



# QAD SRM Release Notes

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## **Introduction**

These release notes include information about QAD SRM 6.0.0. 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 6.0.0, 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 6.0.0 requires Java 17 in order to run in an on-premise environment.



## New Features

### General Usage

#### Links in Text Editors

Text editors that allow formatting text now offer the option to format a text as a clickable link via the new link button (🔗). Please note that by default, entering links is not allowed for security reasons; however, exceptions can be made by defining allowed URLs through regular expression patterns in the system configuration **General > Email configuration**, which can then be formatted as clickable links in a text editor.

### Supplier Data Management

#### Split of Supplier XLSX Import Functionality

The existing export and import of suppliers has been split into two parts. When exporting and importing suppliers through the previous functionality, only company data, including custom properties, can be downloaded and imported. Contacts within those suppliers have been given their own export, which can be found in the global list of contacts available at *Supplier Management > Suppliers > Contacts*. The respective import of supplier contacts can be found at *Supplier Management > Suppliers > Supplier contacts import*.

Neither this import, nor the import of suppliers, allow sending emails with login credentials for new users. Instead, a new button is available in the global list of supplier contacts to “Send onboarding message”, which triggers an email with the existing email template **suppliers/accountCreated**, which was previously sent via the supplier import. Whether or not a contact can be selected to receive this onboarding message can be seen in the new column “Onboarding” in the very same list. The Onboarding field can be found in the contact person right on top of the “Main contact person” checkbox and can be set to “true” in the contacts import.

#### Commodity Risk Status in Suppliers

Material groups may now store information about their base risk for any processes. An administrator may configure a low, medium or high risk for a material group within its category tree in the back office. The risk status can either be set by opening the properties of a material group entry within the tree, or via the XLSX export/import of the tree.



After the initial definition, users will see the respective commodity risk in the material groups of a supplier and also as an overall risk in the status panel. The overall commodity risk is calculated based on the worst material group risk, so as soon as a supplier is linked to a high risk material group, the overall risk is also high. Adding or removing a material group in a supplier automatically updates the overall commodity risk. If changes are made to the risk of a material group in the back office, the **UpdateCompanyCommodityRiskJob** updates the commodity risk of all suppliers.

These statuses are only meant to spread awareness of potential process risk that comes with a supplier, therefore they can only be viewed, but not edited, by users in the front end. The overall commodity risk can be added as a column in the list of suppliers via its table configuration. The same is available in both the global list of taxonomies and the list of material groups in a supplier.

Additionally, the overall commodity risk is treated like any other company data field, and is therefore available for most functionalities involving company data, e.g., in mappings, as data source in ratings or classifications, for configuring basic supplier data fields in the RFQ comparison sheet, and more.

### **Master Administrators for Suppliers**

Suppliers can now be enabled to create user accounts for their company's existing or new contacts instead of requesting an account. Customers who would like to activate this possibility need to add the following entry in the system configuration **General > General features**:

```
<entry key="feature.suppliers.editContacts.createAccount" value="true"/>
```

### **Supplier Specific Roles for Internal Users**

It's now possible to give permission to internal users to edit certain data of specific suppliers. To achieve this, the existing functionality of "internal contacts" in a supplier has been expanded. The previous selection of a "type" of internal contact has now become a "role", with a respective **Supplier internal contact role** with authorization settings in the back office. Any types of internal contacts are automatically migrated to these new roles with no given authorizations. Customers who would like to use this feature will need to reduce the permissions of their internal users' system roles and selectively give authorizations within the new internal contact roles.

### **Webservice for Creating and Updating Serial Ratings**

Additionally to the existing CSV file upload interface, a new REST webservice is now available to create and update serial supplier ratings.



## Sourcing

### Display Supplier Classifications in RFQ Comparison Sheet

Supplier classifications may now be displayed in the comparison sheet of an RFQ. This requires some initial setup by adding the classification categories that should be available to users in the “Supplier classification data” part of the system configuration **Events > RFQs > Comparison sheet > Plugin configurations**. After this is done, users can open the settings of a comparison sheet in an RFQ and select “Supplier classification data” in the “Additional data” setting. The configured supplier classifications will then be shown at the bottom of a quote in the comparison.

Additionally, the existing plugin setting for “Taxonomy (mat/org/reg) specific data” now allows configuring taxonomy based classification categories within the same system configuration.

