23.2 Release Notes

For Invoicing Enhancements

Version 1.2

Table of Contents

23.2 Release Notes Revision History

Version	Date	Description
1.0	June 19, 2023	Initial Version The following Invoicing and Advise feature has been updated since the Preview release: • **Introduction of Intelligent PO Line Recommendations** has been renamed to **Introduction of AI-based PO Invoice Matching Recommendations** The following Invoicing features have been added since the Preview release: • **Changes to Invoices Displayed on Purchase Orders** • **Global Invoicing - New "External Network Name" Field for eInvoicing** 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 23, 2023	The following Invoicing feature has been updated since the UIT release: • **New Experience View Enhancements**

Version	Date	Description
1.2	June 28, 2023	The following Invoicing feature has been updated since the UIT release: • **Introduction of AI-based PO Invoice Matching 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 **Invoicing** 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:

<div align="center">

https://library.jaggaer.com

</div>

> **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.

Invoicing Enhancements

Ability to Invoice Against PO from Different Supplier

Engage Idea 💡

Previously, if a PO was associated with a supplier and the invoice was fulfilled by a different supplier, such as a subsidiary company belonging to the same supplier group, the invoice could not be matched to the PO and the invoice would need to be processed as a non-PO invoice.

In 23.2, a new organization setting makes it possible for an invoice from one supplier record to be matched against a PO and a receipt from a different supplier record. This will allow our users to perform matches on purchases for corporate groups that span several countries.

Customer Impact

- Related Solutions: Invoicing
- 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

In 23.2, a new organization setting makes it possible for an invoice from one supplier record to be matched against a PO and a receipt from a different supplier record.

> **Important Note:** When using this feature, customers should rely on the line-level fulfillment center since the header fulfillment center could be inconsistent when the invoice has multiple POs in general and even more so when multiple POs have different suppliers.

- If an organization has enabled the setting to allow POs from multiple suppliers on invoices, users will notice these changes in the application:

    - The supplier name will be displayed on line items when it varies from the invoice supplier.

    - Logic for two or three-way matching will now be able to match an invoice with a PO and receipt from a different supplier.

    - The Invoice History has been updated to include the supplier name and PO number along with the action when a PO is added to an invoice.

    - Contract validation logic on invoices will evaluate the PO supplier on the line when the PO line supplier differs from invoice supplier. This applies to:

        - Validation of a contract applied to a PO line on invoice import.

        - Any logic that displays the contract on the invoice line or allows user to change the contract on the invoice line.

- These changes will be seen on **INVOICES**:

    - Users can add PO line items (or add a PO to a non-PO line item) with a supplier that is different from the one on the invoice header. If suppliers on a line item vary from the invoice supplier:

        - **On line items**, users will see a warning indicating that PO lines are from a different supplier, and the name of suppliers that differ from the invoice will be listed beside the PO number for that section of lines.

2 Lines

3592524
• Discount Office Supplies, Inc. ⚠

PO line supplier differs from Invoice supplier.

Status	PO Line	Item	Catalog No.	Size,
2 ✓	1	Motion Display Cloth cleaning cloths	857631	EA

3592525

Status	PO Line	Item	Catalog No.	Size,
1 ✓	1	Bulk 8.5 x 11 White Copy Paper	B-1000-1	12/0

On the **Matching** tab, the warning is also displayed at the top of the page.

Invoice • Discount Office Supplies, Inc. • 3339028

| Entry | Summary | Matching | Supplier Messages |

⚠ Document contains PO that is from a different supplier than invoice

- If there are PO lines from a different supplier, AND the supplier on the line item is outside of the supplier group selected on the invoice, an additional warning is displayed at the top of the document on the Entry, Summary and Matching tabs:
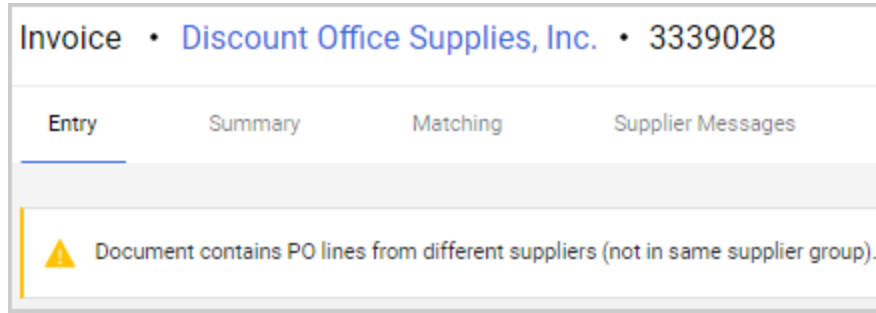
- **Invoice actions have been updated** - The **Match to PO Line**, **Replace with PO Line** (available on Draft invoices), and **Add New PO** invoice line actions have been updated to include POs with a supplier that is different from the one on the invoice header.

  - Initiating an action will cause the system to search for all POs that belong to the invoice's supplier as well as POs that belong to the supplier's parent group. It will automatically apply a supplier filter to the PO search. Users can remove the supplier filter to see POs from all suppliers (with the same currency as the invoice).

- These changes will be seen on **PURCHASE ORDERS** - A new column on the **Invoices** tab lists the name of the **Invoice Supplier** if at least one invoice has a different supplier than that of the PO, otherwise the column is not displayed.

Administrator Impact

In 23.2, a new organization setting makes it possible for an invoice from one supplier record to be matched against a PO and a receipt from a different supplier record.

> **Important Note:** When using this feature, customers should rely on the line-level fulfillment center since the header fulfillment center could be inconsistent when the invoice has multiple POs in general and even more so when multiple POs have different suppliers.

- Complete these steps to enable the new organization setting:

    1. Navigate to **Accounts Payable 🏛 > AP Administration > Configure AP Settings**.

    2. Under the **Accounts Payable Settings** sub-heading, select the **Allow POs from Multiple Suppliers on Invoices** checkbox and save changes.

- **ADW Workflow Rules** have been updated to accommodate POs from different suppliers.

    - When configuring Invoice ADW workflow rules, users can create rules at the header-level or at line-level that reference Supplier Profile data. When an invoice has a PO line with a different supplier than the invoice these ADW rules will use the **invoice supplier**, even when the invoice contains PO lines with a different supplier.

    - There is one exception: the **fulfillment center**. The Fulfillment Center will always be based on the line-level supplier.

Third-Party Integration Impact

> **Important Note:** When using this feature, customers should rely on the line-level fulfillment center since the header fulfillment center could be inconsistent when the invoice has multiple POs in general and even more so when multiple POs have different suppliers.

- **OCR/DMR Invoice Import** has been updated to allow PO lines with different suppliers based on the new **Allow POs from Multiple Suppliers on Invoices** AP Configuration setting:

    - *If the setting is ON* - OCR/DMR invoice import will allow PO lines to have different suppliers than the invoice supplier as long as the currency matches that of the invoice. After an invoice has been imported, the Supplier field can be edited if the invoice has not reached the " Not Ready for Matching" match status.

    - *If the setting is OFF* (existing functionality) - The import stops processing once it reaches a PO line with a different supplier and it posts a notification on the invoice.

- **Buyer Invoice Export** has been updated to support PO lines with different suppliers based on the new **Allow POs from Multiple Suppliers on Invoices** AP Configuration setting:

    - A new **LineSupplier** element includes the supplier name, supplier number and third party reference number. The new supplier element is added at line-level if there is a supplier on a PO line that differs from the invoice supplier. It is not displayed if the

suppliers are the same at both levels.

- The new Buyer Invoice Export DTD and Buyer Invoice Validation DTD version 2.6 includes the new LineSupplier element.

- **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

- If a customer has enabled the **Allow POs from Multiple Suppliers on Invoices** setting:

  - On invoices, suppliers will see warning messages on the **Summary** and **Matching** tabs when a PO line from a supplier is different from the invoice supplier.

  - On sales orders, links to buyer invoices from suppliers that are different from the sales order are read-only links. If a buyer invoice is from the same supplier as the one on the order, then an active link and print actions are available.

Support for Negative Line Quantities on POs and Invoices

In direct commerce, customers sometimes use negative PO line quantities in their ERPs to handle pre-payments, returns and credits. Previously, JAGGAER did not support negative line quantities on purchase orders, and customers could not import direct material POs into JAGGAER to be matched against incoming invoices.

In this release, a new option allows purchase orders to be created and updated with negative line quantities, which can be received and matched to invoices, and customers can process invoices for orders created in the ERP that contain negative line quantities and amounts. We have also updated receiving and matching to accommodate negative line quantities.

Customer Impact

- Related Solutions: Invoicing
- 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

- If the negative quantities feature is enabled:

  - Negative quantities can be entered for line items on **purchase orders**.

↻	Pendaflex Interior File Folders, 1/3 Tab, Letter, Aqua, 100/Box	ESS421013 AQU (BX)	100 BX	37.50	Qty: −5 BX	−187.50	⋯ ☐

  - On **receipts**, negative quantities are already allowed as some customers use them for returns. We have updated Receipt Import and ADW Workflow rules related to receipts to accommodate negative quantities on lines.

  - **Invoices** have been updated to accommodate negative quantities on lines:

    - **When an invoice is created from a PO with negative quantities**, the system respects the negative values on the PO, and the resulting extended price, taxes and all totals update correctly, flowing from a PO with a negative quantity to an invoice.

    - Negative quantities can be entered on **PO and non-PO invoices** when adding or editing lines.

      - Validation prevents users from submitting both negative quantity and negative unit price on any given line.

      - This applies to both buyer side and supplier portal invoices, for manual invoice creation and email invoices.

  - **Credit memos** have been updated:

    - For existing functionality, when credit memo is created from an invoice in JAGGAER, the unit prices on the invoice become negative because they represent a credit amount being returned to the buyer.

    - If the negative quantities feature is enabled, we do not allow negative values on *both* unit price and quantity. Instead, when a credit memo is created from an invoice that has negative quantities on a line, an error is displayed. To resolve the error, users may change the unit price or the quantity to a positive value. **Note:** Users must correct all the lines before saving or the error will

continue to appear.

- If users can create credit memos without an invoice (when configuration allows), they can enter negative quantities on a line.

Administrator Impact

- Contact JAGGAER to enable the **Allow Negative Quantities on POs and Invoices** organization setting and allow negative line quantities on purchase orders and invoices.

- If the negative quantities setting is enabled, negative quantities can be entered on the following documents:

  - **Purchase Orders**

    - Negative quantities can be entered for line items on **purchase orders**.

    - If the setting is enabled, buyer invoices respect the setting **Allow Zero Quantity in the Cart, Non-Catalog and Forms** (under Setup > Configure Documents > General Document Configuration Settings). Supplier portal invoices do not respect this setting. This is existing functionality.

  - **Invoices**

    - Creating an invoice from a PO with negative quantities respects the negative values on the PO, and the resulting extended price, taxes and all totals update correctly, flowing from a PO with a negative quantity to an invoice.

