QAD SRM

RELEASE NOTES

SEPTEMBER 30, 2022

Release 5.4.0, September 2022

Contents

QAD SRM, 5.4.0

Introduction

These release notes include information about QAD SRM 5.4.0. 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 5.4.0, 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 100 or higher
- Mozilla Firefox version 99 or higher
- Google Chrome version 100 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.

New Features

General Usage

New Menu Entries for Application Links and Exports

A bento menu icon has been added to the top-right corner of the main menu. Using this icon, you can quickly access all application links visible to you in the application links widget. The bento menu is only displayed if you have access to at least one application link.

Additionally, exports started from the system (for example, export of events, suppliers, supplier documents, and so on) no longer display a pop-up while the export is being prepared. Instead, another icon appears in the top-right corner of the screen. Click this icon to display a menu that lists all downloads that you have triggered in the last few minutes, allowing you to download the same export multiple times, if needed.

Replacement of Pop-Ups with In-Page Dialogs

All pop-up windows in the system have been replaced by modal dialogs that open within the current window, instead of in a new window.

Supplier Management

Synchronizing Suppliers with QAD Adaptive ERP

A new standard interface allows you to create and update suppliers bidirectionally between QAD ERP and QAD SRM. All previous trigger points for requesting an accounts payable number from SAP are used for this integration as well. This step ensures that suppliers can be synchronized:

- When accepting a registration
- During the awarding process in RFQs
- During activities
- Manually, in the Actions menu of a Supplier record at any time
- Automatically, on a regular schedule through a job

SOAP Web Service for Requesting Suppliers or Supplier Documents with Criteria

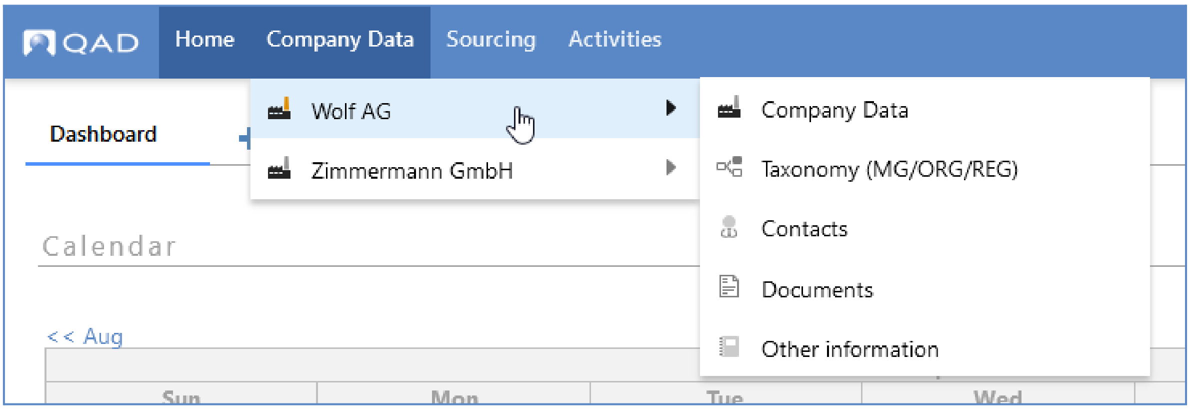
Two new standard SOAP interfaces are available for retrieving either supplier data or supplier documents from QAD SRM, based on custom search criteria. For example, you can retrieve a list of all suppliers located in Australia whose record was updated in the past 48 hours or a list of all valid ISO 9001 certificates.

Role-Based Supplier Data Management

When you edit or create contact person records for a supplier, it is now mandatory to specify a role, although a default role is provided. When creating a new contact record, supplier users must also specify a role. The supplier contact role selection behaves in a similar way to other entity roles such as event roles, document roles, or rating roles. This means that the authorizations granted in the supplier contact role are added to the contacts global system role in the context of one company. Therefore, supplier accounts linked to multiple companies can have different authorizations per company such as the ability to edit everything in one company, and to only be able to edit documents in another company.

