23.2 Release Notes

For Contracts+ Enhancements

Version: 1.1
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### 23.2 Release Notes Revision History

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| 1.0     | June 19, 2023 | Initial Version  
The following General features have been added since the Preview Release:  
- Engage Idea Features Identified in Release Notes  
- Product Release Library and Online Help Updates  
- Business Analytics Supplier Fulfillment Data  
- Supplier IDM - Phased Activation of Multi-Factor Authentication For Suppliers  
- Supplier IDM - Updates To Password Security Rules for Suppliers  
- Supplier IDM - Additional Supported Languages |
| 1.1     | June 27, 2023 | Update clarifying availability of the following feature:  
- Business Analytics - Contract+ Explore Enhancements |
Welcome

The 23.2 JAGGAER One Product Release will be available in the production environment starting July 17, 2023. The purpose of Release Notes is to prepare administrators for the upcoming release from an application standpoint.

This document provides release notes for the Contracts+ solution as well as General enhancements. Additional solution-specific release notes, and other supplemental information such as a Feature Snapshot, are available on the Product Release Library:

https://library.jaggaer.com

Note: A login is required for the Product Release Library. Please see the Welcome page in the online searchable help for login credentials.

This document will help you:

- Understand the impacts of new features on your end-users, approvers, administrators, and other individuals using the system.
- Understand any changes required on your part to enable a feature of the system.
- Provide a starting point of “where to go” to learn more about the features and functionality discussed in this document.
Contracts+ Enhancements

This section focuses on updates that affect the JAGGAER ONE Contracts+ solution.

Contract Validation Rules

In the 23.2 release, we are introducing the ability for administrators to set up rules—similar to ADW rules—that are evaluated before a contract can be submitted into the approval workflow. This functionality can be used to ensure that contracts meet desired requirements before being submitted for approval, reducing the likelihood of a contract needing to be resubmitted for approval.

Customer Impact

- Related Solutions: Contracts+
- Feature Activation: This feature is OFF by default and must be configured by an administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- Contract validation rules can only be configured by an administrator.
- Once configured, contract rules will be validated when a contract is submitted for approval.
- If a configured rule triggers as True, users will be shown an error message detailing what needs to change in the contract so that it may be successfully submitted.

Administrator Impact

- To enable this feature, perform the following procedure:
  2. Select the Validation Rules tab. This will display three sub-tabs: Rules Management, Rules History, and Validation Rules Import/Export.
     a. Rules Management
        i. You may perform a search for any existing rules by providing the Rule Name, providing a rule’s Validation message, and/or selecting the rule’s Status and then clicking the Search button.
ii. You may create a new rule by clicking the **Add Rule** button. This will open the **Editing Rule** page.
   - Use the associated **Edit** button to customize the **Rule Info**. When editing the Rule Info, click the **Active** checkbox to make the rule active. If the rule is not active, the rule will not be checked when the contract is submitted for approval.
   - Use the associated Edit button to customize the **Validation Message**, the message that will be provided to the user if the conditions of the rule are met. Use the **Add/Edit Translations** button to add translated versions of the message that will appear in the designated language(s).
   - In the **Rules** section, use the **Add a new Validation Rule** drop-down selector to select a rule element and press the **Go** button. This will open a pop-up window allowing you to configure the rule element. Repeat this process to add multiple rule elements to a single rule. **Note:** If an active rule has multiple rule elements, **ALL** rule elements will be checked when the contract is submitted for approval, and disabling an active rule will disable **ALL** rule elements associated with it.

b. Rules History
   i. This section displays the history for all rules that have been created, edited, and deleted.
   ii. The list of records can be filtered by expanding the **Filters** section, and the list can be sorted by clicking on the arrows in the **Date**, **User**, **Rule Internal Name**, **Action**, and **Selection** columns.

c. Validation Rules Import/Export
   i. This section allows users to export their current validation rules and import new validation rules. The **Import Instructions** link on this page provides detailed information on the import/export process, and the **Validation Rules XML Template** and
Validation Rules CSV Template links provide functional templates for performing both import and export actions.

ii. Active and inactive rules are exported to both XML and tab-delimited formats. **Note**: Rules that have no rule elements do not get exported.

iii. Translations are not exported.

iv. Rules can be imported in both XML and tab-delimited formats.

v. Imports are validated just like ADW and eSignature rules. **Note**: Validation message is a required field, and any rules that do not have a validation message will be provided with the default message.

**Important Note**: A maximum of 100 active contract validation rules may exist at one time. Error messages will appear if attempting to activate, add, or import validation rules if the action would cause the number of active rules to exceed 100.

**Third-Party Integration Impact**

This feature does not impact third-party integrations.

**Supplier Impact**

This feature does not impact suppliers.