    - Negative quantities can be entered on **PO and non-PO invoices** when adding or editing lines. Validation prevents users from submitting both negative quantity and negative unit price on any given line.

  - **Credit Memos**

    - If the negative quantities feature is enabled, we do not allow negative values on both unit price and quantity. Instead, when a credit memo is created from an invoice that has negative quantities on a line, an error is displayed indicating that the price and quantity cannot both be negative values.

    - If organization settings allow users to create credit memos without an invoice, they can enter negative quantities on a credit memo line.

- **Receipts**

    - On **receipts**, negative quantities are already allowed as some customers used them for returns. We have updated Receipt Import and ADW Workflow rules related to receipts to accommodate negative quantities on lines.

    - The **Prevent Receipt Submission if Over Received** setting (Accounts Payable > AP Administration > Configure AP Settings) logic has been updated to respect the intent of the setting even when negative quantities are in use with the Negative Line Quantities feature.

Third-Party Integration Impact

The following imports and exports have been updated to allow negative line item quantities when the **Allow Negative Quantities on POs and Invoices** setting is enabled:

- **PO Create Import** and **PO Update Import** - Negative line item quantities are not allowed when the setting is OFF. Validation prevents PO import when unit price is negative with or without the setting enabled. This is existing functionality so PO lines cannot be created or updated with negative values for both price and quantity.

    > **Note:** If a PO has a discount and the quantity is negative, then the discount will be positive. For example, if a PO extended price is $-154.00, and the discount 10%, then the discount will be positive ($15.40).

- **Create PO Export** - When purchase orders have negative line item quantities, those negative quantities properly display in the PO Export (Excel, CSV, and XML files). When other fields are affected by the negative quantities of line items (like Ext Price, Taxes, Shipping, and Handling), they are also displayed as negative values in the PO Export.

- **OCR/DMR Import** - When setting is enabled, a negative line item quantity can be included in Invoice Import XML. Negative value is imported and displays on Invoice UI. Extended Price reflects the negative quantity. Credit memos with negative quantities can also be imported via OCR/DMR.

- **Invoice Export** - When invoice line items have negative quantities, they will display correctly on Invoice Search exports (Excel, CSV, XML), Global Invoicing PDF, XML Invoice Export.

- **cXML Invoice Import** - Has been updated to accommodate negative quantities.

- **Receipt Import** - If the negative quantities setting is enabled, Receipt Import will not prevent negative quantities from being imported successfully. This is true regardless of the configuration on the **Handle required fields on Receipt import** setting (Setup ⚙ > Configure Documents > General Document Configuration Settings) and it is allowed if the **Prevent Receipt Submission if Over Received** setting is enabled (Accounts Payable 🏛 > AP Administration > Configure AP Settings). In this case, over-received validation displays in the UI after import.

- **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

If this feature is enabled, suppliers can enter negative quantities on **PO** and **non-PO invoices**.

Tax Engine Enhancements (Part 1)

The JAGGAER tax engine automatically calculates the tax rates on PRs, POs, and invoices based on user-defined tax rules.

In 23.2, we have made changes to tax details and the tax engine user interface for clarity and improved the user experience. These updates are part of the new Tax Validation feature, and the improved layout is also available to customers who use the tax engine and want to continue using the existing rules-based tax engine functionality.

See New Validation for Tax Rates (Part 2) to learn more about the new Tax Validation feature.

> **Note:** These enhancements do not affect the **OneSource™** tax engine, which remains the same.

Customer Impact

- Related Solutions: Invoicing
- Feature Activation: This feature is **ON** for organizations that have enabled the JAGGAER rules-based tax engine.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

User Impact

Tax details and the tax engine user interface have been updated to provide a better layout, more information, and more functionality. Overall, these updates help to warn users when the tax engine has run and has calculated different tax amounts than those currently on the invoice.

SUMMARY TAB CHANGES

On the invoice **Summary** tab, the **Discount, Tax, Shipping & Handling** panel has been updated to make it clearer to users when the rule-based tax engine has not yet run.

Before the tax engine runs

- The **Calculate** button is displayed before the tax engine has run. Previously this was a gray button, now it now has color to make it stand out and a message has been added to indicate that the tax engine calculation is pending so users know they need to select "Calculate."

- Users click the button to run the tax engine. The tax engine will run, and the tax engine will automatically update the Tax Code, Tax Description, Tax Rate, and Tax Amount fields.

- **Note:** In addition to a user clicking the Calculate button, the tax engine will also run if it is triggered by the Calculate Tax workflow step or if fiscal data is updated on the invoice.

After the tax engine runs

- The **Review** button is displayed after the tax engine has run.

  - *If the tax engine has found discrepancies* - Warnings are displayed if the tax engine finds a discrepancy between the initial taxes entered on the invoice and the ones calculated by the tax engine. Users can click the button to open the new Tax Details tab (see below) to view and edit tax information.
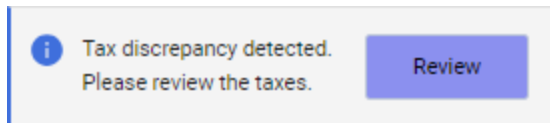
  - *If there are no discrepancies* - There is no warning message. Users can click the button to open the Tax Details tab to view and edit tax information.

New Warnings

If the tax engine calculation has calculated a tax discrepancy, new warnings are displayed in the DTSH panel and sidebar on the Summary tab, indicating that the taxes need review.

THE TAX DETAILS TAB (Tax validation not enabled)

The new **Tax Details** tab is displayed on invoices after the JAGGAER tax engine has run. It is used to review tax calculations. Users can open it by clicking the tab or clicking the **Review** button in the DTSH section on the Summary tab.

Previously, users clicked the Calculate link on the Tax 1 field in the DTSH section to open a "Tax Engine Details" overlay. The Tax Details tab replaces the overlay.

On the Tax Details tab:

1. **Invoice Tax Totals** contains four tiles that show the invoice header-level tax totals: Initial Tax, Current Invoice Tax, Tax Engine, Total Tax Discrepancy.

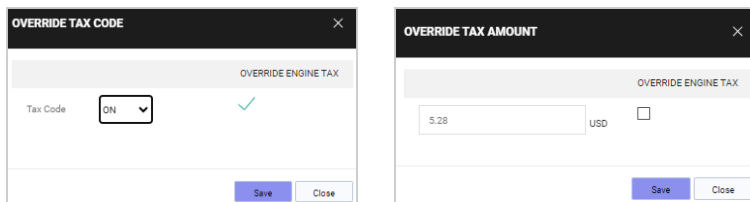2. **Invoice Line Taxes** displays taxes for each line item. This is where taxes can be reviewed and edited. Hover over the info icon ⓘ for a description of the columns.

   - **Invoice Line Details** - The Line, Description, Extended Price columns show what's currently on the invoice. The Initial Tax column shows the value that was initially entered on the invoice.

   - **CURRENT TAX** - The Tax Code, Tax Rate and Tax Amount columns show the values that are currently entered on the invoice. Users can click the edit icon ✏ to change the Tax Code or Tax Amount values.

   - **TAX ENGINE SUGGESTION** - The Tax Code, Tax Rate and Tax Amount columns show the tax values that have been populated by the tax engine.

   - **DISCREPANCY** - Displays the difference between the **Initial Tax** and the tax calculated by the tax engine.

3. Expand a row to review details of the calculations for each line. **Note:** If Shipping and/or Handling is configured to be included in Tax Calculation for an organization, users will see additional lines for Shipping and Handling when the lines are expanded.

☑	LINE	DESCRIPTION	EXTENDED PRICE	INITIAL TAX	TAX CODE	TAX RATE	TAX AMOUNT	☐	TAX CODE	TAX RATE	TAX AMOUNT	DISCREPANCY
					CURRENT TAX				**TAX ENGINE SUGGESTION**			
⌄	1	Exclaim! Pen-Style Chisel Tip Highlighter, Yellow Ink	59.40 USD	N/A	✏ ON	10%	✏ 5.28 USD	☐	USA	5.0000	2.64 USD	2.64 USD

Product

TAX ENGINE	TAX DESCRIPTION	TAXABLE	TAX AMOUNT	TAX RATE	TAX CODE
Rules Engine	United States	52.76 USD	2.64 USD	5%	USA

Shipping

TAX ENGINE	TAX DESCRIPTION	TAXABLE	TAX AMOUNT	TAX RATE	TAX CODE
Rules Engine	United States	0.00 USD	0.00 USD	5%	USA

Handling

TAX ENGINE	TAX DESCRIPTION	TAXABLE	TAX AMOUNT	TAX RATE	TAX CODE
Rules Engine	United States	0.00 USD	0.00 USD	5%	USA

UPDATING TAX VALUES

When updating taxes in new **Tax Details** tab, users have two options:

- **Keep the current tax values** - No change needed!

- **Edit current tax values** - Change either the **Tax Code** or **Tax Amount** by clicking the edit icon ✏ next to the field. Enter a value and click **Save**. If the OVERRIDE ENGINE TAX checkbox is selected, this designates the line as overridden and prevents the tax engine from updating that line going forward. If it is not selected, the tax engine values will override the entered values the next time it is run.

- Once taxes for all line items have been reviewed and any changes have been made:

  - Changed values are saved and totals are updated on the **Tax Details** tab and the **Summary** tab.

  - An indicator is displayed next to the line taxes that have been overridden and they will not be changed by the tax engine if it is run again.

  - Users can click the **Review** button on the Summary tab to review or edit tax values again.

ADDITIONAL UPDATES

- **Tax code rule updates** - In 23.1 we added the ability to configure tax code rules by invoice date. In this release we have added the ability to configure tax code rules by purchase order date and requisition date.

  1. Navigate to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Manage Tax Code Rules**.

  2. **Add** a rule or **edit** a rule. Under **Document-Level Rules** these two new options are available

     - **Purchase Order Date**

- **Requisition Date**

3. The rules first evaluate the PR or PO based on the Accounting Date. If Accounting Date is not available, the rule will evaluate on the Create Date.

Administrator Impact

- These enhancements do not affect the **OneSource™** tax engine, which remains the same with no updates.

- See New Validation for Tax Rates (Part 2) for an overview of how the JAGGAER rules-based tax engine works by default and how it works with the new Tax Validation feature enabled.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Validation for Tax Rates (Part 2)

The JAGGAER tax engine calculates the tax rates on PRs, POs, and invoices based on user-defined tax rules.

By default, the tax engine automatically overrides invoice taxes that are already on a document. In many cases these are taxes submitted by a supplier and customers may not wish to automatically override the tax from the original invoice. They want to compare what the tax engine proposes with the original invoice tax and determine whether to allow the tax engine to change the taxes as originally submitted.

