



QAD Adaptive Applications

SRM Release Notes

June 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 6.2.0. This release of QAD SRM is a General Availability (GA) release. Review this document before proceeding with any phase of an implementation.

Release Summary

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

The user interface is only supported on current versions of the Chrome, Safari, and Edge web browsers (Chrome 121+, Safari 17+, and Edge 121+). 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 6.2.0 requires Java 17 in order 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

Two data analytics visuals are available in this release:

- Activities Participation by Type
- Event Participation by Status

You can access these visuals by adding them as widgets to the SRM dashboard. On the Overview panel for individual suppliers, you can view the visuals at supplier level.

When you view a visual, you can use the visual interface to change elements of the visual, such as the filters that are applied, the style of the visual, and the visual settings. However, you cannot save any changes you make because the visuals are configured by QAD SRM.

You can also drill down on a data point in a visual by clicking a data point on the visual and choosing an option on the context menu.

All Default Buyer roles are assigned the required viewer analytics permissions out of the box:

- Show embedded analytics (AUTH_ANALYTICS)
- Analytics viewer (AUTH_ANALYTICS_VIEWER)

A customer administrator can also add these permissions for any role. All users assigned to that role are then able to view analytics. For more information, see the Online Help.

Note for customer administrators:

To modify user roles, you need to have an account role assigned with the permission AUTH_ROLES_EDIT. If you do not have this permission, please contact SRM support.

Template Builder (RFI)

The new Simplified RFI Wizard makes it quick and simple to create RFI templates. You no longer need to pre-create the questions and groups in the RFI library. You can create these directly in the template and simultaneously configure their properties.

However, all the questions and groups stored in the library are still available for selection in the template with an autocomplete predictive search. You can reconfigure the position of questions by dragging and dropping them within the group.ques

The wizard is available out-of-the-box and ready to use in the events templates gallery.

Ticker Auction Exclusion View

In the bidder auction view for future events, when a participant is excluded the item label now displays *EXCLUDED* instead of *FUTURE*.

QAD Process Intelligence

QAD Process intelligence is now integrated out-of-the-box with SRM. QAD Process Intelligence uses SRM activities for data mining purposes. Activities can be extracted in two ways:

- **Manual:** You can extract the activities log files in *.zip* format for a defined date range. Use the new menu option in Back Office by selecting Tools > Process Intelligence. In the Back Office system configuration General > Process Intelligence, you can configure the available elements to extract.

They can be manually uploaded into QAD Process Intelligence for data mining.

- **Automated:** The provided connector allows full automation of the integration process between SRM and QAD Process Intelligence.

For more information on how to start using QAD Process Intelligence, please contact your QAD Customer Success manager.

SOAP Interfaces Version1 [Updated]

Deprecated Version 1 of SOAP interfaces is removed in this release. Ensure you switch to Version 2 by changing the namespaces accordingly.

API Documentation Browse

A new API Documentation browse is available in Back Office. Select Tools > API Documentation. This browse provides a comprehensive list of the Open APIs provided by SRM. The browse displays the list by API Name, API Description, and API Documentation URI, which includes a URI link to the Swagger repository where you can find the details about a particular API.

You must be assigned the new authorization named AUTH_API_DOCUMENTATION to be able to view the API Documentation menu item.

Strategy Taxonomies Enhancement

When the material group is not mandatory, buyers can make mandatory documents in the registration process and set up activities or tasks for a specific region.

You can now create a strategy where no material group is selected and only an Organization or Region is chosen. This information is enough to determine which suppliers are included in the strategy. You still need at least one mandatory taxonomy for the strategy, but it no longer needs to be a material group.

Two-Factor Authentication in External Approvals Process

For improved security, two-factor authentication is implemented:

- 1) When the user opens the link of the external approval, the approval page is displayed as usual. However, there is no Accept or Reject button. Instead, a Send verification code button is displayed, together with a text message explaining the background.
- 2) When the user clicks Send verification code, a random 6-digit code is generated, stored in memory (the screen) and also sent to the user by email, using the recipient address stored in the approval.
Note: The email is not queued or stored in the database. It is sent immediately.
- 3) The page shows a text input asking the user for the verification code. The Send verification code button is replaced by a Resend verification code button. The Accept and Reject buttons become visible.
- 4) If the user does not receive an email, the user can click Resend verification code, which generates a new, random 6-digit code replacing the current one. The mail is then sent again. This step can be repeated multiple times if it fails.
- 5) When the user enters their code and clicks Accept or Reject, the verification code the user has entered is compared with the generated code. If the codes match, the approval is complete. Otherwise, an error message is displayed to indicate that the verification code is incorrect.