**Contract Term Functionality**

In Contracts+, the user is required to define an explicit **Start Date** and **End Date** when creating contracts that are only effective for a specified span of time. However, in many cases, contracts are written so that if the execution of the contract happens after the designated Start Date, then the Start Date is automatically modified to match the date of execution. Unfortunately, for contracts that are effective for a span of time from the start date (e.g., 1 year), the system doesn’t automatically update the End Date to reflect the change in the Start Date. If this isn’t adjusted manually, then it’s possible the contract expires early in the system. In the 23.2
release, we are introducing a contract Term that will allow the user to specify on a contract that, if the Start Date changes, then the End Date will automatically change in the same way so that the full length of the contract is respected.

Customer Impact

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

User Impact

**Note:** This feature applies to organizations with a CMR license. The Term field will not be visible to organizations that do not have a CMR license.

- Users will now see Term as a new option for the End Date field on contracts and contract templates.

  ![End Date Selector](image)

- When Term is selected, users can enter a value and use the drop-down selector to select **Days, Months, or Years** as the unit.

  ![Unit Selector](image)

- When a contract that uses Term as the End Date value has its Start Date updated, the recorded End Date will automatically update to remain in line with the term. For example, if the term is set to 15 Days, then the End Date will always be recorded as 15 Days after whatever the current Start Date is. This automatically-generated value is referred to as the **Calculated End Date**.
- The Calculated End Date of a contract that uses Term will automatically update if changes are made to the Term. For example, if the Term is changed from 15 Days to 15 Months, the Calculated End Date value will change from being 15 days after the Start Date to being 15 Months after the start date.
• The contract Term can be edited anytime that a user can edit the Start Date of the contract. If the contract is in a state where the Start Date cannot be edited, the Term cannot be edited, either.

• When a contract is copied, the existing Copy Contract overlay now has the Term with the current value displayed. The user can keep, change, or remove the Term, and the Calculated End Date will automatically update. The new contract will display the End Date based on the Term (or no Term) specified during the copy process.

• When creating a contract from a contract template that uses a Term, the created contract will have the Term copied over and will automatically provide the Calculated End Date if the Start Date has been provided. If the template already had a Start Date and Term, then the Calculated End Date will already be present and will also be carried into the new contract.

• When creating an amendment on a contract that has a Term, the amendment will have the Start Date, Term, and Calculated End Date carried over. While the amendment is in the Draft status, the Start Date and Term can be edited and the Calculated End Date will be updated.

• When creating a renewal for a contract that uses a Term, the Term will NOT be copied over to the renewal. Instead, the renewal will be created with the existing logic that the Start Date is the next day after the original End Date, and the End Date will be calculated off the Renewal Term, instead.

• Contract Request (Create and Amend) now includes Term as part of the End Date standard field.

Administrator Impact
This feature does not impact administrators.

Third-Party Integration Impact
This feature does not impact third-party integrations.

Supplier Impact
This feature does not impact suppliers.
Support for Copying Product Items to Non-Catalog Items when the Locale Formatting Differs from System

When users create contracts from awarded sourcing events, the items and prices are transferred to the contract, where they can be made "shoppable" by copying the product and price information to contract non-catalog items. Previously, doing this when the user is in a locale that uses different number formatting (e.g., commas are used instead of decimal points as the decimal separator) could result in incorrectly formatted prices on the new non-catalog items. In the 23.2 release, we now handle this formatting scenario and for existing items we have updated this functionality to automatically convert values whenever they can be reliably determined, and to warn users of instances where prices may require manual updating.

Customer Impact

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

User Impact

- The *Unit Price* for an item is now displayed on the *Product and Services* Items page.
- Price fields are now displayed in the user’s locale format.
- On the Product service items pages, if there is any price formatting that is invalid or requires verification, a message will be displayed on the *Product Items* page for the item in question. The message will detail what the issue is so that the user may take the appropriate action (edit the contract item, make the correction, and save).

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact third-party integrations.
Supplier Impact

This feature does not impact suppliers.

Search by Clause Analysis and Variance Scores

In the 23.2 release, we are introducing the ability to search for contracts based on their clause analysis and variance scores. This makes it easier for users to find and filter for contracts based on the degree to which those contracts differ from their preferred standard language.

Customer Impact

- Related Solutions: Contracts+ and Contracts AI
- Feature Activation: This feature is ON by default.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

Note: This functionality is only available when using the New search experience. Users who have set their preference to Classic will not be able to filter a contract search by either Clause Variance Score or Clause Variance.

- Users must first enable the Clause Variance column in the Configure Column Display window. This is accessed by clicking the gear icon above the contract list.
- To use this feature, perform the following procedure:
  1. Navigate to Contracts > Contracts > Search Contracts.
  2. Users should first enable the Clause Variance column in the Configure Column Display window. This is accessed by clicking the gear icon above the contract list. Like other columns, this column can be reorganized by the
3. In the search bar, click the **Add Filter** button.
4. Scroll the Add Filter selection window to find the **Contract Clause** section.

