Locations in a Supplier Profile	Total Supplier Manager with Onboarding	Admins, End Users	None			
Ability to Resubmit Approved Supplier Registration in Workflow	Total Supplier Manager	End Users	None			
General Enhancements to Supplier Request Functionality	Total Supplier Manager	End Users	None			
Supplier Ability to Sign Tax Documents via DocuSign	Total Supplier Manager with Onboarding	Admins, End Users	None			
New Diversity Classifications	All SelectSite Products (Additional configuration needed for TSM, Sourcing Director, AP Director and TCM Customers)	Admins, End Users	Low			
Update to Diversity Classification User Interface	All SelectSite Products	Admins, End Users	None			
Updates to Manage Translations Page for Importing / Exporting Instructional Text and Custom Profile	Total Supplier Manager, Sourcing Director, Accounts Payable Director, Contract Manager Repository, Total Contract Manager	Admins	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Registration Fields						
Updated NAICS Code Version	All SelectSite Products	Admins, End Users	High			
Ability to Configure Registration Profile Section Headings in Multiple Languages	Total Supplier Manager, Sourcing Director, Accounts Payable Director, Contract Manager Repository, Total Contract Manager	Admins	None			
Updates to Supplier Cold Registration Process	Total Supplier Manager, Sourcing Director, Accounts Payable Director, Contract Manager Repository, Total Contract Manager	Admins	None			
Form Driven Event Generation	Sourcing Director	Admins, End Users	None			
Cost Savings Summary Report Enhancements	Sourcing Director	End Users	None			
Q&A Board Enhancements	Sourcing Director	End Users	None			
Change Supplier Contacts after Events Opened	Sourcing Director	End Users	None			
Send Event Creators Blind Copy (BCC) of Emails Sent to Suppliers	Sourcing Director	End Users	None			
Restrict System-Generated Event Buyer Notifications	Sourcing Director	Admins, End Users	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Scenario Savings Evaluation	Sourcing Director	End Users	None			
Multiple Credentials Supported for eSignature	Total Contract Manager	Admins, End Users	Low			
Zero Touch eSignature for DocuSign	Total Contract Manager	Admins, End Users	Low			
Updates to Contract Notifications	Total Contract Manager	Admins, End Users	Low			
Message from Contract Manager Added to Internal Review Round and Contract Approval Workflows	Total Contract Manager	Admins, End Users	None			
Ability to Add Custom Contract Fields to Contract Summary	Total Contract Manager	Admins, End Users	None			
New Contract Approver Placeholders	Total Contract Manager	Admins, End Users	None			
Update to Contract Action "Upload Fully Executed Contract"	Total Contract Manager	Admins, End Users	None			
New ADW Rules for Template and Clause Statuses	Total Contract Manager	Admins, End Users	None			
Updates to Advanced Search	Total Contract Manager	Admins, End Users	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
New Contract Search Post Filters for Workflow Steps	Total Contract Manager	Admins, End Users	None			
New System Emails and Notification Preferences	Total Contract Manager	Admins, End Users	None			
New Filter for Contract Template and Clause Analysis Report	Total Contract Manager	Admins, End Users	None			
New Filter on Obligations Across Contracts Report	Total Contract Manager	Admins, End Users	None			
Updates to Contract Report Permissions	Total Contract Manager	Admins, End Users	None			
Ability to Terminate Contracts in Draft Status	Total Contract Manager	Admins, End Users	None			
Data Purge for Evergreen Contracts Updated	Total Contract Manager	Admins	None			
My Deliverables and Tasks Page	Portfolio Savings Manager	End Users	None			
Deliverable and Task Enhancements	Portfolio Savings Manager	End Users	None			
Detailed Savings Report Summary Tab	Portfolio Savings Manager	End Users	None			

Feature Name	Related Products	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
Customized Search Export Enhancements	Portfolio Savings Manager	End Users	None			
Automated Report Exports	Portfolio Savings Manager	Admins, End Users	None			
Table Response Type for Custom Fields	Portfolio Savings Manager	End Users	None			
Comment Notifications	Portfolio Savings Manager	End Users	None			
Edit Custom Field Responses on Initiatives in Approved or Open Status	Portfolio Savings Manager	End Users	None			

# General Enhancements

In 17.3, we have made general enhancements, including several enhancements to the MBU feature.

## Ability to Assign a Business Unit to Custom Field Values

Custom fields are used to track customer-specific information such as department numbers, accounting codes, employee numbers, work codes, requisition type, and more. Administrators have the option to assign **values** to custom fields, giving end-users options to select from when filling out a field. In some cases, organizations that have multiple business units may want a single custom field available for all users, but have the values vary by business unit. Previously, this required creating separate custom fields for each business unit with the specific values. In 17.3, we have added a feature that allows organizations to assign one or more business units to a custom field value. This restricts the values to be available only to users in the assigned business units. This provides more efficiency as only one custom field will need to be created and managed for all business units.

### Impact

- Products Affected: All eProcurement for organizations that use the MBU feature.
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: Medium

### Key points of Feature

- This feature is **ON** by default for organizations that use the MBU feature.
- New Permissions related to this Feature: None
- This new feature allows organizations to restrict custom field values to be accessible only to users from a specific business unit.
- Business Units are assigned in the **Value** configuration (Navigate to **Setup > Configure Documents > Manage Custom Fields**, then click on the **Values** tab). When you create a new value or edit an existing value, a new **Assign Business Unit** button is available. Clicking the button allows you to select the appropriate business unit(s) to assign to the value.
- The existing **MBU Chart-of-Accounts** feature allows you to create groups of custom field account codes that are assigned to specific business units. Because such a group of custom fields are all assigned to a single business unit, these fields cannot have values with separate BU assignments. There is a **Use as an MBU Chart-of-Accounts field** setting in the custom field definition. If this setting is enabled, the **Assign Business Unit** button is not available when configuring a value.



- In Value setup, there is a search feature that allows you to search for a specific value for the selected field. A **Business Unit** search field has been added, allowing you to search for and display only values for a specific BU.
- A new option is available that allows code favorites to be created for a business unit in the user profile. Code favorites are managed in Default User Settings > Custom Field and **Accounting Code Defaults > Code Favorites**. A new Business Unit drop-down field is available. You can select the business unit from the options and manage the code favorites for the selected BU.
- Business unit assignment has been added to some of the import/export files associated with custom fields. **If your organization is using any of these processes to integrate with other applications, it is extremely important that you evaluate them to be sure the addition of the field does not cause any issues.** A Business Unit Assignment field is now included in the following imports/exports:
  - Custom field value .csv import template
  - Custom field value .csv export.
  - Custom Field XML export (with the value set information for each exported custom field).
- For additional information about configuring custom fields, please see [Custom Field Management](#) in the online searchable help.

## Ability to Configure Purchase Requisition, Purchase Order, and Invoice Documents by Business Unit

Organizations that have multiple business units may have the need to customize purchasing documents based on the BU. For example, the line item fields for one business unit may differ from the line item fields for another. Previously, an organization could only have a single document configuration for each document type. As of 17.3, administrators are able to select a document configuration per business unit for requisitions, purchase orders and invoices.


A new **Document Configuration** section is available in business unit configuration. The organization's **Active** (default) configuration is inherited by the business unit but can be overridden.

### Impact

- Products Affected: eProcurement and AP Director for organizations that use the Multi Business Unit feature.
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: None

### Key points of Feature

- This feature is **ON** by default but requires set up.

- New Permissions Related to this Feature: None
- To enable this feature navigate to **Setup > Configure Documents > General Document Configuration Settings**. In the General Configuration section, locate the **Allow Document Configuration by Business Unit** setting. Click the checkbox to enable the setting.
- By default, business units inherit the **Active** (default) document configuration for each document type. This new feature allows organizations to override the default with a different document configuration that is specific to the business unit.
  1. Navigate to **Setup > Organization Structure and Settings > Add/Manage Business Units**.
  2. Click on the **Business Units** tab and click on the Business Unit name on the left. Information displays on the right.
  3. Locate the **Document Configuration** section. The fields default to the active document configuration for each document type. To update the process for a document type, click the corresponding **Override** checkbox. The field becomes editable.
  4. Begin typing the document configuration name in the field and matches will be displayed or click the  to search.
  5. Click **Save**.
- Only document configurations that have been *Finalized* can be selected.
- If a business unit does not have a separate document configuration enabled for a document type, the default configuration will be used.
- For additional information about configuring business units, please see [Business Unit Administration](#) in the online searchable help. For additional information about document configuration, please see [Document Setup](#) in the online searchable help.

## Ability to Configure Purchase Requisition, Purchase Order, and Invoice Workflow by Business Unit


Organizations that use the Multiple Business Unit feature may have the need to have different workflow processes for each business unit. Previously, only a single workflow process per document type was allowed. As of the 17.3 release, organizations are able to define different workflow processes for each business unit for Requisition, Purchase Order and Invoice Workflow.

By default, a business unit inherits the **Active** (default) workflow process for each document type. When this feature is enabled, an administrator has the ability to override the default by selecting another valid workflow process in Business Unit Configuration. The feature must be turned on by JAGGAER.

## Impact

- Products Affected: eProcurement and Accounts Payable Director for organizations that use the Multi-Business Unit feature.
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: None

## Key points of Feature

- This feature is **OFF** by default. Please contact JAGGAER to enable.
- New Permissions Related to this Feature: None
- **IMPORTANT:** For existing customers using Multi-Business Units, a change order may be required if new or updated workflow processes are necessary to meet business unit requirements. JAGGAER will assist you in ensuring that only valid, usable workflow configurations are available for selection.
- A separate workflow process can be chosen for each business unit. This is configured within the business unit setup.
  1. Navigate to **Setup > Organization Structure and Settings > Add/Manage Business Units**.
  2. Click on the **Business Units** tab and click on the Business Unit name on the left. Information displays on the right.
  3. Locate the **Workflow Configuration** section. The fields default to the active workflow process for each document type. To update the process for a document type, click the corresponding **Override** checkbox. The field becomes editable.
  4. Begin typing the workflow process name in the field and matches will be displayed or click the  to search.
  5. Click **Save**.
- Only workflow processes that are enabled are available in the **Workflow Configuration** section. For example, if an organization does not have Invoice workflow configured, the option to override for the business unit does not display.
- Administrators can select any workflow process that is available for the document type. This includes both JAGGAER-managed workflow and organization-managed workflow (Advanced Dynamic Workflow).
- Administrators can view the selected workflow process for a business unit in **Workflow Setup**.
  1. Navigate to **Setup > Workflow Setup** and select the appropriate document-type workflow.
  2. Click on the **Workflow Process** tab.
  3. In the **Business Units** drop-down field, select the appropriate option. The *Default Workflow* option displays the active configuration for the document type. If a

separate workflow process is not selected for a business unit, it will also display the active configuration.

- Once a document enters the workflow process, it will continue in that process until completion, regardless of any changes made to document users or the designated workflow process for the business unit.
- If a business unit does not have a separate workflow process enabled for a document type, any documents submitted by that business unit will go through the default configuration.
- A new option is available to filter shared workflow filters in workflow configuration. Folders are managed on the **Shared Workflow Folders** tab. The tab now has the **Show Active Workflow Folders** checkbox. When checked, it will filter the list of folders to display on the active ones. If the user belongs to a business unit that uses workflow configuration that is different than the default, then only active workflow folders related to that configuration will display.
- A user must have the **System Configuration** permission to configure business units.
- For additional information about configuring business units, please see [Business Unit Administration](#) in the online searchable help.

## Ability to Configure Receipt Notifications by Business Unit


AP Configuration settings allow customers to configure receipt notifications at the organization level to either the requisitioners or central receiving users. Previously, this setting applied to all receipts for the organization. Customers that have Multiple Business Units may manage the receipt of goods and services differently across the various business units. As of the 17.3 release, organizations that use Multi-Business Unit feature have the ability to configure receipt reminders at the Business Unit level. A new Business Unit Import/Export action for Receipt Reminder Notifications has also been added, to allow for exporting and importing the Business Unit Receipt Reminder notifications in bulk.

Upon go-live, all business units will inherit the default organization settings for receipt reminders (with the exception of explicit central receive users if they are configured). An administrator can override the settings in Business Unit Configuration.

