



23.2 Release Notes

For eProcurement Enhancements

Version 1.2

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23.2 Release Notes Revision History

Version	Date	Description
1.0	June 19, 2023	<p>Initial Version</p> <p>The following eProcurement and Advise feature has been updated since the Preview release:</p> <ul style="list-style-type: none"> • Introduction of Intelligent Commodity Code Recommendations has been renamed Introduction of AI-based Commodity Code Selection Recommendations. <p>The following General features have been added since the Preview Release:</p> <ul style="list-style-type: none"> • 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 23, 2023	<p>The following eProcurement features have been updated since the UIT release:</p> <ul style="list-style-type: none"> • New Warning for Duplicate Items in Cart • New Experience View Enhancements
1.2	June 28, 2023	<p>The following eProcurement feature has been updated since the UIT release:</p> <ul style="list-style-type: none"> • Introduction of AI-based Commodity Code Selection Recommendations

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 **eProcurement** 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 of the Online Searchable help for credentials.

This document will help you:

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

eProcurement Enhancements

The features listed in this section apply to the JAGGAER ONE eProcurement solution.

Shopping and Ordering

The following enhancements have been made to Shopping and Ordering in the JAGGAER ONE eProcurement solution.

Ability to Return a Document to a Previous Workflow Step



When approving a document, the workflow approval process moves forward through approval steps configured by each organization. Users with the appropriate permission can skip future workflow steps by expediting them. However, until now, if users wanted to return to a prior step in the workflow, they had to return the document to Draft status and resubmit into the approval workflow.

In this release we have added the ability to return a document to a previous workflow step that a user selects. This new option is available for the **Requisition, Purchase Order, Invoice, Receipt, Form Request, Budget Manager, Sourcing** and **Payment** workflow types in this release, with plans to expand the feature to additional workflow types in future releases.

Important! In some cases, repeating automated or integration-based workflow steps can have unintended consequences. To mitigate any potential issues with this new feature and your existing workflow, a services engagement will be required to perform a detailed review of the target workflow and identify any adjustments needed to ensure the best possible implementation and execution of the functionality. Please contact your JAGGAER representative to preview this feature in your test environment or for more information concerning implementation.

Customer Impact

- Related Solutions: eProcurement, Invoicing, Payments, Sourcing,
- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER. Administrator setup is also required.
- New Permissions related to this feature: These permissions are displayed when the Revert Workflow setting for the associated workflow type is enabled:
 - **Revert Requisition Workflow** (Permission Settings > Approvals > Requisition Approvals) - Users with the permission can revert a workflow approval step in the Requisition Workflow.
 - **Revert Purchase Order Workflow** (Permission Settings > Approvals > Purchase Order Approvals) - Users with the permission can revert a workflow approval step in the Purchase Order Workflow.
 - **Revert Invoice Workflow** (Permission Settings > Approvals > Invoice Approvals) - Users with the permission can revert a workflow approval step in the Invoice Workflow.
 - **Revert Receipt Workflow** (Permission Settings > Approvals > Receipt Approvals) - Users with the permission can revert a workflow approval step in the Receipt Workflow.
 - **Revert Form Request Workflow** (Permission Settings > Approvals > Form Request Approvals) - Users with the permission can revert a workflow approval step in the Form Request Workflow.

CAUTION! This permission will allow a user to revert ANY form request workflow regardless of the type (i.e., Supplier Requests, Contract Requests, Generic Requests, Check Requests, etc.).

- **Revert Sourcing Event Workflow** (Permission Settings > Approvals > Sourcing Event Approvals) - Users with the permission can revert a workflow approval step in the Sourcing Event Workflow.
- **Revert Sourcing Event - Evaluation Workflow** (Permission Settings > Approvals > Sourcing Event - Evaluation Approvals) - Users with the permission can revert a workflow approval step in the Sourcing Event - Evaluation Workflow.

- **Revert Budget Manager Workflow** (Permission Settings > Approvals > Budget Manager Approvals) - Users with the permission can revert a workflow approval step in the Budget Manager Workflow.
- **Revert Payment Workflow** (Permission Settings > Approvals > Payment Approvals) - Users with the permission can revert a workflow approval step in the Payment Workflow.
- New Notifications related to this feature: None

User Impact

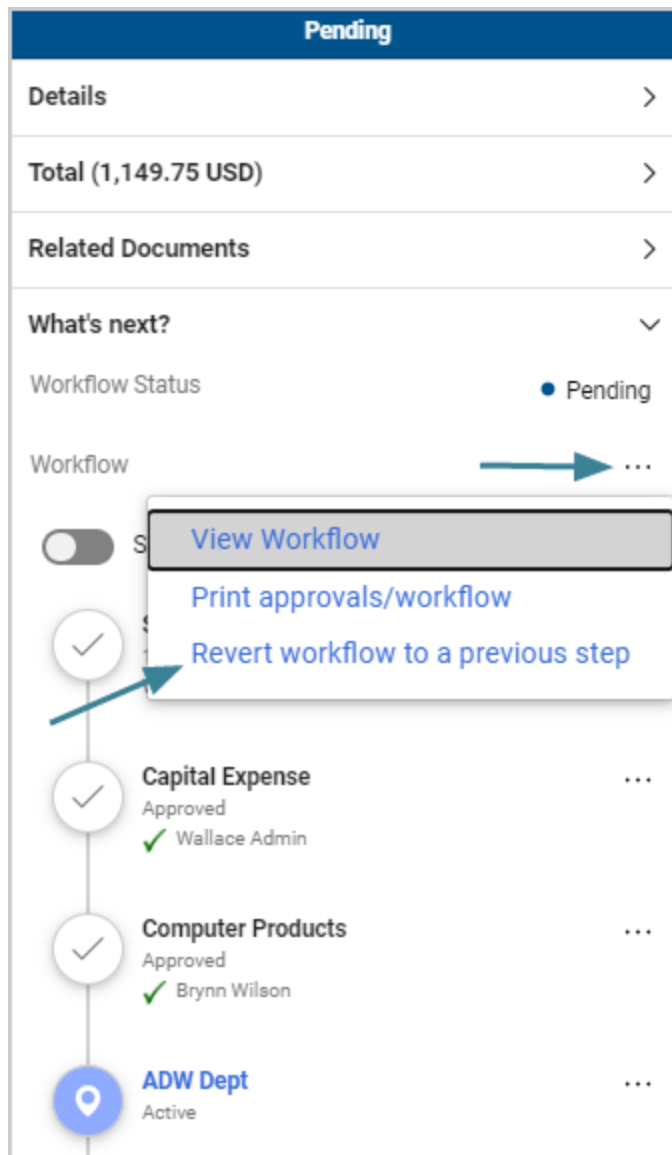
A new **Revert workflow to a previous step** action allows users to return a document to a previous workflow step.

- Similar to the Expedite functionality, care should be taken when granting this capability to users as it may require in-depth knowledge of the workflow process depending on how it is implemented.
- Revert Workflow options are not available for documents in Draft or Completed status, or if an automated step process is pending.

Revert a Workflow Step

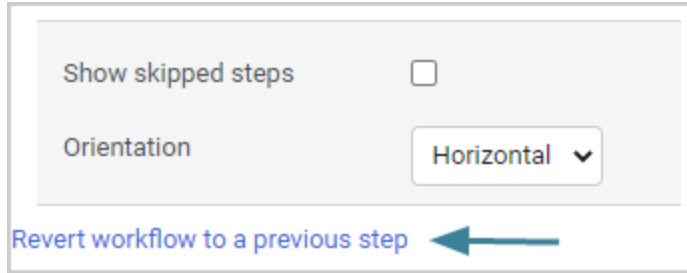
If an organization has enabled the Revert Workflow feature for a document workflow type, users with permission to revert workflow approval steps can do so as follows.

1. Open the document.
2. Select the Revert Workflow action:
 - *New experience view* - In the right sidebar, under **What's next?**, click the actions icon ******* next to **Workflow** and select **Revert workflow to a previous step**.

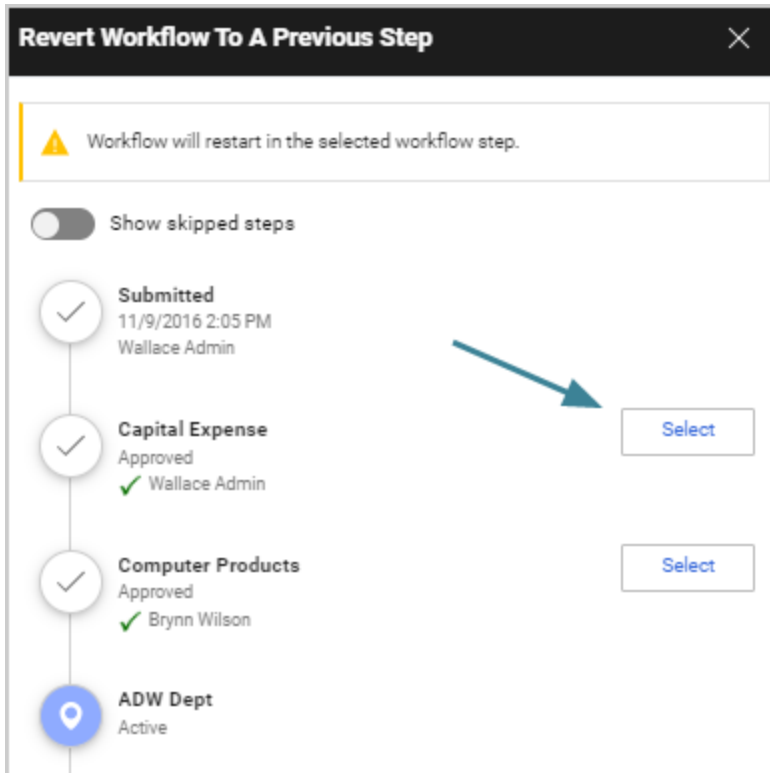


Note: In the new experience view, workflow settings under **What's next?** in the right sidebar have been updated. The view and print icons that were displayed next to **Workflow** have been replaced with an actions icon *** that users can click to access the options in a drop-down menu.