By default, two supplier contact roles are automatically added during the upgrade to release 5.4ff. However, the roles do not contain selected authorizations. This step is to ensure that, after the upgrade, all supplier authorizations remain the same. Using different authorizations for contact roles is optional.

In addition, a change has been made to the way suppliers edit their company-related data. Previously, suppliers clicked on their company icon in the Preferences widget to edit the data related to their respective companies. Now, if you click the icon and have edit authorization, a page is displayed, containing the main company data and any custom properties. You can find all other information in Company Data in the main menu.



Depending on authorization for each company, users can see all of, or a subset of, these entries:

- **Company Data**: Contains the Company Data panel and any custom property panels visible to the supplier.
- **Taxonomy**: Contains material groups, organizations, and/or regions. Only available with the AUTH_PREFERENCES_TAXONOMY_VIEW authorization.
- **Contacts**: Contains all of the company's contacts and the option to create new ones.
- **Documents**: Contains the company's documents, except for supplier rating documents. This option is only available if you have access to document types other than supplier ratings.
- **Other information**: Contains internal contacts, self-assessments, and agreements. Only available if you have access to one of these three panels.

Deleting Supplier Classification Entries by Job

The DeleteSupplierClassificationsJob has been created to automatically delete supplier classifications after a defined timeframe.

Datasource for Taxonomy Custom Properties in Supplier Classifications

In supplier classification schemes, you can use the new "Company taxonomy entry" data source to pull values from the standard or custom properties of a supplier's taxonomy to a classification category. The source taxonomy can either be the respective context (for classifications on taxonomy level) or a fixed taxonomy entry.

Displaying the Company Logo and Link in Data Maintenance Tasks

Any task created by the SupplierDataMaintenanceJob now shows the logo and name of the supplier that the task was created for. When you move your mouse over the logo, the supplier's business card is displayed. This information is visible to both internal users and suppliers.

Mandatory Position in Company Selection in Contacts

When you edit or create a supplier contact, the default behavior is that it is mandatory to select at least one "Position in company." To make the field optional, use the following three feature flags in the **General > General features** system configuration:

- When editing existing contact persons: **feature.suppliers.edit.persons.contactFlags.mandatory**
- When creating new contact persons: **feature.suppliers.create.persons.contactFlags.mandatory**
- During supplier registration: **feature.suppliers.register.persons.contactFlags.mandatory**

Only Send Reminders for Mandatory Documents to the Assigned Supplier Contact

Reminder emails for unanswered mandatory documents are now only sent to the supplier contact assigned to answer the document, instead of to all supplier contacts, by default.

To change the default behavior and to send reminders to all the supplier contacts, use the **feature.suppliers.attachment.sendReminderMandatoryAttachmentParticipants** field in the **General > General features** system configuration.

Preventing Page Skipping in the Suppliers' Data Update Wizard

In the forced data update wizard that suppliers need to move through after their data expires, the user can proceed through, but not finish, the wizard, if any errors occur on a page.

If an error occurs on a page, you can now stop the user from proceeding, effectively forcing the user to correct the error before proceeding to the next page. To enforce this feature, use the **feature.suppliers.wizard.preventUnfocusOnError** feature flag in the **General > General features** system configuration.

Sourcing

Mapping Certificate Data to a Quote in RFQs

When using "Create quote," you can now use a new source, "Supplier documents." This source currently allows you to pull information from certificate metadata and custom properties.

New Cockpit for Ticker Auctions

Similar to English Reverse auctions, ticker auctions now offer a redesigned cockpit, both for internal users and suppliers. Internal users can watch, edit, and send chat messages in the auction cockpit, while suppliers can bid, see feedback, and use the chat function.

Creating Sourcing Requests from QAD Adaptive ERP

A new standard interface lets you create sourcing requests of type "ERP" from QAD Adaptive ERP in QAD SRM.