## Collaboration

### Automatic Triggering of Activities from Strategies

The existing functionality to trigger an activity after a supplier registration in strategies has been expanded to also allow a periodic creation of activities. To set this up, go to the "Suppliers" panel of a strategy and add a new **Activity trigger**. Currently available settings are the type and owner of the activity as well as the time period in days. The **CreateTriggeredActivitiesJob** will then create an activity for all suppliers of this strategy who are currently not in registration, if no activity of the configured type has been created (automatically or manually) within the given timeframe.

### Action for Creating Follow-up Activities

In activities, the new action “Create follow-up activity” can now be used to trigger the creation of a new activity during the workflow of the current activity. Within the configuration of the activity, a **relationType** and an **activityType** need to be defined to create the activity, similarly to the existing action “Create activity relation”.

## Back Office

### Manage SAML Certificates Online

SAML certificates may now be added and changed in the back office at *System configuration > SAML certificates*, allowing an update of the certificate without the need for a server administrator and a



system restart. To edit SAML certificates, the authorizations AUTH\_SAML\_CONFIGS\_VIEW and AUTH\_SAML\_CONFIGS\_EDIT are necessary.



## Improvements and changes

### General Usage

#### New Error Message for Failed Helpdesk Requests

If sending an email after submitting a request via the helpdesk form fails for any reason, e.g. because no support email address was configured, the helpdesk form will not close anymore and will inform the user that the request could not be sent.

#### Line Breaks in Localized Mouseover Info Boxes

Mouseover boxes in standard fields or custom properties can now contain line breaks in their translations. To do so, edit the translation of the respective localization code and hit Enter within the text to create a line break.

### Supplier Data Management

#### Column Filters in List of Supplier Contacts

The global list of supplier contacts now contains filter icons in its column headers to allow quick and easy filtering of the results.

#### Data expires field added to mass edit of suppliers

In the mass edit wizard of suppliers, the field “Data expires” is now available to be selected for mass editing.

#### Set Checkbox "Copy data from company" in Supplier Record Active by Default

The checkbox “Copy data from company” in a contact person in a supplier record can now be set to be ticked by default when creating a new contact. To set this default, the following entry needs to be added in the system configuration **General > General features**:

```
<entry key="feature.suppliers.contacts.new.copyFromCompanyDefault" value="true"/>
```

#### Bundling of Email Notification for New Supplier Ratings

When publishing multiple serial supplier ratings at once, the system is now able to send one email with a list of published ratings to the supplier instead of one separate email. To activate the use of this



bundled email, the following entry needs to be added in the system configuration **General > General features**:

```
<entry key="feature.suppliers.ratings.combineRatingsUpdatedEmail" value="true"/>
```

This new bundled email uses a new email template, which can be found and changed under the path **/suppliers/ratingsUpdated**, if needed.

### **Geocoding Service Sending Full Country Name instead of ISO Code**

The SupplierGeocodingJob now sends the full English country name to the connected maps server instead of the country ISO code due to identification issues in Open Street Map, resulting in less geocoordinate information in supplier records. On-Premise customers with other map providers (e.g. Google Maps) may need to adjust search settings in their maps provider to allow finding suppliers by their full country name.

### **Cancellation Confirmation in Supplier Creation Wizard**

When leaving the wizard for creating a new supplier, a confirmation can now be shown to avoid accidentally leaving and losing the entered data. To activate this feature, go to your account settings and activate the setting for confirmation when canceling a wizard.

## **Sourcing**

### **Ignore Excluded Participants in Ranking and Feedback in Auctions**

If a participant is excluded in an English Reverse auction, their existing bids will not be considered in the further calculation of ranking or traffic lights anymore. Despite this, the participant will still be able to view the last feedback that was available to them before getting excluded.

### **Suppression of Bid Placement if All Items in Auction are Excluded**

If all items have been excluded in an English Reverse Auction it's now not possible for the participant to place a bid anymore.

### **Settings of Edit Criteria Dialogue in Auctions Saved in Session**

When editing criteria in the new cockpit of an auction, any selection made to show or hide criteria settings in this editing dialogue will now be remembered during the session of the current user instead of resetting back to the default after the dialog is closed.



## Collaboration

### Size adjustment of workflow editor

In the workflow editor of an activity or activity template, a new button for “Diagram settings” has been added which allows changing the size of the workflow drawing area. Additionally, the buttons for creating new nodes and new transitions have been moved to the top of the drawing area to avoid scrolling on larger areas.