### Impact

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

## Key points of Feature

- This feature is **OFF** by default and can be configured by an administrator.
- New Permissions Related to this Feature: None
- By default, business units inherit the organization-level receipt notification settings. This new feature allows organizations to override the settings for each business unit.
  1. Navigate to **Setup > Organization Structure and Settings > Add/Manage Business Units**.
  2. Click on the **Business Units** tab and click on the Business Unit name on the left. Information displays on the right.
  3. Click the **Receipt Notifications** tab. The receipt notification fields display. **Note:** If a default setting is not configured for a field a "Default Not Set" message displays for the field.
  4. To make an update to a setting, click the corresponding **Override** checkbox. The field becomes editable.
  5. Enter the updated information in the field.
  6. Click **Save**.
- Organization Receipt Notifications are set at **Accounts Payable  > AP Administration > Configure AP Settings** in the **Receipt Reminder Emails** section. A new link is located in this area: **Click here to override the receipt reminder settings based on business unit**. Clicking this link takes the user to the **Add/Manage Business Units** screen with the **Receipt Notifications** tab active.
- A new import/export action is available that allows you to import or export receipt configuration for business units. On the **Business Units Import/Export** tab:
  - The **Action Type** drop-down now includes a *Receipt Notifications* option.
  - A new Business Unit Receipt Notifications CSV Template is available to download.
  - The export function will export whatever is configured for receipt notifications **ONLY** if the fields are overridden. Default fields do not show in the export.
- The actual functionality for receipt reminders has not changed. See [Enabling Receipt Reminders](#) in the Accounts Payable Handbook for online searchable help for more information.
- For additional information about configuring business units, please see [Business Unit Administration](#) in the online searchable help.

## Removing SSL 3.0 Support for Outbound Connections

Since 2015, JAGGAER has not supported the use of the SSL 3.0 legacy security protocol for inbound connections to our applications. Instead, we have required the use of TLS 1.0 or later. With the 17.3 release, we are also removing support for SSL 3.0 for outbound connections. Both inbound and outbound connections must now use TLS 1.0 or later.

Disabling support for the SSL 3.0 legacy security protocol should have no impact on customer systems. However, connections to legacy Single Sign On (SSO) servers or other

legacy systems that do not currently accept TLS connections might be impacted. If you have any concerns, or if you experience any issues with the 17.3 release, please contact JAGGAER Customer Support.

# eProcurement Enhancements

This section details enhancements that will be available in 17.3 related to the SelectSite eProcurement products.

## PO Change Request Full Functionality

Previously, in order to do a change order on a PO, a PO revision needed to be created. The change order could not be made to the original PO. In 17.2, we introduced a simple PO change request feature that allows users to enter the change information in the **Comments** section of the PO document. The primary goal was to give organizations the ability to test access controls (permissions, etc.) before the full functionality became available. As of the 17.3 release, the full functionality is available. Highlights of the new feature include:

- A **Change Request** interface through which changes can be made to *line items, accounting codes, billing information and shipping information*. The interface is configurable. Administrators can choose to allow changes to all four of those entities or to select only specific entities to be editable.
- New workflow objects for routing documents based on the presence of a change request.
- A new tab on the PO document that gives users visibility of change requests and the ability to delete them when they are in draft status.
- An option for approvers to filter approval documents to view only change requests.
- An area in the application where users can view all of their own draft change requests.
- In addition to the full functionality, a new permission will be available that allows a user the ability to enter a change in the comments only (maintaining the functionality in 17.2).

When 17.3 goes live, organizations that enabled the functionality have the choice to enable the full functionality or maintain the simple change request process using a new permission. Details can be found in the **Key Points** section below.

### Impact

- Products Affected: All eProcurement
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: **High**

## Key Points of Feature

- This feature is **OFF** by default. Organizations that enabled the functionality in 17.2 must configure the Change Request interface to get the full functionality. Organizations that did not enable the functionality need to contact JAGGAER to have the feature turned on.
- New Permissions related to this Feature:
  - **Send Change Request Comment (Permission Settings > Orders > Change Requests)**- This permission allows users to send a change request comment. For users who have permission to create change requests, this allows them to communicate that a change is going to be made to a PO. For users who have ONLY this permission, and not permission to create a change request, this allows them to request a change be made by someone who has the permissions. Change request comments are stored on the Comments tab/screen of a purchase order document.
- **Important:** If you do not want change requests to be included in PR export, you must work with JAGGAER to have it removed. All PO and PR integration points should be tested to evaluate the impact of change requests and mitigate any issues.
- In order to use the full change request capabilities, an administrator must first configure the feature. You can turn on change request functionality for all changeable purchase order groups (line items, accounting codes, billing information, shipping information) or choose only specific groups. To perform this action, go to **Setup > Configure Documents > Configure Change Requests**. Click the checkbox for each group you are allowing to be changeable.
- Change requests can be created for purchase orders that have completed PO workflow but still have an open AP Status (for organizations that use JAGGAER invoicing) or PO Status.
- To create a change request, access the purchase order document. From the **Available Actions** drop-down field, select *Create Change Request*. Then click **Go**. For users who have the **Send Change Request Comment** permission, an overlay displays to enter the comment and email recipients for the comment. After comment information is entered, the purchase order displays in the **Change Request** interface. **Note:** Users who have the Send Change Request Comment permission ONLY are not able to create an actual change request.
- The menu on the left allows you to navigate the document. All changes can be made on the **Summary** screen or you can access a screen for the specific group for which you are making a change; **Shipping, Billing** or **Accounting Codes**. If a group is not configured to allow change requests, the screen will still be available but the information is not editable. **Note:** Line items can only be edited from the Summary screen.
  - **Changing Line Items** - Click on **Summary** in the navigation on the left. Scroll down to the **Lines** group and locate the line you are changing. Click the **edit** button and the Edit Line window displays. Make changes to the quantity or the line-level custom fields and click **Save**. As you make changes to the quantity, the **Document Total** field in the upper-left side of the change request interface updates to reflect the new total. **Important:** It is possible for a PO to have an AP status of open and to also have lines that have been fully or partially invoiced. A line that has been fully invoiced cannot be changed and therefore will not display with the line items on the Summary screen. If a line has been partially invoiced only the quantity that has not been invoiced can be



changed. Therefore, the line will display on the Summary screen but will only reflect the quantity that has not yet been invoiced.

- **Changing Shipping Information** - Click on **Summary** in the navigation bar and scroll to the **Shipping** group or click on **Shipping** in the navigation. Click the **edit** link. You can edit the Attention field (Attn) and the Department field for the currently assigned address. To do so, type over the information in the fields and click **Save Changes**. Alternatively, you can select a different shipping address (if available). To do so, locate the correct address in the **Or Select a New Address...** section and click the **Use** button. A window displays the address information. You can edit the Attention field (Attn) and the Department field. Click the **Use** button. The new address will replace the previously configured address.
- **Changing Billing Information** - Click on **Summary** in the navigation bar and scroll to the **Billing** group or click on **Billing** in the navigation. Click the **edit** link. You can edit the Contact Line 1 field for the currently assigned address. To do so, type over the information in the field and click **Save Changes**. Alternatively, you can select a different billing address (if available). To do so, locate the correct address in the **Or Select a New Address...** section and click the **Use** button. A window displays the address information. You can edit the Contact Line 1 field. Click the **Use** button. The new address will replace the previously configured address.
- **Changing Accounting Codes** - Click on **Summary** in the navigation bar and scroll to the **Accounting Codes** group or click on **Accounting Codes** in the navigation. Edit the accounting codes as necessary. **Note:** It is possible that the user creating the change control is not the original requisitioner, and that user may have access to account codes/values that the original requisitioner did not. In that case, the change request user can access those account code/values. Conversely, if the user creating the change request does not have access to the account codes/values on the requisition, that user can still manage that information.
- **Submitting the Change Request** - Click the Submit Change Request button in the top-right corner.
- When a user submits a change request, the document is sent to requisition workflow. The change request goes through the normal PR workflow. However, instead of creating a new purchase order upon workflow completion, the original PO is updated with the changes.
- After the merge is complete, the purchase order will restart in PO workflow. There is a new ADW workflow rule that can be added to PO workflow to identify if an iteration of a document is a change request. Please contact JAGGAER to discuss having a workflow step added to include this step.
- A new **Change Requests** tab is available on the PO. This tab displays all change requests created for the PO. The change requests can be opened from this tab. Requests that are in **Draft** status (meaning not yet submitted) can be deleted. Change requests can only be opened or deleted in this tab by the user who submitted them.
- If a purchase order has any draft, pending or returned change request present against it, another change request cannot be created. Another change request will be allowed once the previous change request reaches an end state such as: completed, rejected or withdrawn. Multiple draft or pending requests are prevented because of potential data merge conflicts.

- In order to approve change requests, users need the same permissions as are needed to approve requisitions.
- As with other documents for approval, change requests are approved from the My Approvals page. In the **Filter My Approvals** section, the **Type** field now contains a *Change Requests* option. Selecting this option will filter the documents to display only change requests.
- All draft change requests can be viewed by navigating to **Documents > Document Search > Draft Change Requests**.
- A new **Change Request Status** field in advanced PO search allows you to search for purchase orders with change controls and based on the change control status.
- New document-level workflow rule elements are available for routing documents based on the presence of a change request. Rules can be created for Requisition and Purchase Order workflow. Note: For organizations that use Advanced Dynamic Workflow, administrators can add the new elements into existing ADW steps. To have a new step added for these elements or to add them to static/dynamic workflow, please contact JAGGAER.
  - **Requisition Workflow** - The **Is Change Request** element allows the workflow step to evaluate if the requisition itself is a change request. "True" indicates that the document is a change request, "false" indicates that it is not.
  - **Purchase Order Workflow** - The **Has Changes from a Change Request** element allows the workflow to evaluate if the PO document contains changes from a change request.
- Change requests are not included in spend reports.
- Change requests are excluded from Requisition document search.

## Ability to Associate Brands with Line Items

In 17.2, we introduced the **Brand** feature. This feature gives customers the ability to upload and manage a brand list, and to associate brands with supplier profiles. The use of brands assists customers with the shopping and sourcing processes. In 17.3, we are providing additional functionality around brands. Organizations using the feature have the ability to associate brands with line items on requisitions, purchase orders, buyer invoices/credit memos, sales orders and sales invoices. A Brand field can be added on the line-item level. Users are able to select from the organization's brand list.

When a brand is associated with a line item, that information can be used for other functions within the application. For example, brand information can be evaluated in workflow. It can be used as filter criteria for document search. Organizations also have the ability to export brand with other line information for document exports. **Important Note:** Several document import and export processes have been updated to include brand. As with any other import/export changes, this may have an effect on other third-party integrations.

### Impact

- Products Affected: eProcurement

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

## Key Points of Feature

- This feature is **ON** by default for organizations that have the Brand feature enabled but requires set up.
- New Permissions related to this Feature: None
- **Brand** can now be included on Requisitions, Purchase Orders, Buyer Invoices/Credit Memos, Sales Orders and Sales Invoices at the line level.
- In order to be included on a document, the new **Brand** field must be added to the document configuration. Each document type for which you would like to include the Brand field must be updated.
- The Brand field can be filled out on each line item by a shopper prior to submitting the cart. On requisitions, purchase orders, invoices/credit memos, sales orders and sales invoices, the Brand field is filled out by editing the line item. **Note:** As with other line-item fields, the ability to edit the Brand field on a document depends on the status of the status of the document and a user's individual permissions.
- Only brands that have already been set up for the organization can be entered in the Brand field. Brand is a type-ahead field. Begin typing and matching brands display. Select the correct brand and it is entered in the field. For information about managing brands, please see [Managing Brands](#) in the online searchable help.
- Information in the Brand field will persist throughout the life cycle of the document. For example, if a brand is included on a requisition, it will be passed to a purchase order created from that requisition. If an invoice is created from that purchase order, the brand will be passed to the invoice, etc. This assumes that the Brand field has been added to the document configuration for each document type in the life cycle.
- **Brand** is available as a search filter for advanced document search. It's located in the **Item/Product** section of the search screen for requisitions, purchase orders, invoices and sales orders. It is a type-ahead field that matches what the user is typing to brands set up for the organization.
- A new **Brand** element is available to be used in line-level workflow rules for requisition, purchase order, fulfillment and invoice workflow. The element evaluates what the Brand field on a document contains or does not contain (i.e. "Brand contains 'Apple'", "Brand does not contain 'HP'"). For organizations that use Advanced Dynamic Workflow, administrators can add the element into an existing ADW step. To have a new step added for this element or to add it to static/dynamic workflow, please contact JAGGAER.
- Brand information has been added to several document import/export processes. **If your organization is using any of these processes to integrate with other applications, it is extremely important that you evaluate them to be sure the addition of the field does not cause any issues.** The following import/export files are affected.
  - Invoice Export XML
  - PR XML Import and Export

- PO XML Import and Export
- PO Document Search Export (Full and Transaction). In addition, Brand can be added to a custom document export template.