Creating Price List and Supplier Synchronization in QAD Adaptive ERP

A new standard interface lets you create price lists of type P in QAD Adaptive ERP, triggered by the quotation documentation in QAD SRM.

Templates

New Type of Scope of Work Sheet

When you create a new event using the "Scope of work" wizard or when you add a new scope of work sheet to an object, you are now asked to pick from two options: "Hierarchical sheets" and "Single sheet." The first option, which is the default, creates the scope of work sheet as it was prior to this release.

The ability to create a single sheet for the scope of work sheet is new functionality. If you select this option, the Excel upload does not split the scope of work into multiple sheets. Instead, it displays entry rows and grouping rows in a single sheet.

The following example shows how this structure can look:

	Position	Name	Amount	Unit	Price per piece	Total price
⊟	1.1	Project 1			3,66	146,30
	1.1.1	Part 1	35	pieces	1,23	43,05
	1.1.2	Part 2	40	pieces	1,22	48,80
	1.1.3	Part 3	45	pieces	1,21	54,45
⊟	1.2	Project 2			15,00	1.650,00
⊞	1.2.1	Subproject 1			6,00	300,00
⊞	1.2.2	Subproject 2			9,00	1.350,00
⊞	1.3	Project 3			15,00	2.250,00

Page 1 of 1 Entries 8 1

Strategies

Formatted Text in Data Maintenance Tasks

When you configure data maintenance tasks in strategies, the description text field has been replaced with a text editor, allowing you to enter formatted text. The resulting task also contains the formatted description, and a text editor opens when you edit the task.

Back Office

User Interface for XML System Configurations

A new way of editing system configurations has been introduced for some existing configurations. When you create one of these configurations, you see a guided, graphical interface for changing settings, instead of a text editor with XML content. In some cases, multiple system configurations are bundled together into a single new configuration.

Example: The new configuration **General > Currencies configuration** now bundles the following previous configurations:

- General > Default currency
- General > Exchange rates
- General > Currencies organizations
- General > Currencies > ECB > Exchange rates > Currencies
- General > Currencies > ECB > Exchange rates > Source

These single configurations are not available separately any more. In the new, bundled configuration, you can set currencies and exchange rates by editing fields or by adding entries to a list. If necessary, you can still edit the settings in XML— using a new, reduced syntax— through the Actions menu in the configuration.

This new way of editing system configurations will be introduced to the remaining configurations in future releases.

Company Data Variables for Email Template Tasks/Reminder

You can now add fields in the Company Data panel of the Supplier record to the "tasks/reminder" email template using placeholders such as **${tt.company.name}** or **${tt.company.DUNS}**.

Customers who want to add supplier data to the task reminder can adjust their email templates with these placeholders, as needed.

Types and Validity Ranges for Exchange Rate Sets

Currency exchange rate sets now offer two more attributes: a type of exchange rate set and a validity range. When you create a new event, you can pick which type of exchange rate set to use, storing multiple sets at the same time and letting the user decide which one to use.

You can add further exchange rate types, in addition to the default, in the **General > Currencies configuration** system configuration.

Configurable List of Non-Suppressible Email Templates

You can now define a list of email templates that will never show up as suppressible emails in a user's settings in the **General > Email configuration** system configuration. Using this list, you can allow or block emails, without the need to set up email templates and to adjust the associated blocking settings in the system. By default, this list includes 65 email templates including, for example, invitations to events, password related emails, and technical emails, like those in the global macros library.

Improvements and Changes

General Usage

Renamed Labels

Several labels have been renamed in this release:

- Requisitions are now called **Sourcing requests**
- The action menu item to "Request accounts payable number" for the supplier has been renamed to **Synchronize supplier**

UI Changes

Several changes have been made to the user interface to improve user experience:

- The icon denoting a supplier has been replaced, to offer better visibility of status indicators, for example, in the global list of suppliers or for participants in events.
- In all lists; borders, colors, and icons have been changed to improve the visibility of data.
- On dashboards, the possibility to drag and drop multiple widgets into one layout column has been removed because it caused misaligned layouts for some users.
- The company data and company information widgets in the supplier overview dashboard have been updated and no longer show blank labels if no data is available.
- Spacings, colors, and borders were adjusted in various places.

