



QAD Adaptive Applications

# **SRM Release Notes**

September 2023

These release notes include information about the changes made to the latest version of Supplier Relationship Management (SRM). The changes consist of new functionality, enhancements to existing functionality, and fixes.

## **Contents**

<b>Introduction</b>	<b>3</b>
<b>Auctions</b>	<b>4</b>
<b>Roles and Authorities</b>	<b>4</b>
<b>Strategies</b>	<b>4</b>
<b>Suppliers</b>	<b>5</b>
<b>Activities</b>	<b>6</b>
<b>Documents</b>	<b>6</b>
<b>Events</b>	<b>8</b>
<b>General</b>	<b>8</b>
<b>Guide Me</b>	<b>9</b>
<b>Bug Fixes</b>	<b>9</b>
<b>Improvements</b>	<b>11</b>

## Introduction

These release notes include information about QAD SRM 6.1.0. This release of QAD SRM is a General Availability (GA) release. Review this document before proceeding with any phase of an implementation.

## Release Summary

This release, QAD SRM 6.1.0, is available as a GA release. Customers are encouraged to work closely with their QAD Customer Success manager or Helpdesk to learn more about the selection, implementation, and use of new and upgraded capabilities for their specific business requirements.

## Web Browsers Supported

Web browsers supported for this release include:

- Microsoft Edge Chromium version 108 or higher
- Mozilla Firefox version 108 or higher
- Google Chrome version 108 or higher

Although other web browsers can be used, you may encounter differing levels of performance and user experience. Some functionality may not be available.

## Technical Prerequisites

QAD SRM 6.1.0 requires Java 17 in order to run in an on-premise environment.

## Auctions

### Ticker Cockpit

- Excluded participants are no longer displayed in the auction. You can exclude participants from bidding in ticker auctions. When the participant has been excluded, they no longer appear in the cockpit. The removed participant is not displayed regardless of whether you remove the participant in advance of the auction or during it.

### Cockpit and Sidebar

- The status colors of ticker and reverse auctions are now the same. The status color in the ticker cockpit is now aligned with the ER cockpit, enabling you to recognize differences more easily.

## Roles and Authorities

### Supplier Authorization

- Users with local authorization for a company were previously able to change their authorization levels, thus changing the security context and causing problems. With this release, users with local authorization for a company can no longer perform changes that reduce their authorization. The changes prevent the current user from:
  - Removing themselves as a contact person or removing their account
  - Changing their role
  - Removing themselves as an internal contact
  - Changing their role as an internal contact

### New Global Site Authorization

- The authority AUTH\_COMPANY\_EDIT\_TAXONOMY\_SPEND\_TAX intended for Internal Users can now be defined also as a site role: AUTH\_SUPPLIERS\_EDIT\_TAXONOMY\_SPEND\_TAX.

## Strategies

### Strategies Browse Filter

- You can now filter the Strategies browse by taxonomies. Organization, Material Group, and Region are implemented as columns of the result set table.

## Suppliers

### Classification Visuals Widget

- A new classification widget named *Classification report* is available. Based on the classification criteria you select, the widget finds and groups the worst 25 last classification values.

The worst values are found based on the `valueAscending` setting in criteria settings of the configuration.

Move the mouse over a piece of the pie chart to display the percentage of suppliers with this classification value. You can view the visual as a pie chart or a bar chart.

### DUNS Validation

- A new validation for DUNS numbers is in place for suppliers, preventing further errors downstream in the business process.

It validates the format pattern of the DUNS number so it is composed of (2 numbers) - (3 numbers) - (4 numbers); for example, 12-345-6789

### Security

- You can no longer remove yourself from the participant list for supplier attachments (such as contracts and certificates) or documents in general. If you are selected in the participants list, the Remove button is disabled. This will align the behavior with other entities with participants, such as in events.

### Interface for Ad Hoc Ratings

- It is possible to create and update Supplier ratings (type `adhoc`) from a 3rd party application, as well as querying the status and results of a certain rating.

Ad hoc supplier ratings are a way of creating ratings/score cards for suppliers on a non-regular basis. They are typically initiated to rate the performance of a supplier in regards to a finished project. Unlike classic ratings, which are usually heavily automated and generated on a regular basis, ad hoc ratings allow you to collect and aggregate the scores of several users for one score. This is done with so-called rating parts.

Each rating part contains a list of categories consisting of questions and KPIs. A single user provides answers and ratings. After a rating part is saved and submitted, all available scores of a category are aggregated to one overall score for the specific category. At the end of the rating period the overall score for each category and for the whole rating can be read for rating purposes.

Every rating is defined by its scheme. The scheme defines the hierarchy of KPIs, their possible values, used input elements, and all kinds of calculations within one rating.