In 23.2, the new Tax Validation feature provides the option to prevent the tax engine from automatically overriding invoice taxes without review. Instead, we provide a warning when there's a discrepancy between current tax and tax values calculated by the tax engine and allow the user to review and decide which to use.

As part of this update, we have made changes to tax details and the tax engine user interface for clarity and improved the user experience. These changes are also available to customers who use the tax engine but want to continue using the existing rules-based tax engine functionality.

See Tax Engine Enhancements (Part 1) to find out more about changes to tax details and the tax engine user interface. The information below describes the new tax validation feature.

Customer Impact

- Related Solutions: Invoicing
- 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 the **Prevent Tax Engine from updating taxes without review** setting is enabled for an organization, it prevents the tax engine from automatically overriding invoice taxes without review. Instead, we provide a warning when there's a discrepancy between current tax and tax values calculated by the tax engine and users can review and decide which to use.

The following sections provide an overview of how the feature works and the differences between existing tax functionality and how it works with the new setting enabled. Please see Tax Engine Enhancements (Part 1) to find out more about changes to tax details and the tax engine user interface.

THE TAX DETAILS TAB (Tax Validation enabled)

The **Tax Details** tab is displayed on invoices after the JAGGAER tax engine has run. It is used to view, accept or change tax calculations. Users can open it by clicking the tab or clicking the Review button in the DTSH section on the Summary tab.

If the Tax Validation feature is enabled for an organization, there are a few differences users will note when reviewing taxes:

- The tax engine checks for discrepancy between the **current tax** on the invoice and tax values calculated by the tax engine.

- If there is a discrepancy outside the set tolerance configured by the organization, a warning is displayed and **the tax engine will not override taxes without review**. Discrepancy is considered outside tolerance if the header tax discrepancy exceeds tolerance OR if the sum of discrepancies on each line exceeds tolerance.

- When users review tax values on the Tax Details tab, the **TAX ENGINE SUGGESTION** section includes checkboxes next to each line item that users can select to choose the tax engine recommended values for that line and apply those values.

Here is an overview of the tab with the Tax Validation feature enabled:

1. A **message** at top is displayed if tax engine amounts have not been applied because there is a discrepancy.

2. **Invoice Tax Totals** contains four tiles that show header-level tax totals: Initial Tax, Current Invoice Tax, Tax Engine, Total Tax Discrepancy.

3. **Invoice Line Taxes** displays taxes for each line item. This is where taxes can be reviewed and edited. Hover over the info icon 🛈 for a description of the different tax level totals.

- **Invoice Line Details** - The Line, Description, Extended Price columns show what's currently on the invoice. The Initial Tax column shows the value that was initially entered on the invoice.

- **CURRENT TAX** - The Tax Code, Tax Rate and Tax Amount columns show the values that are currently entered on the invoice. Users can click the edit icon ✏ to change the Tax Code or Tax Amount values.

- **TAX ENGINE SUGGESTION** - The Tax Code, Tax Rate and Tax Amount columns show the tax values suggested by the tax engine. **Users select the checkbox** next to line items to choose the tax engine recommended values for that line. The tax engine calculated values are highlighted in green. When one or more checkboxes are selected, users can click the **Apply** button to apply the tax engine suggested values.

CURRENT TAX				TAX ENGINE SUGGESTION			
TAX CODE	TAX RATE	TAX AMOUNT	☐	TAX CODE	TAX RATE	TAX AMOUNT	DISCREPANCY
✏ ON	10%	✏ 5.28 USD	✓	USA	5.0000	2.64 USD	2.64 USD
✏ ON	10%	✏ 16.65 USD	☐	USA	5.0000	8.33 USD	8.32 USD

- **DISCREPANCY** - Displays the difference between the **Current Tax** and the tax calculated by the tax engine.

4. Expand a row to review details of the calculations for each line. **Note:** If Shipping and/or Handling is configured to be included in Tax Calculation for an organization, users will see additional lines for Shipping and Handling when lines are expanded.

					CURRENT TAX				TAX ENGINE SUGGESTION			
☑	LINE	DESCRIPTION	EXTENDED PRICE	INITIAL TAX	TAX CODE	TAX RATE	TAX AMOUNT	☐	TAX CODE	TAX RATE	TAX AMOUNT	DISCREPANCY
∧	1	Exclaim! Pen-Style Chisel Tip Highlighter, Yellow Ink	59.40 USD	N/A	✏ ON	10%	✏ 5.28 USD	☐	USA	5.0000	2.64 USD	2.64 USD

Product

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Rules Engine	United States	0.00 USD	0.00 USD	5%	USA

Handling

TAX ENGINE	TAX DESCRIPTION	TAXABLE	TAX AMOUNT	TAX RATE	TAX CODE
Rules Engine	United States	0.00 USD	0.00 USD	5%	USA

STEP-BY-STEP

Review Taxes with the New Validation Feature

1. **Open the invoice** with the taxes to review. This can be a Draft invoice or one that is in Pending status in the approval workflow.

2. Click the **Summary** tab. On the **DTSH** panel, the tax engine button will either say **Calculate**, which means the tax engine has not run, or **Review**, which means the tax engine has run. Choose one:

   - **Calculate** - Click the button to run the tax engine. After the tax engine has run:

     - The **Calculate** button changes to **Review**.

     - The tax engine checks for discrepancy between the **current tax** on the invoice and tax values calculated by the tax engine.

       - *If there is no discrepancy* - No warnings are displayed and the tax engine will automatically update Tax Code, Tax Description, Tax Rate, and Tax Amounts so that lines have the correct Tax Code values.

       - *If there is a discrepancy*, the system will check if it is within the set tolerance as configured by the organization.

- *If the calculated discrepancy is greater than the set tolerance* - **A warning is displayed** in sidebar and in the DTSH section on the Summary tab, and **the tax engine will not override taxes without review**.

- *If the calculated discrepancy does NOT exceed set tolerance* - No warnings are displayed and the tax engine will automatically apply tax engine calculated values to the tax fields. The Tax Details tab will show the discrepancy.

- `Review` - The tax engine has run. Click the button at any time to open the Tax Details tab and review or edit tax information.

3. Users can open the **Tax Details** page and adjust taxes by choosing one of these options for line-items:

- **Keep the current tax values** - No change needed!

- **Use the calculated tax engine values** - Select the checkbox next to line items to choose the tax engine recommended values for that line. The tax engine calculated values are highlighted in green. When one or more checkboxes are selected, click the **Apply** button to apply the tax engine suggested values.

CURRENT TAX				TAX ENGINE SUGGESTION			
TAX CODE	TAX RATE	TAX AMOUNT	☐	TAX CODE	TAX RATE	TAX AMOUNT	DISCREPANCY
✎ ON	10%	✎ 5.28 USD	✓	USA	5.0000	2.64 USD	2.64 USD
✎ ON	10%	✎ 16.65 USD	☐	USA	5.0000	8.33 USD	8.32 USD

- **Edit current tax values** - Change either the **Tax Code** or **Tax Amount** by clicking the edit icon ✎ next to the field. Enter a value and click **Save**. If the OVERRIDE ENGINE TAX checkbox is selected, this designates the line as overridden and prevents the tax engine from updating that line going forward. If it is not selected, the tax engine values will override the entered values the next time it is

run.

4. Once taxes for all line items have been reviewed and any changes have been made:

    - Changed values are saved and totals are updated on the **Tax Details** tab and the **Summary** tab.

    - An indicator is displayed next to the line taxes that have been overridden and they will not be changed by the tax engine if it is run again, unless a user unchecks the Override Engine Tax checkbox on the Override Tax Code/Tax Amount overlay.

    - Users can click the **Review** button on the Summary tab to review or edit tax values again.

Administrator Impact

The new Tax Validation feature can be enabled to alert AP users when the tax engine calculates a different value than what is currently on the invoice. They can compare the two values and accept or decline tax engine updates before they are made on the invoice.

> **Note:** The Tax Validation feature only applies to the JAGGAER rules-based tax engine. It does not affect the **OneSource™** tax engine or manual updates (i.e., directly editing tax amount or rate).

DIFFERENCES

Differences between Default and Tax Validation Functionality

Here is a quick overview of how the JAGGAER rules-based tax engine works by default and how it works with the new Tax Validation feature enabled. The primary difference in functionality is in how discrepancies are calculated and whether the tax engine overrides the current tax values automatically.

- *If the Tax Validation setting is OFF (Default functionality)*

  - The tax rules tax engine is triggered to run when a user clicks the Calculate button in the DTSH section of the invoice, from a Calculate Tax workflow step, or when any fiscal data is updated on the invoice (same for both configurations).

  - By default, the system checks for any discrepancy between the **initial tax** entered on the invoice and the tax values calculated by the tax engine.

  - When the tax engine runs, it **automatically updates** the Tax Code, Tax Description, Tax Rate, and Tax Amount fields based on tax engine rules.

- *If the Tax Validation setting is ON*

  - The tax rules tax engine is triggered to run when a user clicks the Calculate button in the DTSH section of the invoice, from a Calculate Tax workflow step, or when any fiscal data is updated on the invoice (same for both configurations).

  - With the new Tax Validation feature enabled, the system checks for discrepancy between the **current tax** on the invoice and tax values calculated by the tax engine. If there is a discrepancy, it also checks if it is within the set tolerance as configured by the organization.

    - *If the calculated discrepancy is greater than the set tolerance -* **A warning is displayed** in sidebar and in the DTSH section on the Summary tab, and **the tax engine will not override taxes without review.**

    - *If the calculated discrepancy does NOT exceed set tolerance -* **No warnings are displayed** and the tax engine will automatically apply tax engine calculated values to the tax fields. The Tax Details tab will show the discrepancy.

ENABLE THE TAX VALIDATION FEATURE

1. Go to **Setup** ⚙ **> Hosted Catalog and Ordering Configuration > Default Ordering Settings (eg. Tax, S&H, Payments**. Click on the **Tax** tab.

2. Activate these two settings to enable the feature:

   > **Important Note:** These settings, unlike the others in this section, **only apply to invoices**.

- **Prevent Tax Engine from updating taxes without review** - Select the checkbox to display a warning on invoices when there is a difference between the **current invoice** total and the total tax calculated by the tax engine. When the warning is displayed, the tax engine will not override taxes without review. and users will have the option to keep the current total, modify tax values, or allow the tax engine to calculate the tax total.

  - *When the setting is ON* - The tax engine will store data but will not override existing tax values. The Tax Code, Tax Description, Tax Rate or Tax Amount values are not changed by the tax engine.

  - *If the setting is OFF* - The tax engine will automatically update tax values.

- **Allowed Tolerance for discrepancy between Invoice Current Tax and Tax Engine Amounts** - This field is displayed if the checkbox above is selected. In this field, **enter a number** (up to 3 characters) that represents the tolerance amount for a discrepancy between the tax engine calculation and the current tax amount on an invoice, so that if an invoice exceeds the tolerance amount, a warning will be displayed and the tax engine will not override taxes without review. The setting is blank (or zero) by default, which means that any discrepancy will trigger a warning.