## Ability to Include Custom Fields and Codes in PR and PO Import/Export

With the 17.3 release, customers have the ability to import custom fields and codes in the Purchase Requisition (PR) import and Purchase Order (PO) import messages. Custom fields can be included for the header, header and line, and line level. Also with the release, new PR and PO export DTD versions are available that allow for including custom fields and codes/code splits from the document in the export messages. In order to use these features, the custom fields and codes must be present on the corresponding PR and/or PO document configuration.

### Impact

- Products Affected: Order Manager, Requisition Manager
- End User Impact: None
- Admin User Impact: Low
- Integration Impact: **High**

### Key points of Feature

- This feature is **OFF** by default and you must contact JAGGAER to implement.
- The Purchase Requisition (PR) and Purchase Order (PO) import messages can now include custom fields and codes that are present on the corresponding document configuration.
- Custom fields can be included for the header, header and line, and line level.
- New PR and PO DTD Export Versions **3.0** is available to include Custom Fields and Custom Attributes.
- You must contact JAGGAER to enable the appropriate DTD Export version as well as to ensure all other organization settings support the export of custom fields.

# Accounts Payable Enhancements

This section details enhancements that will be available in 17.3 related to the SelectSite Accounts Payable products.

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

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

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

- [Ability to Configure Purchase Requisition, Purchase Order, and Invoice Workflow by Business Unit](#)
- [Ability to Configure Purchase Requisition, Purchase Order, and Invoice Document by Business Unit](#)

## Ability to Configure Invoice Workflow with Supplier Elements

Previously, many supplier elements such as tax certification expiration and insurance expiration were only available for supplier workflow. Most supplier elements have not been available for invoice workflow, which meant some supplier information could not be confirmed before finalizing payment on an invoice. With the 17.3 release, supplier-related elements are now available for invoice workflow. The supplier-related elements are available in both Static workflow as well as for ADW rules.

### Impact

- Products Affected: Accounts Payable Director, Total Supplier Manager (some supplier elements), Onboarding (some supplier elements)
- 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 implement new workflow processes; customer administrator can update ADW rules.
- Supplier related workflow elements are now available for invoice workflow process.
- The elements are available for Standard (static) and Advanced Dynamic Workflow (ADW):

- For Static workflow changes, contact JAGGAER to update your workflow process.
- Organization administrators can create/edit ADW rules using the supplier related elements.
  - If you insert the supplier-related rules into existing rule groups that are in your organization workflow, you do not need to contact JAGGAER for any additional work.
  - However, if you create a new rule group with the supplier related objects, you must contact JAGGAER to insert the rule group(s) into your workflow process
- Some supplier related elements are only available if your organization has Total Supplier Manager or the Onboarding license. For example, tax information is only available to organizations with the Onboarding license. Custom fields are only available to organizations with the Total Supplier Manager license. Contact JAGGAER with questions about the supplier elements that apply to your organization.

# Supplier Management Enhancements

This section focuses on enhancements in the 17.3 release related to Supplier Management activities.

## New Diversity Classifications Available

JAGGAER continues to address customer needs related to tracking important diversity information for suppliers by adding new classifications from time to time. With the 17.3 release, two new diversity classifications are available. **Historically Underutilized Business (HUB)** is available under Federal Diversity Classifications, and **State of Arizona Small Business (AZ-SB)** is available under State Diversity Classifications. Customers with the Total Supplier Manager, Sourcing Director, Accounts Payable Director, or Total Contract Manager license must enable the new classifications in order for them to be visible in the customer's supplier portal. All other customers will see the new classification available by default for selection on the supplier profile.

### Impact

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

### Key points of Feature

- This feature must be enabled for supplier use by customers with Total Supplier Manager, Sourcing Director, Total Contract Manager, or the Accounts Payable Director license. It is on by default for all other customers.
- New Permissions related to this Feature: None
- New **State Diversity Classification** for **State of Arizona Small Business (AZ-SB)**.
- New **Federal Diversity Classification** for **Historically Underutilized Business (HUB)**.
- TSM, Sourcing Director, Total Contract Manager, and AP Director customers can select the new diversity classifications to be available to suppliers in the Customer Branded Portal via **Suppliers > Configuration Settings > Diversity Configuration** in the **State Diversity Classifications** section (assuming that Diversity is configured to show in the Branded Portal under Registration Configuration).
- Suppliers will have the ability to select the new classifications in their network supplier profiles, but can select it for customer specific profiles only for those customers who have made the new classifications visible.

- A customer user with appropriate permissions may choose to enable the new classifications for the supplier in their view of the supplier profile.
- The new classifications are listed on the **Supplier Dashboard** in the **Supplier Diversity Dashboard** section. Customers can choose to hide the classification from display within the application via field management.
- The new classifications are available in the Diversity Classification search criteria in advanced supplier search.
- The new classifications can be included in the TSM Supplier Import/Export.
- For more information about diversity selections, see [Diversity Classifications](#), and [Managing Diversity Selections in the Supplier Profile](#).


## Update to Diversity Classification Selection UI

When adding a new Diversity Classification to a supplier profile, supplier and customer users previously had to open each section of classifications to see the available selections. Also, it was not easily apparent which classifications allowed and/or required additional information. With the 17.3 release, several enhancements have been made to the Diversity Classification User Interface that make it easier for suppliers and customers to add and manage diversity information. Customers also have additional flexibility when configuring the diversity classification information visible in the supplier registration profile forms.


### Impact

- Products Affected: All
- 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
- By default, the system uses the **number of employees, annual sales, and NAICS code** provided in the supplier profile to determine if the supplier qualifies as a Small Business Enterprise. A message is displayed on the Diversity page, indicating if the system has detected if the supplier does or does not qualify based on that information. With this release, customers can configure the registration to hide that message.
  - In the **Entity Registration** and **Individual Registration configuration** (Suppliers  > Configuration Settings > Registration Configuration), a new setting is displayed on the **Diversity** page for **Hide SBE auto calculation messages**.
  - The setting is OFF by default. When not enabled, the message regarding qualification displays on the Diversity page of the profile.



- When enabled, the message regarding qualification does not display. The supplier can choose to associate the SBE classification if appropriate.
- When configuring the Diversity classifications visible to suppliers (**Suppliers**  **> Configuration Settings > Diversity Configuration**), you can now select or deselect the option **Decline to Answer** under the **No Classification** section. The option is selected by default.
- Previously, selecting the **Add Diversity Classification** button displayed menu options to select from Federal, State, or Other classifications, based on the customer's configuration. Once selected, another menu item would display the specific classifications available for the customer. With 17.3, selecting the **Add Diversity Classifications** button will open an overlay with a list of the configured diversity classifications in a customer organization.
  - Several classifications can be selected in the overlay.
  - Once selected and the overlay closes, warning messages will display on the page for any classifications that require additional information. The Diversity section of the profile will not be considered complete until all required information for the selected classifications has been completed.
- All changes are reflected in the customer's view of the Supplier Profile, the Proxy view of the supplier registration, as well as to suppliers in the Customer Branded Registration Profile.

## Updates to Manage Translations Page for Importing/Exporting Instructional Text and Custom Profile Registration Fields


Customers have the ability to add Instructional Text to any of the standard profile fields in the Registration configuration. When configuring the Instructional Text, the customer can add translations for any language supported by the organization. Total Supplier Manager customers have the ability to configure custom profile fields in multiple languages as well. These changes can be made on a field-by-field basis. In the 17.1 Release, a **Manage Translations** page was added under **Registration Configuration** for Total Supplier Manager customers in order to support managing translations for the registration custom profile fields in one place.

With the 17.3 release, **all** customers who configure registration now have access to the **Manage Translations** page, which shows all standard fields in the Entity Registration configuration, along with Instructional Text and translations. Customers have the ability to manage, import and export standard registration field Instructional Text in multiple languages from this page. **Total Supplier Manager** customers have the ability to import and export custom profile field translations and Instructional Text from this page as well, allowing for changes in bulk rather than field-by-field.

## Impact

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

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- The **Manage Translations** page (**Suppliers**  **> Configuration Settings > Registration Configuration**) is now available to **all** customers who configure supplier registration. The page has been updated as follows:
  - When you click on any language hyperlink (i.e. under Instructional Text), an overlay displays the actual content in the multiple languages.
  - Two new columns have been added to support managing instructional text: **Help Style** and **Instructional Text**:
    - The **Help Style** column indicates what type of Help has been selected to display - None, Icon, or Inline.
    - The **Instructional Text** column indicates languages that have instructional text configured for the field. Click on the language hyperlink to see an overlay of the content. Click the **Edit** button to make changes to the Instructional Text for that field from this page.
  - An **Actions** dropdown button to Import or Export profile fields and instructional text translation information for management in bulk.
  - **Total Supplier Manager** Customers:
    - The Custom Type column information (for custom profile fields) is displayed next to the Custom Profile field name in parentheses. The Custom Type column has been removed.
    - A new **Profile Field Name Translations** column shows N/A for all standard fields, and indicates translated languages, if configured, for custom profile field names.
      - Selecting the language hyperlink will display an overlay with the translated content.
      - Click the **Edit** button to make changes to the Custom Profile Field translations from this page.
- When you select to **Export** from the **Actions** dropdown, an **Export** overlay displays:
  - A default **Description** is provided. You can change it if needed.
  - By default, both **Instructional Text** and **Custom Profile Fields** are selected to be exported.

- Selecting **Instructional Text** will export the Instructional Text for all standard profile fields that have instructional text content. For TSM organization, this selection will include any custom profile fields with Instructional Text.
- Selecting **Custom Profile Fields** will export the custom profile field names and translations (applies only to Total Supplier manager organizations).  
**Note:** The Instructional Text for Custom Profile Fields is included only when Instructional Text is selected.
- Click the **Export** button. A confirmation message will display along with a link to the export file location (**Administer > Administration > View Import and Export Results**).
- The file is in Excel format. Instructional text for standard fields is included on one worksheet, and custom profile fields and translations are on a separate worksheet within the file.
- When you select to **Import** from the **Actions** dropdown, an **Import** overlay displays:
  - A default **Description** is provided. You can change it if needed.
  - Click **Select file** and choose the appropriate file for import, or drag and drop it into the gray area for **File Name**.
  - By default, both **Instructional Text** and **Custom Profile Fields** are selected to be imported. If both are left selected but there is no data for one of the options, the import will process the included data only.
    - Selecting **Instructional Text** will import the Instructional Text for fields in the file.
    - Selecting **Custom Profile Fields** will import the profile field names and translations (applies only to Total Supplier manager organizations).
    - If both options are selected but there is no data for one of the options in the file, the import will process the included data only.
    - If only one option is selected but data in the file contains both tabs, only the option selected is imported.
    - If a field is not included, no changes are made to the field values.
    - If a field is misspelled in the file, the import will generate an error and will not import the row.
    - The Import supports a column for each language that the customer organization supports.
- Changes made on this page and via import are reflected in History (Suppliers > Configuration Settings). Up to 100 characters are displayed for old and new text, with a **more...** link to see the entire value.)
- Translations will display to customer users in the supplier profile view, as well as the Supplier Registration (Proxy) view.
- Translations will display to suppliers in the Customer Branded Portal.

# Update to 2017 NAICS Code Version

NAICS stands for the North American Industry Classification System, which has industry-standard codes that describe the type of products and/or services a supplier provides. The supplier can designate a primary NAICS code, and one or more secondary NAICS codes as applicable. The NAICS version was last updated in 2012. With the 17.3 release, the NAICS codes has been updated with the latest 2017 version. As part of the release, codes stored for organization suppliers, sourcing events, etc., have been updated accordingly.

## Impact

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

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- With the 17.3 Release, the 2017 NAICS code version is available for use by customers and suppliers.
- If a code remained the same from the previous to the current version, no changes have been made.
- If a code was removed / updated to a new numeric value but the name/description remained the same, the value has been updated for associated suppliers.
- Codes that were merged have been configured to place the updated code as the supplier's Primary or Secondary code, as determined by where the old code existed.
- For codes that were removed but replaced in the new version with more than one new codes, one of the new codes was updated as the Primary and additional codes as Secondary codes.
- **Note:** Please contact JAGGAER if you use NAICS codes when inviting suppliers to Sourcing events, or if they are contained in integration messages. Additional configuration may be necessary.

# Ability to Configure Registration Profile Section Headings in Multiple Languages

In the 17.2 release, we updated the UI for **Supplier Portal Configuration, Entity Registration Help** and **Individual Registration Help\*** messages to allow for configuration of the page content in multiple languages enabled for the organization. With the 17.3 release, we have continued the support for multiple languages by allowing the

**Section Configuration** messages in the **Entity Registration** and **Individual Registration**\* to be updated in multiple languages.


Supplier users viewing the pages will see the section text in the language selected in the user's profile.

\*Individual Registration Help and Individual Registration profile configuration pages display to organizations with the Total Supplier Manager license.