5. In the Add Filter selection window, users may enable the **Clause Variance** option. This option will filter the search by the date when the last clause variance score was performed. This option will also open a pop-up window allowing the user to set the parameters for the search criteria. **Note:** Users may select the **Date is Missing** option to include contracts that have not had a Clause Variance Analysis performed in the search results.
6. Users may also enable the **Clause Variance Score** option to filter for contract clause variance scores. This will open an additional filter pop-up. Use the first drop-down selector to select the desired clause. Use the middle drop-down selector to select the desired criteria for the variance score for that clause. Use the final drop-down selector to set the desired variance score data. Click **Apply** to filter the list of contracts. **Note:** Using this option will only return contracts which have the selected clauses with an associated Clause Variance Score. Contracts that have not had a Clause Variance Analysis performed or which do not have the selected clauses will not appear in the results without using an additional filter.

- When a search has been filtered by either Clause Variance Score or Clause Variance, users will see a Clause Variance column. Users may click the associated eye icon 🎫 to view a detailed breakdown of the contract's Clause Variance Analysis results.

- When performing a search result export, a Screen Layout/Excel export will include the last update date for Clause Variance in the export.

**Administrator Impact**

This feature does not impact administrators.

**Third-Party Integration Impact**

This feature does not impact third-party integrations.
Supplier Impact

This feature does not impact suppliers.

Import/Update Contract End Dates and Termination Information via Web Service

In the 23.2 release, we are introducing the ability for users to import and update contract end dates and termination information via the web service. This feature allows for greater flexibility and ease of use for updating end date and termination data, and is especially useful for organizations that need to copy data from one Contracts+ instance to another.

Customer Impact

- Related Solutions: Contracts+
- Feature Activation: This feature is ON by default.
- New Permissions related to this feature: Change Contract End Date (previously known as Extend Contract End Date)
- New Notifications related to this feature: None

User Impact

- The following points apply to editing the End Date of a contract directly via the UI:
  - Users with the appropriate permission can now change the Contract End Date via the UI to be earlier than the existing End Date on contracts in the Executed In Effect and Executed Future statuses. **Note:** This feature is only available to users with the ability to edit a contract AND the permission Change Contract End Date.
  - When editing the Contract Header, the Extend Expiration Date button has been renamed Change End Date.
  - When terminating a contract with a date in the past, the UI will now show the past date. For example, a user terminates a contract on 5/22/2023, but the termination date the user provides is 5/15/2023. **Note:** This functionality only applies to contracts that can be terminated.
  - When terminating a contract with a date in the past, the actual date the termination was performed will be recorded in the audit trail. Returning to the earlier example, if a user terminates a contract on 5/22/2023 and provides the termination date 5/15/2023, the audit trail will include that the change was made on 5/22/2023.
When terminating a contract, the **Is the termination effective immediately?** option now defaults to **No**. This is to ensure that the user can see that they can schedule any date (past, future) for the termination if desired.

- The following points apply when updating the End Date of a contract using the XML import function:
  - When performing an XML import, users will be able to change the contract End Date on contracts in the Executed In Effect, Executed Future, and **Expired** statuses. This is in addition to the existing ability to change the End Date on contracts in the **Draft** status. End Date can be set to earlier or later values.
  - When performing an XML import, all validation rules (such as "Start Date must precede End Date") remain unchanged.

**Administrator Impact**

- To be able to change the End Date via the UI, users must be granted the Change Contract End Date permission. This permission was previously known as **Extend Contract End Date**.
- Users who had previously been granted the Extend Contract End Date permission will automatically have the Change Contract End Date enabled.

**Third-Party Integration Impact**

This feature does not impact third-party integrations.

**Supplier Impact**

This feature does not impact suppliers.

**Import/Update Contract Non-Catalog Items via the Contract Import J1P API**

In the 23.2 release, we are introducing the ability to import and update contract non-catalog items data via the XML web service as well as via Contract XML Import. This feature allows for greater flexibility and ease of use for updating this data, and is especially useful for organizations that need to copy data from one Contracts+ instance to another.
Customer Impact

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

User Impact

- In the Contract XML import file, non-catalog item information is stored in the `<NonCatalogItems>` tag, with each item’s information held in a `<NonCatalogItem>` tag. Refer to the Contract XML Import technical specification for more information.
- The Contract XML Import for non-catalog items is **FULL REPLACE**. Everything that is on the XML Import Data is preserved, while everything that is not included in the XML Import Data is deleted.
- In the XML import, the key element for each non-catalog item is **CATALOG NUMBER**.
  - If a CATALOG NUMBER is included in the XML import file but not present in the destination, a new non-catalog item will be **CREATED**. The data for the new item will be populated based on the other elements in the XML import file.
  - If a CATALOG NUMBER is included in the XML import file and present in the destination, the existing non-catalog item will be **UPDATED**. The data for the item will be updated to reflect the other elements included in the XML import file. If any elements are present in the destination but not in the XML import file, they will not be changed.
  - If a CATALOG NUMBER is not included in the XML import file but exists in the destination, the existing non-catalog item will be **DELETED**.
- An XML import of non-catalog items has the same validation rules as the currently existing non-XML import. This includes any validations on Dynamic Attributes.