Changes to the Cookie Banner

To comply with current cookie rulings, the cookie banner on the login page has been updated. The text has changed to indicate that the system only uses necessary cookies. Additionally, the button for confirming and closing the banner has been removed to ensure that the cookie banner is always displayed on the login page. The **astras-cookies-accepted** cookie, that was set when confirming the banner, has been removed also.

New Columns in the Task Reminder List

The list of tasks that can pop up as a reminder after you login to the system now contains two more columns. These new columns display the supplier name and supplier DUNS number, in case the task is assigned to a supplier.

Supplier Management

Display the DUNS and Supplier Number in Company Links in Supplier Accounts

In the user account of a supplier contact, any linked companies are displayed. With this release, these links also show the linked companies' DUNS number and supplier number, if available.

Identify Suppliers by Custom Property

In the standard SupplierTypes web service interface, the BatchUpdateCompaniesRequest now lets you identify a supplier for update using a custom property, instead of the ID, DUNS, or supplier number.

New Authorization for Viewing Classifications in Serial Ratings

The system contains a new authorization, AUTH_SUPPLIER_RATINGS_CLASSIFICATIONS, for viewing classifications. The new authorization is in addition to AUTH_SUPPLIERS_CLASSIFICATIONS and to any other authorizations configured in the classification scheme required for viewing supplier classification panels for serial ratings. Customers using this functionality must add this authorization to any roles that access these panels.

New List for Recipients of Mass Emails

When adding recipients to a supplier mass email, a supplier contact list is displayed. This list has been updated to be the same type as that used in the global suppliers view. The list includes a simple search and column filters that improve searching.

Keystore Certificates Removed

For suppliers who need to electronically sign quotes in RFQs, they no longer need to have a corresponding keystore certificate for the electronic signature. The keystore functionality has been removed from suppliers.

Faster Loading times in Global Spends List

Previously, customers with a large amount of spend data encountered slow loading times when opening the global list of spend data. Performance has been improved in this list. Additionally, a default search filter has been added to the list to ensure that it only shows spend records from the past four months, by default, reducing the performance strain on the system.

Sourcing

Removing Positions in Ticker Auctions

While creating a new ticker auction, you can now remove any ticker positions added to the wizard, other than the default mandatory position.

Improved Placement of Validation Messages in Auctions

When suppliers validate or place bids in the new auction cockpit of an English Reverse auction, the confirmation or error message box that subsequently displays has been moved further to the top of the screen, to avoid overlap with parts of the quoting sheet.

Hidden Transparency with Multiple Criteria and Initial Bids in Auctions

Previously, when using the “Do not show best bid/rank/traffic light, if supplier has not yet offered” setting in multiple auction criteria with an existing initial bid, the system showed transparency for all criteria when a bid from the supplier was received. Now, the setting only shows transparency for the criteria that the supplier has placed a bid for.

Excluded Positions Ignored in Total Calculations in Auctions

In English Reverse auctions with multiple positions, if a supplier bids for a position that the supplier was excluded from after the bid was entered, the bid is excluded from the calculation for the total criteria.

Validating the Start Date for Ticker Auctions

When using edit mode to manually change the start date of a ticker auction, the date you enter in the start field must be in the future. If you specify a date in the past, the system displays an error message and prevents you from saving your changes.

Truncated Titles for Automatic Sourcing Requests

When you create an RFQ, sourcing requests are automatically created in the background. The sourcing request title is composed of the event name, the position number, and the position description, which can result in a very long title. Since the title field in a sourcing request can have a maximum of 200 characters, titles for automatically created sourcing requests are now truncated to 200 characters, instead of showing an error message in the RFQ wizard.

Request Approval Button Disabled in Edit Mode

When in edit mode in an RFQ, the button to request approval for a nomination is now disabled and the functionality is only available without edit mode.