## Templates

### Use Mouseover Help Texts in Scope of Work Templates

Mouseover help texts are now available in Scope of Work templates, just like in Grid templates. To add them, open the settings of a column in a Scope of Work sheet and enter a localization code in the “Help text” field. Add the translations for the localization code at *System configuration > Localizations* in order to view the translated name in the mouseover info box of this column.

The info box is shown by moving your mouse on the respective column, both in the regular layout and in the modernized layout of an English reverse auction cockpit.

### Improved Manual Editing of Rows in Single Sheet type Scope of Work Sheets

When manually editing a single sheet type Scope of Work, the following behavior has been changed:

- When converting a regular row to a header row, all content was previously dropped, which resulted in empty content fields and formulas if the row was then converted back to a regular row again. This is now prevented by keeping any content and formulas saved, but hidden to the user.
- When adding new sub rows, content fields are now automatically prefilled with the hidden content of the parent row, including formulas.

## Back Office

### Localized Role Names

The names of system and entity roles in the back office can now be localized. Instead of entering a plain name, enter a localization code in the name field and tick the “Localized” checkbox. Add the translations for the localization code at *System configuration > Localizations* in order to view the translated name in the respective places. Please note that the names of entity roles, e.g., an RFQ role



or project role, does not change in already existing entities after changing the role name in the back office, only in future ones.

### **Logo selections moved from site to logos**

The selection for which logo should be used as the application and login logo of a site has moved from the site settings to the logo itself. In a logo in the back office, two checkboxes are now available to set the logo as the application and/or login logo. Only one logo can be selected as application and login logo respectively.

### **No automatic start of search for revisions**

The search for revisions in the back office now does not trigger automatically after selecting an entity anymore, allowing you to fill out more search criteria before starting the search operation manually.

### **Improvements in email templates for webmailers**

In the email template `globalMacrosLibrary`, which defines global styles and macros for the new version of email templates, the styles for `body`, `img` and `mailButton` previously included in the style tag have been moved to their respective macros as in-line styles to improve display of emails in some web-based freemailers like Gmail. Customers who use an adjusted `globalMacrosLibrary` template can pull the updated version via the actions menu of the email template to compare and move the necessary changes to their custom email template, if needed.

### **Further Configurations Moved to New GUI**

Several system configurations have been upgraded to the new visual user interface.

The following configurations can now be found as part of the new configuration **Events > RFQs > Comparison sheet > Plugin configurations**:

- Events > RFQs > Comparison sheet > Basic supplier data
- Events > RFQs > Comparison sheet > Pooling potential
- Events > RFQs > Comparison sheet > SSA fields
- Events > RFQs > Comparison sheet > Supplier user-defined fields
- Events > RFQs > Comparison sheet > Taxonomy (MG/ORG/REG) specific supplier data

The following configurations can now be found as part of the new configuration **General > Your Data > Proxy/Substitute > Configuration**:

- General > Your data > Create Proxy/Substitute > Authentication mechanisms
- General > Your data > Create Proxy/Substitute > Set in e-mail Cc > Default value
- General > Your data > Proxy/Substitute > Password request > Excluded Authentication mechanisms



The following configurations can now be found as part of the new configuration **Events > Jobs > Configuration**:

- Events > Jobs > Archive events
- Events > Jobs > Close events
- Events > Jobs > Enable archive events
- Events > Jobs > Reminder for participation
- Events > Jobs > Reminder to enter a quote
- Events > Jobs > Reminder to enter a quote (limit value)
- Events > Jobs > Report (days)
- Events > Jobs > Report (event manager responsible = EMR)
- Events > Jobs > Report (quotes)
- Events > RFQs > Internal user > Reminder at the end of a round

The following configurations can now be found as part of the new configuration **Suppliers > Ratings > Adhoc > Taxonomy**:

- Supplier > Ratings > Adhoc > Divisions mandatory
- Supplier > Ratings > Adhoc > Divisions multiple selection
- Supplier > Ratings > Adhoc > Material groups mandatory
- Supplier > Ratings > Adhoc > Material groups multiple selection
- Supplier > Ratings > Adhoc > Regions mandatory
- Supplier > Ratings > Adhoc > Regions multiple selection

The following configurations can now be found as part of the new configuration **Suppliers > Activities > Taxonomy**:

- Activities > Material groups multiselectable
- Activities > Material groups obligatory
- Activities > Organizations multiselectable
- Activities > Organizations obligatory
- Activities > Regions multiselectable
- Activities > Regions obligatory

All of these configurations are automatically migrated to the new bundled configuration during the release upgrade. Using the old XML only configuration is not available for these anymore.