The aim of the web service interface is to integrate the SRM ratings with other components of the QAD ecosystem or remote third party systems. You can:

- Create a rating.
- Define participants and assign categories to each participant.
- Push data for participants. For example, you can use the interface to provide hard facts.
- Query status or data from existing ratings.

## Activities

### Linking to Activity in an Event

- You are now able to start an activity from an event. There is a direct link to the activity by clicking the activity name when you are in the event.

## Documents

### New Document Mapping Options

- Additional mapping adapters are introduced for supplier documents. Besides the existing mappings for certificates, all other attachment types are also now supported. You can now map properties from any of these document types:
  - Supplier Ratings
  - Supplier Rating Analysis
  - Contract
  - General Documents
  - Mandatory Documents
  - Reports

### Advanced and Qualified Electronic Signature with DocuSign

- You can now request advanced and qualified e-signature through our DocuSign interface. However, you can use system configuration to decide the kind of signature you want to use.
- The following types of documents can currently be signed inside QAD SRM:
  - NDA
  - Supplier Attachments

To configure the types of documents that can be signed through DocuSign, use the system configuration *General > ESignatures > Usages*. This system configuration also allows for additional e-signature providers to be implemented in the future, in addition to DocuSign.

## Certificates and Keys Truststore

- Truststore in QAD SRM allows users to save certificates and private keys into the database keystores. These certificates and private keys are all encrypted with AES-256 CBC to create digital signatures for DocuSign, PDF, and SAML.

All related files can now be managed in the Back Office. Certificates and keys can be created, edited, and deleted in *Back Office > Master data > Truststore*.

Supported extensions for certificates:

- .pem
- .crt
- .cer
- .p12
- .p7b
- .p7c
- .p7s
- .pfx

Supported extensions for keys:

- .key
- .pem

Certificates and keys are applicable to DocuSign, PDF, and SAML. The table displays the rights available to use the Truststore.

Right	Technical Name	Description
View keystore entries	AUTH_TRUSTSTORE_VIEW	Entitles the holder to view their own keystore entries. (ADMIN).
Add keystore entries	AUTH_TRUSTSTORE_ADD	Entitles the holder to add their own keystore entries. (ADMIN).
Edit keystore entries	AUTH_TRUSTSTORE_EDIT	Entitles the holder to edit their own keystore entries. (ADMIN).
Remove keystore entries	AUTH_TRUSTSTORE_REMOVE	Entitles the holder to remove their own keystore entries. (ADMIN).

## Mandatory Certificates from Strategies Validation

- When you click OK on the Supplier Taxonomies screen, only a warning message now displays. The message notifies you that some of the selected taxonomies require mandatory certificates. The actual validation takes place on the Attachments screen, where you are prompted to upload the required attachments.

## Events

### Restrict quoteCommitted and selfAssessmentCommitted Mail

- When the sendQuoteCommittedMail feature flag is set to true, the emails quoteCommitted and selfAssessmentCommitted are now sent only to internal participants with the Event Manager flag set, similar to the confirmedParticipation mail. In the past, these emails were sent to all internal users.

## General

### Sort Filters Alphabetically

- Saved filters in SRM browsers are now sorted alphabetically. Previously, they were sorted by date of entry. This provides a clearer view of the available saved filters and facilitates the search for a specific filter.

### Connectors Status Widget

- A new widget is available to display a list of all active connections that are running or have errors. It is named *Connectors status*, and you can find it in the General section of the widget gallery. Additionally, the Connector browse has been improved with columns to show possible errors.

### Select all | Deselect all Buttons in Browse Configuration

- *Select all* | *Deselect all* functionality is now implemented so the user can select or deselect all the columns simultaneously in a resultset configuration. This is available for all browses in the system.

## Guide Me

### Guide Me Enabled for SRM

- Guide Me is now enabled for SRM for some business flows. This feature enables easier onboarding for new users. The list of available scripts are:
  - Overview
  - Start and Event
  - Activate Supplier
  - Supplier Self Registration

The Supplier Self Registration Guide Me is automatically displayed when a supplier user accesses the supplier self-registration portal. You can choose to follow or cancel the Guide Me.

To configure Guide Me in your system, go to the system configuration *General > GuideMe configuration*. You can enable or disable Guide Me and choose the URL pointing to your preferred Guide Me server. Production and Test URL are predefined, so you do not need to make any other changes to the configuration or provide any other URL.