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact third-party integrations.
Supplier Impact
This feature does not impact suppliers.

Ability to Amend Executed: Future Contracts

In the 23.2 release, we are introducing the ability for users to amend contracts that are in the Executed: Future status. This will accommodate situations when a contract needs to be amended after it has been approved and signed but before the Start Date when it will go into effect. Previously, the only way for users to amend contracts in this state was to return the contract to Draft status and resubmit it for approval and signing.

Customer Impact

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

User Impact

- Users can now amend contracts in the Executed: Future status.
- The Amend action can now appear on Executed: Future Amendments, Renewals, and Original versions.

Note: The Amend action will generally only appear when the contract status is Executed: In Effect or Executed: Future AND the contract has no amendment already underway.

- When a Draft amendment goes through workflow and is executed, the previous version (Executed: Future) is changed to Superseded.
- Each Renewal Group—Renewal 0, Renewal 1, etc.—can only have one (1) Active amendment underway at a time. An Active amendment is considered a Draft up until it enters the Executed: Future status.
- The existing Amendment Underway status will now only display if there is an Active
amendment underway for the specific Renewal Group.
- Contract Requests to amend a contract now also show eligible Executed: Future contracts to be selected.

Administrator Impact
This feature does not impact administrators.

Third-Party Integration Impact
This feature does not impact third-party integrations.

Supplier Impact
This feature does not impact suppliers.

Business Analytics - Contract+ Explore Enhancements
With the 23.2 release, the Contracts+ Explore has several new features, including:

- **Contract Adjusted Spend Data** - Manually adjusted spend contained on a contract can now be added to reports. Previously, only actual document spend was available.

- **Sourcing+ Category Tree information** - For customers utilizing Sourcing+ contracts, the Category Tree information is now available in the Contracts+ reports.

- **Contract AI Clause Information** - Contract AI clause analysis and variance score are now available.

- **Contract+ History** - Customers have the audit trail fields available in order to analyze changes that are being made to contracts, such as how many modifications are made, the types of modifications, etc.

**Important Note!** This feature will not be available with UIT. This feature will be released no later than production.
Customer Impact

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

User Impact

This feature does not impact end users.

Administrator Impact

The **Contract** Explore page now has additional information available for analysis. You can hover over each of the fields in the solution to see an explanation:

- **Spend Data**
  - The **Actual Spend by Version** values on the **Budget and Spend** page of the contract provides key information on PR, PO and Invoice contract spend for each version of a contract. Users can manually edit these values. Previously, the contract spend data in Explore reports only included spend that was recorded on an actual document (PR, PO or Invoice). With this release, the contract’s adjusted spend values can also be included in Explore reports.
    - A new grouping **Spend Adjustments** is available in the field picker under the **Contract Spend - Requisition, Contract Spend - Purchase Order**, and **Contract Spend - Invoice** sections. With these new fields, the user can add the spend adjustments on the contract to the existing regular document spend values.
    - Sums will show in the organization’s base default currency and the document currency.

- **Sourcing+ Category Tree Information**
  - The Sourcing+ Category Tree can provide a hierarchy of values for use with contracts.
  - A new **Label Trees** section allows reports to contain fields containing the associated Sourcing+ information for the contract for:
    - **Business Unit Tree** - Code and Description
    - **Category Tree** - Code and Description
    - **Region Tree** - Code and Description

**Note:** This feature only applies to customers utilizing the Sourcing+ solution.
• **Contract AI Information**
  - A new section for **Contract AI Clause Analysis** includes fields to show the relationship between a contract, clauses, and the corresponding variance score.
    - Clause Analysis Score
    - Standard Clause Library Name
    - Standard Clause Name
  - Also, under **Dates and Time Zones** section, new fields for **Clause Analysis Time and Date** are available.

• **Contract History**
  - A new **Contract History** section is available in the Field Picker. Fields exist for the details available when viewing the audit trail on a contract.
  - A new **History Log Time and Date** field is available under the **Dates and Timestamps** section that allows reporting based on a specific date and time.
  - A new **History Log User** field is available under the **Users** section to report on the user information provided in the history of a contract.

**Third-Party Integration Impact**
This feature does not impact any third-party integrations.

**Supplier Impact**
This feature does not impact suppliers.
General Enhancements

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

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

Engage Idea Features Identified in Release Notes

JAGGAER Engage is our method of crowd sourcing product enhancement ideas from customers. Within Engage you can submit ideas, vote on ideas of others, or discuss ideas via comments. The most highly voted ideas are selected for development each release and are now highlighted in the Release Notes with this icon.

JAGGAER Engage is accessible through the JAGGAER Engage tab in the Customer Care Portal. All customers with access to the Customer Care Portal have access to JAGGAER Engage.

Product Release Library and Online Help Updates

The Product Release Library (https://library.jaggaer.com) and online help have has been updated and reorganized to enhance usability.