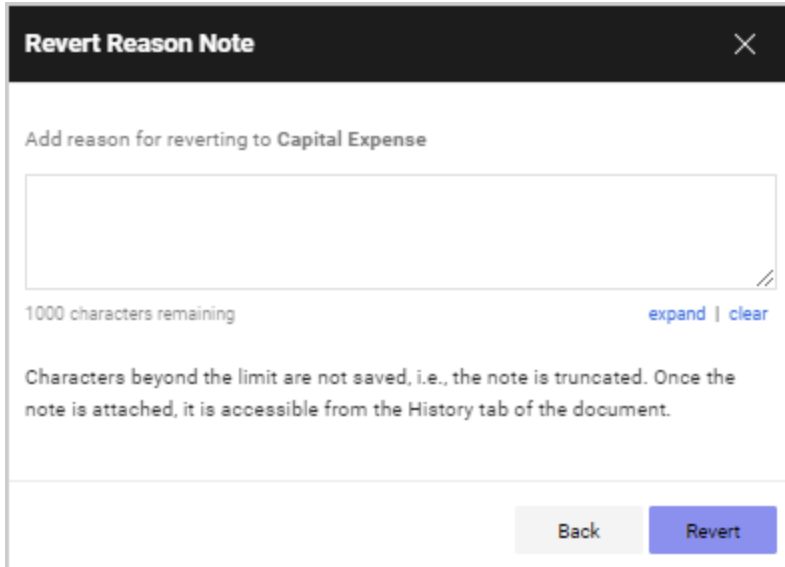
- *Legacy view (for any document showing the legacy view, such as Forms or Sourcing) -* Click the **Revert workflow to a previous step** link.



3. In the pop-up window, click the **Select** button next to the workflow step that you want to revert TO.



4. Enter a reason for reverting the step (required) and click **Revert**.



Revert Reason Note

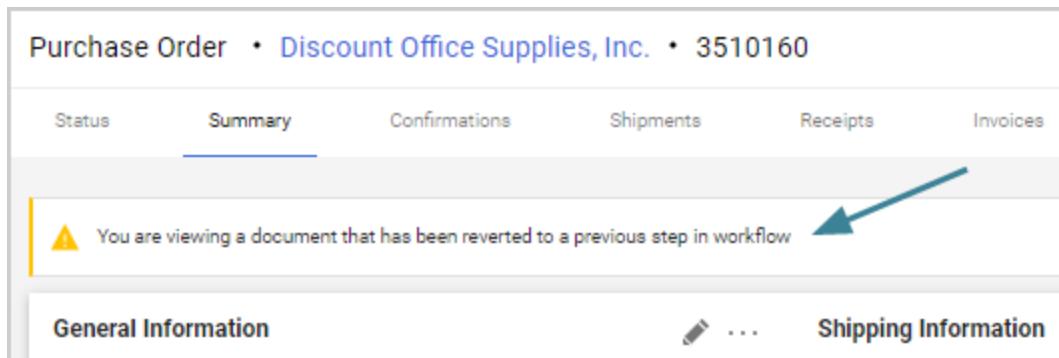
Add reason for reverting to **Capital Expense**

1000 characters remaining [expand](#) | [clear](#)

Characters beyond the limit are not saved, i.e., the note is truncated. Once the note is attached, it is accessible from the History tab of the document.

[Back](#) [Revert](#)

5. The document returns to the selected workflow step, which now becomes the active step in workflow. Once the **Revert** button is clicked:
- The Revert Workflow action is recorded in the History along with the reason.
 - The workflow is re-calculated and any previously approved steps, including the newly active step, are reset. All previous approvals are cleared and the steps will require approval again (although all previous approvers of a workflow step are still recorded in the History).
 - Emails and notifications will be re-sent where applicable.
 - A notification near the top of a document indicates that it has been reverted to a previous workflow step.



Purchase Order • Discount Office Supplies, Inc. • 3510160

Status **Summary** Confirmations Shipments Receipts Invoices

⚠ You are viewing a document that has been reverted to a previous step in workflow

General Information **Shipping Information**

- The **Revert** workflow action affects different types of workflow steps as follows:
 - **Parallel workflow steps** - Users can revert back to any parallel step. This will cause ONLY the selected step to become active, while all other parallel steps will remain in their current state (approved, bypassed, skipped). **Users need to repeat the Revert Workflow action for EACH parallel step that they want to make active.**
 - **Ad-hoc workflow steps** - Users can revert back to an ad hoc step. The step will become active and the approver that was previously selected for the ad-hoc step will need to approve it again. This is also true if workflow is reverted to a step *before* an ad-hoc step - the ad-hoc step will be reset and the approver who was previously selected will need to approve the step.
 - **Skipped steps** - Since workflow is re-calculated, skipped steps are reset. Previously skipped steps are displayed or hidden as if entering the initial workflow.









Administrator Impact


- A new **Revert workflow to a previous step** action allows users to return a document to a previous workflow step that a user selects. Enable the feature as follows.
 1. **Contact JAGGAER to enable this feature** for your workflow type(s).

Important! In some cases, repeating automated or integration-based workflow steps can have unintended consequences. To mitigate any potential issues with this new feature and your existing workflow, a services engagement will be required to perform a detailed review of the target workflow and identify any adjustments needed to ensure the best possible implementation and execution of the functionality. Please contact your JAGGAER representative to preview this feature in your test environment or for more information concerning implementation.

- This feature is available for the **Requisition, Purchase Order, Invoice, Receipt, Form Request, Budget Manager, Sourcing** and **Payment** workflow types with the 23.2 release, with plans to expand the feature to additional workflow types in future releases.
- Since reverting workflow to previous steps can have an adverse impact on integrations, there may be a point in the workflow that the revert action should no longer be an option. To mitigate these risks, JAGGAER has the

ability to add flags to workflow steps. These flags will prevent steps from being reverted to or reverted from.

- This feature is not available for the mobile app.
2. **Update user permissions** - Once the Revert Workflow setting is enabled for a workflow type, the corresponding Revert Workflow permission is displayed, and it allows users to return to a previous workflow step. Administrators can assign the Revert Workflow permissions to user roles or user profiles as follows:
- a. Open the user role or user profile:
 - *User roles* - Navigate to **Setup**  > **Organization Structure and Settings > Manage User Roles** and select the **user role** to update.
 - *User profiles* - Navigate to **Administer**  > **Manage Users > Search for Users** and select the **user profile** to update.
 - b. In the left menu, select **Permissions** (for user roles) or **Permission Settings** (for user profiles), then **Approvals**.
 - c. In the right panel, enable the **Revert Workflow** permission under the sub-heading for the workflow type. For example, under **Requisition Approvals**, enable **Revert Requisition Workflow**.
- These **Cycle Time Reports** will now reflect the total time the document is in workflow including steps repeated due to a revert action:
 - Reporting  > Operational and Site Usage Reports > Cycle Time Reports > Time from PR submission to PR completion.
 - Reporting  > Operational and Site Usage Reports > Cycle Time Reports > Time from PR submission to original PO revision.
 - Reporting  > Operational and Site Usage Reports > Cycle Time Reports > Time from PR submission to last PO revision.
 - Reporting  > Operational and Site Usage Reports > Cycle Time Reports > Time from PR submission to Invoice Export.
 - Reporting  > Operational and Site Usage Reports > Cycle Time Reports > Time from Invoice Create to Invoice Export.
 - Reporting  > Operational and Site Usage Reports > Cycle Time Reports > Time from Invoice Submission to Invoice Export.

- Accounts Payable  > Reports > Cycle Time - Invoice Workflow > Cycle Time - Invoice Workflow.
- Accounts Payable  > Reports > Cycle Time - Exports.
- Sourcing  > Reports > Cycle Time Summary.
- Business Analytics reports have not been updated to include the new Revert Workflow action at this time. This is planned for a future release.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Warning for Duplicate Items in Cart

In 23.2, a new validation for carts can be enabled to notify users if an item in their cart has recently been ordered, preventing users from potentially ordering duplicate items.

When a user is viewing their order at checkout, the system will check if an item on the current order, with the same department or custom field, has recently been ordered. If there are potential duplicates, a warning will be displayed, and users can view details of the potential duplicate item in a pop-up window. This feature is also supported on the mobile app.

Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator.
- New Permissions related to this feature:
 - **View Warnings for Potential Duplicate Items** (Permission Settings > Shopping, Carts & Requisitions) - Users with this permission will see a warning at checkout if an item they have selected has been recently ordered by another user. This permission is only displayed if the **Duplicate Item Warning Settings** feature is enabled (under Setup > General Site Settings > System Settings and Configuration).

User Impact

- If **Duplicate Item Warnings** have been enabled for an organization, and a user has the appropriate permissions:
 - The system will check if an item on the current order has recently been ordered. The system will search for hosted, contract non-catalog and punch-out items with the same department or custom field, that have been ordered within a specified time period based on settings configured by the organization.
 - If there are potential duplicates, a warning is displayed on the draft requisition during checkout.
 - Users can click a line number in the warning to view details of the duplicate item in a pop-up window.


The screenshot displays a requisition draft for requisition number 4175845. The main table lists one item: 'Exclaim! Pen-Style Chisel Tip Highlighter, Yellow Ink' with a unit price of 11.88 and a quantity of 1. A warning box on the right side of the screen, titled 'Draft', contains a yellow triangle icon and the text 'Potential item duplicates. You may review and proceed.' Below this, it says 'Potential Duplicates: Line 1' with a blue arrow pointing to the item line. At the bottom of the warning box, there are two buttons: 'Total (11.88 USD)' and 'What's next for my order?'.

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 Exclaim! Pen-Style Chisel Tip Highlighter, Yellow Ink	CEB51222 (DZ)	12 DZ	11.88	1 DZ	11.88

Administrator Impact

- A new **Duplicate Item Warnings Settings** validation can be enabled to notify users if an item in their carts has recently been ordered, preventing users from potentially ordering duplicate items.
 - The validation is displayed by line number. Users can click a line number in the warning to view details of the duplicate item in a pop-up window.
 - Organizations can choose whether the system will search for duplicate items by department or by a custom field. They can also choose the time period within which the system will look for duplicates.



- The duplicate warnings will trigger for hosted, contract non-catalog and punch-out items.
 - The system will search requisitions that have reached Pending and Completed status within the number of days specified on the configuration. Withdrawn, returned and rejected requisitions will not be considered as potential duplicates.
 - This feature is supported on the mobile app with slight modifications (i.e., clickable links are not available on mobile).
- **Enable the feature** as follows. The System Configuration permission is needed to perform this task:

1. Navigate to **Setup**  > **General Site Settings > System Settings and Configuration**.
2. Expand the **Duplicate Item Warnings Settings** section and complete these fields:
 - **Enabled** - This setting is off by default. Select the radio button to activate the feature. If enabled, users will be notified if an item they have added to their carts matches an item that has recently been ordered.
 - **Days** - Enter a number that represents the number of days prior to the current date that the system will check for duplicates. The default value is 7 days. This can be changed to a numeric value between 1 and 365 days.
3. Select the criteria that the system will use to check for duplicates by enabling **ONE** of the following options - it must be either Departments OR Custom Fields. A warning is displayed if the setting is enabled without duplicate criteria selected.
 - **Departments** - This setting is off by default. Select this option to have the system search for duplicate items by department.

Note: This option is not displayed if your organization does not use department or role relationships. Contact JAGGAER if you wish to enable these settings for your organization.

- **Custom Field** - This setting is off by default. Select this option to have the system search for duplicate items by custom field. If this option is selected, a drop-down menu listing active custom fields for your organization is displayed. Select a single custom field for the duplicate comparison.

4. Update user permissions:

- a. Open the user role or user profile:
 - *User roles* - Navigate to **Setup**  > **Organization Structure and Settings > Manage User Roles** and select the **user role** to update.
 - *User profiles* - Navigate to **Administer**  > **Manage Users > Search for Users** and select the **user profile** to update.
- b. In the left menu, select **Permissions** (for user roles) or **Permission Settings** (for user profiles), then **Shopping, Carts & Requisitions**.
- c. In the right panel, under the **Cart/Requisition** sub-heading, enable the **View Warnings for Potential Duplicate Items** permission. Users with this permission will see a validation warning at checkout if an item they have selected has been ordered by another user within the duplicate criteria defined by the organization.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

PO Clause Rules

Engage Idea



PO clauses configured at the organization level are inherited by all requisitions, but until now, if PO clauses needed to be attached to a document based on data specific to each record, users needed to add or remove clauses manually on individual documents.

In 23.2, new **PO Clause Rules** allow customers to configure rules so that the system will automatically attach PO clauses to documents based on criteria set by the organization.


Customer Impact

- Related Solutions: eProcurement
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

- If **PO Clause Rules** have been enabled for an organization, the PO clauses added by rules can be seen on documents by opening links in the **PO Clauses** field, which can be displayed in the document header, on line items, or in the Supplier Details section (this is configured by the organization).



Note: On requisitions, an information icon  is displayed and indicates that the clause count in this field may not include clauses that may be applied due to clause rules. On purchase orders, the clause count includes clauses applied due to clause rules and the icon is not displayed.

- Click the **View details** link to see PO clauses that have been added by a rule. Clauses added by organization default settings are listed first, then PO clauses added by a rule, followed by clauses that have been added manually.

No.	Name	Text	
0001	Privacy Standards	This Purchase Order is issued in accordance with the following privacy standards: a) Health Insurance Portability and Accountability Act of 1996 (Public Law 104-191), also known as HIPAA, and b) Family Educational Rights and Privacy Act of 1974 (20 U.S.C. § 1232g; 34 CFR Part 99), also known as FERPA.	Inherited - Org
1201	Assignment	Supplier shall not assign this Purchase Order or any interest therein without prior written consent of TRITON.	PO Clause Rule
1101	Payment Terms	Net 30 days from delivery and acceptance by TRITON of merchandise and Supplier's true and correct invoice. All invoices must separate taxable costs from non-taxable costs. Invoices not in compliance may be rejected. For merchandise requiring installation, Payment Terms are Net 30 days from delivery and installation of merchandise and acceptance by TRITON of merchandise and installat...	Manual

[Show more](#)

- Click the **Edit** link to add or remove a clause.
 - *On requisitions*, PO clauses added by rules cannot be removed.
 - *On purchase orders*, all clauses on purchase orders can be edited while the purchase order is in the approval workflow, including clauses added by a rule. They cannot be changed once a purchase order is complete.


No.	Name	Text	<input type="checkbox"/>
1201	Assignment	Supplier shall not assign this Purchase Order or any interest therein without prior written consent of TRITON.	PO Clause Rule
0001	Privacy Standards	This Purchase Order is issued in accordance with the following privacy standards: a) Health Insurance Portability and Accountability Act of 1996 (Public Law 104-191), also known as HIPAA, and b) Family Educational Rights and Privacy Act of 1974 (20 U.S.C. § 1232g; 34 CFR Part 99), also known as FERPA.	✓
101	Entire Agreement	This order is for the purchase and sale of goods and/or services described on this order and any attachments hereto. Acknowledgment hereof by Supplier, as set forth on page one herein to The Triton Organization (TRITON) shall constitute Supplier's acceptance of such order. In the absence of such acknowledgement, commencement of delivery of the goods and/or services and acceptance of s...	<input type="checkbox"/>

[Show more](#)

Administrator Impact

New **PO Clause Rules** allow customers to configure rules so that the system will automatically attach PO clauses to documents based on criteria set by the organization.

Configure PO Clause Rules

1. Navigate to **Setup**  > **Hosted Catalog and Ordering** > **Default Ordering** > **PO Terms**.
2. Click the new **PO Clause Rules** tab. Similar to other rule configurations, PO clause rules are set up in four panels.
3. Click the **Add Rule** button to create a new rule. To update an existing rule, generate a search in the Filter panel, then click the **edit** link next to a rule.
4. In the **Rule Info** panel, click **Edit**. Complete these fields and click **Save**:
 - **Internal Name** - Enter an internal system name for the rule.
 - **Display Name** - Enter the name that will be displayed for the rule. This can be the same as the internal name.
 - **Rule Description** - Enter a brief description of what the rule does.
 - Click the **Active** checkbox to enable the setting. This can be done after document-level and line-level rules are added.
5. In the **PO Clauses** panel, select the PO clauses you want to associate with the rule:
 - a. Select a **Location** to define which PO Clause field on a document that the rule will apply to. Organizations have the option to display PO Clause fields at header-level, line-level, or supplier-level, and a PO clause rule can be applied to the PO Clause fields at any of those levels.

Note: There must be PO Clause fields on the requisition and purchase order document configuration at the level that is selected in this field. For example, if "Header Level" is selected here, there must be a header-level PO Clause field on the active document configuration. See "Update document configuration" below for more information.



- b. Click the **Select PO Clauses** button. An overlay opens and displays the PO clauses that can be selected for the rule.
- c. Click the checkbox next to **each PO clause** that the rule will apply to and save changes. The selected clauses are displayed in the PO Clauses panel.

- d. Once PO clauses have been selected for a rule, additional **Edit PO Clauses**, **View PO Clause Details** and **Remove Selected PO Clauses** buttons are displayed in the panel. To edit, view or remove clauses, first select clauses in the panel, then click the appropriate action button.
6. Add PO Clause rules at the **Document-Level** and/or **Line-Level**. These are the rules that direct the system to add a PO Clause to a requisition or purchase order based on the configured rule evaluation. For example, an organization can create a set of rules that will add a PO clause to a purchase order based on the supplier. Select an option from the **Add a new rule for** field, click **Go**, and complete the fields for the rule as directed.
7. The rules are applied to new documents going forward.