## Bug Fixes

- [\[AST-10821\]](#) - Registration - Adding material groups causes an Application Error- URL ... does not match the ASTRAS URL pattern
- [\[AST-10835\]](#) - ClassCastException when loading values from SystemConfiguration
- [\[AST-10838\]](#) - ActivityTrigger in Strategy - incorrect migration and column definitions
- [\[AST-10876\]](#) - Error when saving or closing (master data) after jumping from task to supplier master
- [\[AST-10883\]](#) - Single sheet - creating events
- [\[AST-10893\]](#) - R.5.4 - Problems with bank routing when using DocuSign (internal user)
- [\[AST-10894\]](#) - R.5.4 Tasks: Description field is displayed incorrectly
- [\[AST-10895\]](#) - "Application Error" when creating a global task
- [\[AST-10897\]](#) - Pop Up field for session timeout (3 minutes in advance)
- [\[AST-10898\]](#) - Saved filter in the menu item does not work
- [\[AST-10899\]](#) - Collection issue: fixing roles for Supplier Jobs
- [\[AST-10900\]](#) - MDM: exception when accessing menu strategy>configuration>event
- [\[AST-10903\]](#) - After Supplier-login: Task Pop-up problem
- [\[AST-10907\]](#) - Tender list is not generated
- [\[AST-10910\]](#) - Error message when filtering CPs in supplier overview
- [\[AST-10915\]](#) - ABSTRACT\_COMPANY\_EDIT and ABSTRACT\_COMPANY\_PERSONS\_SEND\_USERNAME\_PASSWORD are required to send person's login data
- [\[AST-10917\]](#) - Succession plan does not work
- [\[AST-10918\]](#) - Creating new site leads to NonUniqueObjectException
- [\[AST-10921\]](#) - "AUTH\_SUPPLIERS\_EDIT\_ACCOUNTS" Not able to create proxy/substitute account for the supplier

- [\[AST-10923\]](#) - Ad hoc supplier ratings with local authorizations: Clicking Close button redirects the user to the global supplier rating list where error message "Access denied" displays
- [\[AST-10924\]](#) - Ad hoc supplier rating with local authorizations: Taxonomy entries dialog and the Excel rating export displays an "Access denied" message
- [\[AST-10926\]](#) - Purge Audits Job returns an error
- [\[AST-10927\]](#) - Company>Relations: LazyInitException
- [\[AST-10929\]](#) - R.5.4 - Old SOW not working anymore as in R.5.2
- [\[AST-10930\]](#) - AUTH\_COMPANY\_PERSONS\_EDIT\_ACCOUNTS does not allow for adding and deleting proxy substitute
- [\[AST-10933\]](#) - Supplier Export/Import via Excel Table - custom mandatory fields are missing in xls
- [\[AST-10934\]](#) - Supplier list - Simple search not working properly
- [\[AST-10935\]](#) - Threshold budget 1: Incorrect participant chosen
- [\[AST-10936\]](#) - FILE\_INPUT Quotation field in RFI does not upload document
- [\[AST-10941\]](#) - Sorting of CPs fields/select boxes in supplier overview is not working properly
- [\[AST-10943\]](#) - Column filter in the Suppliers in Registration list does not work
- [\[AST-10948\]](#) - Supplier taxonomy entry with local authorities: Spend panel is empty with the AUTH\_COMPANY\_SPEND
- [\[AST-10963\]](#) - Supplier local authorities: Adding taxonomy entries to a company is not possible without some global authorizations: AUTH\_SUPPLIERS\_EDIT
- [\[AST-10964\]](#) - Localization for suppliers.list.search.identifier is not picked up
- [\[AST-10967\]](#) - Add Suppliers - Resultset: Filters are shown in the columns, but are not implemented
- [\[AST-10968\]](#) - Supplier Documents > Relations: Resultset filters are not implemented
- [\[AST-10969\]](#) - Ticker Cockpit does not show Internal Participants
- [\[AST-10970\]](#) - Internal user requires reverification
- [\[AST-10973\]](#) - Supplier spend data with local authorities AUTH\_COMPANY\_SPEND not showing any data
- [\[AST-10975\]](#) - R.5.2/DN Test 12/Hard facts Filtering - Creation date & Part number Filter in combination
- [\[AST-10979\]](#) - Changes to auction criteria before auction begins are not reflected in the Cockpit
- [\[AST-10987\]](#) - Error with Job Import Dnb Scorecard Job
- [\[AST-10993\]](#) - Error when uploading file during supplier import
- [\[AST-10996\]](#) - Export of internal contact roles failing
- [\[AST-10999\]](#) - Comparison of self assessments fails due to lazyinit initializations.
- [\[AST-11000\]](#) - R.5.4 - Advanced product search returns an error
- [\[AST-11004\]](#) - SRM not allowing signing of documents using DocuSign
- [\[AST-11009\]](#) - Cockpit: Edit criteria shows unchanged items when bulk editing
- [\[AST-11011\]](#) - UIEventException in SSA data list in Matrix view
- [\[AST-11012\]](#) - Switching to French language breaks the main menu and other scripts
- [\[AST-11023\]](#) - Interface: Accounts Payable Facility SAP - Classification in the taxonomy
- [\[AST-11024\]](#) - java.lang.NullPointerException when saving supplier data
- [\[AST-11027\]](#) - Supplier Dashboard: "Certificates that need updating" is not displayed and the window hangs