#### **Increased text length for taxonomy labels**

Labels of entries in a taxonomy tree in the back office can now fit up to 200 characters in all languages.



### **Additional Validations when Importing Taxonomy Trees**

When importing an XML or XLSX to update an existing taxonomy tree in the back office, the system now validates the IDs of the tree and its items against the existing data. Previously, if an ID that exists in the import file did not exist in the tree yet, the item was simply added to the tree. Due to the newly added validation, an error message would be shown to avoid accidentally importing the wrong file.



## Fixed bugs

The following issues have been fixed in this release:

- Error editing RFQ round as an internal user with supplier authorizations
- Link to the company in supplier data maintenance tasks does not work
- Sourcing requests assigned to scope of work positions not visible
- Error generating ratings PDF for ratings that include activity data
- Select all results ignores filter settings in serial emails
- Error when requesting electronic signature in certain contract subtypes
- Export of resultset not starting in rare cases
- Raw placeholder displayed in PDF export of unassigned activities
- Error using formula variables with source data that contains double quote characters
- Error when extending running auction with extension mode "Limited"
- Wrong authorization assigned to visibility of send invitation button in participant lists of events
- Adding new taxonomies in registration acceptance wizard unavailable
- Entries in columns "inactive" and "Leading data set" not updated in external references import
- Wrong popup in agreements panel in supplier data update wizard
- Error when importing XML rating scheme
- Incorrect display of month in serial ratings online view on servers based in certain time zones
- Error when opening template in library which contains GAEB sheets
- Error when logging in as another user using global administrator permission
- Error when importing supplier classifications with DUNS or supplier number as supplier identifier
- Wrong authorization assigned to select/deselect buttons in global list of products
- Error when opening accepted agreements in a supplier record
- Future bids of "Alternative start price" are not shown as placed bids in Japanese ticker cockpit view
- Misalignment of address fields in supplier record on large screens
- Mapping action fails in some activities with no supplier participants
- Missing taxonomy status in additional information widget in supplier overview
- Error when running SourcingItemCopyAndReminderJob
- Error opening helpdesk contact form on login page if session is still active in browser
- Error exporting quote PDF for electronic signature
- Formulas referring to incorrect row in quoting templates of new single sheet scope of work
- OK button not available in old system configurations
- Missing search boxes for selecting the target activity when creating an activity relation
- Error in new cockpit of multi currency ticker auctions after placing bid
- Error when exporting a quotation template with new single sheet scope of work
- Error saving transition which triggers a mapping action in activities without suppliers



- Rounding inaccuracy in calculation of traffic light with blur in reverse auctions
- Documents of global EDM not selectable to add in templates
- Supplier document Excel export/import showing subtypes of all document types in every tab
- Columns not removable in scope of work sheets that contain hidden columns
- Feedback in reverse auction not displaying supplier name correctly after delegation of participation
- Excluded participants shown with rank 10000 in reverse auction export
- Adding new roles to accounts in the front end not available
- File creation date of construction sheets is displayed in the system's default time zone instead of the user's
- Error when importing a rating or classification scheme XML
- Error when viewing company relations in graph mode as non-admin user
- Error when uploading company logos in the supplier record
- Activity type specific authorizations missing in authorization tree
- Error running ImportDnBScorecardJob
- Empty confirmation popup when deleting a contact person as a supplier
- Error accepting signed NDA as an internal user on behalf of a supplier
- Buttons for editing formulas for ABC rating and color in rating scheme not opening editing window
- Error adding new contact person to newly created company as a supplier
- Error copying an event that contains a participant that was moved to a different company
- Error in supplier cockpit in reverse auction when using login as functionality as internal user
- Incorrect display of umlauts in portal names in emails
- Sending chat messages through context menu of participant view in internal cockpit of reverse auction unavailable
- Error loading resultset entries after filtering in list of hardfacts
- Error importing external references via Excel
- Incorrect display of trophy icon in internal user's feedback view of Japanese ticker auctions
- Error in auction cockpit when deleting criteria that already has bids during running auction