  - E.g., If the Allowed Tolerance is set at 0.10 USD (10 cents), then users will be warned only when the discrepancy between the tax engine calculated tax value and the current tax value is more than 10 cents. If the discrepancy is less than 10 cents, the tax engine will automatically apply its calculated value without warning the user.

  - Discrepancy is considered outside tolerance if the header tax discrepancy exceeds tolerance OR if the sum of discrepancies on each line exceeds tolerance.

Third-Party Integration Impact

- **OCR/DMR** and **cXML** import have been updated so that if the **Prevent Tax Engine from updating taxes without review** setting is enabled, the tax engine will not override taxes. If there is a discrepancy between the taxes originally entered on the invoice and those calculated by the tax engine, a warning message is displayed.

- **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

- Supplier portal invoices have been updated so that if a customer has the **Prevent Tax Engine from updating taxes without review** setting enabled, the tax engine will not override taxes. If there is a discrepancy between the taxes originally entered on the invoice and those calculated by the tax engine, a warning message is displayed.

Allow Cancellation of Returned Invoices

Engage Idea 💡

Invoice approvers can choose to return an invoice as a workflow action, which puts the invoice back to a Draft state and assigns it to the invoice creator or owner. The invoice owner or creator can fix the invoice and re-submit it, but often a new invoice is created instead.
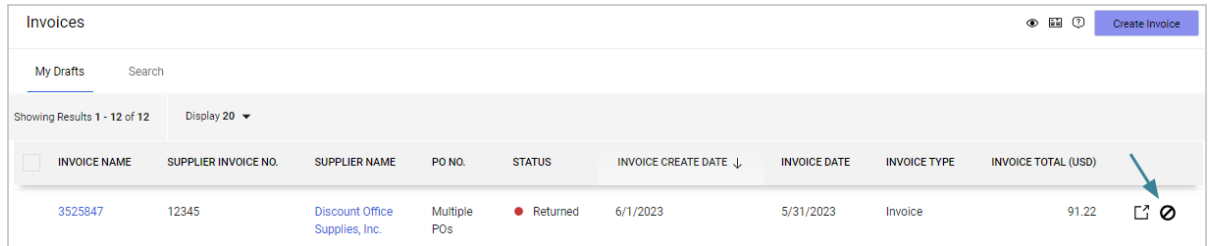
Over time, users may accumulate many returned invoices on their Draft Invoices page, many of which have already been replaced with a new invoice and will never be used. To allow users to remove these invoices from their Drafts page, we've added a new Cancel action for Returned invoices.

Customer Impact

- Related Solutions: 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

- A new Cancel ⊘ action allows users to remove returned invoices from their Draft Invoices page. Users can cancel their returned invoices as follows:

  1. Navigate to **Accounts Payable 🏛 > Invoices > View Draft Invoices**. A Cancel ⊘ icon is displayed next to returned invoices only.

  2. Click the **Cancel** ⊘ icon next to a returned invoice to remove it from the page.

     - The Pay Status of the invoice changes to Cancelled.

     - The Cancel action is recorded in the History tab along with the name of the person who performed the action.

Administrator Impact

- A new Cancel ⊘ action has been added to the **View All Returned Invoices** page so that administrators with access to this page can cancel returned invoices for an organization.

- In addition, a new **View Cancelled Return Invoices** page has been created that allows users with the appropriate permissions to view all returned invoices with the Cancelled status.

- **Cancel returned invoices for an organization** as follows. The **AP Configuration** permission (Permission Settings > Accounts Payable) is needed perform this task:

  1. Navigate to **Accounts Payable 🏛 > Invoices > View All Returned Invoices**.

  2. Enter search criteria (optional) in the search filter fields and click **Search**. A Cancel ⊘ icon is displayed next to the returned invoices.

3. Click the **Cancel** 🚫 icon next to a returned invoice to remove it from the page.

- The Pay Status of the invoice changes to Cancelled.

- The Cancel action is recorded in the History tab along with the name of the person who performed the action.

- **View cancelled return invoices for an organization** as follows. The **AP Configuration** permission (Permission Settings > Accounts Payable) is needed perform this task:

1. Navigate to **Accounts Payable** 🏛 **> Invoices > View Cancelled Return Invoices**.

2. Enter search criteria (optional) in the search filter fields and click **Search**.

3. Cancelled return invoices are displayed in a read-only view. Click an invoice number to open the invoice.

Accounts Payable ▸ Invoices ▸ View Cancelled Return Invoices

View Cancelled Return Invoices

> Search Cancelled Return Invoices

Invoice Number	Supplier Invoice Number	Supplier Name	PO Number	Invoice Create Date	Invoice Date	Invoice Type	Invoice Total	Last Modified Date/Time
2972434		Staples Advantage (formerly Corporate Express)	3141394	6/2/2022	6/1/2022	Invoice	196.08 USD	2/1/2023 9:37:12 AM

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

These updates have been made in the supplier portal:

- On supplier invoices in the portal, the **Cancel** action is recorded in the History tab along with the name of the person who performed the action.

- A new **Status** column has been added to the **Invoice Returned to Buyer User for Changes** page:

- Navigate to **Orders** **> Supplier Invoices > View Invoices Returned for Buyer Changes**.

- A new **Status** column displays the status of returned invoices. The invoices will show a status of "Returned" or "Cancelled".

- Attachments cannot be added to canceled invoices.

Ability to Make Internal Attachments Required on PO Invoices

Engage Idea 💡

Customers may need to make internal attachments on invoices required. Previously, the buyer invoice document configuration settings that cause internal attachments on invoices to be required only applied to non-PO invoices. In this release we have updated these validation settings so that they apply to internal attachments on both PO invoices and non-PO invoices.

Customer Impact

- Related Solutions: Invoicing
- Feature Activation: This feature is **ON** by default for customers that already require internal attachments on invoices. Otherwise, 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 internal attachments are required on invoices by your organization, a message is displayed on PO and non-PO invoices and credit memos if there is no internal attachment. If an organization has set attachments to be required, the invoice will stop and not be able to move forward until the required attachment is added.

Administrator Impact

- Validation settings have been updated on the Internal Attachments field on the buyer invoice document configuration so that the settings now apply to PO invoices (new functionality) as well as non-PO invoices and credit memos (existing functionality). This applies to internal attachments at the header-level and at the line-level.

- This is an update to existing validation settings. Organizations that have already set their buyer invoice document configuration to make internal attachments required will notice that the validation now automatically applies to the PO invoices as well as non-PO invoices and credit memos.

- The settings do not apply to portal invoices on the supplier side because suppliers do not use internal attachments.

- To make internal attachments required, update the buyer document configuration settings as follows:

    1. Navigate to **Setup** ⚙ **> Configure Documents > Configure Buyer Invoice Document**.

    2. Open a draft version of the buyer invoice document configuration to be updated.

    3. In the **Layout Details** tab, select the **Internal Attachments** field.

    4. Complete these fields in the **Validation** section:

        - **Submit validation rules** - Set the **If empty** setting to **Error**.

        - **Workflow validation rules** - Set the **If empty** setting to **Error**.

    5. Save changes, then 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.

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.

Introduction of AI-based PO Invoice Matching Recommendations

Companies receive thousands of invoices without PO numbers and struggle to match the invoice to the appropriate order manually, spending valuable time linking invoice lines to order lines.

In 23.2, end-users can leverage the AI-based JAGGAER Advise solution to facilitate Invoice to PO line matching, which leverages AI (artificial intelligence) and machine learning based on the invoice line description and historical invoices for similar items, saving precious time for AP clerks and end-users.

> **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 PO invoice matching recommendations.

Customer Impact

- Related Solutions: JAGGAER Advise, Invoicing
- 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: **Match to PO Line**
- New Notifications related to this feature: None

User Impact

Match an Invoice to a PO Using an AI-Based Recommendation

If this feature has been activated, Invoice Specialists with the **Match to PO Line** user permission can access recommended matches when they receive an invoice without an associated PO.

1. Expand the **...** drop-down within an invoice line that does not have a PO number and click **Match to PO Line**.

2. An overlay containing a list of up to the top 5 PO lines that are most likely to match the invoice appears. Select a radio button for a PO line and then click **Match** to complete the selection.

a. Information from the invoice is displayed for the user's convenience.

b. A **Matching** column displays the percentage of match likelihood as calculated by Advise.

> **Note:** Match likelihood is determined by considering various factors, including **Organization Name**, **Item Description**, **Timestamp**, **Currency**, **Supplier ID**, **Supplier Name**, **Contract ID**, **Grand Total**, **Unit Price**, **Quantity**, and more. Achieving a 100% match requires a complete alignment across all fields, which is uncommon. However, even with a lower value, a significant match can still be identified and considered highly suitable.

c. Radio buttons are available to select a recommendation.

d. Click the **Match** button to complete the selection.

e. Left and right arrows allow users to navigate between invoice lines with minimal clicks. Users can skip any lines they do not want match by navigating through these lines without clicking **Match**.

3. A green Success message box is displayed on-screen. An invoice line that is matched through a recommendation is automatically updated with the PO information and a green checkmark is displayed in the **Matched** column.
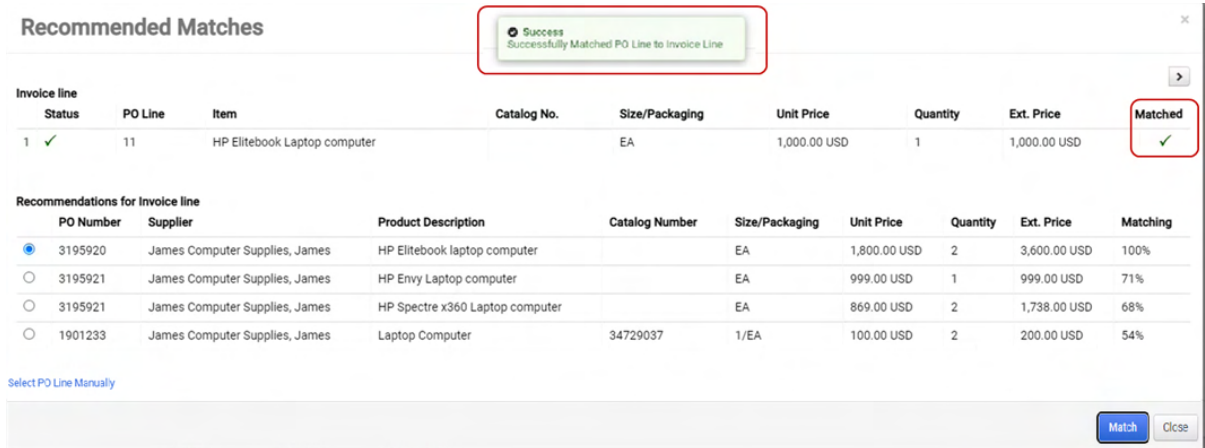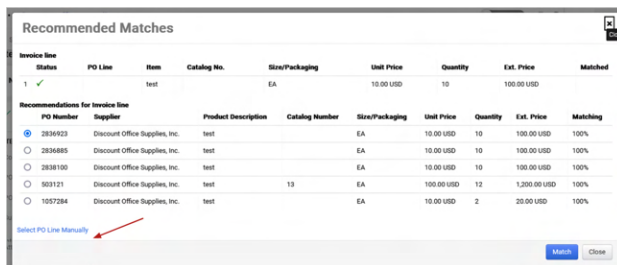
4. Click **Close** to close the *Recommended Matches* window or use the left and right arrows to move to other unmatched invoice lines.