Update document configuration (optional)

For the new PO clause rules, PO clauses must be on the active requisition and purchase order document configuration at the level that matches the rule. For example, if "Header Level" is selected for a PO Clause rule, there must be a corresponding header-level PO Clause field on the active document configuration.

PO Clause fields can be added to an organization's requisition and purchase order document configurations as follows. This is existing functionality:

1. Navigate to:
 - *Requisition* - **Setup**  > **Configure Documents** > **Configure Requisition Document**.
 - *Purchase Order* - **Setup**  > **Configure Documents** > **Configure Purchase Order Document**.
2. Open the **Draft** copy of the active document configuration and click the **Layout Details** tab (for requisitions) or **Summary Page** tab (for purchase orders).
3. Expand the **+ All fields** or **+ Unassigned** fields section and select the appropriate **PO Clause** field. Note that there are *three* levels of PO Clause fields for requisitions and *two* levels of PO Clause fields for purchase orders:
 - **Header-only** (requisitions and purchase orders)- PO Clauses are displayed on the document header if they are inherited from organization settings for default clauses, and they can be added manually to a document. As of this release they can also be automatically added from an active PO Clause Rule.

- **Line-only** (requisitions and purchase orders) - On requisitions, clauses on line items can be inherited from a contract's configuration. On purchase orders, they are inherited from the PR line. They can also be added manually to a document. As of this release, they can automatically be added from an active PO Clause Rule.
- **Supplier-level only** (requisitions only)- Clauses in this location are inherited from the supplier's fulfillment center configuration. Clauses can be applied from the default settings for the supplier, or specific clauses can be configured on individual fulfillment centers. They can also be added manually to a document. As of this release, they can automatically be added from an active PO Clause Rule.

Note: On the purchase order fax document configuration, header, line and supplier clauses can be configured on the fax distribution.

4. Add the field element to the document configuration. Select the placement, display order, and validation options for the field.
5. Repeat the steps above to add additional PO Clause fields as needed.
6. Save, finalize, and activate the document configuration.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Introduction of AI-based Commodity Code Selection Recommendations

Buying organizations use commodity codes (classification codes for products and services) on PR lines to track and classify their spend through the procure-to-pay process, but this can be a cumbersome and manual process. Before 23.2, when users needed to assign commodity codes on a PR or PO line, they had to manually locate and link the appropriate commodity code for each item. This process is time-consuming and can easily result in the selection of incorrect codes, leading to inaccurate spend analysis and GL code assignment.

In 23.2, end-users can leverage the AI-based JAGGAER Advise solution to facilitate the selection of commodity codes on PR and PO lines, which prompts the user with commodity code recommendations based on the item description and historical PO/PR line code assignments for similar items.

Note: This feature is a paid change order and requires a new JAGGAER Advise SKU for activation. This SKU is not available yet and will be released by the end of July. Please engage with your Account Manager if you are interested in activating commodity code selection recommendations.

Customer Impact

- Related Solutions: JAGGAER Advise, eProcurement
- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

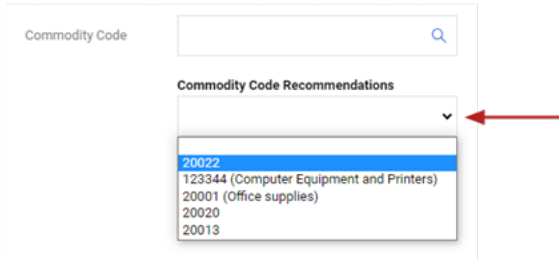
User Impact

Select a Commodity Code Using an AI-Based Recommendation

- If this feature is enabled, a **Commodity Code Recommendations** drop-down appears below the **Commodity Code** search box when users click into an empty **Commodity Code** search box.




- Users can expand this drop-down to access a list of up to the top 5 codes that are most likely to match the item's commodity code. The commodity code recommendations are presented in descending order based on their relevance to the item, with the most relevant codes listed first.



- When users select a code, the drop-down collapses and the **Commodity Code** field is populated with the selected code.

Selecting a Code for New Non-Catalog Items:

1. Navigate to **Shopping**  > **Non-Catalog** Item.
2. Enter a description in the **Description** field.
3. Click into the empty **Commodity Code** field. Recommendations are displayed the first time a user clicks into this field.

Note: Recommendations are not updated if the text in the **Description** field is changed.

Selecting a Code for eProcurement Forms:

1. Navigate to the *Form Fields* page within an eProcurement form.
2. Fill in the **Unit Price**, **Quantity**, and **Product Description** fields.
3. Click the **Edit** button for the **Commodity Code** field.

LME New Form - CC Reco... **Form Fields - Page 1** Request Actions ▾ | History | ?

Form Number **1564423**
Purpose **Procurement Request**
Status **Incomplete**

Instructions
[Details](#) ✓
Suppliers ✓
Attachments ✓
Item Attribute Defaults ✓

Form Fields ✓

Review and Submit

▼ **A**

D'ya like dags?
 Yes No

German Shepard RU

Unit Price	<input type="text" value="500"/>	USD	Quantity	<input type="text" value="2"/>	Total	0.00 USD
------------	----------------------------------	-----	----------	--------------------------------	-------	----------

Product Description
991 characters remaining

Commodity Code [Edit](#)

4. The *Commodity Codes* search box appears. Recommendations are displayed at the top of this overlay.

Commodity Code Search ✕

Commodity Code Recommendations

Code	Description	
20001	Office supplies	+
20002	Food Supply Services	+
123344	Computer Equipment and Printers	+

Code starts with...

Description contains...

Filter

Clear All Filters

1
Page 1 of 3

1-20 of 53 Results

20 Per Page ▾

Code	Description ↑	
20003		+
20004		+
20011		+
20012		+
20013		+


Close

Notes:


- Unlike commodity code recommendations on carts and other documents, recommendations on forms do not display a drop-down list that is separate from the search overlay.
- If the **Description** field is edited, click the **Edit** button for the Commodity Code field to refresh the recommendation list.
- AI-based recommendations are available only at the line-level. Recommendations are not available for commodity codes at the header-level, which do not relate to a specific product description, unit price, and quantity.

5. Click the **Select** button to choose a recommendation from the list. The selected commodity code populates the **Commodity Code** field. When a form is completed, the selected recommendation is copied to the created cart.

Important Notes

- Once a commodity code is selected by either method, the **Commodity Code Recommendations** drop-down does not reappear when users click into the **Commodity Code** box. However, users can access the recommendations by clicking the magnifying glass icon  within the **Commodity Code** search box to open the *Commodity Code Search* pop-up window.
- Commodity Code recommendations are not supported when the **Commodity Code** field is configured as a drop-down list instead of a search box. If you are unable to access recommendations because your commodity codes are displayed in a drop-down list, please contact JAGGAER for assistance with your site configuration.
- Feedback on a selected code is returned to Advise to support machine learning and to help make future recommendations more accurate.

Select a Commodity Code Manually

- Users have the option to reject the commodity code recommendations and perform a match manually using standard JAGGAER functionality.
- Click the magnifying glass icon  within the **Commodity Code** search box to access the familiar *Commodity Code Search* window where users can use pre-existing search functionality to locate and select a code.

- For users' convenience, Advise recommendations appear at the top of this page. Click a recommendation's + icon to select that commodity code.

The screenshot shows a window titled "Commodity Code Search" with a close button (X) in the top right corner. Below the title bar is a section titled "Commodity Code Recommendations" enclosed in a red rounded rectangle. This section contains a table with the following data:

Code	Description	
20001	Office supplies	+
20002	Food Supply Services	+
123344	Computer Equipment and Printers	+
123		+

A red arrow points from the top right of the red box to the plus icon in the second row. Below the table are two input fields: "Code starts with..." and "Description contains...". To the right of these fields are two buttons: "Filter" and "Clear All Filters". Below the filters is a pagination section showing "Page 1 of 3" and "1-20 of 53 Results", with a "20 Per Page" dropdown menu. Below the pagination is another table with the following data:

Code	Description ↑	
20003		+
20004		+

Administrator Impact

This feature is a paid change order and requires a new JAGGAER Advise SKU for activation. This SKU is not available yet and will be released by the end of July. Please engage with your Account Manager if you are interested in activating commodity code selection recommendations.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Change to Invoices Displayed on Purchase Orders

We have updated the way invoices are displayed on purchase orders. Previously, invoices in draft status, or invoices that had a status of "Not Ready for Matching", were displayed on purchase orders. This has been updated so that draft invoices and invoices that are not ready for matching are not automatically displayed on purchase orders.

Customer Impact

- Related Solutions: eProcurement, Invoicing
- 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 way invoices are displayed on purchase orders has been updated so that draft invoices and invoices that are not ready for matching are not automatically displayed on purchase orders.

- Invoices are not displayed in the **Related Document** section on purchase orders if they are in Draft status, or if they have a status of "Not Ready for Matching". Invoices will need at least one line *without* the matching status of "Not Yet Ready for Matching" for it to be shown in the Related Documents section.
- On the **Invoices** tab of purchase orders, the **Hide 'Not Ready for Matching' Invoices** toggle is ON by default so that invoices that are not ready for matching are not shown on the PO Invoices tab. Users can switch the toggle to display invoices that are not ready for matching.