- [\[AST-11034\]](#) - Widget "Events with a round that ends this week" doesn't work
- [\[AST-11043\]](#) - Error loading resultset entries in classifications
- [\[AST-11051\]](#) - Classification widget: pie chart does not get displayed
- [\[AST-11061\]](#) - BigDecimal migration: Not null constraint is not removed for old decimal columns
- [\[AST-11062\]](#) - Supplier classifications panel: Export fails
- [\[AST-11063\]](#) - ClassCastException in RESTSupplierClassificationHistoricalData
- [\[AST-11068\]](#) - Widget maximizes after replacing it and saving the dashboard
- [\[AST-11071\]](#) - "504 Gateway Time-out" when filtering for companies without contact person
- [\[AST-11076\]](#) - Cannot create quote
- [\[AST-11079\]](#) - Data Validation error in LV Template when you choose the "Single Sheet" option
- [\[AST-11080\]](#) - SSA Forms List Compare function does not work - comparison does not load or is empty
- [\[AST-11084\]](#) - Problem with supplier export (generic Resultset-Export)
- [\[AST-11093\]](#) - Succession plan bug

## Improvements

- [\[AST-10640\]](#) - Pre-register wizard: email addresses can only have certain length
- [\[AST-10779\]](#) - AuthenticationServer for OAuth and Connector API
- [\[AST-10828\]](#) - CLONE - Extended eSignature interface
- [\[AST-10848\]](#) - Possibility to disable SearchBox through user permissions
- [\[AST-10879\]](#) - SupplierSelfAssessments do not work properly with abstract roles
- [\[AST-10880\]](#) - "Welcome" widget cannot be changed for SaaS-Admins (other users)
- [\[AST-10881\]](#) - Tasks: Link to the company does not show up when editing a newly created task
- [\[AST-10905\]](#) - Archived files are sometimes not copied
- [\[AST-10916\]](#) - Selection of NDAs is not taken into account when exporting
- [\[AST-10925\]](#) - Adjustment of the email "A new supplier scorecard is available online!"
- [\[AST-10937\]](#) - ChooseGroup dialog: Groups selectbox should be only protected by AUTH\_ACCOUNTS\_EDIT\_GROUPS
- [\[AST-10938\]](#) - Edit Line items sheet: change title of edit item screen according to the actual action
- [\[AST-10942\]](#) - Supplier Attachments: "Approved" checkbox stays checked if you just close the popup
- [\[AST-10950\]](#) - Cockpit -> Edit criteria: Show description instead of name
- [\[AST-10966\]](#) - Better mail template retrievePasswordLink
- [\[AST-10988\]](#) - XLS does not localize Boolean value in all languages
- [\[AST-10994\]](#) - Jasper Reports: Set sans-serif as default font for html exports
- [\[AST-10997\]](#) - Incorrect triggering of data validation by internal users, faulty checks, and emails
- [\[AST-10998\]](#) - Edit criteria in Cockpit: Add title to criteria
- [\[AST-11028\]](#) - Force password update after login not working (if DevTools enabled)

- [\[AST-11033\]](#) - Change CSS class names that conflict between SRM and Logic Composer
- [\[AST-11035\]](#) - Documents: Selection from the drop down does not lead to the chosen logic
- [\[AST-11036\]](#) - Refactor StartDetachedProcessController subclasses to use getOrmCriteriaFromResultset() to get criteria for export
- [\[AST-11046\]](#) - Publish supplier ratings job should be refactored
- [\[AST-11052\]](#) - Download progress reports Java class
- [\[AST-11053\]](#) - Updated EhCache throws StoreAccessExceptions
- [\[AST-11060\]](#) - WPS SendSourcingItemQuote needs additional authorities
- [\[AST-11065\]](#) - workflow.jsp uses <%= %> output
- [\[AST-11069\]](#) - Allow dynamic proxy IPs for Remote Host IP detection
- [\[AST-11075\]](#) - No suggestions appearing when creating mapping case
- [\[AST-11078\]](#) - Improved participant resolution in #ASTRAS function for activities
- [\[AST-11085\]](#) - SAML Registry improvements
- [\[AST-11089\]](#) - Ratings startDate and endDate db-columns should be integers
- [\[AST-11095\]](#) - PublishSupplierRatingJob - Make the job stateful
- [\[AST-11103\]](#) - Comparison operator in the list of ratings raw data