Match an Invoice to a PO Manually

Users can reject recommendations and perform matches manually.

1. Click the **Select PO Line Manually** button on the *Recommended Matches* window.

2. The *Recommended Matches* window closes and a PO search window appears. The search window corresponds to the invoice line that was displayed on the *Recommended Matches* window. Click a **+** sign to select a PO.
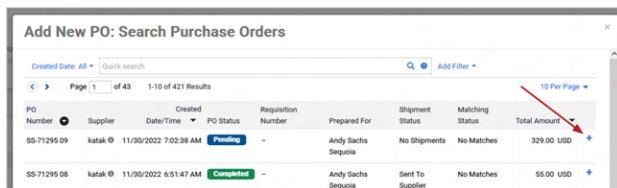
3. The lines associated with the selected PO are displayed on screen. Click the corresponding link in the **Match** column to select a PO line. If the invoice is not a correct match, click **Cancel** to close this overlay and return to the list of possible invoice matches.
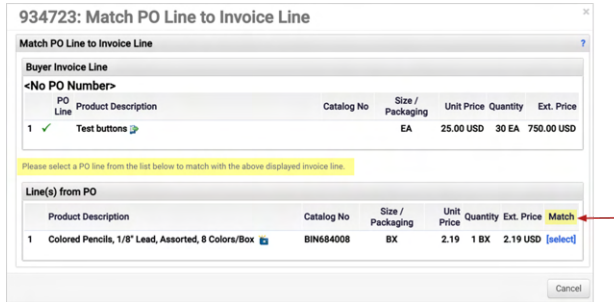
4. Upon selection, the screen overlays close. The recommendation selection is recorded into the history of the invoice. The following data is updated on the invoice:

- Invoice Line Type

- Match Status

- Contains Non-PO Lines

- PO Number

- PO AP Status

- PO Match Status

- PO Line Match Status

- Tolerance Status

> **Note:** When PO lines and invoice lines are matched, the following information is copied from the PO line to the invoice line:
>
> • Accounting Codes
>
> • Custom Fields (except for the **Tax Code** customer field)
>
> This information is copied regardless of whether recommendations are used or matches are processed manually.

Manual Matching When No Recommendations are Found

If no matches are received from the Recommendation Engine, a blue message box appears to convey this information.

- If an invoice has one line, users are redirected to the PO search window with a message instructing them to select a PO and its line manually.

- If an invoice has more than one line, users remain on the Recommended Matches window. A message instructs them to close the window and retry the **Match to PO Line** action.

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 PO invoice matching recommendations.

- The user permission called **Match to PO Line** (**Permission Settings > Accounts Payable**). With this permission, users have access to the **Match to PO Line** action button, which creates recommendations for PO line matches.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Ability to Automatically Export Receipts When Canceled

Customers typically need to export canceled receipts to their ERP in order to keep the ERP synchronized with JAGGAER. Previously this could only be done through a manual action by clicking the Resend to ERP button and then selecting the correct connection.

With this release, a new setting provides the ability to automatically export any receipt that is canceled, eliminating the need for a manual step.

Customer Impact

- Related Solutions: Invoicing
- 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

Previously, canceled receipts needed to be synced to an ERP system through a manual action by clicking the Resend to ERP button and then selecting an ERP connection. Now, if this feature is enabled, canceled receipts are automatically synced to the ERP and users do not need to manually export canceled receipts.

Administrator Impact

- A new receipt trigger has been added to Document Export Settings. Enable the feature as follows:

  1. Navigate to **Setup** **> General Site Settings > Document Export Settings**.

  2. Click the **trigger mgmt** tab.

  3. In the left panel, select an existing **Receipt Export** trigger to edit, or click **New Trigger** and select **Receipt** in the Document Type field. In the Event field, a new On Receipt Cancel option is available.

  4. In the right panel, locate the **Event** field and select **On Receipt Cancel**.

  5. Complete additional fields as needed and save changes.

     > **Note:** If there is no existing receipt export connection and schedule, they will need to be configured in the **connection mgt** and **scheduling mgt** tabs.

Third-Party Integration Impact

- Document Export Settings have been updated. If a receipt trigger under **Setup > Document Export Settings > trigger mgt** is set to **On Receipt Cancel**, receipts will be automatically exported to the ERP with the Cancelled status when a receipt status changes to "Cancelled".

- **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.

Receipt Enhancements

On requisitions and purchase orders, items being purchased can be defined as a "product" or a "service" in the Line Item Type field. Previously, the Line Item Type was not carried over to receipts and fields displayed on the Receipt document were same for both product and service items. Since many of the fields on a receipt are only used for "product" types of items, receipts created for "service" items had extra fields that did not need to be filled out.

With this release, a new **Receipt Purpose** field has been added to the receipt header. It automatically separates receipts into "Services" and "Products" purposes. If a Receipt Purpose is "Services", the fields related to products are hidden.

Customer Impact

- Related Solutions: 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

- A new **Receipt Purpose** field has been added to the receipt header to indicate what type of line items are on the receipt. On Draft receipts, the field will automatically display one of these values:

    - **Services** - Indicates that all lines on the receipt are for services. If this option is displayed, fields related to products are hidden, i.e., such as Packing Slip No., Carrier, or Tracking No.

    - **Products** - Indicates that all lines on the receipt are for products.

    - **No Value** - Indicates that there are both "Service" and "Product" types of line items on the receipt. A warning in the right sidebar will indicate that there is a mixture of Product and Services line item types and that one type of item will need to be removed before the receipt can be completed or submitted to workflow.

- A new **Receipt Purpose** filter has been added to the **Receipt Search** page (**Accounts Payable 🏛 > Receipts > Search for Receipts**). Users can apply the filter to search and report on receipts by their line item type.

Administrator Impact

- A new **Receipt Purpose** field is displayed on the receipt header. When a receipt is created, the system will check for the Line Item Type on the purchase order and will automatically display a value in the field using these criteria:

    - The system will automatically select a value of **Services** if all lines on a receipt are defined as "Services" on the PO, or if one or more lines are defined as "Services" and the remaining lines are set to "None". If the value in the field is set to "Services", fields related to "Products" types of items are hidden.

    - The system will automatically select a value of **Products** if all lines on the receipt are defined as "Products" on the PO, or if one or more lines are defined as "Products" and the remaining lines are set to "None".

    - **No Value** will display if there are both "Services" and "Products" types of line items on the receipt. Warnings on the receipt will indicate that there is a mixture of Product and Services line item types and that one type of item will need to be removed.

- The **Force Separation of Products and Services Receipts** setting (Accounts Payable 🏛 > AP Administration > Configure AP Settings, in the Accounts Payable Settings section) must be enabled for the **Receipt Purpose** field to be displayed on receipts. Previously this setting was labeled **Prevent Receipt Submission for Mixed Line Item Types** and it has been renamed to **Force Separation of Products and Services Receipts** in this release.

    - *When the setting is ON* - Receipts are separated based on the line item type of "Products" or "Services", the Receipt Purpose field is displayed on Receipts, and errors are displayed if a receipt contains a mixture of line item types and a message indicates that one of the line item types will need to be removed.

    - *When the setting is OFF* - Receipts are not separated based on the line item type and the Receipt Purpose field is not displayed on Receipts.

- A new **Receipt Purpose** filter has been added to the Receipt Search page. Users can apply the filter to search and report on receipts by their line item type.

Third-Party Integration Impact

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Global Invoicing - New "External Network Name" Field for eInvoicing

Previously there was no way for Global Invoicing customers to identify the network / partner that an eInvoice came from, such as Peppol or sdI, etc. In this release, we have added a new **External Network Name** element to the application that can be used to indicate the external network source on eInvoices.

Customer Impact

- Related Solutions: Invoicing
- Feature Activation: For customers with Global Invoicing, this feature is **ON** by default for

Invoice Search. Additional setup by an organization administrator may be required.

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

User Impact

The **External Network Name** field can be found in these locations in the application. It is a read-only field that displays the external network source of an eInvoice if there is one.

- **External Network Name** has been added to Invoice Search. Users can display, filter for or export the External Network Name information:

  - External Network Name is available as a filter in the General Information section of search filters.

  - Under Configure Columns 🔧, it can be selected to show as a column in the search results.

  - It is available for Invoice Search exports (Screen Layout, Full and Transaction).

- If the field has been added to your organization's buyer invoice document configuration, **External Network Name** appears as a read-only field on Summary tab of eInvoices.

Administrator Impact

- For organizations with Global Invoicing, the **External Network Name** field has been automatically added to these areas in the application:

  - It has been added to **Invoice Search**. Users can display, filter for or export External Network Name information (see the User Impact section above).

  - It has been added to OCR/DMR invoice imports and to Invoice Export (see the Third-Party Integration Impact section below).

- To display the External Network Name field on eInvoices in the application, the field must be added to the buyer invoice document configuration:

  1. Navigate to **Setup** 🔧 **> Configure Documents > Configure Buyer Invoice Document** and open a draft version of the buyer invoice configuration to change.

  2. Click the **Layout Details** tab.

3. Expand the **Global Invoicing Fields** section in the left panel and select **External Network Name.**

4. Select placement and configuration options in the right panel. It is a header-only field. The Supplier Portal Visibility Flag field provides the option to either hide the field or display it as a read-only field on supplier portal invoices.

5. Save changes, then finalize and activate the version.

Third-Party Integration Impact

- **OCR/DMR** imports have been updated to include the External Network Name field as an optional element.

- **Invoice Export DTD** version (2.6) has been updated to include the new External Network Name field. The field is optional and is only displayed in export if populated.

- **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

- If a customer has added the External Network Name field to their buyer invoice document configuration and made it visible to suppliers, suppliers viewing eInvoices from that customer in the supplier portal will see the read-only field indicating the source of the external network.

- The External Network Name field is available on Invoice Search in the supplier portal, as a filter, column heading and in search export (Screen Layout, Full and Transaction).

Global Invoicing - GI Fields Added to CSV Invoicing Import

The CSV Invoice Import feature in the supplier portal allows suppliers to upload invoices in bulk. Previously, it did not support Global Invoicing fields. In this release we have updated the CSV import settings with new fields, including Global Invoicing fields, and added the appropriate validation.