The Product Release Library (PRL) is where customers and suppliers go to see the latest information about releases such as release notes and videos. The library also contains information about release timelines, recommended browsers, and other helpful information.

Beginning in 23.2:
• Access to release information for each product is now available through a left-hand side menu. Users can select which release they want to view information on, and then access pages for each product under that release.

• Product release notes will also include general platform enhancements, eliminating the need for separate platform release notes documents.

• Overview pages for each release contain content such as release videos, release flyers, and other information when available. From Overview pages, users can also access the Release Notes page, where users can download release notes documents for multiple products at once.

• The Online Help has been updated to match the PRL categories.

Customer Impact

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

User Impact

Product Release Library Updates:  
The Product Release Library has been updated and reorganized to enhance usability:

• Access to release information for each product is now available through a left-hand side menu. Users can select which release they want to view information on, and then access a page for each product under that release.

• Products are organized by solution in the menu. For example, ASO now appears under Sourcing in the menu.

• Product release notes will also include general platform enhancements. Separate platform release notes documents are no longer available.

• From Overview pages, users can also access the Release Notes page, where they can download release notes documents for multiple products at once. Select the desired
release notes documents from the available checkboxes, then click the Download button.

Online Help Updates:

Information in the Online Searchable Help has reorganized to match the PRL categories. On the Home page:

- **Inventory Management** no longer appears as a separate tile. It has been moved to eProcurement. Users can click the eProcurement tile to see Inventory Management articles.

- The **Payments** solution information was previously located under Invoicing. It is now a separate section that can be accessed from a tile on the Home page.
Administrator Impact
This feature does not impact any third-party integrations.

Third-Party Integration Impact
This feature does not impact any third-party integrations.

Supplier Impact
- These changes also impact suppliers who access the Product Release Library.
User Profile First and Last Name Character Limit Expanded

With this release, the First Name and Last Name in the user profile can now accept up to 128 characters. This enhancement allows for harmonization of the user first and last name across all JAGGAER solutions.

Customer Impact

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

User Impact

- Users can now enter up to 128 characters for the First Name and Last Name fields in the user profile ( > View My Profile).

Administrator Impact

- When adding or modifying users, the user first and last name fields now accept up to 128 characters.
- When importing users via the Delimited User Import or XML User Import process, the first and last name fields now accept up to 128 characters.
Third-Party Integration Impact

- Any validations or imports that contain the user's first and last name now accept up to 128 characters.

Supplier Impact

- Supplier users have the same field limit for user First Name and Last Name.

Internet Explorer Browser No Longer Supported for JAGGAER Solutions

In response to Microsoft’s plan to retire Internet Explorer and replace it with Microsoft Edge, JAGGAER ended support for Internet Explorer in 2022. At that time, users could continue to log in to the application using IE, but would see a warning that the browser was not supported by JAGGAER and they may face some issues. With this release, buyer/supplier users can no longer login to JAGGAER application using the IE browser.

**Note:** After providing the credentials, users will receive a warning message to use a different browser if the browser in use is not supported by JAGGAER.

What do you need to do?

All customers should work to ensure that end users are no longer using Internet Explorer when accessing JAGGAER solutions. JAGGAER currently supports the following browsers:

<table>
<thead>
<tr>
<th>Platform</th>
<th>Browser Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>Edge - latest version</td>
</tr>
<tr>
<td></td>
<td>Chrome - latest version - automatically updated by Google</td>
</tr>
<tr>
<td></td>
<td>Firefox ESR - latest version - automatically updated by Mozilla</td>
</tr>
<tr>
<td>Macintosh</td>
<td>Safari latest version</td>
</tr>
<tr>
<td></td>
<td>Firefox - latest version - automatically updated by Mozilla</td>
</tr>
</tbody>
</table>

Ending support for Internet Explorer is driven by Microsoft with the expectation that your organization will begin using Microsoft Edge instead.
Customer Impact

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

User Impact

- Buyer users cannot login to JAGGAER application if they use Internet Explorer browser. Buyers will receive a warning message to use a different browser.

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

- Supplier users cannot login to JAGGAER application if they use Internet Explorer browser. Suppliers will receive a warning message to upgrade or use a different browser.

Introduction to Buyer Identity Management (IDM)

JAGGAER Buyer Identity Management (Buyer IDM) is an improved authentication and login experience for JAGGAER ONE customer users. Buyer IDM ensures that a buyer user is uniquely identified and authorized to access and navigate across JAGGAER’s solutions and customer application landscape. When a user is created in the selected JAGGAER ONE solution for User Management, the user will be created in Buyer IDM and synchronized across all JAGGAER ONE solutions. The user can then access and navigate across all the JAGGAER ONE applications according to their organization’s licenses and user permissions. Customers can choose to activate one of the following Buyer IDM modes:
• **Buyer IDM Modes - Internal Identity Provider (IDP)**

  • The authentication process is managed by JAGGAER within the Buyer IDM and the JAGGAER solutions.