## Impact

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

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- Registration fields are configured at **Suppliers**  **> Configuration Settings > Registration Configuration > Entity Registration.**
  - **Note: Total Supplier Manager** customers will also see a separate **Individual Registration** page where fields for Individual Registrations are configured.
- When expanding a profile section and selecting the **Section Configuration** page, the **Note to Supplier** (Entity Registration) and **Note to Individual** (Individual Registration) section has been updated.
  - Previously, the content for **Note to Supplier** and **Note to Individual** was displayed and editable on the page. With this release, an **Edit Message** button is selected to create or make edits to the content.
  - When the **Edit Message** button is selected, an overlay displays for editing content in the organization default language. Select from the organization's configured Languages to create/edit content for the message in other languages.
  - With 17.3 go-live, each Section Configuration will contain the same information as the organization had saved prior to 17.2.

## Updates to Supplier Process for Cold Registration


Many organizations allow suppliers to submit a registration for the Customer's Branded Portal from the Branded Portal home page. Previously, a Create Account button displayed if the organization was configured to allow this type of registration. A message for potential new suppliers is configured on the **Supplier Portal Configuration** page. With this release, we have streamlined the process for suppliers to register with a new customer. Instead of a

Create Account button, suppliers can simply enter their email address and be directed to the next steps for registering with the customer organization, depending if the user already exists in the JAGGAER network or not. Administrators may want to update the **Supplier Portal New Suppliers Message** to reflect this change.

## Impact

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

## Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- When a supplier navigates to a Customer Branded Portal URL, they can now enter an email address and click Next to validate the email address.
  - If the email address exists for a supplier in the JAGGAER Supplier Network and the customer organization accepts Unsolicited Registrations, the supplier user will see an overlay that the user account already exists, and they can select to proceed to create an account with the customer.
  - If the email address exists for a supplier in the JAGGAER Supplier Network and the customer organization DOES NOT accept Unsolicited Registration, the supplier user will see an overlay that the user account exists but that the customer is not accepting new registrations. The supplier cannot proceed with logging into the Customer Portal.
  - If the email address does not exist, the supplier will be directed to proceed with creating an account if the customer organization accepts Unsolicited Registrations.
- The **Supplier Portal New Suppliers Message** is configured at **Suppliers**  **> Configuration Settings > Supplier Portal Configuration** under the **Supplier Portal Login Page** section. Your organization may want to update this message if it currently references a Create Account button on the login page.

# Total Supplier Manager

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

Please note that several features explained in other sections of this document also impact Accounts Payable products.

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

## Ability to Deactivate Locations in a Supplier Profile

With the 17.3 release, customers and suppliers have the ability to deactivate locations in the supplier's profile. A new **Active** flag is now available, and enabled by default for existing locations and when creating a new location. In the Proxy Registration view of the supplier's profile, users now see the option to make a location inactive (or active). When a supplier location is activated or deactivated, the supplier will see the notation in the Customer Branded Registration Profile history log, and can easily identify inactivate locations in the Customer Branded Supplier Profile.

The Location Active status is included in the Supplier CSV Export when selecting to export Supplier Locations, and also in the TSM Import/Export when locations are included.

### Impact

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

### Key points of Feature

- This feature is **ON** by default
- New Permissions related to this Feature: None
- New **Location Active** setting is now present for each Location in the supplier profile. This setting shows to customers in the supplier profile view (**Supplier Profile > Contacts and Locations > Locations**), the Proxy view, and to suppliers in the Customer Branded Portal.
  - All Locations associated with a supplier profile upon 17.3 go-live have the **Location Active** setting enabled.
  - The setting will default to OFF when creating a new Location.
- When landing on the Locations page, only Active locations will show by default.

- A new link to **Show inactive locations** is available. When selected, inactive Locations display in italics. You can select an inactive Location and enable the Location Active setting.
- When inactive Locations are displayed, a new link to **Hide inactive locations** is available. When selected, only active Locations will display.
- Inactive locations are not available for associating to addresses/contacts, and are not listed in the address wizard.
- The **Location Active** setting is included in the **Supplier CSV Export** when selecting to export Supplier Locations.
- If a supplier makes a location active or inactive, the change is effective in your organization as per your configuration settings for requiring review of supplier profile fields.
  - If you require approval for pending edits from a supplier, the change made by a supplier will not be effective until your organization approves it.
  - If you do not require approval for changes to locations, the change made by a supplier will be immediate. The History for the supplier profile indicates the supplier made a change to the Active status of a location, and whether or not the change is pending customer review.

## Ability to Resubmit Approved Supplier Registration in Workflow

Previously, a supplier registration could only be submitted or resubmitted into the registration workflow process if the supplier status was not yet "Approved". However, an organization may need to resubmit an approved supplier registration into workflow if there is information that needs to be updated or new information the customer requires. With the 17.3 release, customers now have the ability to resubmit suppliers that are already approved into workflow. Once a supplier registration is resubmitted, the supplier status will be reset to "Profile Complete".

### Impact

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

### Key points of Feature

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



- A supplier in any status has the selection for **Submit to Supplier Registration Workflow** in the **Supplier Actions** dropdown when viewing the profile. The option does not display from search results.
- When a supplier in **Approved** status is resubmitted into Supplier Registration Workflow, the status is reset to **Profile Complete**. There are no changes to functionality when a supplier in any other status is submitted into Supplier Registration Workflow.

## General Enhancements to Supplier Request Functionality

With the 17.3 release, JAGGAER continues to enhance the Supplier Request functionality. This includes streamlining the process of notifying the requester to review supplier information when a request is approved and when the supplier moves through different stages of the registration process. Also, organizations now have the ability to select from all standard and custom profile fields when creating a supplier request template. This will make it easier for users to populate supplier information from the request after the supplier is approved.


### Impact

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

### Key points of Feature

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


### SYSTEM EMAILS AND NOTIFICATIONS FOR SUPPLIER REQUEST APPROVAL AND REGISTRATION STATUS CHANGES

- Two new system emails are available related to Supplier Request actions. The system emails are managed at **Site Administration**  **> Email Management > System Emails > Supplier Management:**
  - Supplier (Requested by You) is approved in workflow
  - Update on Supplier requested by you
- New **Notification Preferences** are available for users with the **Request New Supplier** permission in order to receive the new system emails. They are **not enabled** by default, but can be enabled for email, notification or both in the User Profile or by an

administrator at the role level. The User Profile preferences are located at **My Profile > Notification Preferences > Supplier Management > Supplier Administration**:

- **Supplier (Requested by You) is approved in workflow** - This email/notification is sent when a supplier who was requested by the user is approved in Supplier Request workflow.
- **Update on Supplier requested by you** - This email/notification is sent when the requested supplier moves through the various stages of the registration process: Invited, In Progress, Profile Complete and Approved

#### STANDARD AND CUSTOM FIELDS AVAILABLE FOR SUPPLIER REQUEST TEMPLATES

- Also with this release, all standard and custom profile fields can be included in a supplier request template (**Suppliers  > Configuration Settings > Manage Supplier Request Templates**). When selecting to **Add Question** to the supplier request template, you will now see the choice to **Add Standard Supplier Fields, Add Custom Supplier Fields, or Add Custom Questions**:
  - **Standard Supplier Fields** include:
    - Company Information
      - Supplier Name
      - Doing Business As (DBA)
      - Country of Origin
      - DUNS Number
      - Legal Structure
      - Tax ID Number Type
      - Tax ID Number
      - VAT Registration Number
      - Are you exempt from backup withholding?
      - Website
    - Business Details
      - Year Established
      - Number of Employees
      - Business Description
      - Annual Revenue/Receipts
      - Keywords
    - Addresses (individual fields cannot be selected; address fields are added as an entire block of data)
    - Contacts (individual fields cannot be selected; contact fields are added as an entire block of data)
    - Locations (individual fields cannot be selected; location fields are added as an entire block of data)
    - Insurance (individual fields cannot be selected; insurance fields are added as an entire block of data)

- Tax Information (individual fields cannot be selected; tax information fields are added as an entire block of data)
- **Custom Supplier Fields** are the custom fields created in your registration configuration. Select from the dropdown list.
- **Custom Questions** are additional questions you can add to the template that relate to the type of Supplier Request the template should address.
- When a Supplier Request is approved and a new supplier record is created, the supplier data contained in the Supplier Request will be copied to the new Supplier Profile.

## Supplier Ability to Sign Tax Documents via DocuSign

Many customer organizations require suppliers to submit signed tax documents in the supplier profile. Previously, a supplier might be required to submit a scanned image of a signed document because there was no ability to electronically sign the document from within the system. With the 17.3 release, users can either manually upload the scanned image of the signed document or choose to sign via DocuSign. The option is available for all tax types. If the user signs a document via DocuSign, the customer will have the ability to accept or decline DocuSign changes. This feature applies to Customer Branded Supplier Profile, the customer's view of the supplier profile, as well as the customer's proxy view of the profile.

### 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 adding tax information in the supplier profile or a supplier registration, a new option is available: **Do you want to DocuSign the tax document?**
  - If **Yes** is selected, a **Sign Document** button will display. When selected, the document to be signed will open with information pre-populated. Users can edit and add information as needed, sign the document, and save it to the system.
  - If **No** is selected, users can manually download the tax document, sign, scan and upload to the system as a new file (no change to previous functionality).
- A DocuSign account is not required to open and sign a tax document.
- Does history capture that the document was signed in this manner?

# Sourcing Director Enhancements

This section focuses on enhancements to the Sourcing Director product on the SelectSite platform.

## Form Driven Event Generation

With the 17.3 release, users with little knowledge of Sourcing Director or sourcing processes are able to request the initiation of a sourcing event for the purpose of procuring needed goods or services. They can access, fill-out, and submit a Sourcing Request form that will then be administered through a formal workflow process.

Administrators will craft sourcing request forms within SelectSite for the purpose of gathering all data necessary for the creation and administration of an event by a sourcing specialist.

The ability for anyone within the buyer's organization to submit a sourcing request, by filling out a request form with all information necessary for the creation and administration of an event, ensures that the organization's sourcing procurement framework is available to meet the needs of all users and departments across the organization.

### Impact

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

### Key points of Feature

- This feature is **On** by default but optional for use.
- New Permissions related to this feature: **Sourcing Event Requester** (Permissions > Sourcing) - Allows users to submit sourcing even requests.
- Workflow updates may be required based on how clients want Sourcing Requests to be administered.
- To create a request template:
  - Navigate to **Sourcing > Templates and Libraries > Event Request Templates** and click the **Create Sourcing Event Request Template** button. The Create Sourcing Event Request Template overlay opens.

- Enter a **Template Title** and click **Create**. The overlay closes and the user is brought to the template creation wizard.
- Complete the Template Setup, Instructions, Attachments, Questions, Product Line Items, Service Line Items, and Suppliers steps of the wizard.
- When the template is complete, navigate to the **Review and Finalize** step on the wizard, and click the **Finalize Template** button.
- To create a sourcing request:
  - Navigate to **Sourcing > Requests > Request Sourcing Events**. The Initiate Sourcing Request overlay displays.
  - Enter a Sourcing Request Title and select a Sourcing Request Template, then click **Open Request Form**.
  - Complete the Details, Instructions, Attachments, Questions, Product Line Items, Service Line Items, and Suppliers steps of the wizard.
  - When the request is complete, navigate to the **Review and Submit** step on the wizard, and click **Submit**. Users are not able to submit a request until all other wizard steps are complete.
  - Once the user submits the request, the form enters workflow, where appropriate review and approvals are obtained. Depending on workflow configuration, sourcing specialists will be able to either initiate associated events in an appropriate step of the workflow, or will be able to do so after the form has completed the workflow process.
- To view sourcing event requests, navigate to **Sourcing > Requests > My Sourcing Event Requests**. Click the **Filter Sourcing Event Requests** link to view a list of request statuses, select which ones to view, and click **Apply**. Event requests with the matching status are displayed.

## Cost Savings Summary Report Enhancements

The **Cost Savings Summary** report shows a graph and displays a summary of sourcing event cost savings on required items. The report is accessed by navigating to **Sourcing > Reports > Cost Savings Summary**.

With this release, options have been added to display the following columns on the report:

- **Award Date** - Date the event was awarded. This will allow users to amalgamate savings into a user-defined time period when producing targeted cost savings reports.
- **Estimated Value** - The value from the Estimated Value field on the Setup page of a draft event. This is the buyer's estimate of what they believe will be the cost of fulfilling the item requests of the event. This will allow users to assess savings without relying on a system-calculated value.

- **Award Recipient** - Supplier the event was awarded to. This will allow users to measure vendors, assess how repeat winners consistently win events, and ultimately re-evaluate event strategies.