Customer Impact

- Related Solutions: 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

This feature does not impact end users.

Administrator Impact

- The CSV Invoice Import feature in the supplier portal has been updated with new fields, including Global Invoicing fields, in the CSV import and the appropriate validation has been added. Suppliers can now use the feature to import invoices from their Global Invoicing customers.

- Since some fields are populated directly from the supplier profile, we have included only those fields that can be populated by suppliers on the invoice import.

Third-Party Integration Impact

- The CSV Invoice Import feature in the supplier portal has been updated to include Global Invoicing fields in the CSV import.

- **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

- The CSV Invoice Import feature in the supplier portal has been updated to include Global Invoicing fields and the appropriate validation has been added. Suppliers can now use the feature to import invoices from their Global Invoicing customers.

- Global Invoicing field values will only import to customers with the Global Invoicing license enabled.

- The **CSV Invoice Import** logic has been updated:

- It now allows imports to Global Invoicing customers (previously this was not allowed).

- For Global Invoicing Credit Memos, the Remit to Address **Country** is required. The **Related Invoice Number** is required unless it has been explicitly set to not be required for the country by the customer on their credit memo configuration.

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.
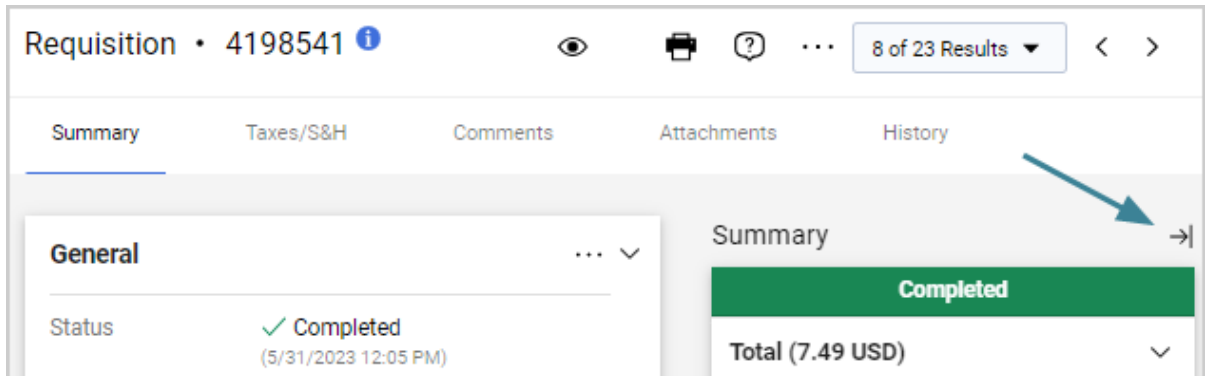
- **Filter View** settings on documents have been updated so that the options that were last selected now remain in place, even if a user navigates away from the page and returns.

- The look and feel of

    - buttons ( )

    - toggles ( ), 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.
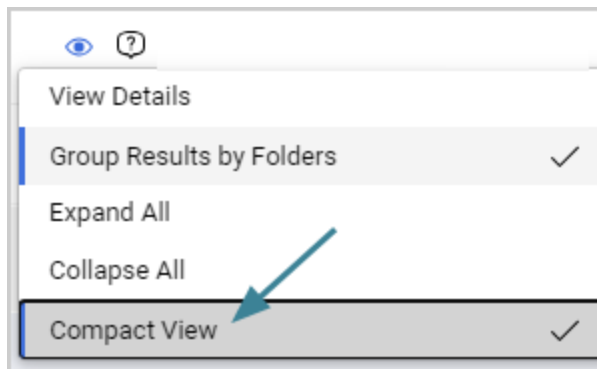
Approvals Page Updates

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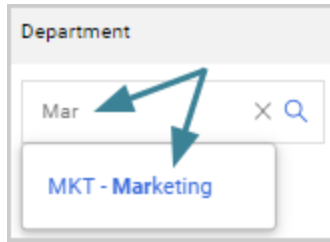
Here is an example of an account code custom field that displays the drop-down menu.
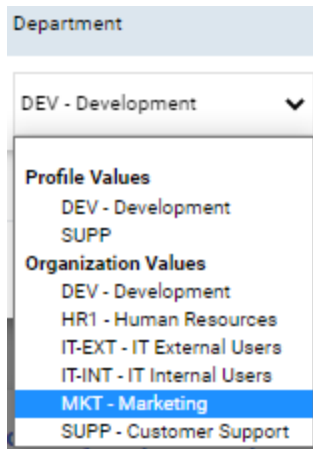
Administrator Impact

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.

Ability to Return a Document to a Previous Workflow Step

Engage Idea 💡

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**.
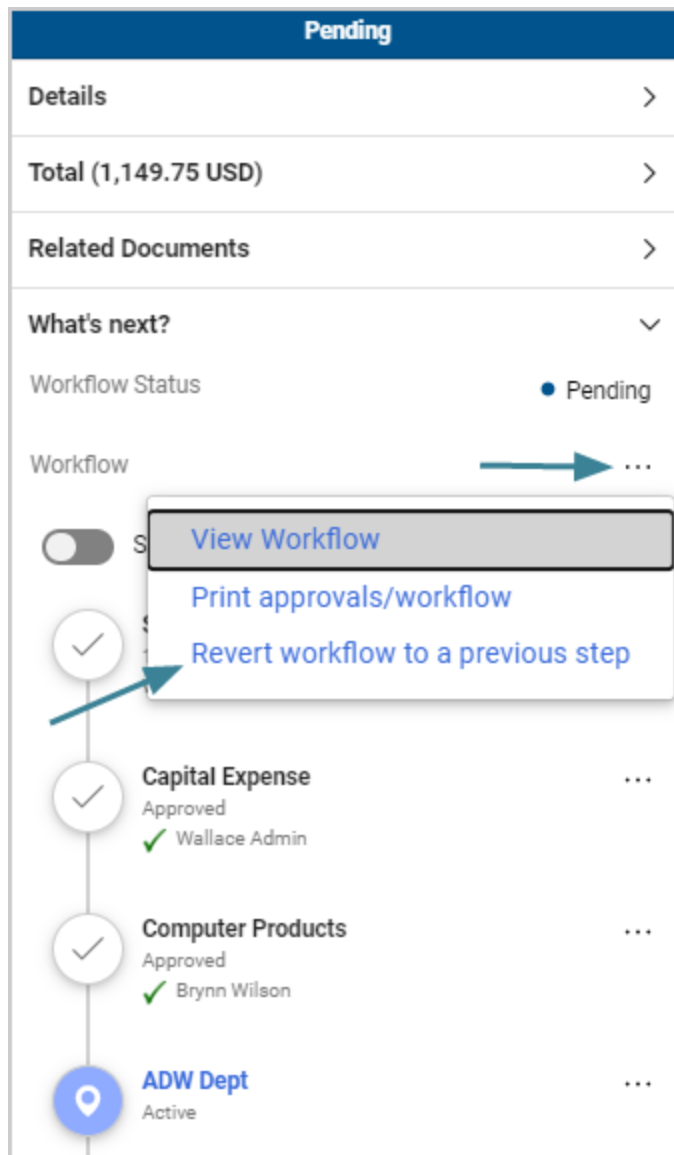
> **Note:** In the new experience view, workflow settings under **What's next?** in the right sidebar have been updated. The view and print icons that were displayed next to **Workflow** have been replaced with an actions icon ⋯ that users can click to access the options in a drop-down menu.
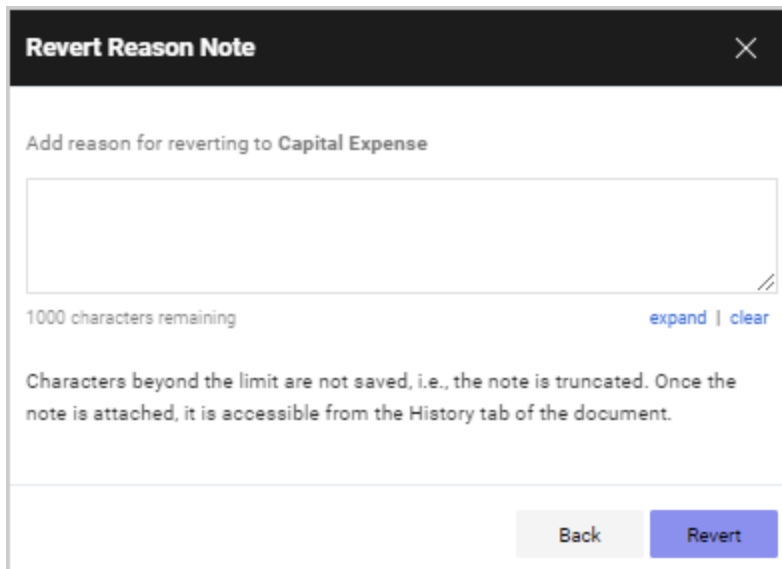
- *Legacy view (for any document showing the legacy view, such as Forms or Sourcing)* - Click the **Revert workflow to a previous step** link.
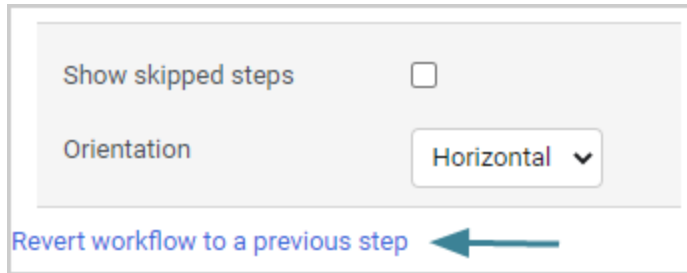
3. In the pop-up window, click the **Select** button next to the workflow step that you want to revert TO.
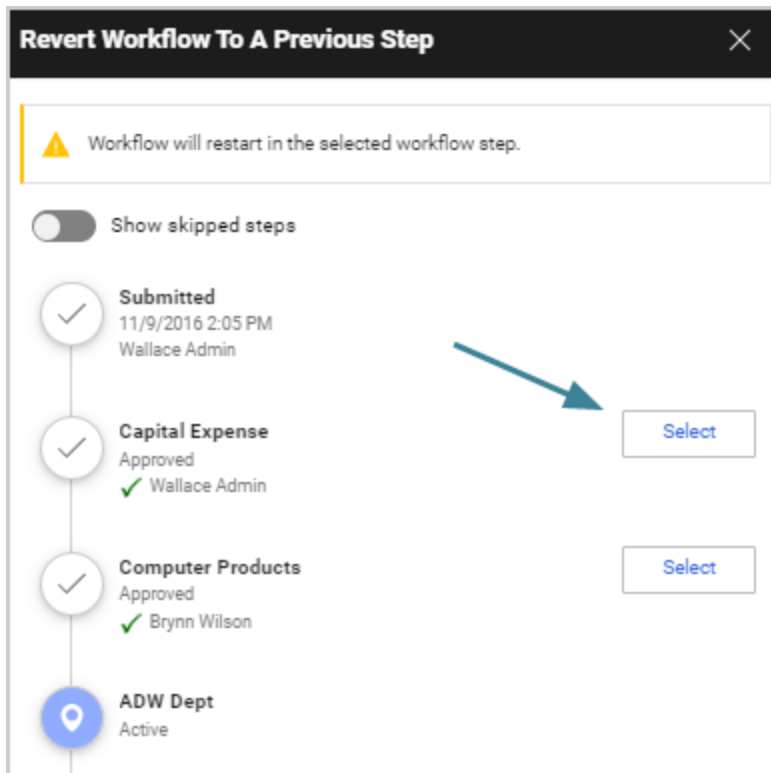
4. Enter a reason for reverting the step (required) and click **Revert**.
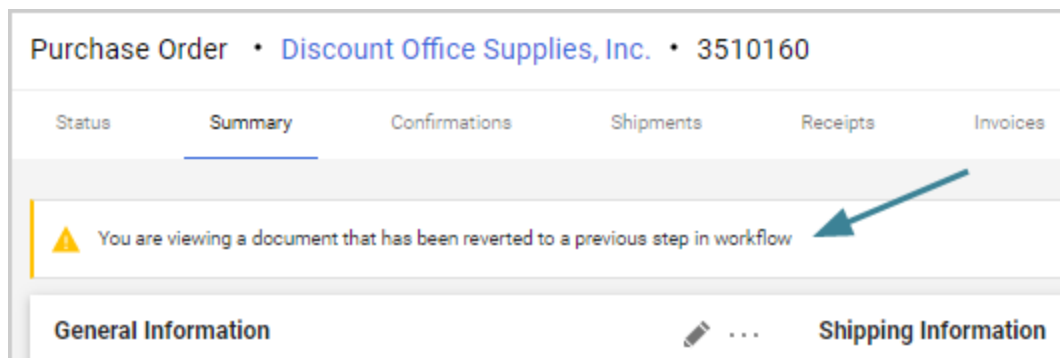
5. The document returns to the selected workflow step, which now becomes the active step in workflow. Once the **Revert** button is clicked:

- 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.

- 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.

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.
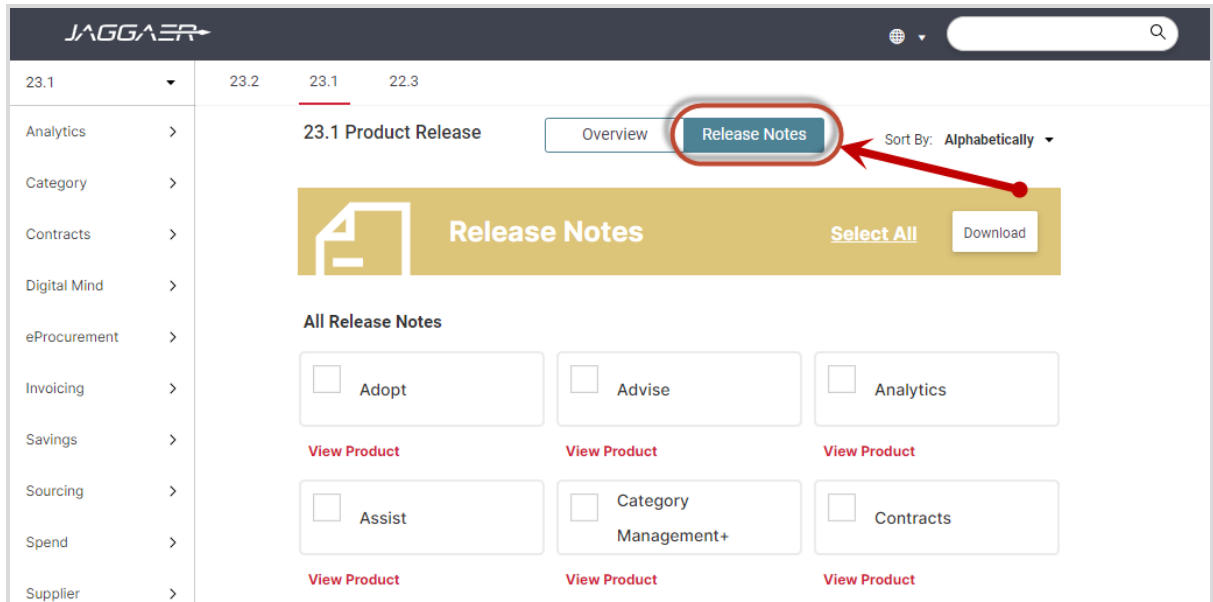

Online Help Updates:

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.
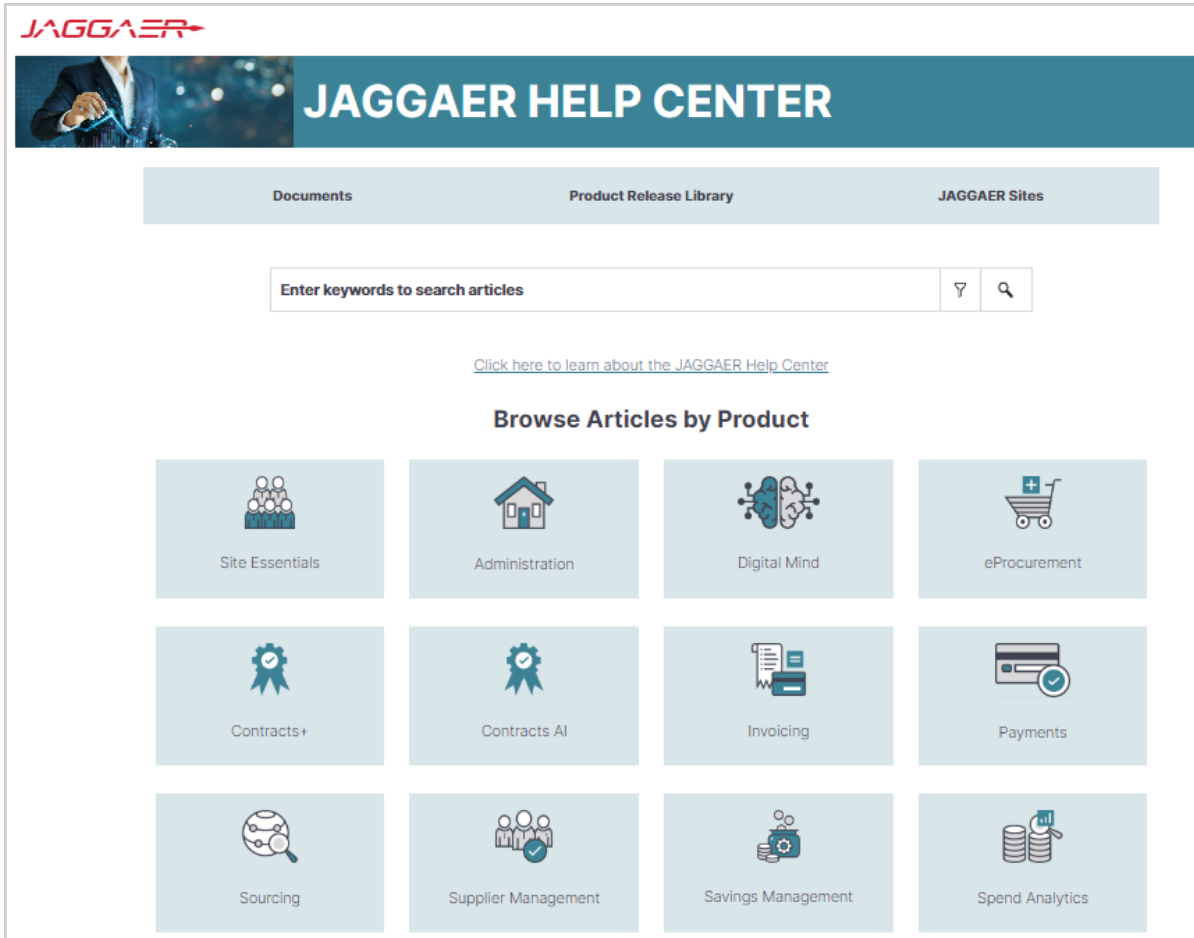
Administrator Impact

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**.

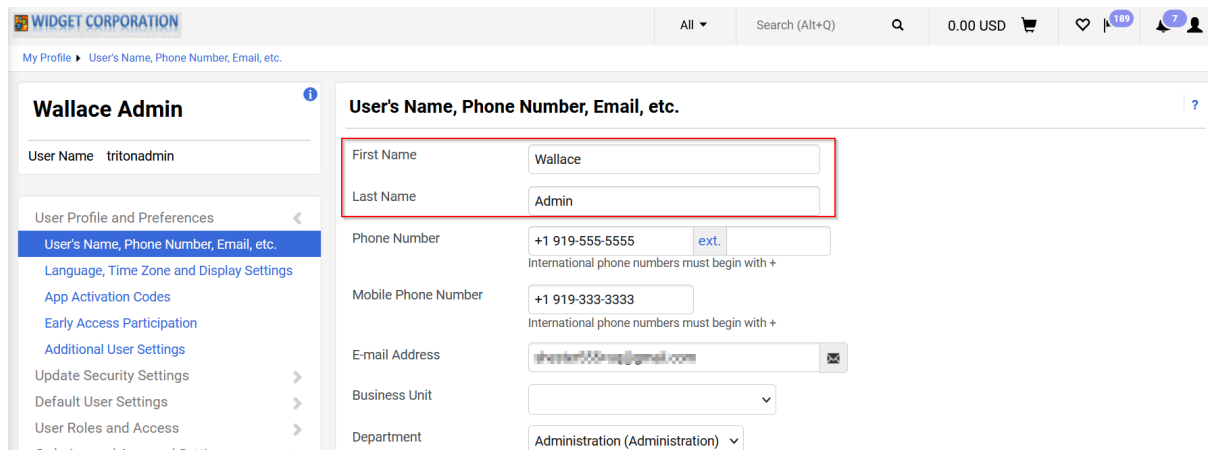# User Profile First and Last Name Character Limit Expanded

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**).