  • The Internal authentication leverages the **Username** as a key.

  • Users access solutions from the **Buyer IDM** login page.

  • The JAGGAER Buyer IDM functionalities are enabled (MFA, Notifications, etc.).

• **Buyer IDM Modes - External Identity Provider (IDP)**

  • The authentication passes through the customer’s identity providers.

  • The external authentication leverages the **Username** as a key.

  • JAGGAER Buyer IDM functionalities are disabled (MFA, Notifications, etc...).

  • The authentication process is fully managed with **External IDP** capabilities while the Buyer IDM manages the internal authorization.

  • Users can be automatically redirected to the **Customer IDP** login page without passing through the JAGGAER login page.

• **Buyer IDM Modes - Mixed Identity Providers**

  • The authentication can be done both **internally** with **Buyer IDM** or **externally** with one or multiple **Customer IDPs**.

  • All the IDPs configured will be available to users on the JAGGAER login page and users can choose which one to access.

  • For users who access the platform using **Internal IDP**, customers can leverage Buyer IDM functionalities. In case of **External IDP**, users will be redirected to the IDP login page.

**Customer Impact**

• Related Solutions: All Solutions

• Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER.

• New User RightsPermissions related to this feature: None

• New Notifications related to this feature: **Yes - Buyer IDM Notifications (Only For Internal IDP)**
User Impact

- If Buyer IDM is enabled for an organization, users will experience a different login page depending on the organization’s configuration:
  
  - **Internal:**
    - Buyers receive a notification including a link to update their password.
    - Unless the password is updated, buyers cannot login to JAGGAER application.
    - Once the password is updated, users will login through the JAGGAER IDM page.

  
  - **External:**
    - Buyers will initially access the IDM login page. When “Internal Access” is selected, the user will login to the JAGGAER application through the customer’s External login page. **Note:** In this mode, notifications will not be sent to update the password and users are not forced to update their credentials.
    - Once the credentials are entered, users will then be logged into the JAGGAER application.
• **Mixed:**

  ◦ The login screen allows the buyer user to choose to login through the JAGGAER IDM page (internally) or the customer’s login page (externally).

  ◦ To log in directly through the JAGGAER IDM page, the user enters the username and password. For this method, the user must first update the password to establish the Buyer IDM identity.

  ◦ To log in via the company’s external login provider, select the appropriate sign in option and proceed with login. In this case, the user is not required to update the password.
Login With Multi-Factor Authentication (MFA):

- MFA will leverage on both *Google Authenticator* or *FreeOTP* Mobile apps.

- MFA can be activated ONLY in case of *Internal IDP* configuration or *Mixed IP* (internal option).
Notifications:

- In case of "Internal IDP" configuration, the **Buyer IDM** will send notifications to users as follows:
  
  - New Account Created.
  
  - Update Password (expiration link = 12 hours).
  
  - Reset Password Requested (expiration link = 45 minutes).

Default Password Policies:
Buyer users must comply with the following password policy (unless otherwise configured by the organization):

- Minimum length 8.
- Must contain at least 1 special character.
- Must contain at least 1 numerical digit.
- Must contain at least 1 lower case letter.
- Must contain at least 1 upper case letter.
- Must not be equal to the last 3 passwords.
- Must be different from the Username.

**Note:** The password policy can be customized. Please contact JAGGAER to request the customization.

**Locked Credentials:**

- Buyer users will be blocked for 15 minutes if they fail to enter correct credentials for five consecutive times. Once the 15 minutes is passed, the buyer user can again attempt to log in. **Note:** The number of attempts and the duration that a user is temporarily blocked may vary depending on the organization’s configuration.

**Localization:**

- Buyer IDM supports localization for both UI and Notifications for all J1 Supported Languages following the main language selected by the User.

**Administrator Impact**

This feature does not impact administrators.

**Third-Party Integration Impact**

This feature does not impact any third-party integrations.

**Supplier Impact**

This feature does not impact suppliers.
Supplier Search - New Experience View

JAGGAER has updated the search experience for various documents over past releases. With the 23.2 release, we are introducing a new experience view for supplier search. In order to solicit feedback about the new experience, and give organizations an opportunity to test it, we have made this Beta version available for users with "Early Access Participation" enabled.

The new user interface provides a consistent, modern, end-to-end experience for users with easier access to important functions, enhancing the user experience. Based on the devices being used, desktop, tablet or mobile - the new responsive layout also offers adaptive display sizes for user convenience.

Users will see the supplier search page in the new experience view as follows:

- The new supplier search view is displayed by default for organizations with Early Access enabled.
- A new Choose Your Experience toggle at the bottom-right of the screen allows users to switch between the new and classic views at any time.
- Click the What's Beta (What's beta?) icon at the top of the page for general information about the Beta version.
- As you utilize the new experience view, we would value your feedback. Click the Got Feedback? at the top of the page to send a screenshot and comments.

Some search features are not yet available in the new search experience. Also, some areas of the solution may navigate to the previous supplier search interface. Features that are standard with the current supplier search and other enhancements will be added in future releases.