SRM Online Help

The Manual for buyers has been replaced with a new and improved Online Help. It can be accessed from the same question mark icon.

The information from the Manual for buyers has been carefully reviewed and updated before moving it into the new Online Help. There have also been additions in some areas.

The Online Help will be updated and expanded in future releases.

Sourcing Request Open API

Sourcing items are the most atomic form of items that are sourced and they are supported in projects and events. There is now a new Open API available to read and update sourcing items. For more details about the API, visit our Swagger space, which you can access from SRM in API Documentation.

External References Open API

A new CRUD API is available for External References. This API allows SRM to work with company identifiers for a third-party system. This simplifies the integration with any external system that requires this cross-reference information, such as Integrity Next. For more details about the API, please visit our Swagger space, which you can access from SRM in API Documentation.

Localized Anonymous Sender Name

A customized sender in anonymous email messages is now possible. Currently, the Email address (especially the domain) cannot be custom and must stay as it is. However, the name of the sender can be set to a custom value.

To use this feature you must:

- Add a localization code to the email configuration in the master site
- Add a default localization for that code in the master site
- Use customized localization entries in sites that require customization

Note: The translation only happens with the default locale (English). So the same value is used for all languages.

Material Description for Sourcing Requests

A new Material Description text field is available in Sourcing Request. This field is added because some users might know the material number but others may not. Therefore, the material description can be helpful in understanding what is being managed in the sourcing request.

Add Group Participant to Archived and Closed Events

SRM users can now be added to the participants of an event when the event is closed or archived. This enables users to access historical events in case they need to review them later. The detailed behavior and required configuration is as follows:

- The CompletedEventsAddParticipants job automatically adds pre-configured participant groups to closed events.
- This job selects all closed events that do not have a group participant of a configured group. If no such event is found, the job does nothing.
- This job loads the group by the configured group name as well as the role for each event type with the configured name. If there is no role found for every type, only the found types are processed.
- For each event, a group participant is added with the configured group.

You must configure the groups to add to the process in the Back Office system configurations under: Events > Automatically invite participants > Closed Events.

Interface to Update Sourcing Request Data from a Remote System

On the Sourcing Request main panel Actions menu, an Update sourcing request data option is now available if the Sourcing Request status is New. Selecting this option updates your sourcing request with the configured remote system data.

This feature needs to be configured in the Back Office system configuration under Sourcing Request > Update sourcing item data configuration. Here, you can define:

- The default webservice configuration

- An optional webservice configuration in case of different destinations for each sourcing item type

The following authorizations are required:

- AUTH_SOURCINGITEM_UPDATE_DATA
- AUTH_SOURCINGITEM_EDIT

Improvements

- [AST-10956] - In migration to Jakarta EE, jCaptcha (simpleCaptcha) is removed
- [AST-10958] - In migration to Jakarta EE, commons file upload support is available
- [AST-11102] - The PDF generator module is now used in one standard way
- [AST-11111] - Basic preparations are done for source folder, servlet, filter chain, and component-scan
- [AST-11113] - OAuth authentication takes place in the standard way
- [AST-11120] - Freemailers list is now in the resourceManagerParent.xml file
- [AST-11130] - To prevent multiple instances of beans, the WS interceptors and other beans have been adjusted to set their scope to singleton
- [AST-11131] - The release notes popup is now optional
- [AST-11162] - iText PDF CustomProperties rendering is changed
- [AST-11163] - There is now an entity for clientId and clientSecret
- [AST-11168] - Ratings rendering for iText PDF is changed
- [AST-11179] - The iText PDF HtmlTableCell inner class is replaced
- [AST-11199] - The iText PDF footer and header rendering is changed
- [AST-11215] - For iText PDF, html+css is now used to generate PDF outlines
- [AST-11216] - When creating a new AgreementAccept the user can select an agreement type rather than a single agreement in BOS
- [AST-11266] - PurgeAuditsJob can drop constraints automatically
- [AST-11342] - SAML Signature Algorithm is now configurable
- [AST-11348] - For REST API, client secret is no longer exposed
- [AST-11350] - CWE 916: An encrypt/decrypt issue for clientId/secret is mitigated
- [AST-11351] - CWE 316: OAuthRequest helper class risk issue is mitigated
- [AST-11352] - SAMLResponseLogger is implemented
- [AST-11354] - BinaryArchiver is no longer creating too many links
- [AST-11365] - The Process Intelligence API is improved
- [AST-11370] - Site color settings are improved
- [AST-11378] - There are improvements to the Process Intelligence configuration and export tool
- [AST-11386] - There are API Browse improvements
- [AST-11418] - SimpleRFI - Template Builder has UX improvements
- [AST-11421] - Follow-up activities can now be automatically created by action and are automatically added to the activity if there is a group predefined in the template
- [AST-11452] - All Add participant resultset search elements are changed to searchBoxes
- [AST-11456] - New questions are no longer removed when questions are added to the RFI Simplified Questionnaire using the edit sheet properties.