## 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.
- To display the new columns on the report, click the **More Options** link on the Cost Savings Summary page. Select the **Award Date**, **Estimated Value**, and **Award Recipient** options as desired, and click the **Run Report** button.

## Q&A Board Enhancements

With this release, buyers are able to submit questions directly to event-participating suppliers using either the **Q&A Board** or **Supplier Responses** pages throughout the course of an event.

Buyers are no longer limited to responding to questions submitted by suppliers, or broadcasting Q&A entries to all event-participating suppliers.

New notifications, both in SelectSite and through email, inform suppliers of buyer-submitted questions, and inform buyers of supplier-provided answers.

## Impact

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

## Key points of Feature

- This feature is **On** by default but optional for use.
- New Permissions related to this Feature: None.
- Buyers can now submit questions directly to event-participating suppliers from two locations: the Buyer's Q&A Board and the Supplier Responses page.
  - To ask a question from the **Q&A Board**, click the **Submit Question** drop-down and select **Ask a Question**. The Ask a Question overlay displays. Fields for subject, question, and attachments are available. Clicking the **Edit** button on the **Send To** field allows the buyer to change the recipient from all suppliers on the event, to only selected suppliers.
  - To ask a supplier a question from the **Supplier Responses** page, click the dropdown arrow listed by the supplier and select **Ask a Question**. The Ask a Question overlay displays. Fields for subject, question, and attachments are available. Clicking the **Edit** button on the **Send To** field allows the buyer to change the recipient from all suppliers on the event, to only selected suppliers.
  - From the **Supplier Responses** page, users can also select multiple suppliers and choose the Ask a Question option within the Evaluation Actions drop-down. This allows the buyer to broadcast a common question to all of the suppliers, or to a subset of the participating suppliers.
- The buyer Q&A Board now displays the following tabs for browsing questions:
  - Unanswered Questions
  - Public Q&A
  - Questions from Suppliers
  - Questions sent to Suppliers

## Change Supplier Contacts after Events Opened

With the 17.3 release, users now have the ability to add and remove supplier contacts for events that are in Open status.

### Impact

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

## Key points of Feature

- This feature is **On** by default but optional for use.
- New Permissions related to this Feature: None.
- To add a supplier contact from an open event, navigate to the event's Suppliers page and click the **Add Contact** button under the supplier. Users can select from current contacts for the supplier, or select the **The contact I am adding is not listed** option and enter information for the new contact.
- To remove a supplier contact from an open event, navigate to the event's Suppliers page and click the **Remove** button beside the supplier. The Remove button only appears when more than one contact has been set for a given supplier.

## Send Event Creators Blind Copy (BCC) of Emails Sent to Suppliers

With this release, event creators have the option to receive a blind copy (BCC) of each system-generated supplier email for their events.

Users can enable this option by navigating to their profile and selecting **Notification Preferences > Sourcing Director**, then enabling the option for **Receive BCC of system-generated event Supplier emails**. This option is off by default.

## Impact

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

## Key points of Feature

- This feature is **On** by default but optional for use.
- New Permissions related to this Feature: None.
- Users can enable this option by navigating to their profile and selecting **Notification Preferences > Sourcing Director**, then enabling the option for **Receive BCC of system-generated event Supplier emails**. This option is off by default.



# Restrict System-Generated Event Buyer Notifications

Administrators often add their system users to common projects so that the users are able to view events across the organization. This practice results in system-generated emails being sent to many users, even when they are not relevant to the users.

With this release, clients have the option to enable a new access group on events, and when enabled, only users included in that group will receive system-generated buyer notifications.

## Impact

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

## Key points of Feature

- This feature is **Off** by default but can be enabled by an organization administrator.
- New Permissions related to this Feature: None.
- To enable this feature, navigate to **Sourcing > Sourcing Administration > General Sourcing Settings**. Under the **Notification Emails** heading, select **Optional** or **Required** for Restrict Buyer Notifications.
  - If **Optional** is selected, users will need to specify on the project level to restrict system-generated event buyer notifications.
  - If **Required** is selected, all sourcing events will include restricted buyer notification delivery.
- If buyer notification restriction has been enabled, either at the project level or system-wide, events will include an access group called **Notification Recipients**. Only users added as notification recipients will be eligible to receive system-generated event notifications. Only Event Creators and Owners may manage the Notification Recipients access group.
- Note: Notification preference settings will still dictate if targeted notifications are delivered to members of this access group.

## Scenario Savings Evaluation

With this release, a new tab has been added to the sourcing event **Evaluations** page called **Scenario Savings**. This tab allows evaluators to view cost savings data (relevant to

historical price points) for defined award scenarios. With this information, users can perform event-level cost savings assessments, and comparisons between award scenarios.

The Scenario Savings tab displays a tabled line-by-line summary of an award scenario, including columns for historical prices, bids, extended spend, and savings vs. historical.

The data can also be exported as an Excel file. The information is exported in a format that allows an evaluator to conduct further analysis of the data (e.g., craft pivot tables, etc.).

## 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.
- To access the **Scenario Savings** tab:
  - From an Under Evaluation status event, navigate to the **Supplier Responses** page.
  - On the Supplier Responses page, use the **Evaluation Actions** drop-down to evaluate all responses or selected responses. The Award Scenario page displays.
  - Click the **Scenario Savings** tab.
- To perform an Excel export of the information on the Scenario Savings tab, click the **Export** dropdown button on the Scenario Savings tab and select **Export this Scenario**. The Evaluation Export overlay displays. Update the description if desired and click **Submit**. The export request is submitted and the user can proceed to the Evaluation Exports page to download the report.

# Contract Lifecycle Management Enhancements

This section details enhancements that will be available in 17.3 related to the CLM product Total Contract Manager (TCM).

## Total Contract Manager Enhancements

In 17.3, the following enhancements are available in Total Contract Manager (TCM).

### Multiple Credentials Supported for eSignature

The eSignature feature has been updated to support multiple user credentials for the eSignature providers Adobe Sign and DocuSign.

Customers that have multiple eSignature account credentials set up with their eSignature provider can define default eSignature settings at the organization level. These settings can be overridden at the Project level, where they apply to all contracts in a project. Different accounts can be used with different projects, giving organizations more flexibility when managing eSignature documents.

Organizations can change eSignature settings at any time. All changes are recorded.

#### Impact

- Products Affected: Total Contract Manager
- End User Impact: Medium
- Admin User Impact: High
- Integration Impact: Low

#### Key points of Feature

- This feature is **On** by default for organizations using eSignature. Administrator setup may be required.
- New Permissions related to this Feature: None.
- The eSignature feature has been updated to support multiple user credentials for Adobe Sign and DocuSign eSignature providers. The changes affect multiple areas of the system. Here is an overview of how it works, with details below:
  - **General Contract Settings** - The eSignature tab on the General Contract Settings page is used to configure the default eSignature settings for the organization. These settings are displayed on projects and contracts unless changed.
  - **Projects** - New settings on contract Projects provide the ability to override the organization's default eSignature settings. This includes the ability to select different

eSignature provider user accounts on different projects. Project settings affect all contracts in the project.

- **Contracts** - The contract eSignature page has been updated to accommodate the organization-level and project-level eSignature settings. Contracts use the eSignature provider account configured on the project, and this cannot be changed on a contract. Signing order and placement of signature options can be updated on a contract.
- **Existing eSignature settings will not change with the release.** For organizations already using eSignature, existing settings have been maintained so there is no loss of functionality. The extra options provided by this update are available, and organizations will need to update their eSignature settings manually if changes are desired.
- **Organization-Level Setup**
  - The **eSignature** tab on the General Contract Settings page is used to configure eSignature settings for an organization. These settings are displayed on projects and contracts by default. It has been updated to group configuration options into three sub-sections:
    1. **eSignature Connection** (previously under DocuSign Settings or Adobe Sign Settings) - This section is used to set up account information for the eSignature service provider. It contains the following fields:
      - **eSignature Service Provider** - Used to select an eSignature provider. Additional fields are displayed, depending on the provider selected:
        - **DocuSign** - Displays **User Name** and **Password** fields.
        - **Adobe Sign** - Displays the **Activate** button, which will redirect users to Adobe Sign to log in with their user information.

**Note:** Upon the release of 17.3, existing eSignature provider accounts will be used for the default organization-level setting.

- A **Test Connection** button provides the ability to test your connection to the eSignature provider.

**Important Note:** For organizations using **Adobe Sign**, when the General Contract Settings page is first opened after the 17.3 release, the **eSignature Service Provider** field will be blank and the **User Name** field will display a dash "-". Organization administrators will need to click the **Test Connection** button to populate the field with existing eSignature account information.

2. **eSignature Settings** (previously called Additional Settings) - This section is used to configure organization defaults for the following fields:
  - **Order of Signers** (*displayed for organizations using Adobe Sign only*) - This field determines the order in which a contract is signed. There are two options:
    - **Sign in Parallel** - Signers are listed together in no particular order. New signers are added to the bottom of the list. Signers can sign the contract any time.
    - **Sign Sequentially** - When there is more than one signer on a contract, a Signing Order field is used to define the sequence in which individuals sign the contract.
  - **Placement of Signature Block Fields** - This is a new field for organizations using DocuSign. It determines how signature block fields are placed on a contract. There are two options:
    - **Manual - Placed by Contract Manager** - The contract manager sends the contract to the eSignature provider when it reaches the appropriate eSignature workflow step. This option requires contract managers to manually place signature block fields on a contract in Adobe Sign or DocuSign before sending it out for signature. **Note:** For organizations using DocuSign, this option will be selected by default with the 17.3 release.
    - **Automatic - Placed by eSignature Application** - The system sends the contract to the eSignature provider when it reaches the appropriate eSignature workflow step. This option is designed to work with text tags that have been added to clauses, templates or contracts to indicate where signature block fields should go.
  - **Use eSignature** - This is a new field that defines the default setting of the **Use for eSignature** checkbox on the contract header. Select **Yes** to have the Use for eSignature checkbox selected by default on all contracts in the system. Select **No** to leave the Use for eSignature checkbox blank.
3. **Signer Options** - This section has not changed.
  - **Organization default settings can be changed at any time**, even while outstanding eSignature contracts exist. Changes cascade down the system as follows:
    - On **projects**:
      - Project fields that are using the **organization defaults** will be updated and reflect the new settings.
      - Project fields that have **overridden the organization defaults** will not be updated and continue to use the option chosen on the project.
      - New contracts use the settings that exist on the project at the time of creation.

- On **existing contracts**, it depends on the eSignature options that have been selected and where the contract is in the workflow:
  - The **Placement of Signature Block Fields** and **Order of Signers** fields populate with the project settings in use at the time the "**Use eSignature for this contract?**" field on the contract header is set to **Yes**. Existing contracts that have eSignature enabled are not changed unless the settings are updated manually on the contract.
  - Contracts use the **eSignature Service Provider user account** that is defined on the project at the time a contract is submitted into the contract approval workflow. This setting cannot be changed on a contract.
- **Project-Level Setup**
  - A new **eSignature Settings** section on the **Contract Setup** tab defines eSignature options for contracts in a project:
    - The fields display organization settings by default.
    - Project settings can be changed at any time.
    - Child projects can use the default settings from the parent project, or explicitly state the Placement of Signature Block Fields or Order of Signers settings.
  - The **eSignature Settings** section contains the following fields:
    - The **eSignature Service Provider** field displays the eSignature provider account configured for the project. This is the account that contracts reference when they are sent out for signature:
      - The organization eSignature user account is displayed by default. If in a child project, settings from the parent are displayed.
      - The **Use Different Account** button is used to override existing settings and select a different eSignature user account for the project.
        - Click to open the **eSignature Setup** window and enter new eSignature user account information. The setup is identical to that used for organization-level setup (see the eSignature Connection section above).
        - A **Use Default** option can be used to return the project to the organization default settings.
    - Contracts use the eSignature user account named on the **project**. When a contract is submitted into the contract approval workflow, the system will check to see which eSignature Account is currently configured for the project, and this information will be displayed on the "eSignature Account Used" field on the contract.

- (For organizations using Adobe Sign only) The **Order of Signers** field displays organization default settings plus override options:
  - **Use Default - Current Setting: [organization default setting]** - Displays the organization default. No changes are required if the setting is correct. If the organization default is updated, this setting is also changed.
  - **Override Default Setting - Always Parallel** - Select to have the **Sign In Parallel** option selected in the field by default. This means signers are listed together in no particular order. If the organization default is updated, this setting does not change.
  - **Override Default Settings - Always Sequential** - Select to have the **Sign Sequentially** option selected in the field by default. This means a Signing Order field is used to select the sequence in which individuals sign a contract. If the organization default is updated, this setting does not change.
- The **Placement of Signature Block Fields** setting displays organization default settings plus override options:
  - **Use Default - Current Setting: [organization default setting]** - Displays the organization default. No changes are required if this setting is correct. If the organization default setting is updated, this setting is also changed.
  - **Override Default Setting - Always Automatic, Placed by eSignature Application** - Select to have the **automatic** signature placement option selected in the field by default. This means the system sends the contract to the eSignature provider when it reaches the appropriate eSignature workflow step. If the organization default is updated, this setting does not change.