Customer Impact

- Related Solutions: All Solutions
- Feature Activation: This feature is OFF by default. It is ON by default for users with Enable new search experience set to Yes.
- New Permissions related to this feature: None
- New Notifications related to this feature: None
User Impact

A Beta version for an enhanced supplier search view is available that allows for a simplified search process and management of the search results. A user must have the **Enable new search experience** setting enabled in the user profile to toggle between new and classic view.

The Supplier Search Enhanced View

Previously, when navigating to **Suppliers > Manage Suppliers > Search for a Supplier**, a search box allowed for the user to enter criteria to return search results. Selecting “Advanced Search” displayed additional search options. With the enhanced view, the **Search for a Supplier** page displays suppliers who have been modified within the last 90 days by default.

Other features include:

- **Quick Search**
  1. Enter a supplier name or number in the **Quick search** field.
  2. Click the search icon ![search icon](image). Matching suppliers are returned in the search results.

- **Advanced Search** - Use the filter options to perform a more specific search.
  1. Click the **Add Filter** button (located to the right of the **Quick search** field). A list of available filters displays. **Note:** These filter options are the same options that display on the current Advanced Search page.
  2. You can search for a specific filter by entering a value in the field. The list of filters will be refined and only matching filters display.
  3. Click the checkbox for the appropriate filter. Configuration options display. For example, if you choose **Status**, an overlay displays from which you can select the appropriate status values. **Important:** When there are many options, a list of “suggested” values displays with the configuration overlay. To choose a value that is not in **Suggested** list, enter a value in the search field.
4. When you have made the appropriate configurations to the filter, select the 
*Apply* button. The search results are refined to reflect the filter. The filter 
displays above the search results. Click the ✗ to remove the filter.

5. Repeat the steps above to add additional filters. The search results update to 
reflect the new filters.

- **Configuring Search Results Columns** - You have the ability to choose the columns that 
display in the search results and the order in which they display.

  1. On the *Search Results* page, click the ✉ located on the right, above the 
supplier list. The *Configure Column Display* screen displays. A list of all 
available columns displays on the left, and a list of selected columns displays 
on the right, where you can sort the order in which they display on the search 
results page.

  2. Follow the steps below to add columns:

     a. Locate the column(s) in the list. You can scroll through the list or enter a 
value in the search field to search for a column.

     b. Click the checkbox for each column you would like to add. The columns 
are automatically added to the bottom of the selected columns list on 
the right. See the next step for information about sorting the list.

  3. Manage the selected columns list.

     - To sort an item in the list, you can drag the columns to the selected 
location or use the ↑ ↓ to move the columns up and down.

     - To delete a column from the selected list, click the 🗑.

  4. By default, the updated selected and sorted columns only display for the life 
of the current search.

  - **Best Practice!** If you would like to keep the column configuration for all 
searches going forward, select the *Pin Columns* option from the dropdown.

  5. Click *Apply*.

- **Taking Action from Search Results** - You can choose to take appropriate actions (per 
user permissions) for the supplier using the action ellipses at the beginning of each search 
result or at the header row for multiple results. The actions for each supplier and process 
for completing those actions are unchanged.

  - To take action on a single row:

    1. Click the ellipses at the beginning of the row. The appropriate actions for the 
supplier will display as hover text.

    2. Select the appropriate option and follow the instructions.

  - To take action on multiple rows:

    1. Click the ellipses at the beginning of the header row.

    2. Click *Show Multiple Selection*. Check boxes are now displayed in the header 
row and for each row.
3. Select the appropriate boxes. If the header row checkbox is selected, all results on the page are selected.
4. Once selections are made, click the ellipses in the header row again. The appropriate actions for the supplier will display as hover text.
5. Select the appropriate option and follow the instructions.

- An Expand/Collapse button beside the Search Suppliers header allows you to view or hide the Quick Filters and My Searches panels on the left. Select again to hide.

- Quick Filters - This area displays filters available to further refine search results. As with other search results pages, simply select or deselect options from the filter list to refine results. You can continue to use the Add Filter dropdown above search results, which will update the Quick Filters information.

- Save searches by selecting the Save As dropdown at the top of the page.

- You can choose to manage searches from the My Searches tab on the left. You can also select the Manage Searches option from the Save As button dropdown to navigate to the Manage Searches page.
• You can choose to Pin Filters and Pin Columns from the dropdown when you use the same filters and column layout for searches, so you do not have to reapply filters and rearrange columns each time.

• The Export options are contained in the dropdown above search results. Options to Export All or Export Selected Rows are available. Use the multi select ellipses on the left, if necessary, to enable the selection boxes for each row (existing functionality). You can then choose rows to export if appropriate, choosing the Export Selected Rows option. The functions of the remaining options are unchanged. You can also choose to navigate to search exports and scheduled exports from the dropdown.

