



QAD Adaptive Applications

SRM Release Notes

October 2024

These release notes include information about the changes made to the latest version of Supplier Relationship Management (SRM).

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Introduction

These release notes include information about QAD SRM 6.3.0. This QAD SRM release is a General Availability (GA) release. Review this document before proceeding with any phase of an implementation.

Release Summary

You are encouraged to work closely with your QAD Customer Success manager or the Helpdesk to learn more about the selection, implementation, and use of new and upgraded capabilities for their specific business requirements.

Web Browsers Supported

The user interface is only supported on current versions of the Chrome, Safari, and Edge web browsers (Chrome 124, Safari 17.4, and Edge 123). Although you can use other web browsers, you may encounter differing levels of performance and user experience. Some functionality may not be available.

Technical Prerequisites

QAD SRM 6.3.0 requires Java 17 to run in an on-premise environment.

Online Help Location

https://documentlibrary.qad.com/help/SRM/en-US/index.html#page/SRM/Portal_Overview.html

New Features

Analytics

Use the data analytics dashboards to analyze information about suppliers in a visual format. These dashboards allow you to monitor sources that provide insights into supplier performance. Slice-and-dice capabilities ensure that you can modify the data output according to your needs. The embedded analytics read the data directly from the core SRM system in real time or daily, depending on your needs.

Visuals are graphical representations of the source data, which are displayed on dashboards. You can change a visual's settings to show different information about the data source. You can also switch between different types of visuals. If you are assigned certain permissions from the host user, you can create visuals, save them to the visual inventory, and use them on dashboards.

Data Analytics enables you to view key supplier metrics at a glance and to assess various activities within the system. You can now view and edit existing dashboards. You can also export a dashboard.

Advanced Supplier Categorization

A taxonomy matrix is a combination of taxonomies linked to a supplier. A taxonomy matrix enables you to add a specific categorization to your suppliers to control RFQ participation and awards with the correct enforcement level. A supplier can have a different categorization for each event.

A taxonomy matrix is a combination of up to three taxonomies, such as (Material group + Organization) + Supplier. The taxonomy matrix determines the behavior of each supplier for participation and award in an RFQ.

Two new menu items are added in this release:

- Taxonomy Matrix
- Taxonomy Matrix Import

On the Taxonomy Matrix screen, you can:

- Navigate, filter, and search within the Taxonomy Matrix list.
- Set up a taxonomy matrix that combines up to three taxonomies; for example, Supplier + (Material group + Organization).
- Export taxonomy matrices to Excel.

On the Taxonomy Matrix Import screen, you can create a new taxonomy matrix or update an existing one in Excel.

When taxonomy matrix functionality is enabled in the system, you can also create a taxonomy matrix on the Supplier screen. A new Taxonomy Matrix panel presents fields similar to those in the Taxonomy Matrix menu item, except that the taxonomy matrix only applies to the current supplier. On the Contact Persons panel, an additional Contact for

taxonomy matrix field enables you to specify the taxonomy matrices for which this contact person is the main contact. This person becomes the default person invited to any event with this taxonomy matrix.

A new system configuration in the Back Office allows you to set up Advanced Supplier Classification. This new system configuration is in a table format and it combines three concepts that form the taxonomy matrix:

- A free-text categorization definition
- An enforcement level to control participation and define default categorizations
- An approval point for participation or award

Use authorizations and permissions to determine access and edit rights.
See the Online Help for details.

Process Intelligence Integration Enablement

For Process Intelligence integration purposes, a new column identifies activities exported from SRM as part of a particular process. The CASEID field is included in files for both API export and manual export so you can identify the elements in the activity you are working with.

System Configuration at Tenant Level

The following system configurations are now exposed at tenant level. Each customer can configure these independently. Where no tenant configuration exists, the system uses the master configuration.

- Events > Jobs > Configuration
- General > Currencies configuration
- Events > RFQs > Comparison sheet > Plugin configurations
- Suppliers > Ratings > Adhoc > Taxonomy
- General > Countries and languages
- General > Process Intelligence configuration
- General > Task configuration
- Suppliers > Activities > Taxonomy
- Suppliers > Category Entries > Advanced Supplier Categorization

Customer Ideas

The following improvements are as a result of customer ideas.

Best Possible Contact in RFQ

To optimize RFQ workflow, the system now invites the best contact from the participant supplier by default. The defaults are based on the contact settings for the three available taxonomies, beginning with Material Group, followed by Organization, and then Region.