Ignoring Empty Selections in Excel Uploads

When uploading a quote or answer sheet from Excel, a blank value in select boxes previously caused an error to display in the import window, if a blank value was not a valid option in the select box settings. Now, empty values are ignored and, instead, the first option in the select box is set during the import.

Orders Module Removed

The Orders module has been removed and its functionality is no longer available in SRM.

Collaboration

Menu Icons

Icons have been added to the sub menu entries of the Collaboration menu.

Uploads in Outgoing Activity Interface

In the standard ActivityTypes web service interface, a list of existing (supplier) uploads for the activity is now included in the response to a GetActivityRequest and when the activity is sent to another system through the SendActivityClient.

Templates

Dependent Option Lists for CONTENT Fields

You can now use CONTENT fields in dependent option lists in templates and, additionally, with QUOTATION and ANNOTATION fields.

Changes in the Excel Export for Grid Sheets

When exporting an Excel version of a grid sheet (for example, a quoting sheet in an RFQ or a content export in the template library), grid lines are now disabled by default to be more consistent with the online display of the sheet. You can force the export of a sheet to enable grid lines by selecting the **Show grid lines in export** box in the grid sheet's properties.

Additionally, the **Show headers for columns and rows** sheet setting now affects the Excel export, instead of just the online display. If you do not select this box in the sheet properties, coordinate headers for columns (A, B, C, …) and rows (1, 2, 3, ...) are not displayed by default in the Excel export of the sheet.

Back Office

Message Queue in SaaS

SaaS administrators can now use the AUTH_MESSAGING_QUEUEANDLOG authorization to view their site's global email log, which is located in the back office at *Tools > Message queue and log*.

Please contact the helpdesk for assistance in applying this authorization to your account.

Site-Specific Logos in SaaS

SaaS administrators can now use the new AUTH_LOGOS authorization to access their site's logo library, which is located in the back office at *System configuration > Logos*. The logo library contains the logo used in the main menu, in the background image of the login page, and in any fixed images shown in templates or in web content widgets.

Please contact the helpdesk for assistance in applying this authorization to your account.

Validating Screen Configurations

When you save a screen configuration in the back office, the configuration is now checked to determine if it is a valid JSON format and if it results in a renderable layout. If not, the system displays an error message and your changes are not saved.

Format Change in Activity Settings in the Rating Scheme

The trigger value field in the criteria settings for a rating scheme now allows you to specify numbers with up to two decimal places, instead of only whole numbers.

Change in File Types Configuration Default

The default list of allowed file types for upload, defined in the **General > File uploads > Allowed mime types and file extensions** system configuration, now includes .zip, .docx, and .mp4 files. The system now allows these file types to be uploaded by customers who do not use their own adjusted list.

Change in the Default Setting for the CloseEventsJob Feature

The default setting for the **feature.events.rfq.closeEventsJob.activeEventsOnly** feature flag has been changed to **true**.

Duplicate Check for Mappings

When you save a new mapping in the back office, a duplicate check is now performed that prevents you from saving the mapping if another record with the same mapping case already exists. This check is applied to all mapping cases, except for the "Custom" case, which can exist multiple times.

System Configuration Removed

The **General > Your data > Read only fields** system configuration has been removed. Customers who currently use this configuration can use **General > Your data > User account > Edit read only fields** instead, which offers the same and additional options, compared to the removed configuration.

Higher Character Limit in System Configurations

The character limit for XML-based system configurations has been changed from 40000 to 200000 characters.