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.

New Email Order Distribution Administration



In the 23.2 release, a new error notification has been added to the **Purchase Order Distribution Errors** queue in the **Find and Fix Errors** menu that allows customers to view PO email distribution errors and re-send them.

Customer Impact


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

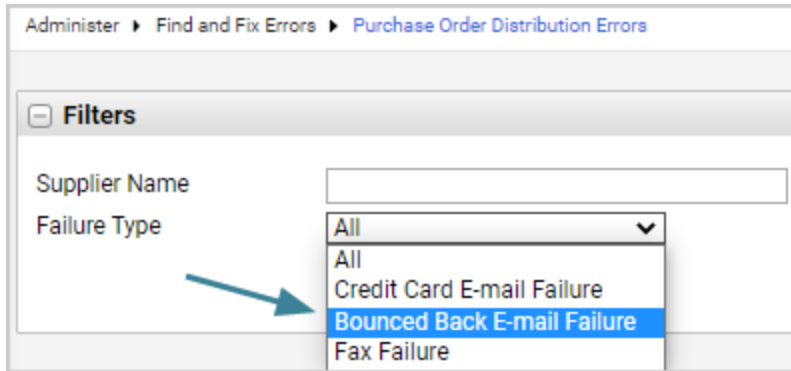
User Impact

This feature does not impact end users.

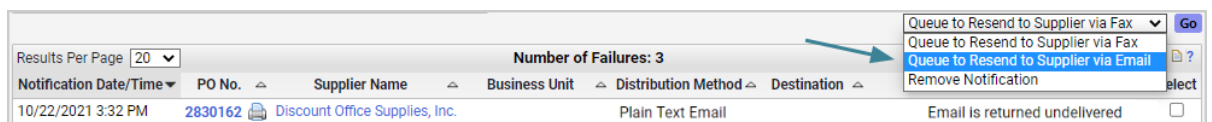
Administrator Impact

A new distribution notification failure type has been added to the **Purchase Order Distribution Errors** queue in the **Find and Fix Errors** menu that allows customers to view PO email distribution errors and re-send them.

1. Navigate to **Administer**  > **Find and Fix Errors** > **Purchase Order Distribution Errors**.
2. In the **Filters** panel, a new option has been added to the Failure Type menu. Select **Bounced Back E-mail Failure** to view a list of PO distribution emails that were unsuccessful, then click **Search**.



- The system checks once every hour for failed emails.
 - The Reason column will indicate that the **Email is returned undelivered**.
3. To re-send a failed email:
 - a. Select the checkbox next to each PO you want to re-send to the supplier via email.
 - b. In the **action** menu, select **Queue to Resend to Supplier via Email**, then click **Go**



- c. Complete fields in the overlay and click **Save**.

Resend PO via E-mail

Enter an email address, select the email type, and enter any comments below.

Email

Plain Text
 HTML Body
 HTML Attachment
 PDF Attachment

Comments

This field is limited to 1000 characters. Its contents will be accessible in the History tab of any/all orders to which this specific action is applied.

Save

Best Practices

- **Best practice** is for administrators to re-send failed emails within 24 hours of the error appearing on the Find and Fix Errors page, and to use the comments available on the Resend overlay to provide additional information in the PO History. Emails re-sent after 24 hours will have additional limitations as noted below.
 - For errors processed **within 24 hours** the following will take place:
 - The log will clear from the Find and Fix Errors page on a re-send.
 - An entry in the PO History records that the order was re-sent.
 - If the email distribution method or email address that is selected on a re-sent order differs from the one selected on the original order, those changes will NOT be noted in the PO History. Use the comments when re-sending to record this information.
 - If the re-send fails, the Find and Fix Errors page will have a new entry that displays the email used for the re-send. The email distribution method will default to the method selected on the original distribution.
 - Errors that have been listed for **more than 24 hours** on the Find and Fix Errors page are processed as follows:

- PO's that are re-sent after 24 hours will process as usual from the Find and Fix Errors page (i.e., the log is cleared from the Find and Fix Errors page and an entry is recorded in the PO History).
- However, if the re-send also fails, there will *not* be another entry on the Find and Fix Errors page. This failure will require intervention by support. Contact JAGGAER if this occurs.

Additional Information

- To meet the requirements for the new feature, **JAGGAER will include the PO number on the Subject line of every purchase order distributed by email** with the 23.2 production release. To facilitate this:
 - *The Include "PO Number in Subject" setting has been removed* - This was an optional setting to include PO numbers in the Subject line of PO distribution emails. It was located under **Hosted Catalog and Ordering Configuration > Default Ordering Settings eg. Tax, S&H, Payments > Ordering**. Under the **General Email Settings** sub-heading, the **Include PO Number in Subject** setting is no longer available.
 - *Supplier export has been updated* - With the site setting removed and all orders distributed by email containing the purchase order number, the Fulfilment Order Distribution section of the supplier export will now always show "true" in the column "Include PO Number in Subject".
- **Notification Preferences** - Users with the following notification preferences enabled will automatically receive an email notifying them if a PO sent via email was not delivered. Users need the **Manage Order Failure Notifications** permission (Permission Settings > Orders > My Orders/Organization Orders) to see these notification preferences:
 - **Notification Preferences > Administration & Integration**
 - **Prepared By - PO Distribution Failure Notice**
 - **PO Distribution Failure Notice**
 - **PO Distribution Failure Notice By Business Unit**
- The **PO History** has been updated - Previously, for purchase orders that were distributed via email, the PO History would show that the purchase order had been sent, but it did not indicate that the email was processed successfully. Now, an entry on the purchase order's History will indicate that the email distribution has failed. If an email has been re-sent, it will also note "Queued to Resend to Supplier via Email".

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Experience View Enhancements

In 23.2, enhancements to buttons, icons and sidebar display options on documents provide improved readability. Filter view settings have been updated, and a new **Compact View** option on Approval and Draft pages allows users to view more records on a page.




In addition, a new type-ahead feature for custom field entry will be available for beta testing with this release. It's an enhancement that makes it much easier and more efficient for users to type and tab through fields when entering custom field values.

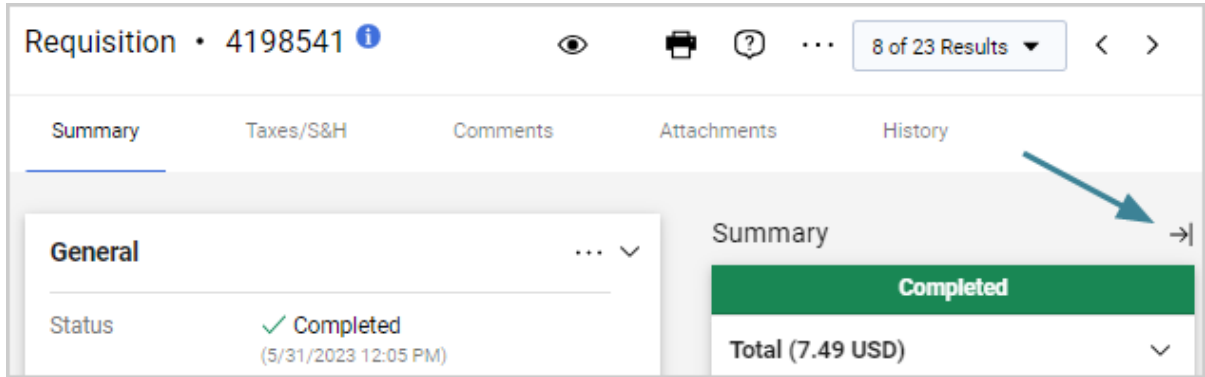
Customer Impact

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

User Impact

Document Updates

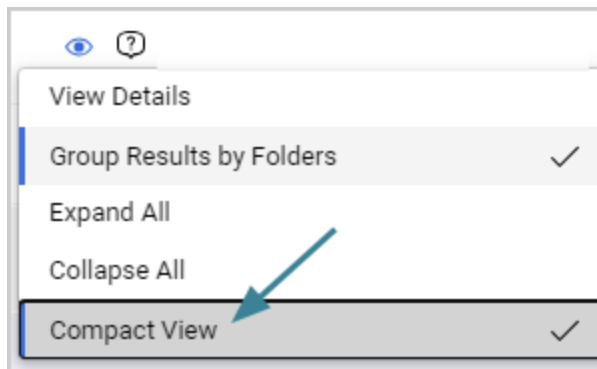
- The **sidebar display** settings have changed on all documents. Previously the Show Sidebar icon  was displayed in the top right corner of the page. Now the icons have changed and have moved to the top corner of each sidebar. On the right sidebar, users click the  icon to hide the sidebar and the  icon to open it. On the left sidebar, the reverse is true.



- **Filter View** settings on documents have been updated so that the options that were last selected now remain in place, even if a user navigates away from the page and returns.
- The look and feel of
 - buttons ()
 - toggles (**Show skipped steps**), and
 - icons ()
 on documents have been updated for improved readability and usability.

Approval and Draft Page Updates

- **Filter View** settings on Approval and Draft pages have been updated:
 - The options that were last selected now remain in place, even if a user navigates away from the page and returns.
 - A new **Compact View** option displays the records with condensed spacing so that more records are displayed on the page.