Supplier Upload by Sourcing Item

Previously, for each sourcing item, all supplier uploads (documents) were transferred for each sourcing item. Now, only documents belonging to the relevant sourcing item are transferred. The solution follows this logic:

- If there is an association between the sourcing item to a sheet (optionally item), the system copies all RFQ uploads that are not associated with a sheet or item or that match the sheet or item of the sourcing item.
- If there is no association between the sourcing item and a sheet, the system copies all RFQ uploads.

Supplier Ratings Data Sources

- For ratings purposes, you can now return values from the selected organizational unit, including spend data and custom properties. Configure the source in the rating calculation by selecting the data source Organizational unit data and specifying the variable name and the field containing the value you want to map into the rating category. For example, to map the value of Billing volume - Q1, enter `spendInvoiceVolume0`.
- A new data source for ratings calculations based on activity data returns the number of activities of a specified type that meet the specified criteria over a defined period. The activity type, criteria (such as Status or State), and period are configurable. You can select different data sources to retrieve data at supplier header level or at organizational level.
Example: There is an activity type called COMPLAINTS. This activity includes a checkbox labeled 8D required, either in the sheet or as a custom property field. In the context of the monthly serial rating, the objective is to return the number of complaints (Activity type) requiring an 8D report (specified criteria) that have been created for a specific supplier within a given month (defined period).
- The Supplier Data data source has been extended to return any number value from the supplier record, such as Aggregated Spend Data or Status flags. Configure the source in the rating calculation by selecting the data source Supplier Data and specifying the variable name and the field containing the value you want to map into the rating category. For example, to map the value of Billing volume - Q1, enter `spendInvoiceVolume0`.
- The Activity data source can retrieve various data from an activity. The data can be located in the header data, custom properties, or the activity template. You can retrieve data at supplier header level or at the organizational level.

Open APIs

The Open APIs provided for this release are listed here. The Swagger documentation details each available endpoint and its functionality.

- Open API - Ratings
- Open API - Suppliers
- Open API - Sourcing Request
- Open API - Classifications

- Open API - Category Trees Open API
- Open API - Custom Properties
- Open API - Users
- Open API - Company Relations

Other Changes

- [AST-11326] - The Riskmethods integration in SRM has been upgraded so that the authentication point and the request point are separate.
- [AST-11543] - Due to the addition of the awarding sourcing request in QAD, there is a new PriceListConnector connector for SRM Integration when SRM sends the sourcing request back to QAD. The new connector only needs one request.
- [AST-11704] - To help you to decide which suppliers to include when creating a new round, the Participants screen has been upgraded. It displays all suppliers who are participants in the event, along with their approval status for participation and approval point. Multi-selection is possible.
- [AST-11812] - For this release, the auto-add logic is improved so that you cannot remove a participant who is auto-added unless you have a special authority AUTH_EVENT_PARTICIPANTS_MANDATORY_REMOVE.
- [AST-12020] - You can now change the layout of SRM dashboards so that as much space as possible is available for complex widgets like analytics dashboards. The new layout is called SingleWidgetFullscreen.

Improvements and Bug Fixes

- [AST-11207] - Date and time stamps in column filters are displayed multiple times
- [AST-11369] - Export of tasks is empty
- [AST-11380] - External users do not have an authentication to get authorities from
- [AST-11494] - Adding a supplier to Projects > Supplier Pool results in an error loading the resultset
- [AST-11509] - /suppliers/accountCreated does not send the registration part
- [AST-11529] - Some taxonomies are still displayed white on gray and cannot be read
- [AST-11531] - In approvals, the verification code InputElement has no validation
- [AST-11532] - SAML users are not visible in users widget
- [AST-11534] - PublishSupplierRatingJob results in an exception
- [AST-11536] - SpendChartPlugins displays data from the master site
- [AST-11545] - Strategy > PDF Export exports template fragments
- [AST-11546] - When creating a strategy, created tasks inside the strategy are not displayed in the resultset
- [AST-11550] - Activity > Main Data: Request due date. An error occurs in the dialog "suppliers.activity.updateMilestone.error"
- [AST-11552] - Supplier Registration: Resultset filters in Documents and Certificates do not work
- [AST-11561] - Feedback for total price is visible to the supplier in the feedback view
- [AST-11563] - Approval denied but approval granted
- [AST-11566] - Enable the option to proceed to the next panel in the registration wizard when a mandatory certificate or document cannot be provided