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:
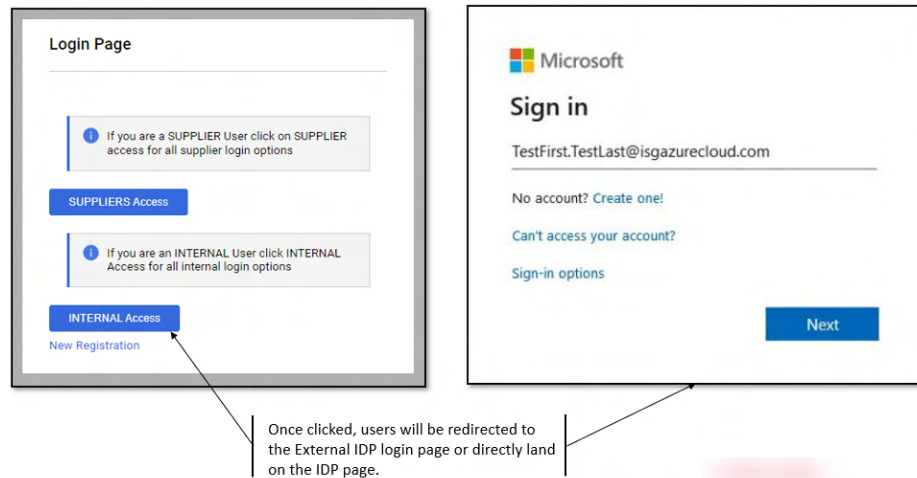
  - **Internal**:

    - 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.

Once clicked, user will be redirected to the Buyer IDM login page
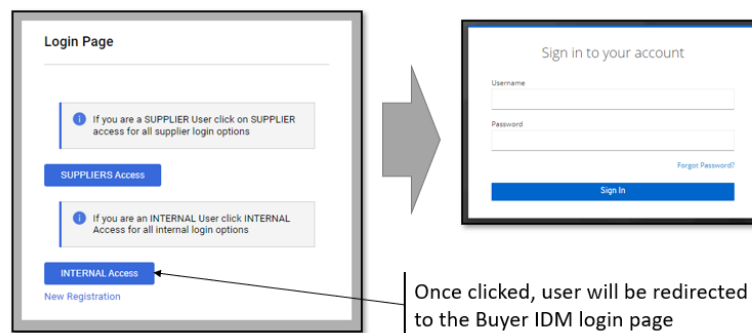
  - **External**:

    - 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.

Once clicked, users will be redirected to the External IDP login page or directly land on the IDP page.

- **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.
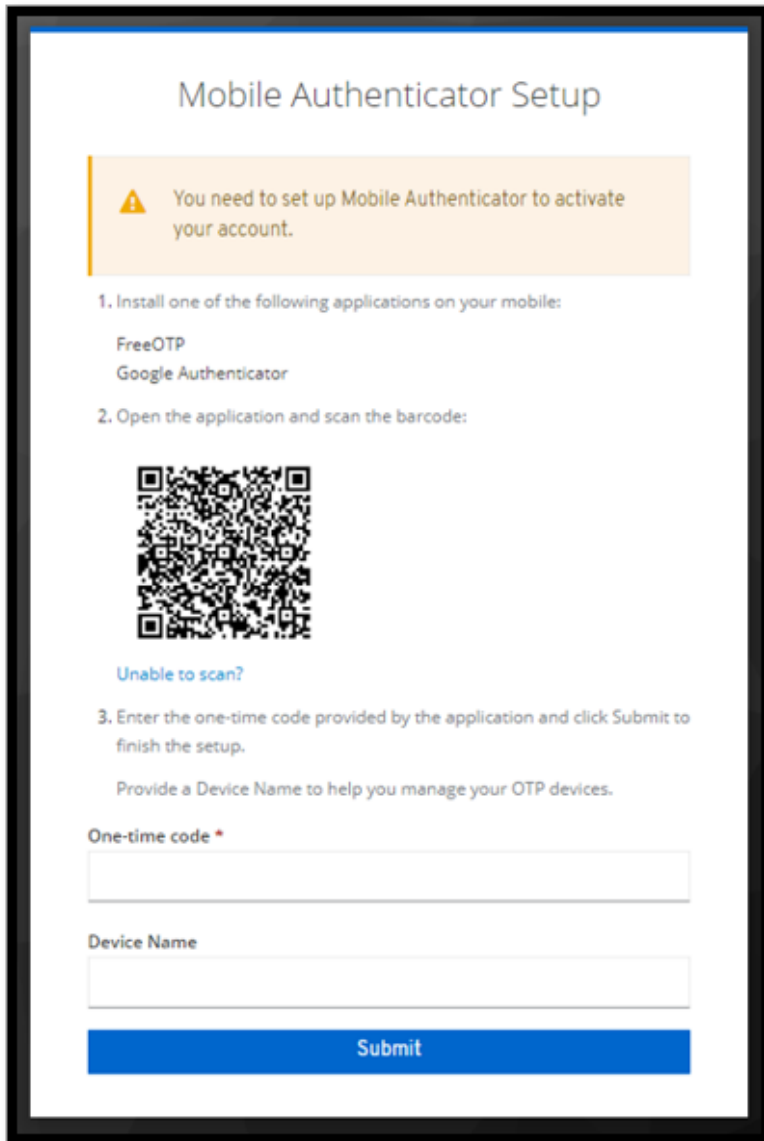
Login With Multi-Factor Authentication (MFA):

- 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 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.
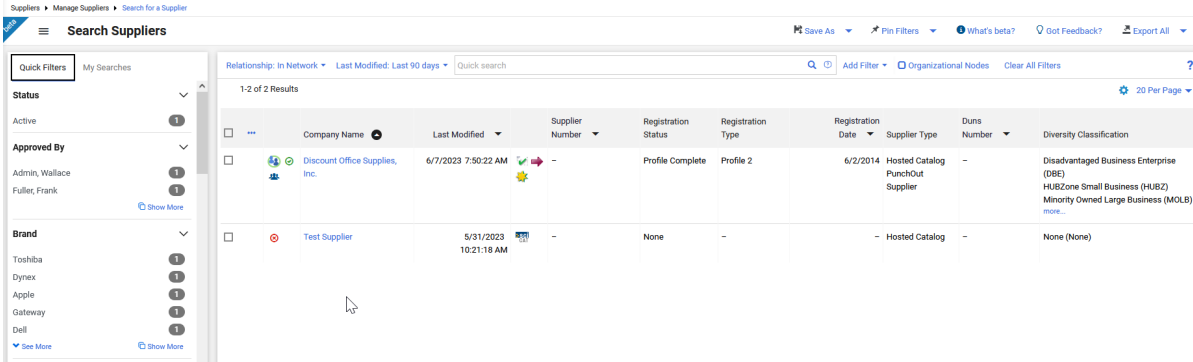
Customer Impact

- 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.

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 he **Quick Filters** and **My Searches** panels on the left. Select again to hide.
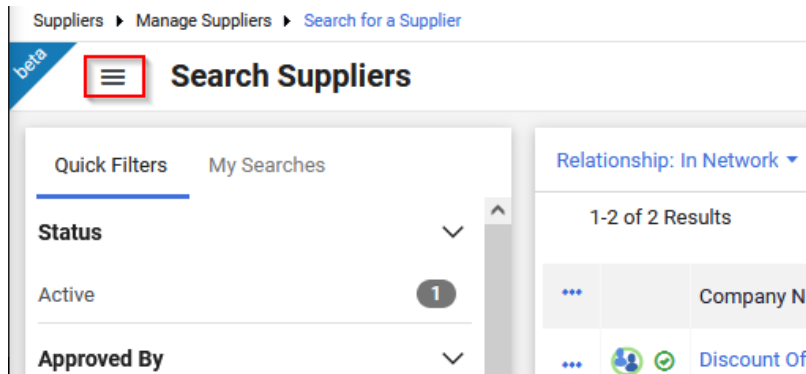
- **Quick Filters** - This area displays filters available to further refine search results. As with other search results pages, simply select or deselect options from the filter list to refine results. You can continue to use the **Add Filter** dropdown above search results, which will update the **Quick 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.
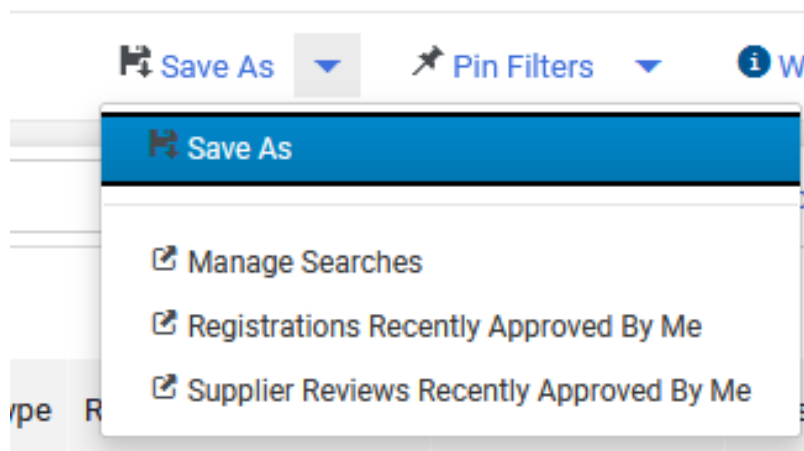
- You can choose to **Pin Filters** and **Pin Columns** from the dropdown when you use the same filters and column layout for searches, so you do not have to reapply filters and rearrange columns each time.
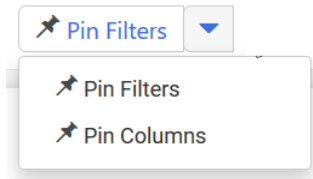
- The **Export** options are contained in the dropdown above search results. Options to **Export All** or **Export Selected Rows** are available. Use the multi select ellipses on the left, if necessary, to enable the selection boxes for each row (existing functionality). You can then choose rows to export 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.
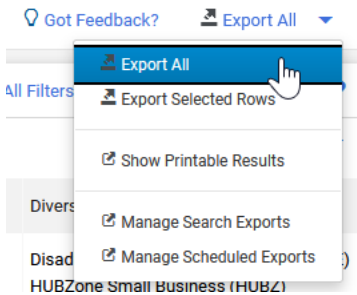
Administrator Impact

- 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.
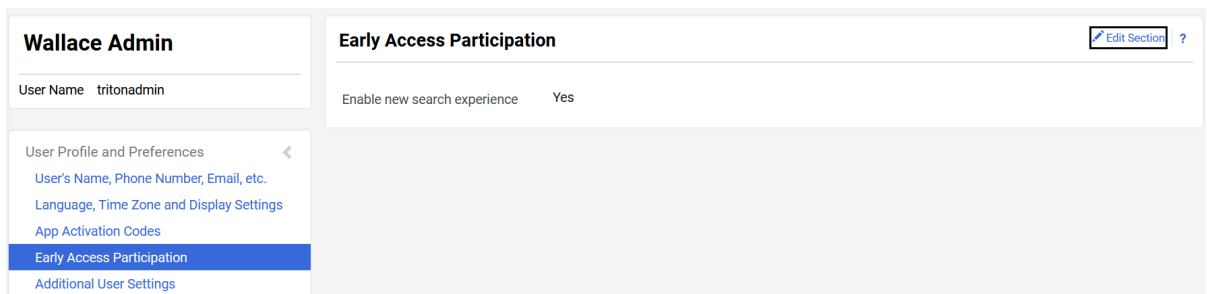
Third-Party Integration Impact

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