- **Override Default Setting - Always Manual, Placed by Contract Manager** - Select to have the **manual** signature placement option selected in the field by default. This means the contract manager sends the contract to the eSignature provider when it reaches the appropriate eSignature workflow step. If the organization default is updated, this setting does not change.
- eSignature on **Contracts**
  - The **eSignature** page has been updated:
    - A new **eSignature Account Used** field is displayed once an eSignature contract is sent for approval. It shows the user account selected on the **project** at the time the contract was submitted into the contract approval workflow.
      - This field will be blank on contracts that went to eSignature prior to 17.3, but the General Contract Settings page will show the name of the current active eSignature account.
      - Contracts that are sent for eSignature after 17.3 will show account used, and the General Contract Settings page will show the name of the current active eSignature account.
    - The **Placement of Signature Block Fields** in the Settings section has been updated to provide manual and automatic options for both DocuSign and Adobe Sign. See [Zero Touch eSignature for DocuSign](#).
    - The Order of Signers and Placement of Signature Block Field settings can be changed until the contract enters the contract approval workflow.

## Zero Touch eSignature for DocuSign

Organizations using DocuSign as their eSignature provider have a new option that allows them to automatically send contracts to DocuSign.

Previously, contract managers were required to manually send a contract out for eSignature by selecting the Launch eSignature contract action. With this release, a new **Automatic - Placed by eSignature Application** option is available. If selected, the system will automatically send a contract to DocuSign when it reaches the appropriate workflow step.

New DocuSign text tags are also available for use with this feature. Users can insert DocuSign text tags into clauses, templates or contracts, which will be populated and inserted into contract text by DocuSign when a contract is sent out for eSignature.

### Impact

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



## Key points of Feature

- This feature is **On** by default but optional for use, for organizations using DocuSign as their eSignature provider.
- New Permissions related to this Feature: None.
- For organizations using DocuSign as their eSignature provider, a new **Placement of Signature Block Fields** setting provides two options for sending contracts to be signed electronically:
  - **Manual - Placed by Contract Manager** - The contract manager sends the contract to the eSignature provider when it reaches the appropriate eSignature workflow step. This option requires contract managers to manually place signature block fields on the contract in DocuSign before sending it out for signature.

**Note:** This is existing functionality. For organizations using DocuSign, this option will be selected by default with the 17.3 release and organizations will need to update their eSignature settings if changes are desired.

- **Automatic - Placed by eSignature Application** - The system sends the contract to the eSignature provider when it reaches the appropriate eSignature workflow step. This option is designed to work with text tags that have been added to clauses, templates or contracts to indicate where signature block fields should go. If you want to indicate to your signers what and where to sign, you must use the DocuSign text tags.
- The **Placement of Signature Block Fields** setting is available in three areas:
  - **General Contract Settings** - The field is displayed on the **eSignature** tab in the **eSignature Settings** section. This is the organization's default selection for the field.
  - **Projects** - The field is displayed on the **Contract Setup** tab in the **eSignature Setting** section. This is the default selection for the field on all contracts in a project.
  - **Contracts** - The field is displayed on the contract **eSignature** page. The option selected in this field on a contract determines whether signature fields are placed manually by the contract manager or automatically by the system when the contract is sent for eSignature.

See also [Multiple Credentials Supported for eSignature](#).

- **DocuSign text tags** are available with this update. Users can insert DocuSign text tags into clauses, templates or contracts to indicate where signature block fields should go. When a contract with text tags is sent for eSignature, DocuSign will convert the text tags into signature placeholder fields that the signers complete. When the fully executed contract (.PDF) is returned, only the information entered by the signers is visible – users won't see the signature tag, they'll just see the signature.
  - Text tags must use transparent text or text that is the same color as the document background, or the text tags will be visible on the contract.
  - If the **Placement of Signature Block Field** is set to **Automatic - Placed by eSignature Application** on a contract and there are no text tags on the contract, signers will need to both place and sign the signature block fields in DocuSign.

- If the **Placement of Signature Block Field** is set to **Manual - Place by the Contract Manager** and there are text tags on the contract, the tags are converted to signature placeholders, but the contract managers will still need to select the Launch eSignature contract action to open the contract in DocuSign and send the contract to signers.

## Updates to Contract Notifications

Contract notification settings have been updated to differentiate between notifications sent to contract managers and stakeholders explicitly named on a contract, and those inherited from the project.

Previously, selected contract notifications were sent to all contract managers and stakeholders listed on a contract. With this release, new settings on the contract Notifications page allow notifications to be sent to contract managers and stakeholders inherited from the project only, to contract managers and stakeholders named on the contract only, or to both sets of users.

### Impact

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

### Key points of Feature

- This feature is **On** by default but optional for use.
- New Permissions related to this Feature: None.
- The contract **Notifications** page has been updated. New Contract and Project checkboxes in the **Contract Managers** and **Stakeholders** columns allow users to define who will receive contract notifications:
  - Selecting a checkbox in the **Contract** column means that contract managers and stakeholders **explicitly named on the contract** will receive the notification.
  - Selecting a checkbox in the **Project** column means that contract managers and stakeholders **inherited from the project** will receive the notification.
- The new settings apply to the following notifications on the Notifications page.
  - Budget Exceeded (*applies to eProcurement contracts only*)
  - Percentage Tiers (*applies to eProcurement contracts only*)
  - Amount Tiers (*applies to eProcurement contracts only*)
  - Start Date - Advance Notice
  - Start Date Passed
  - End Date - Advance Notices

- End Date Passed
  - Renewal Date - Advance Notices
  - Renewal Date Passed
  - Review Date Passed
- With the 17.3 release, if existing contracts have one or more of these notifications selected, both the Contract and Project settings will be checked by default so there is no loss of existing functionality. If changes are desired, the settings will need to be manually changed on each contract.
  - Contract managers and stakeholders must enable the corresponding notification preference on their user profile (Notification Preferences > Contracts) and have access to the contract before they will receive the notifications selected. This includes contract managers and stakeholders explicitly named on the contract and those inherited from the project.
  - The Contract Excel and CSV **Search Results export** has been updated to accommodate the new notification settings.
  - **Contract CSV Import/Export** and **Contract XML Import/Export** have been updated to accommodate the new notification settings:
    - Five new columns for *each* notification listed above have been added to the **CSV Import/Export** file. This means there are 50 field columns related to contract notifications in total. For example, the **Budget Exceeded** notification will have five fields that will turn each option on or off:
      - BudgetExceededContractManagersOnContract - Indicates if contract managers named on the contract receive the Budget Exceeded notification.
      - BudgetExceededContractManagersOnProject - Indicates if contract managers inherited from the project receive the Budget Exceeded notification.
      - BudgetExceededStakeholdersOnContract - Indicates if stakeholders named on the contract receive the Budget Exceeded notification.
      - BudgetExceededStakeholdersOnProject - Indicates if stakeholders inherited from the project receive the Budget Exceeded Notification.
      - BudgetExceeded - Indicates if external contacts receive the Budget Exceeded notification.

**Note: For organizations with CCT only**, the Contract Import/Export CSV file for Contract Compliance Tracker has been updated to include a column for each Contract Manager, Stakeholder and External Contact notification, but Contract and Project options are not included, as projects are not used with Contract Compliance Tracker.

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

# Message from Contract Manager Added to Internal Review Round and Contract Approval Workflows

A new message field has been added to Internal Review Rounds and Contract Approval workflow, providing a way for contract managers to add a message about an internal review round or contract approval workflow step that is visible to reviewers or approvers.


## Impact

- Products Affected: 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.
- A new message field is displayed when a contract is sent for an internal review round or is submitted for approval, allowing contract managers to enter a message that is visible to all reviewers or approvers:
  - Message are optional.
  - Messages are editable while the internal review round or approval workflow is active. Changes are immediately visible to all reviewers or approvers. Changes are logged in the History.
- **Internal Review Rounds**
  - Contract managers can add messages to automated or manual internal review rounds:
    - **Automated** - When **Start Automated Internal Round** is selected, the Begin Automated Internal Review window opens and displays the **Message to Reviewers** field. Contract managers can choose to enter a message in the field or leave it blank. Clicking the **Begin Automated Internal Review** button starts the automated internal review round.
    - **Manual** - Contract managers create a manual review round and add reviewers. When **Begin Round** is selected, the Begin Internal Review window opens and displays the **Message to Reviewers** field. Contract managers can choose to enter a message field or leave it blank. Clicking the **Begin Manual Review** button sends the contract out for review.
  - Contract managers can update a message while a review round is active by clicking the **Edit** button next to the **Message From:** field on the review round. Changes are

immediately visible to all reviewers and anyone who can access the page. They are also logged in the History.

- Internal review round messages are displayed in two places:
  - On the **Review Rounds** page, the "**Message From:**" field is displayed directly underneath the heading of the round it is associated with, so users can view messages specific to a round.
  - On the following **system emails**, if configured for your organization (see the System Emails section below):
    - Contract Internal Review Notification
    - Contract Internal Review Workflow Reminder
- **Contract Approval Workflow**
  - A message from the contract manager can be added to the contract Approvals page:
    - When the **Submit for Approval** button is clicked, an Approval Details window opens and displays the **Enter Message to Approvers** field. Contract managers can choose to enter a message in the field or leave it blank. Clicking the **Submit for Approval** button sends the contract into the approval workflow.
  - Contract managers can update a message while the contract is in the approval workflow by clicking the **Edit** button next to the **Message From:** field on the Approvals page. Changes are immediately visible to all approvers and anyone who can access the page. They are also logged in the History.
  - Approval messages are displayed in three places:
    - On the contract **Approvals** page, directly underneath the **Approvals** heading.
    - On the **My Approvals** page (Documents  >Approvals>My Approvals - Contract) in the **Message to Approvers** column.
    - On the following **system emails**, if configured for your organization (see the System Emails section below):
      - Contract Pending Approval Workflow
      - Contract Approval Workflow Reminder
      - Contract Pending Workflow Via Email

- **System Email Updates**

- The following **internal review round** system emails have been updated to include internal review round messages in the email text:
  - Contract Internal Review Notification
  - Contract Internal Review Workflow Reminder

**Important Note:** If your organization has previously customized the text of these system emails, the email text will NOT be updated with the release. System administrators will need to manually add the new **Review Message From** and **Review Message** placeholders to the system email text to display internal review round messages in the system emails.

- The following **contract approval workflow** system emails have been updated to include contract approval workflow messages in the email text:
  - Contract Pending Approval Workflow
  - Contract Approval Workflow Reminder
  - Contract Pending Workflow Via Email (**Note:** This is a new system email and notification. See [New System Emails and Notification Preferences.](#))

**Important Note:** If your organization has previously customized the text of these system emails, the email text will NOT be updated with the release. System administrators will need to manually add the new **Approval Message From** and **Approval Message** placeholders to the system email text to display contract approval workflow messages in the system emails.

## Ability to Add Custom Contract Fields to Contract Summary

New configuration settings allow organizations to display custom contract fields on the Contract Summary, so that users who don't have access to the full contract can view this information.

Customers define custom contract field visibility settings for the Contract Summary at the organization level. Visibility settings can also be configured for individual custom contract fields on a contract type, so that organizations can customize which custom contract fields are displayed on a Contract Summary by contract type.

### 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.
  - There are four points of reference that will determine if a custom contract field is displayed on a Contract Summary:
    - **Custom Contract Fields** - A new Show on Summary checkbox on **custom contract fields** permits a field to be displayed on the Contract Summary page.
    - **Contract Types** - The custom contract field Show on Summary setting can be overridden on contract types, so organizations can choose which custom contract fields are displayed on the Contract Summary for a contract type.
    - **Configure Contract Summary Screen** - A new Custom Contract Fields section determines whether custom contract fields are displayed on the Contract Summary based on contract visibility controls.
    - **Contracts** - The visibility controls selected on each contract determine whether users will be able to see custom contract fields on the contract summary based on their permissions and the settings above.
  - **Set Organization Defaults**
    - To configure the **organization default settings** for the display of custom contract fields on a Contract Summary page, two areas must be updated:
      - **Custom Contract Fields** - For each custom contract field, selecting the new **Show on Summary** checkbox on the Create/Edit Custom Contract Field page permits the custom contract field to be displayed on the Contract Summary. The field is blank by default.
      - **Configure Contract Summary Screen** - A new **Custom Contract Fields** section determines whether custom contract fields are displayed on the Contract Summary based on contract visibility controls:
        - Selecting a checkbox in the **Admin/Manager** column will cause all custom contract fields added to the contract type to be displayed on the Contract Summary for contract managers and administrators. In this case the Show on Summary settings defined on custom contract fields are disregarded, and users with Admin/Manager visibility will be able to see all active custom contract fields added to the contract type.
- Note:** Contract managers explicitly named on a contract will always be able to see all the custom contract fields on a contract when viewing a Contract Summary.
- Selecting a checkbox in the **Full**, **Partial**, and **Limited** columns will cause only those custom contract fields with the Show on Summary field selected on the contract type to be displayed on the Contract Summary page when the visibility control option is selected on a contract.