Approvals Page Updates

- Previously, a checkmark ✓ indicated a document was ready to be approved. This has been replaced with an **Approve** button.
- Users can now click anywhere on a folder row to expand and collapse the folder and the latest selection is saved. The color of the Approvals folder rows has also been updated.

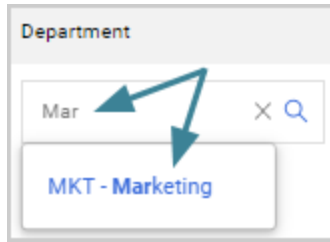
Forms Updates

- The entry field alignment on forms has been updated.
- When configuring forms, organizations can add an HTML field type to a form that can be used for emphasis or instructions to end users. In this release we have expanded the number of characters allowed for the HTML code from 2000 to 8000 characters.

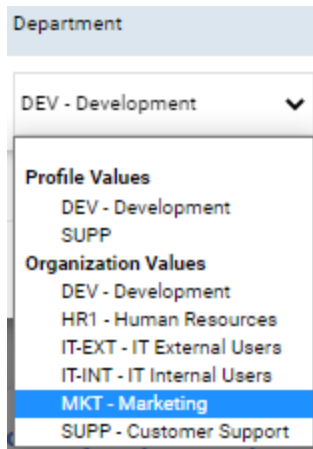
Custom Field Enhancements

- Custom fields have been reconstructed for a more efficient type-ahead experience.
 - **This update will only be available for a limited beta group in the 23.2 release.** Please contact JAGGAER if your company is interested in testing this feature.
 - With this update, new type-ahead capabilities allow users to start entering values in the custom fields and the system will immediately provide matching options. If users are familiar with the values that need to be entered, they will be able to type and tab through fields.
 - If users don't know the values to enter, or there are no matches provided by the system, users can select the search icon in a field to open the search overlay and select values or use the search field to find values, but it is not required.
 - When users open a custom field in a document, it will be displayed as EITHER a drop-down field that can be tabbed through, OR an auto-complete field, which is displayed if the drop-down list is too long. System settings determine which version is displayed.

Here is an example of an account code custom field with the type-ahead / auto-complete function.



Here is an example of an account code custom field that displays the drop-down menu.



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.

Business Analytics - Budget Manager Explore Date Field Adjustments

When a customer creates a budget, they must select a time zone that the budget honors. The start date associated to a budget is based on UTC and then adjusts for the budget's assigned time zone. However, when customers run reports against budgets, if the budget is not in the UTC time zone, the dates may show differently, especially for those time zones that occur before UTC. For example, if a budget is set to central European time for January 1, 2023 at 00:00, the database saves this as December 31, 2022 at 23:00, due to the time difference.

With the 23.2 release, the **Budget Manager** Explore start and end dates fields have been enhanced to take the timezone into consideration so that report data will adjust for the assigned timezone.

Customer Impact

- Related Solutions: eProcurement
- 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 **Budget Manager** Explore fields have been updated as follows (hover over each field in the solution to see an explanation):
 - The following existing fields have been renamed:
 - Date Range Start Time and Date is now **Range Start Time Date**.
 - Date Range Next Start Time and Date is now **Next Range Start Time Date**.

- The following new fields have been added that utilize the timezone to make sure they are displaying correctly:
 - Range Start Date
 - Next Range Start Date
 - Range End Date

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Inventory Management

The following enhancements have been made to Inventory Management in the JAGGAER ONE eProcurement solution.

New Inventory Item Export Integration

In this release, a new **Inventory Item Export Integration** has been developed for customers to update their inventory item data. It can be used to update Inventory Management items based on additions, modifications and status changes.


Customer Impact

- Related Solutions: eProcurement, Inventory Management
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator.
- New Permissions related to this feature: None
- New Notifications related to this feature:
 - **Inventory Item Export Failure Notice** (Notification Preferences > Administration & Integration) - Notifies users that the Inventory Item Export process has failed and will need to be reviewed and re-processed. The Manage Integration Export Failure permission is needed to view this notification preference.


User Impact



This feature does not impact end users.

Administrator Impact

- The new **Inventory Item Export Integration** allows customers to update inventory item data with a new export integration.
 - The new integration supports item data from the **Basic**, **Additional** and **Physical Inventory** tabs, located under **Contracts**  **> Hosted Catalog Items and Price > Hosted Catalog Items**.

Note: Some Physical Inventory Quantities may not be supported in this release.

- Once the integration is configured, inventory items are added to the integration queue when they are manually syndicated. The **Syndicate** action will add inventory items that are new or edited to the inventory item queue for export.
- **Enable the new Inventory Item Export Integration** to support the export of inventory item data by configuring a connection and setting up a schedule as follows:
 1. **Create new connection:**
 - a. Navigate to **Setup**  **> General Site Settings > Document Export Settings**.
 - b. Click the **connection mgt** sub-tab.
 - c. Click **New Connection**.
 - d. In the right panel, select **Supports Inventory Items Export**. The Items Per Message fields appears.
 - e. In the **Items Per Message** field, enter the maximum number of inventory items from the queue that can be included in one XML export.
 - f. Complete remaining connection fields and save changes.
 2. **Create a schedule** to define when exports occur:

- a. Navigate to **Setup**  > **General Site Settings** > **Document Export Settings**.
 - b. In the left panel, click **New Schedule**.
 - c. In the right panel, locate the **Doc Type** field and select **Inventory Items**.
 - d. Complete remaining fields and save changes.
- A new **Inventory Item Export queue and error management page** is used to manage errors:
 - **Export Queue** - Navigate to **Administer**  > **Find and Fix Errors** > **Inventory Item Exports**. The queue displays the number of items in a Pending state and the number of items in an Error state.
 - The pending records are items that have been updated or created and are waiting in queue for the next scheduled export to run. Clicking 'Delete pending' will remove all items from the queue and prevent them from being exported.
 - The error records are items that have failed to be exported. Users can choose to either delete the errors or re-queue them to move them to a pending status where they will be re-queued for export.
 - A new **email notification** has been created to report errors to customer administrators:
 - **Inventory Item Export Failure Notice** (Notification Preferences > Administration & Integration). - Notifies users that the Inventory Item Export process has failed and will need to be reviewed and re-processed. The Manage Integration Export Failure permission is needed to view this notification preference.

Third-Party Integration Impact

- The new **Inventory Item Export Integration** allows customers to update inventory item data with a new export integration.
 - See **Administration Impact** section above for details about the new Inventory Item Export Integration connection and schedule options, and the Inventory Item Export queue and error management page.
 - A new **Inventory Item Message** DTD has been created.
 - A new **Inventory Item Export XML** has been created.

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

Supplier Impact

This feature does not impact suppliers.

Budget Manager

The following enhancements have been made to Budget Manager in the JAGGAER ONE eProcurement solution.

Business Analytics - Budget Manager Explore Date Field Adjustments

When a customer creates a budget, they must select a time zone that the budget honors. The start date associated to a budget is based on UTC and then adjusts for the budget's assigned time zone. However, when customers run reports against budgets, if the budget is not in the UTC time zone, the dates may show differently, especially for those time zones that occur before UTC. For example, if a budget is set to central European time for January 1, 2023 at 00:00, the database saves this as December 31, 2022 at 23:00, due to the time difference.

With the 23.2 release, the **Budget Manager** Explore start and end dates fields have been enhanced to take the timezone into consideration so that report data will adjust for the assigned timezone.

Customer Impact

- Related Solutions: eProcurement
- 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 **Budget Manager** Explore fields have been updated as follows (hover over each field in the solution to see an explanation):
 - The following existing fields have been renamed:
 - Date Range Start Time and Date is now **Range Start Time Date**.
 - Date Range Next Start Time and Date is now **Next Range Start Time Date**.
 - The following new fields have been added that utilize the timezone to make sure they are displaying correctly:
 - Range Start Date
 - Next Range Start Date
 - Range End Date

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 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 Permissions related to this feature: None
- New Notifications related to this feature: None