- [AST-11473] - On a GridSheet in edit mode, clicking a disabled select box or checkbox now correctly selects a cell
- [AST-11503] - Parameter logging in connectors is improved
- [AST-11511] - Preauthenticate on blur-only improves sign in
- [AST-11272] - On the buyer side, an error message issue when an offer is placed against the bidding direction no longer appears
- [AST-11262] - For the Japan Ticker, there are no longer incorrect values in Supplier view after OV end
- [AST-11263] - Feedback (rank) for excluded supplier is no longer displayed in the cockpit (buyer and supplier)
- [AST-11305] - In Supplier view, when a position in an event is excluded from quote, the participant can no longer edit the value in the cockpit
- [AST-11287] - Feedback settings are now displayed correctly in Supplier view
- [AST-11307] - Sourcing request from ERP to SRM no longer fails with lowercase letters in unit of measure
- [AST-11475] - Feedback settings are now displayed correctly in Supplier view for different currencies and when excluding positions
- [AST-11231] - EWT Report improvement
- [AST-11235] - EWT Report extraction improvement

Fixed Bugs

- [AST-11071] - 504 Gateway time-out when filtering for companies without a contact person
- [AST-11116] - Accountsuccessor for activities does not work properly
- [AST-11129] - Occasional build errors within unit tests that require a resource from the classpath
- [AST-11132] - Sync Tenant does not work correctly
- [AST-11134] - Automatic email notifications are missing for document uploads by suppliers
- [AST-11140] - ITestAdhocSupplierRating fails due to a NullPointerException
- [AST-11146] - Access denied in SupplierSelfAssessment comparison
- [AST-11148] - Column filter does not function in Supplier view
- [AST-11165] - User cannot create supplier internal contact role
- [AST-11169] - Incorrect triggering of data validation by internal users, faulty checks, and emails
- [AST-11174] - Last quotation values on the supplier cockpit disappear when the auction ends
- [AST-11178] - Incorrect logic as to what an excluded supplier can see in a ticker auction after the auction is ended
- [AST-11180] - NDA acceptance entries are multiplied
- [AST-11181] - Checkbox for default supplier internal contact role is missing
- [AST-11184] - Supplier documents fixes, setting approved flag, update detection
- [AST-11189] - AccountExpirationJob strategies do not work
- [AST-11190] - NotSerializableException when running ITestConnectors
- [AST-11195] - Column filter does not function in Supplier view
- [AST-11196] - Connector GUI validation error
- [AST-11200] - The QUOTA_OLD field has no default value