- [AST-11570] - Accept registration: Matching suppliers similar values are no longer highlighted
- [AST-11571] - Request new due date function is not working for suppliers
- [AST-11583] - Supplier import file displays incorrect mandatory fields
- [AST-11592] - Import of internal contacts through BatchUpdateCompaniesEndpoint is not working
- [AST-11595] - Comparison sheet: Nomination shows no error when the quote sum is between 100,01 and 100,04%
- [AST-11599] - JS000125 - Error while importing internal users
- [AST-11600] - Highlighting data in duplicates does not work properly
- [AST-11601] - Drag and drop of columns results in mixed up data
- [AST-11606] - RemoveGroup and AccountRole does not work
- [AST-11608] - Adding more than one GrantedAuthority to connector configuration leads to an exception
- [AST-11610] - Exception in cluster communication
- [AST-11612] - Cluster communication for ConnectorDefinition events
- [AST-11616] - AnalyticsManager: DAPHttpClient resources are not properly closed
- [AST-11617] - Connectors: It is not possible to add multiple authorities simultaneously
- [AST-11618] - After reverse auction end, the supplier no longer sees their prices in the cockpit
- [AST-11619] - SimpleCompanyModel in different yaml files
- [AST-11621] - Detached process manager does not work with the xml data formatter in the system
- [AST-11622] - PriceListConnector does not log invalid taxonomy.sharedSetCode configurations
- [AST-11624] - XStream error when reading old archived files: No such field as initializedAssociations
- [AST-11643] - Supplier with updates widget does not show any results
- [AST-11644] - Supplier list filter not working
- [AST-11648] - Closing Events > Jobs > Events does not work
- [AST-11650] - Log corruption because ADDON servlet /systeminfo is trying to create ApplicationMenu
- [AST-11651] - SRM: analytics: tenant sync: new tenant: SRM should not use the DAP API /tenants POST
- [AST-11653] - IntegrationTestFollowUpActivity is failing
- [AST-11655] - Analytics: DAPHttpClient: Old connections in http connection pools
- [AST-11662] - Data update process: Unknown error while saving updated data
- [AST-11664] - Activities: Create supplier documents process displays application error
- [AST-11666] - Source qad:srm:suppliers:spend is not working
- [AST-11671] - Guide Me is not visible in multi-tenant systems
- [AST-11672] - Some taxonomies are still displayed in the wrong color
- [AST-11696] - TaxonomyEntries Resultset: Currency column is displayed twice
- [AST-11697] - EventsMassExport cannot be interrupted
- [AST-11708] - Activity cannot be saved and returns the error "A different object with the same identifier value was already associated"
- [AST-11717] - Auctions Cockpit incorrectly displays option list labels

- [AST-11718] - Filename of attachments sent with email "/suppliers/accountCreated" is corrupted
- [AST-11730] - Cannot create a client credential
- [AST-11745] - SUSPA: failure to lazily initialize a role collection
- [AST-11768] - Allows multiple account updates before storing in the database
- [AST-11769] - Supplier cannot save quote temporarily
- [AST-11770] - FullSuppliersXLSEExport cannot be interrupted
- [AST-11774] - Supplier currency: EUR is always added
- [AST-11778] - Suppliers: Perimeter search does not work
- [AST-11785] - Activity list: Drag and drop of custom property fields mixes data up
- [AST-11787] - Event: Supplier upload not visible in quote for evaluation
- [AST-11791] - Cannot create any object (landing page)
- [AST-11798] - Time zone field type is confusing
- [AST-11806] - Process Intelligence manual export undefined error
- [AST-11830] - Security hole for authentication mechanism SAML
- [AST-11833] - PreAuthentication not working for SAML
- [AST-11836] - Possibility to create taxonomy matrix with one taxonomy tree type
- [AST-11839] - It is possible to select participants who are still waiting for an approval
- [AST-11842] - While creating a strategy, a NullPointerException occurs on the Dashboard panel
- [AST-11853] - Duplicate button for "request approval"
- [AST-11854] - Approval failed in events
- [AST-11857] - Event approvals no longer work after the ASC logic was implemented
- [AST-11887] - Approvals: External approvers (Email) and internal approvers are not able to send Additional Documents with their approval
- [AST-11888] - Editing dashboards in Back Office with an analytics widget
- [AST-11890] - Analytics visuals performance issues in customer tenants
- [AST-11894] - Sometimes dropdown list of resultset actions does not appear
- [AST-11896] - Analytics super admin permission (yellow) is still available when you remove the SuperAdmin permission from a role
- [AST-11901] - SUSPA: failure to lazily initialize a role collection
- [AST-11903] - ASC Import/Export buttons - AUTH dependences and issues
- [AST-11905] - Cannot create approval for nominationSet in RFQ
- [AST-11906] - Guide Me button overlaps dialog window
- [AST-11907] - Error while importing supplier contacts
- [AST-11908] - Errors in the supplier attachment importer are not displayed
- [AST-11910] - Create button becomes a blue square in the embedded composer
- [AST-11935] - Creation of a new round causes TransientPropertyValueException
- [AST-11936] - ASC-Import from a buyer perspective: "Your current authorities are insufficient for import."
- [AST-11941] - Saving of completed sub-rating not possible due to calculation error
- [AST-11959] - Last bid from an English auction was not calculated to the final ranking
- [AST-11960] - RFQ screen cannot be serialized after creation
- [AST-11964] - Change label from "event" to "perimeter search"
- [AST-11967] - Username and Password in email "A user account has been created for you" not working
- [AST-11977] - When a request for an approval was automatically created but you decide to remove the supplier from the event, you get a database error