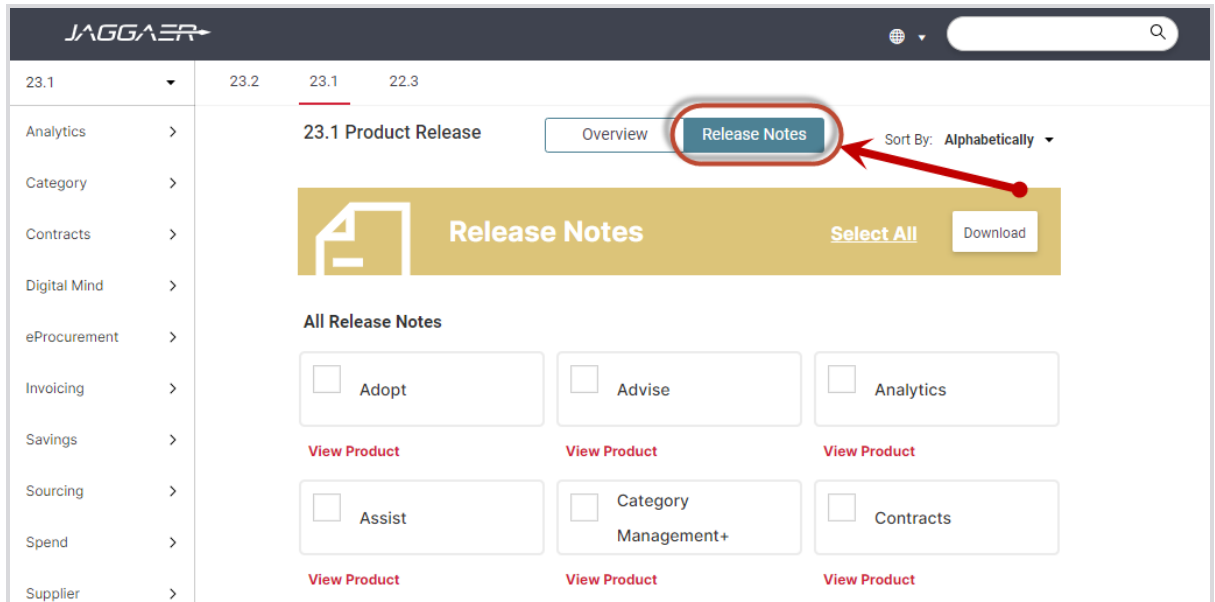
User Impact

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

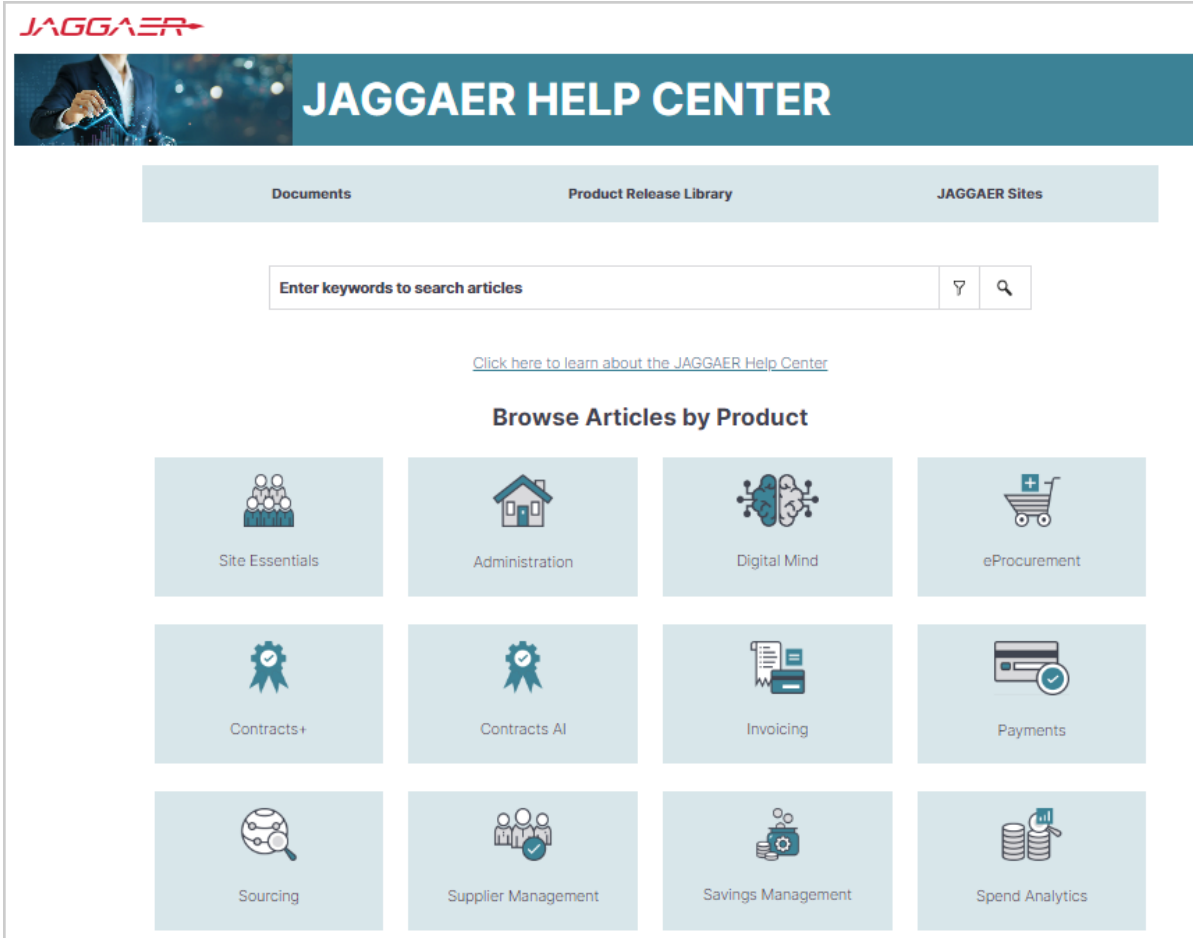
release notes documents from the available checkboxes, then click the **Download** button.



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

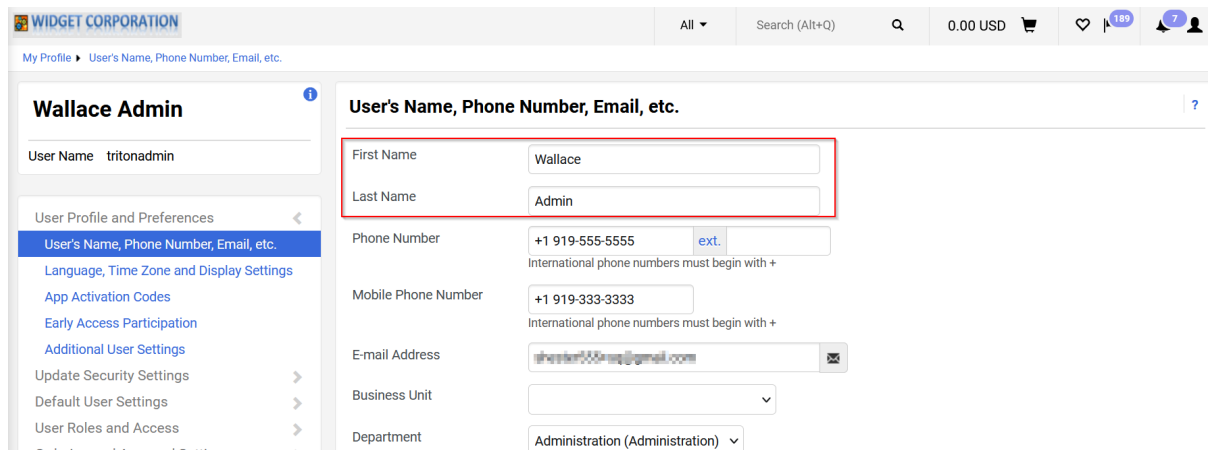
With this release, the **First Name** and **Last Name** in the user profile can now accept up to 128 characters. This enhancement allows for harmonization of the user first and last name across all JAGGAER solutions.

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**).



The screenshot shows the user profile page for Wallace Admin. The page title is "WIDGET CORPORATION" and the user's name is "Wallace Admin". The user's name is "tritonadmin". The page is divided into two main sections: "User Profile and Preferences" and "User's Name, Phone Number, Email, etc.". The "User's Name, Phone Number, Email, etc." section is highlighted with a red box and contains the following fields:

- First Name: Wallace
- Last Name: Admin
- Phone Number: +1 919-555-5555 (ext. field)
- Mobile Phone Number: +1 919-333-3333
- E-mail Address: [redacted]@gmail.com
- Business Unit: [dropdown menu]
- Department: Administration (Administration) [dropdown menu]

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:

Platform	Browser Support
Windows	Edge - latest version Chrome - latest version - automatically updated by Google Firefox ESR - latest version - automatically updated by Mozilla
Macintosh	Safari latest version Firefox - latest version - automatically updated by Mozilla

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 Permissions 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

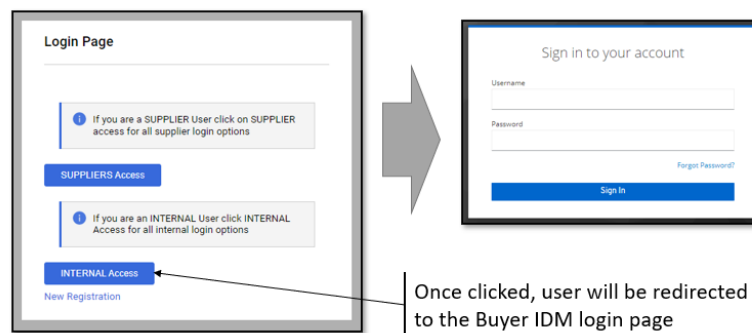
- Related Solutions: All Solutions
- Feature Activation: This feature is **OFF** by default and must be enabled by JAGGAER.
- New Permissions related to this feature: None
- New Notifications related to this feature: **Yes - Buyer IDM Notifications (Only For Internal IDP)**

User Impact

- If **Buyer IDM** is enabled for an organization, users will experience a different login page depending on the organization's configuration:

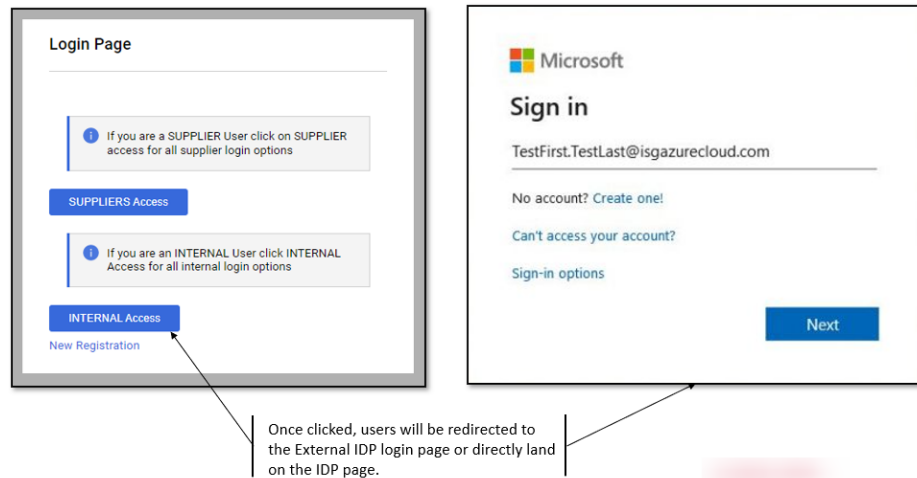
- **Internal:**

- 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.