- [AST-11206] - BasicSetupIntegratedEnvironmentURLUpdate does not update URLs for the PriceList Connector
- [AST-11208] - DataRetrievalFailureException when running ITestConnectors
- [AST-11222] - Exception when updating company of an activity after mapping
- [AST-11230] - You should not be able to add the same activity type multiple times in Process Intelligence configuration
- [AST-11233] - Reminder email is missing a certificate
- [AST-11234] - Email prevention in user account: Select all does not work
- [AST-11244] - An advanced search causes the application to crash
- [AST-11257] - Incorrect encoding by Process Intelligence export
- [AST-11261] - Mass edit of taxonomy entries is not working as expected
- [AST-11268] - Certificate type groups from strategy applies in supplier profile
- [AST-11269] - Multiple tests fail due to AST-11261
- [AST-11270] - Creation of a new tenant in SRM calls the DAP API twice for the tenant
- [AST-11289] - DAP API responds with tenantId is missing due to incorrect ContentType in http header
- [AST-11291] - Ecovadis integration not working with multiple integration ids being returned
- [AST-11312] - Missing authorities for BatchsendcompaniesJobBean and BatchUpdateCompaniesJobBean
- [AST-11313] - Certificate panel URL redirecting to Regions form
- [AST-11317] - Failed error message when attaching documents in an activity
- [AST-11319] - Incorrect currency in Supplier view in Japan ticker auction
- [AST-11324] - Insert widget dialog: The text "Alle (107)" is hardcoded to the German language
- [AST-11325] - Previously executed setups can be executed a second time
- [AST-11328] - Documents and certificates required during registration without proper strategy
- [AST-11335] - Maxlength missing for position
- [AST-11336] - Empty pattern on Boolean cell in activity sheet causes issues with display and PDF export
- [AST-11340] - Update on SAMLConfig is not transmitted to the other node
- [AST-11345] - Patch 712 Extend currencies config throws an error when there is nothing to migrate
- [AST-11347] - SAML does not support EncryptedAssertions
- [AST-11353] - Errors in database upgrade to 6.1
- [AST-11355] - baseUrlWithContext is not properly initialized from bean
- [AST-11356] - glassfish-web.xml is no longer valid
- [AST-11358] - Certificate valid until date is not correct
- [AST-11360] - Removing a widget from a dashboard leads to a NullPointerException
- [AST-11361] - Exception in classifications
- [AST-11362] - Exception in mapping
- [AST-11364] - Exception in suppliers
- [AST-11366] - Cannot accept NDAs
- [AST-11367] - Ticker Auction XLS import error while casting
- [AST-11368] - Application error occurs when opening messages online
- [AST-11369] - Export of tasks results in an empty sheet
- [AST-11374] - External event approval is not possible

- [AST-11375] - Recommendation sheet shows all approvers of the strategy
- [AST-11379] - SaveCompanyRequest fails with an exception
- [AST-11383] - Classifications show internal values and not the description
- [AST-11384] - Ad-Hoc Rating results are not being published in the table
- [AST-11385] - Logos missing in site settings
- [AST-11390] - SaveBuyerEndpoint runs into a NPE with Account.getLogEntries()
- [AST-11391] - SaveRatingEndpoint runs into a NPE with SupplierRating.getLogEntries()
- [AST-11405] - Report export error at Huf Group
- [AST-11424] - Approval process still not working
- [AST-11426] - Missing authority in job
- [AST-11431] - Reports cannot be opened
- [AST-11435] - Diagram widget shows wrong numbers
- [AST-11436] - Save button enabled on visual on dashboard on SRM but hidden on single visual
- [AST-11438] - Email prevention does not work for "Company XYZ has changed their data"
- [AST-11441] - In supplier status, when changing the status from Registered to In registration, an exception message appears
- [AST-11442] - Drag and drop of questions causes some visual issues
- [AST-11445] - Authorities are scoped multiple times causing access denied issue for event messages
- [AST-11446] - Change the verification.metadata.xml file to not trust all the jars
- [AST-11453] - Exception while creating company using webservice
- [AST-11463] - IntegrationTestRFQInvitationEmailVerify.testRFQInvitationEmailVerify fails
- [AST-11470] - Screens are not serializable on the integration system
- [AST-11472] - IntegrationTestFollowUpActivity fails with a java.lang.ArrayStoreException
- [AST-11474] - New supplier wizard has inactive fields
- [AST-11477] - In supplier documents, Update Emails is not working for watchers
- [AST-11478] - When rejecting a supplier NDA, a message is displayed that the requested page does not exist.
- [AST-11491] - Error in onboarding email notification
- [AST-11492] - JasperReport PDF export throws an exception
- [AST-11493] - Attachment filenames containing special characters are lost on download
- [AST-11495] - User can set the To Date later than the Start Date under Process Intelligence
- [AST-11497] - Data is missing in csv Process Intelligence export file
- [AST-11499] - Checklist# JSS00123 - Error in Supplier Onboarding
- [AST-11501] - Issue with mass import of mandatory documents
- [AST-11502] - Issue with preparing contract in RFQ with nominations
- [AST-11510] - Supplier import and contact import leads to an error message: "An unknown error has occurred"