- **Configure Custom Contract Field Settings on Contract Types**
  - On custom contract fields added to a **contract type**, click Edit next to a custom contract field (on the Custom Data tab) to open the Edit page. A new **Show on Summary** option displays the default setting for the custom contract field plus override options:
    - **Use Default Setting - Current Setting:** [*displays current setting*] - Displays the Show on Summary option selected on the custom contract field. **Yes** means the custom contract field can be displayed on the Contract Summary page of contracts using the contract type. **No** means it cannot be displayed on the Contract Summary page of contracts using the contract type. No changes are required if this setting is correct.
    - **Override Setting - No Never Show** - Select if the custom contract field is not to be displayed on the Contract Summary page on contracts using the contract type.
    - **Override Setting - Yes Always Show** - Select to display the custom contract field on the Contract Summary page on contracts using the contract type.
  - Custom contract field Show on Summary settings are inherited by child contract types.
- On **Contracts**
  - The **Visibility Controls** selected on the **Users and Contacts** page determine if users can view contract custom fields on the Contract Summary based on their permissions, the settings on the Configure Contract Summary Screen, and settings on the custom contract field.
- On a **Contract Summary**
  - Custom contract fields are displayed under the **Additional Details** heading using the same configuration as set up on the contract type.
  - Contract managers explicitly named on a contract will always be able to see all the custom contract fields on a contract when viewing a Contract Summary.

## New Contract Approver Placeholders

A new **Approvers** option has been added to the Placeholders tab in the JAGGAER Contract Authoring for Word app. Approval placeholders can be added into clause, template or contract text, and approval information will be automatically displayed on the main contract document once the contract is approved. This may be helpful for customers that are not using eSignature, but still want to note workflow step approvers and approval information on the contract document.

This feature requires configuration by JAGGAER.

### Impact

- Products Affected: Total Contract Manager
- End User Impact: Medium
- Admin User Impact: Medium



- Integration Impact: None

## Key points of Feature

- This feature is **On** by default and requires configuration by JAGGAER. **Please contact Support to enable this feature.**
- New Permissions related to this Feature: None.
- The feature will work with or without eSignature. eSignature setup is not required.
- A new **Approvers** option is available on the Placeholders tab of the JAGGAER Contract Authoring for Word App. Once the feature is configured by JAGGAER, the following placeholders can be placed in clause, template or contract text:
  - Approver Block (includes the name of the contract approval workflow step, approver name, and approval date and time)
  - Step Name (the name of the contract approval workflow step)
  - Approver Name and Date
  - Approver Name
  - Approval Date
- Each approval placeholder is linked to a contract approval workflow step. Users will need to know which workflow step they want to add an approval placeholder for when they are inserting approver placeholders into documents.
- Placeholders for skipped or expedited steps are displayed as "Step skipped" or "Step bypassed" in the contract text.
- If multiple approvers are assigned to one workflow step, a carriage return is automatically added after each approver, which will affect document formatting. Using a table format in the Word document is useful to ensure appropriate alignment, for example:

If you set approval placeholders for each workflow step in a table in the Word document:

Placeholder: "Step Name"	Placeholder: "Approver Name and Date"
[ Step: Account Check ]	[[ Approver Name and Date (Step: Account Check) ]]
[ Step: Budget ]	[[ Approver Name and Date (Step: Budget) ]]

It will appear something like this in the final compiled document:

Account Check	John Doe 9/15/17 1:35 PM Jane Smith 9/15/17 1:35 PM
Budget	Step skipped

The Account Check step has multiple approvers, so a return is added after each approver name. If the placeholder wasn't in a table, "Jane Smith" would be displayed along the left margin of the document, underneath "Account Check". This example also shows that the Budget step was skipped.

- If organizations are using the Approver placeholder feature, approval information is displayed on the PDF copy of the contract.

## Update to Contract Action "Upload Fully Executed Contract"

A new **Full Contract PDF** option has been added to the contract action **Upload Fully Executed Contract**.

Previously, if contract managers wanted to attach an already signed contract through the contract approval workflow in the Upload Fully Executed Contract overlay, they had to first download it from the Attachments page before they could upload it in this window. With this release, the Full Contract PDF option provides the ability to upload the Full Contract PDF that just went through 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.
- The contract action **Upload Fully Executed Contract** is displayed when a contract has reached the appropriate eSignature workflow step and stopped. It displays the **Pending Signature** contract status. It indicates that the contract has been approved, but a signed copy of the contract has not been uploaded into the system.
- In the **Upload Fully Executed Contract** window, select the **Use Full Contract PDF** option to upload a PDF copy of the contract from the system. This is the current version of the contract that has gone through the contract approval workflow up to this point.

## New ADW Rules for Clause and Template Statuses

Two new ADW rules provide the ability to catch contracts that are using inactive or previous versions of a clause or template. When the rules are added to an ADW step, the workflow will stop until the inactive or outdated record is replaced with the current version. These rules can be used to ensure that users are always reviewing or approving the correct version of contract text.

## 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. Assistance from Support may be required.
- New Permissions related to this Feature: None.
- New **Contract Clause & Version Status** and **Contract Template & Version Status** rules can be added to an ADW workflow step to check for inactive or previous versions of clauses and templates:
  - The rules can be used with the Automated Internal Review Rounds workflow or the Contract Approval workflow.
  - On each rule, three fields are used to select the name, version and status of a clause or template that the rule will evaluate. If all three variables are found to be true when the rule is evaluated, the workflow will stop at the step that the rule is added to, and the reviewer or approver on the rule must replace the clause or template and approve the step before the internal review round or contract approval workflow will continue.
  - We recommend using a dedicated ADW workflow step for clause and template checks to facilitate adding multiple rules to one step. For example, organizations may want to add a rule to check that a specific clause is up to date as well as add rules to check for previous versions of clauses or templates. If configured this way, the workflow step is only displayed if one of the rules on the step is evaluated as true. Setting up a dedicated ADW workflow step may require assistance from Support.
- The rules can be added to an ADW workflow step as follows:
  - Select **Contract Clause & Version Status** to add a rule that checks for inactive or previous versions of clauses. This rule applies to both clauses in a template used by a contract and to clauses added directly to a contract.
  - Select **Contract Template & Version Status** to add a rule that checks for inactive or previous versions of templates.
  - For each rule, complete these three fields. The rule element is evaluated as true if it matches all three variables selected:
    - **Clause Name / Template Name**
      - Select *one of the following values* to assess specific clauses or templates, then choose the records to evaluate.

- Select *none of the following values* to exclude specific clauses or templates from assessment, then choose the records to exclude from evaluation.
- Select *any available value* to assess all clauses or templates.

**Note:** If either of the first two options is selected, a list of current and active clauses or templates is displayed in the "Available Clauses/Templates" panel on the left. Move the clauses to be evaluated into the "Selected Clauses/Templates" panel on the right.

- **Clause Status / Template Status**
  - Select *All* to evaluate both active and inactive clauses or templates.
  - Select *Active* to evaluate only active clauses or templates.
  - Select *Inactive* to evaluate only inactive clauses or templates
- **Clause Version Status / Template Version Status**
  - Select *All* to evaluate clauses or templates in any status.
  - Select *Current* to evaluate only current versions of clauses or templates.
  - Select *Previous* to evaluate only previous versions of clauses or templates.

## Updates to Advanced Search

A new search filter has been added to the Advanced Search page to allow users to search for contracts based on the day they completed the contract approval workflow and reached Executed: Future or Executed: In Effect status.

### Impact

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

### Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- A new **Approvals Completed** search filter on the **Advanced Search** page allows users to search for contracts that reached Executed: Future or Executed: In Effect status within a date range that is entered in the calendar fields provided.

# New Contract Search Post Filters for Workflow Steps

Enhancements to the Search Contract Results page allows users to refine search results for contracts based on where they are in the contract workflow. Users can search for contracts in a specified contract approval workflow step, or in an internal review round.

## 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 **Search Contracts** page, a new **Current Workflow Step** filter has been added to the **Refine Search Results** column on the left. It contains these filters:
  - Each **contract approval workflow step** configured for an organization is listed as a separate item under the Current Workflow Step heading. Select a workflow step filter to show all contracts currently in the workflow step.
  - A **Contract Internal Review** filter is displayed at the end of the Current Workflow Step list. Select the filter to show all contracts that are in an internal review round.

# New System Emails and Notification Preferences

The following new system emails and notification preferences have been created:

- **Contract Approval Workflow Reminder Via Email** (system email) - Reminder email sent to contract approvers if they have not approved a contract in a timely manner.
- **Contract Approval Workflow Completed** (system email and notification preference) - Sent to indicate that a contract has been approved. This notification is sent to contract managers and stakeholders explicitly named on a contract, and to contract facilitators.
- **Form Request - Contract Executed** (system email and notification preference) - Sent to contract requesters to indicate that a contract they requested has completed the contract approval workflow and is in an Executed status.

## Impact

- Products Affected: Total Contract Manager

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

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- The new system email **Contract Approval Workflow Reminder Via Email** is a reminder email sent to contract approvers if they have not approved a contract in a timely manner. Users must have permission to approve and return contracts via email. Organization settings must allow approvers to take action on contracts via email. The reminders are sent on intervals based on an organization's "Pending Approval Document Reminder" configuration.
- The new system email and notification **Contract Approval Workflow Completed** is sent to explicitly named contract managers or stakeholders on a contract, or to contract facilitators, when the contract they are named on has completed the contract approval workflow and is in Executed status. Users must opt into the notification preference **Contract Approval Workflow Completed** to receive this notification (Notification Preferences > Contracts > Contract - Approval Workflow).
- The new system email and notification **Form Request - Contract Executed** is sent to contract requesters to indicate that a contract they requested has completed the contract approval workflow and is in an Executed status. Users must opt into the notification preference **Form Request Contract is Executed** to receive this notification (Notification Preferences > Form Requests > Form Request Review Workflow).
- Email logs have been updated to include emails related to approving and reviewing contracts.

## New Filter for Contract Template and Clause Analysis Report

A new **Clause changes made by** filter has been added to the Clause by Contract tab on the Contract Template and Clause Analysis Report. It allows users to search for contracts containing clauses that have been added, removed or changed.

## 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 but optional for use.
- New Permissions related to this Feature: None.
- On the **Clause by Contract** tab of the **Contract Template and Clause Analysis** report, select the **Clause changes made by** filter and click the search icon to choose any of the following search filters:
  - Any Clauses Added to Contract
  - Any Clauses Edited
  - Any Clauses Removed from Contract
  - Any Negotiable Clauses Edited
  - Any Non-Negotiable Clauses Edited
  - Any Not Required Clauses Removed
  - Any Required Clauses Removed

## New Filter on Obligations Across Contracts Report

A new filter on the Obligations Across Contracts Report provides contract super users, contract administrators and contract managers the option of viewing only the obligations assigned to them.

## 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 but optional for use.
- New Permissions related to this Feature: None.
- A new **Only My Obligations** checkbox is displayed on the **Obligations Across Contracts** report for contract super users, contract administrators and contract managers.

- When a user selects the checkbox, the search results will be limited to obligations assigned to them. These are obligations on contracts where they are a contract manager, and obligations where they are a first party owner or stakeholder.
- The **Action Items** notification flag has been updated to only show action items for obligations assigned to the user who is logged into the system.

## Updates to Contract Report Permissions

Contract permission settings have been updated to allow users who have read-only access to contracts to view and export the following contract reports if they also have the Export Search Results permission:

- Contracts that Require Attention: Review Pending
- Contracts that Require Attention: Expiring Contracts
- Workload by Contract Manager
- Cycle Time Report: Contract Creation to Execution
- View Saved Report Filters

### 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.
- To view the contract reports listed, users will need view access to contracts plus the **Export Search Results** permission (Permission Settings > Contracts > Contracts Permissions).