Sign in to your account

Username

Password

Forgot Password?

Sign In

Or sign in with

AZURE


Internal


External

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).

Mobile Authenticator Setup

 You need to set up Mobile Authenticator to activate your account.

1. Install one of the following applications on your mobile:
FreeOTP
Google Authenticator
2. Open the application and scan the barcode:


[Unable to scan?](#)

3. Enter the one-time code provided by the application and click Submit to finish the setup.
Provide a Device Name to help you manage your OTP devices.

One-time code *

Device Name

Submit

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 contains 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?** ( [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

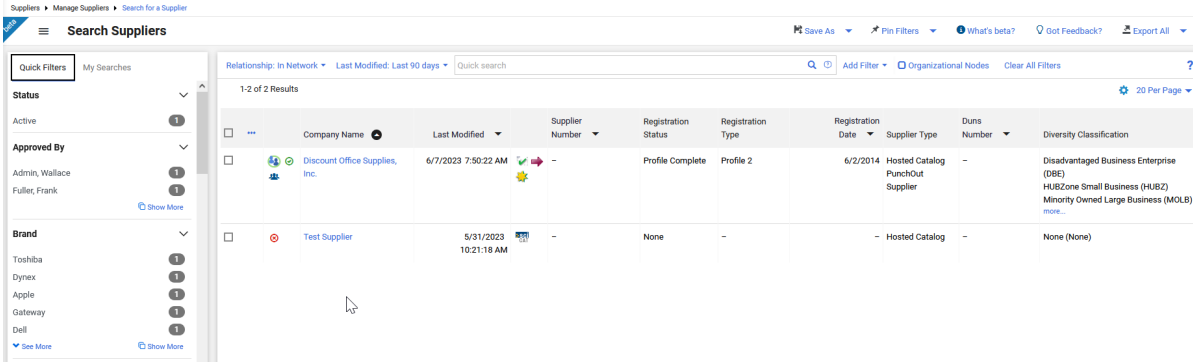
- Related Solutions: All Solutions
- Feature Activation: This feature is **OFF** by default. It is **ON** by default for users with **Enable new search experience** set to **Yes**.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

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 display by default.



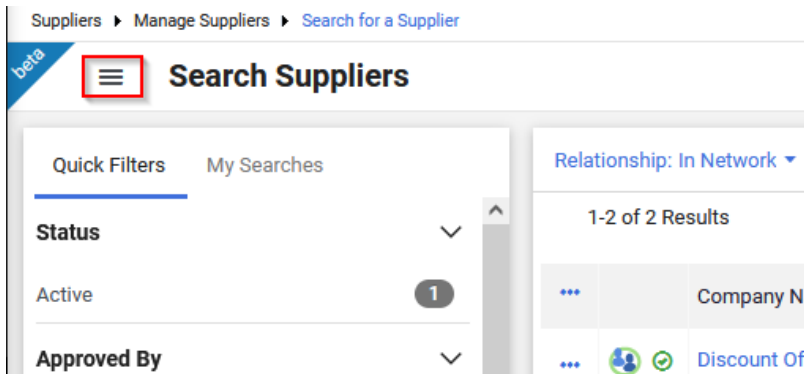
Company Name	Last Modified	Supplier Number	Registration Status	Registration Type	Registration Date	Supplier Type	Duns Number	Diversity Classification
Discount Office Supplies, Inc.	6/7/2023 7:50:22 AM		Profile Complete	Profile 2	6/2/2014	Hosted Catalog PunchOut Supplier	-	Disadvantaged Business Enterprise (DBE) HUBZone Small Business (HUBZ) Minority Owned Large Business (MOLB) more...
Test Supplier	5/31/2023 10:21:18 AM		None	-	-	Hosted Catalog	-	None (None)

Other features include:

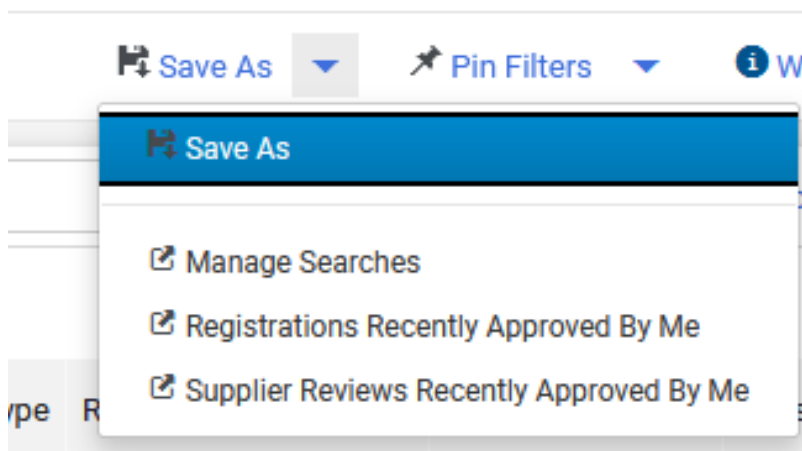
- **Quick Search**
 1. Enter a supplier name or number in the **Quick search** field.
 2. Click the search icon . Matching suppliers are returned in the search results.
- **Advanced Search** - Use the filter options to perform a more specific search.
 1. Click the **Add Filter** button (located to the 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.

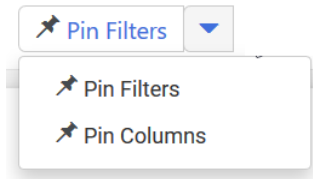
3. Select the appropriate boxes. If the header row checkbox is selected, all results on the page are selected.
 4. Once selections are made, click the ellipses in the header row again. The appropriate actions for the supplier will display as hover text.
 5. Select the appropriate option and follow the 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.



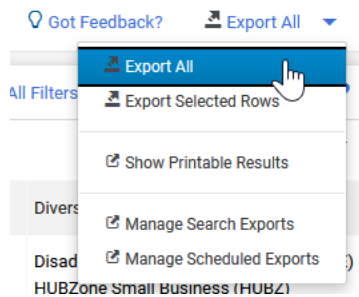
- **Quick Filters** - This area displays filters available to further refine search results. As with other search results pages, simply select or deselect options from the filter list to refine results. You can continue to use the **Add Filter** dropdown above search results, which will update the **Quick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

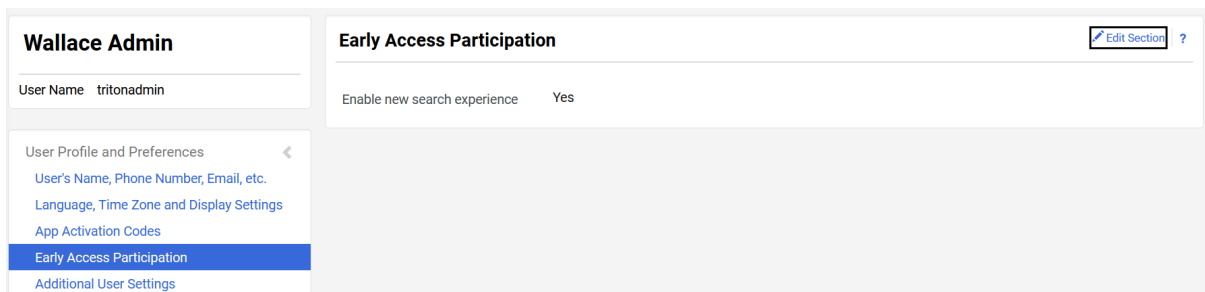


- The **Export** options are contained in the dropdown above search results. Options to **Export All** or **Export Selected Rows** are available. Use the multi select ellipses on the left, if necessary, to enable the selection boxes for each row (existing functionality). You can then choose rows to export 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 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

page explaining what MFA is and what would be the impact.

- Supplier user can choose to "**Read More**" to get further information, or click "**Dismiss**" to be redirected to the application.

Note: Supplier users who already have a JAGGAER Global Identity (via Supplier IDM) will receive emails containing a **One-Time-Password (OTP)** when they attempt to authenticate to JAGGAER.

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 Permissions 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:

- German
- English
- Italian
- French
- Spanish

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 Permissions 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