Administrator Impact

• A user must have the Enable new search experience set to Yes at the user or role level (user profile > User Profile and Preferences > Early Access Participation) to view the new search and have the toggle present on the supplier search page. If the Enable new search experience is set to No, the previous search interface appears and the toggle is not present.
**Third-Party Integration Impact**

This feature does not impact any third-party integrations.

**Supplier Impact**

This feature does not impact suppliers.

**Business Analytics - Supplier Fulfillment Center Data Added to Explore Reports**

Many suppliers operate from multiple fulfillment centers, and information about the fulfillment center is contained in the supplier profile. Custom data can also be added to fulfillment centers. With the 23.2 release, supplier fulfillment center information, including custom data, has been added to the Supplier Explore.

**Important Note!** This feature will not be available with UIT. This feature will be released no later than production.

**Customer Impact**

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

**User Impact**

This feature does not impact end users.

**Administrator Impact**

- The Supplier Explore contains information for supplier fulfillment centers as provided in the supplier profile (selected supplier > Contacts and Locations > Fulfillment Centers). Hover over each field in the field picker to see an explanation. Some fields to be included are:
• Is Default Configuration?
• Fulfillment Center Name
• Active Fulfillment Address ID
• Fulfillment Center Address ID
• Fulfillment Center 3rd Party Address ID
• Fulfillment Center Active status
• Buying Unit Association
• Contact ID, Contact 3rd Party ID and Contact Name for the user associated to the fulfillment center
• Custom data associated with the Fulfillment Center

**Third-Party Integration Impact**

This feature does not impact any third-party integrations.

**Supplier Impact**

This feature does not impact suppliers.

**Supplier IDM - Phased Activation of Multi-Factor Authentication For Suppliers**

Starting with the 23.2 release, JAGGAER implements the phased activation of the Multi-Factor Authentication (MFA) for Suppliers. Supplier users will be notified via the UI prior to the MFA activation, including:

• Explanation and Benefits of MFA
• Timeline of MFA Activation
• Request to update email that is used as username in IDM and as second factor for the authentication.
Note: All new supplier users in Supplier IDM will be automatically authenticated with MFA. For all other existing supplier users, the MFA activation will be in batch process.

Customer Impact

- Related Solutions: All Solutions
- Feature Activation: This feature is ON by default when Supplier IDM is enabled. Contact JAGGAER if you want to enable the Supplier IDM.
- New User Rights/Permissions related to this feature: None
- New Notifications related to this feature: Yes - One-Time-Password (OTP)

User Impact

This feature does not impact end users.

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

- If Multi-Factor Authentication (MFA) is activated for a supplier user, the user will be notified (as explained above). Supplier user will be recommended to update his email (in the user profile section) that is used as username in IDM and as second factor for the authentication.
  - A new message in the login area is displayed for supplier users (before login) until MFA is activated for all users. There is a link in the message that redirects supplier users to a new page explaining what MFA is and what would be the impact.
- If Multi-Factor Authentication (MFA) is NOT activated for a supplier user, a message is displayed on the screen after logging to the application indicating the MFA activation Date for the current user. There is a link in the message that redirects supplier users to a new
Supplier IDM - Updates To Password Security Rules for Suppliers

With the 23.2 release, the Password Security Rules are updated for supplier users including:

- Mix of uppercase and lowercase characters (at least 1 from each)
- Minimum of 12 characters (as opposed to 8 previously)
- Password must be different from the 12 previous passwords (as opposed to 3 previously)

Note: This is only applied to supplier users who already use the JAGGAER Supplier IDM. Supplier users will only be required to change their password at the time of the password expiry.

Customer Impact

- Related Solutions: All Solutions
- Feature Activation: This feature is ON by default when Supplier IDM is enabled. Contact JAGGAER if you want to enable the Supplier IDM.
- New User RightsPermissions related to this feature: None
- New Notifications related to this feature: None

User Impact

This feature does not impact end users.
Administrator Impact
This feature does not impact administrators.

Third-Party Integration Impact
This feature does not impact any third-party integrations.

Supplier Impact
- The password security policy is updated as follows:
  - Minimum of 12 characters
  - Minimum of 1 uppercase characters
  - Minimum of 1 lowercase characters
  - Minimum of 1 special character
  - Minimum of 1 number
  - Email must be different from Password
  - Password must not be equal to any of the last 12 passwords
  - Password expires after 90 days
- Supplier users will only be required to change their password at the time of the password expiry.

Supplier IDM - Additional Supported Languages
With this release, the Supplier IDM is now enhanced to support five languages including:
Customer Impact

- Related Solutions: All Solutions
- Feature Activation: This feature is **ON** by default when Supplier IDM is enabled. Contact JAGGAER if you want to enable the Supplier IDM.
- New User RightsPermissions related to this feature: None
- New Notifications related to this feature: None

User Impact

This feature does not impact end users.

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

- Supplier users can now choose any of the following languages before or after authentication via JAGGAER Supplier IDM:
  - German
  - English
- Italian
- French
- Spanish