- [AST-11979] - TenantAdmin can edit users from other tenants if the user ID is known
- [AST-11986] - Defined participants not populated automatically when activities are created by classification entries and strategies
- [AST-11988] - Exception while canceling an approval in RFQs
- [AST-11996] - Connector randomly fails to connect
- [AST-11997] - CQ: Supplier uploads are not working in the Supplier helpbar
- [AST-12002] - Ad hoc ratings: N/A not to be considered in the scoring
- [AST-12003] - Average raw data should not be visible
- [AST-12007] - Analytics Service: Redirect to admin UI: Login screen appears instead of Analytics Admin UI
- [AST-12008] - Analytics: Tenant creation does not trigger tenant sync
- [AST-12009] - Analytics content import API: Add payload error processing
- [AST-12013] - Sourcing requests: Participants: Invite groups dialog results in AccessDeniedException
- [AST-12044] - DAP API response includes errors in payload but SRM does not recognize them
- [AST-12048] - NoSuchMethodError when submitting a signed binding offer
- [AST-12055] - Analytics: TaxonomyItems belonging to an archived tree should be ignored
- [AST-12067] - Field size was not corrected in the database
- [AST-12069] - Application error when adding a currency column to the Organization table
- [AST-12071] - The link added to the email template Mandatory documents does not work
- [AST-12073] - Serial rating: Chart is not displayed (NumberFormatException)
- [AST-12077] - Increase the length of the dashboard table layout column
- [AST-12082] - Analytics Management console: "Tenant sync logs" table: The Date of entry column does not display the sort indicator icon
- [AST-12087] - Analytics: DataModels: SupplierClassificationEntries view should not join with the core_taxonomy_labels table
- [AST-12088] - Supplier with event status "Strategic" can be removed
- [AST-12101] - Supplier cannot save company data: org.hibernate.LazyInitializationException
- [AST-12102] - Reload of SAML keystores does not work
- [AST-12128] - Defined participants not populated automatically when activities are created by strategies
- [AST-11551] - Updating supplier data: Sidebar information does not correspond with the panels
- [AST-11475] - Feedback settings are displayed incorrectly in the Supplier view for different currencies and when excluding positions
- [AST-9988] - Call checkLicenceTask during gradle build
- [AST-10703] - Update JDBC dependencies
- [AST-10806] - Add rejectPublicInvocations to all SecurityInterceptors
- [AST-11444] - Guide Me: Misleading guide during supplier registration
- [AST-11513] - Process Intelligence: Add the Create activity log and all the activities with that log
- [AST-11515] - Approval of contracts
- [AST-11548] - Color Scheme: Dialog titles are invisible if the color scheme is white

- [AST-11558] - The button is still visible when the document is edited
- [AST-11569] - Add getters to BinaryManager
- [AST-11586] - Onboarding mail cannot be sent even if the onboarding checkbox is selected
- [AST-11605] - SRM-DAP on AWS environment: Auth0 and DAP http client needs to use a http proxy
- [AST-11613] - SRMDatabaseManager: Create a separate dataSource with credentials for the db admin user
- [AST-11645] - Disable default security auditor notification
- [AST-11660] - Supplier sync with QAD ERP requires super admin authority
- [AST-11661] - Amendment to Suppliers SOAP WS to extend WSCompany with companyType field
- [AST-11668] - "Login as" is only working with the authority "AUTH_PREFERENCES_PERSONAL_EDIT"
- [AST-11691] - ASC system configuration improvement
- [AST-11725] - Color Scheme: Dialog titles are invisible if the text is white
- [AST-12089] - Activity names generated by TestDataSetupMultipleActivities contain spaces