## Ability to Terminate Contracts in Draft Status

Previously, the contract action Terminate was only available for contracts in Executed: In Effect status. With this release, the Terminate contract action is also available for contracts in Draft status, providing a way for customers to keep a record of draft contracts for historical purposes rather than deleting them.



## 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 Terminate action is available for contracts in Draft or Executed: In Effect status if a contract is not checked out, or checked out to the user who is performing the contract action. It is not available if the contract is checked out to another user.
- In the Cycle Time Report, contracts in Draft status that are terminated are displayed when the Created filter is applied.

# Data Purge for Evergreen Contracts Updated

Data Purge has been updated to purge evergreen contracts based on their termination date. Evergreen contracts are contracts with no end date.

## Impact

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

## Key points of Feature

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- Data purges configured for the Contracts area will purge terminated evergreen contracts based on their termination date.
- Evergreen contracts that are purged based on their termination date are included in the purge report.
- For consortium contracts, terminated evergreen contracts cannot be purged if any organizations are currently subscribed to the contract.

# Portfolio Savings Manager Enhancements

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

## My Deliverables and Tasks Page

With this release, users have the ability to search for and manage their upcoming assignments (deliverables and/or tasks) via the **My Deliverables and Tasks** page.


The page displays deliverables and tasks in both list and calendar views, with options to search deliverables and tasks by owner, due date, status, project, and either all deliverables or the current deliverable.

Users with permissions to manage other users' assignments are also able to manage these assignments on the page.

### IMPACT

- Products Affected: Portfolio Savings Manager
- End User Impact: Medium
- 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.
- To access the My Deliverables and Tasks page, navigate to **Portfolio Savings**  **> Savings Initiatives > My Deliverables and Tasks**.
- Use the search filters to determine which deliverables and tasks will be displayed. The available search criteria are:
  - **Owner** - Select any user, the current user, or search for other users. Searches on Any or Pick still show only deliverables and tasks the user has access to view/manage based on permissions, project access, and assigned deliverables/tasks.
    - **Any** is a search on all users (unfiltered).
    - **Me** is a search of just deliverables/tasks assigned to the logged in user.
    - **Pick** allows the user to filter, selecting one or more users to whom deliverables/tasks are assigned.

- **Due Date** - Select all dates, a pre-defined date range, or create a custom date range.
- **Status** - Search for and select the deliverable/task status or statuses you would like to search by.
- **Include** - Select either all deliverables or only the current deliverable.
- **Project** - Search for and select the project to search by. Users see only projects to which they have access. They may be assigned deliverables or tasks without having project access, in which case they would not have any options to filter by project.
- Click the Search button to display deliverables and tasks matching the search criteria. Click the calendar and list icons to navigate between the two display options.
  - In the list view, deliverable and task details are displayed, with links to the initiative Track Savings page and Deliverables Progress page. A dropdown button with options to manage the deliverable/task are also available. Users can choose which columns to display using the gear icon at the top of the search results table in this view.
  - In the calendar view, deliverables and tasks can be displayed by month or day. Clicking a deliverable/task on the calendar will open a popup that shows deliverable/task details. A link to the Deliverables Progress page is also provided.

## Deliverable & Task Enhancements

With this release, deliverables and tasks have received the following enhancements:


- Users are now able to add attachments to deliverables and tasks throughout the life of savings initiatives. **Deliverables & Tasks Libraries** have also been enhanced to allow users to add attachments there. Deliverable and task attachments are included when savings initiatives are copied. Deliverable and task attachments also display on the Attachments page of the initiative, where they may be downloaded, edited, and deleted. Versioning is available for savings initiative attachments but not for deliverable/task attachments.
- Users are able to choose who gets notified via email when a deliverable or task is complete, on both event-specific and library deliverables and tasks.
- With this release, users are able to link tasks to sourcing events and contracts. Previously, users could only link savings initiatives and deliverables to sourcing events and contracts. The display of contracts and/or sourcing events fields is dependent upon organization licenses. Additionally, individual users will see for selection only contracts and sourcing events to which they have access within those modules. Once contracts and/or sourcing events are linked to tasks, they also display on the Relationships page of the initiative, where they can be viewed or removed as well.

### IMPACT

- Products Affected: Portfolio Savings Manager
- End User Impact: Low

- Admin User Impact: None
- Integration Impact: None

## KEY POINTS OF FEATURE

- These features are **On** by default but optional for use.
- New Permissions related to this Feature: None.
- To add attachments to deliverables and tasks on a savings initiative:
  - Navigate to the **Deliverables and Tasks** page of a draft initiative, or the **Deliverables Progress** page of an open initiative.
  - Click the Edit button beside an existing deliverable or task, and the overlay will open with the Attachments field available. The Attachments field will also appear when creating a new deliverable or task.
  - Click the **Select Files** button beside Attachments to open file navigation and select the desired file(s). Click **Open**. The selected files are uploaded as attachments on the deliverable or task.
  - Alternately, users can drag and drop as many files as needed directly into the gray area around the **Select Files** button.
  - Click **Save Changes** to close the deliverable or task and save the attachments.
- To add attachments from the Deliverables & Tasks Libraries page:
  - Navigate to **Portfolio Savings**  > **Libraries** > **Deliverables & Tasks Libraries**.
  - Click the **Edit** button beside a library entry and navigate to the Deliverables and Tasks tab.
  - Click the **Action** dropdown beside the desired deliverable or task and select Manage Attachments. The **Manage Attachments** overlay displays.
  - Click the **Select Files** button beside Attachments to open file navigation and select the desired file(s). Click **Open**. The selected files are uploaded as attachments on the deliverable or task.
  - Alternately, users can drag and drop as many files as needed directly into the gray area around the **Select Files** button.
  - Click **Save** to close the overlay and save the attachments.
- To add users for notification when a deliverable or task is complete:
  - When creating or modifying a deliverable or task, use the **When Complete Notify** field to search for and select the user(s) that should be notified when the deliverable or task is complete. Any user in the organization with the View Savings Initiative permission may be selected.

- To link sourcing events and contracts to tasks:
  - Navigate to the **Deliverables and Tasks** page on a draft initiative, or the **Deliverables Progress** page on an open initiative, and select the task to be edited.
  - Search for and select the desired contracts and sourcing events to be linked to the task using the fields available under the **Related To** heading.

## Detailed Savings Report Summary Tab


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

With this release, a **Summary** tab has been added to the report. This tab displays the savings initiative results from the Detail tab, grouped by Savings Type.

### IMPACT

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

### KEY POINTS OF FEATURE

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- To generate the Detailed Savings Report:
  - Navigate to **Portfolio Savings**  > **Savings Initiative** > **Search Savings Initiatives**.
  - Click the **advanced search** link to see advanced search options and enter criteria in any of the appropriate fields. When done entering criteria, click **Go** to search.
  - Click the **Export Search Results/Report** button to open the Export Search Results/Report overlay and customize the report details.
  - Select **Standard Detailed Savings Report** and click **Submit**.

## Customized Search Export Enhancements

The Customized Search Export has been enhanced to include contract and sourcing relationships, comments made on deliverables and tasks, the latest due date extension note, the **Auto complete**


**Deliverable when all its tasks are completed** flag, and the deliverable/task **When Complete Notify** field.

Additionally, when custom fields are included in the export and search results include initiatives with table type custom fields, a tab with table custom fields now displays after the Summary tab.

## IMPACT

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

## KEY POINTS OF FEATURE

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- To perform a customized search export:
  - Navigate to **Portfolio Savings**  > **Savings Initiative** > **Search Savings Initiatives**.
  - Click the **advanced search** link to see advanced search options and enter criteria in any of the appropriate fields. When done entering criteria, click **Go** to search.
  - Click the **Export Search Results/Report** button to open the Export Search Results/Report overlay and customize the search export.
  - Select **Customized Search** export and click **Submit**.

## Automated Report Exports

With this release, PSM's reporting experience has been improved by giving administrators the ability to schedule a recurring export using the Document Export Framework.

Users with access to **Document Export Settings** are able to configure the exported data format as XML or JSON. This export contains the raw data that customers may use to generate their own reports.

This feature benefits users who have extensive, repeat, and customized reporting needs.

Additionally, links to the XML and JSON files associated with each savings initiative are now available from those savings initiatives. Any users who can view the initiative have access to these links.

## IMPACT

- Products Affected: Portfolio Savings 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.
- To configure a recurring export:
  - Navigate to **Setup > General Site Settings > Document Export Settings**.
  - Using the tabs on the Document Export Settings page, navigate to **document export > connection mgt**.
  - Click the **New Connection** button. Complete the fields as desired and select the **Supports PSM Export** checkbox. Enter the number of Savings Initiatives per message and select the Export Type. The required fields are Name, Connection Internal Name, URL, Connection timeout & Response timeout. Identity and Shared Secret may also be required, depending on organization configuration. Click **Save**.
  - Navigate to the **scheduling mgt** tab. Click the **New Schedule** button and complete the schedule information, selecting PSM Export as the doc type. When you select PSM Export as the doc type, any **PSM Export** connections that have been created are displayed, and users must select the ones they are setting this schedule for. Click **Save**.
  - Initiatives will be queued for export each time a new one is created or a change is made to an existing one. Initiatives are exported from the queue based on the schedule configured in relation to each PSM Export connection. Additionally, administrators can queue all initiatives to export at once from the PSM Export Queue.
- PSM users subscribed to receive the **PSM Export Failure Notice** will receive an email and/or notification based on their notification preferences. Navigate to **Notification Preferences > Administration & Integration**, click the **Edit Section** link, and choose your preference on the **PSM Export Failure Notice** line.
- Administrators may also monitor pending and exported initiatives from the PSM Export Queue. Navigate to **Administer > Find and Fix Errors > PSM Exports**. Filter by Start and End Date to view the most recent 200 initiatives added to queue, and the most recent 200 initiatives exported from the queue. Here, users can also re-queue or delete errors, delete pending requests, or queue all savings initiatives for export.
- To download the XML and JSON files associated with a savings initiative, navigate to that initiative and click the **View XML** or **View JSON** link appearing on any page of that initiative.

An Export overlay displays with the code. Click the **Download** button on the overlay to download the file.

## Table Response Type for Custom Fields

Users can add custom fields to savings initiatives. This enables them to capture and report on additional information that is unique to their business.


With this release, users are now able to use tables as a response type, in addition to the text (single line), text (multi-line), numeric, yes/no, dropdown list (pick one), multiple choice (pick one), multiple select (pick many), and date response types.

The table response type can be configured to use other custom fields that have been defined by the organization as the table columns. When completing tables on initiatives, users add rows to the table by completing each of the custom fields added to the table as columns.

### 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.
- To configure a custom field using the table response type:
  - 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, 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.
  - Select **Table** as the **Response Type**. Additional fields for creating table columns will appear.
  - Select a column from the **Custom Contract Field** dropdown. The other custom fields created in the library are the available columns. Optionally select the **Response is Required** checkbox.
  - Click **Add Table Column** to add the column. Continue adding columns as needed.



- To edit any added column, click on the field name. This displays up and down arrows that can be used to change its display order, and a Remove button to delete it from the table.
- Click **Save** to save the custom field and close the overlay.
- A savings initiative's initiative type determines the custom fields that will appear on the savings initiative. Custom fields must be configured on initiative types before they are available for use on savings initiatives.
- Custom fields cannot be used twice on an initiative type. If custom fields used in a table have already been used on the initiative type, that table will not appear for selection in fields available to be added to a group on that initiative.
- Newly added custom fields appear on new savings initiatives created with the edited initiative type.

## Comment Notifications

With this release, users now have the ability to choose who gets notified on savings initiative comment threads. Adding or editing comments includes access to an optional field where users can be added as notification recipients.

Additionally, users are now able to view comments added to deliverables and tasks without having to display the deliverable/task overlay. A comment icon displays next to the deliverables and tasks that contain comments on the **Deliverables and Tasks** and **Deliverables Progress** pages. Users may view comments by clicking the icon.

### 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.
- To select the users to be notified of a comment, use the **Send Notification To** field on the comments overlay when adding or editing a comment, to search for and select users. Any user with the View Savings Initiatives permission is available for selection.
- To quickly view comments on deliverables and tasks, click the comment icon that displays next to deliverables and tasks that contain comments on either the **Deliverables and Tasks** or the **Deliverables Progress** pages. The comments display in a popup.

# Edit Custom Field Responses on Initiatives in Approved or Open Status

With this release, PSM managers and initiative creators are able to edit their custom field responses on savings initiatives while the initiatives are in approved or open status. Users continue to be able to edit custom field data on draft initiatives, and cannot edit custom field data on withdrawn, rejected, on hold, or completed initiatives.

## 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.