Improvements to Email Template Contents

In the invitation email templates for all four event types, an additional check for a supplier's registration status has been added. This new check prevents you from sending an invitation with a registration link to suppliers who have finished their registration, but who are waiting for approval. Customers with customized invitation emails must manually update their email templates with the extended check by replacing this line:

```
#if ( $company.InRegistration )
```

With this line:

```
#if ( $company.InRegistration && !$company.RegistrationFinished )
```

Fixed Bugs

The following issues have been fixed in this release:

- The Confirmation button was missing when uploading a signed NDA in company data with default eSignature settings.
- The edit criteria dialog did not open in the English Auction cockpit when there was a large number of criteria.
- An error occurred when downloading the PDF for a nomination in an archived RFQ version.
- An error occurred when opening the list of groups in the back office.
- There was unnecessary spacing in the HTML for data protection and terms of use.
- The SAML login created the wrong target URL, if the language was pulled from the account.
- An error was displayed when approving participants for the round phase, despite successful approval.
- The old and new values tables were not displayed in the suppliers/updateCompany mail.
- An email on unaccepted optional agreements in events was not sent to the email addresses configured in the agreement.
- Fields for several objects were displayed in one layout column, instead of two.
- There was a duplicate display of supplier uploads in activities.
- An error occurred when sorting by specific columns in some lists.
- For super administrators, personal preferences data was displayed incorrectly.
- Text translations were not displayed in the auction cockpit when running auctions with high concurrency.
- Roles of type "Project" were not displayed in the new workflow editor.
- The Finish button was not clickable in the data update wizard, if errors occurred on the last page.
- An error occurred when using the requiresDigit property in password policy configurations.
- An error occurred when creating tasks in the supplier record without global admin permissions.
- An error occurred when creating events with a grid template that contained select boxes that referenced back office option lists.
- The kebab menu icon disappeared in lists with active column filters.
- Authorizations were missing for some activity roles after the upgrade to release 5.3.x.
- An error occurred when opening very old documents that had been moved to archive.
- An error occurred when regenerating ticker steps in ticker auctions after new positions were manually added in edit mode
- For non-super administrators, an error occurred in the list of dashboards in the back office.
- Swimlanes for system and unassigned could not be hidden permanently in the new workflow editor.
- In some databases, an error occurred in the list of application links in the back office.
- The Reload bid sheet button was sometimes unavailable to suppliers after their bid was rejected by a buyer.
- The Suppliers cockpit did not automatically switch to bid mode when an auction started.
- A decimal digit cut-off occurred in the display of target values for users with certain country-specific number formats.
- An error occurred when adding a new contact as a supplier and when viewing company data with address fields that needed approval.
- Automatically added participants were duplicated in activities.

- Active activities were not consistently displayed on the sourcing requests main page.
- When editing project participant roles, the window was unresponsive.
- The mapping to the sourcing request was not triggered during activity creation.
- An error occurred when validating a bid in empty criteria using the “prevent equal values” setting.
- Criteria feedback contained an incorrect number of decimal digits.
- An error occurred when an auction started in the supplier cockpit.
- An error occurred when adding a sourcing request participant role to the activity template.
- A duplicate display of approvals occurred in events.
- A rare unresponsive state occurred for the auction cockpit after an auction reset.
- The ESignature panel did not display in the edit view for the General Documents attachment type, even though the configuration and permissions were correct.
- An error occurred in lists when you created a new dashboard, added a list widget, and created a new filter, before saving the dashboard.
- Bids were not shown in the auction cockpit until the first manual refresh, if the auction was started without starting prices.
- An access denied error was displayed when downloading the log after the mass import of mandatory documents.
- An error was displayed when opening a link from the whiteboard widget.
- Chat messages were not displayed in the auction cockpit until the first manual page reload.
- Participants of activities added using the interface were not shown for some users.
- An error occurred in the list of supplier relations for users without access to all suppliers.
- The eSignature was not displayed for some document types.
- An error occurred when creating new object-based roles.
- The “Charts and reports” widget did not correctly show rating data in Oracle and MariaDB databases.
- An unintended field type of UPLOAD was displayed in the custom properties.
- The localized titles of custom email templates were not translated in email prevention settings.
- An error occurred when copying an event for a supplier participant that was no longer linked to the same company.
- An error occurred when copying classification schemes.
- It was possible to accept NDAs with required upload outside of events, without uploading the signed version.
- Authorizations for eSignatures in supplier documents had no effect if they were granted through document roles.