JAGGAER ONE

JAGGAER Assist

JAGGAER ONE Assistant Guide

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Table of Contents

Overview

Introduction

JAGGAER Assist is JAGGAER's solution for providing guided assistance for users directly within the JAGGAER ONE platform. By using the built-in smart assistant tool, you can ask questions and receive answers that explain how to perform tasks without ever leaving the application.

The tool supports a Frequently Asked Questions capability to provide detailed instructions for how to use the functionality across various modules.

This document will help you:

- Access the JAGGAER Assist tool.
- Utilize all essential functions of JAGGAER Assist.
- Configure guided assistance functionality.
- Know how to provide feedback to influence future JAGGAER Assist updates.

> **Note**: In order to use JAGGAER Assist, JAGGAER personnel must enable the Assist control setting for the organization and administrators must grant access to the tool to users. Some functionality is limited to the Premium Edition of Assist. Speak with a JAGGAER representative for more information.

Key Features

- **JAGGAER Assist** allows users to ask operational questions of the Assistant tool and receive answers directly within the JAGGAER ONE platform.

- **JAGGAER Assist** can automatically redirect users to the proper location within the JAGGAER solution to view, create, or search for specific objects.

- **JAGGAER Assist** provides assistance when users perform specific functions within supported JAGGAER modules.

- **JAGGAER Assist** provides enhancements to navigating within supported modules.

- **JAGGAER Assist** Premium Edition grants organizations the ability to create and upload FAQ responses tailored to their unique needs.

- The **Provide Feedback** option allows users to provide direct comments on the JAGGAER Assist tool and the System responses received. This allows users to influence future improvements of the JAGGAER Assist tool.

JAGGAER Assist Premium Edition

Organizations that desire greater control over **JAGGAER Assist** functionality may purchase a license for the JAGGAER Assist Premium Edition.

Premium edition users are able to:

- Customize the training phrases used to trigger application intents to conform with the terminology in use at the organization (e.g. "ITT" instead of "RFQ").
- Generate reports on usage of the intents in the agent.
- View conversation logs of prior conversations to determine areas where the agent capabilities could be improved.
- Add/customize the training phrases/synonym translations to support languages that the base JAGGAER Assist does not currently support.

For complete details about JAGGAER Assist Premium Edition, and how to acquire a license, contact your JAGGAER representative.

> **Note**: If your organization decided to go the Premium version, your organization will be responsible for reviewing and upgrading the content from each release. JAGGAER will not be responsible for creating/upgrading the content.

User Enablement

JAGGAER Assist must be enabled within client organizations by JAGGAER personnel. However, there is a client admin-controlled access permission that can be used to control which users within an organization will have access to the tool.

No user within the organization can use **JAGGAER Assist** unless they have been granted this permission. The table below describes the permission associated with **JAGGAER Assist**, its function, the levels to which it can be applied within an organization, and the location where the permission can be accessed.

Permission List

Permission Name	Function	Level	Default Setting	Location
Access JAGGAER Assist	Enables or disables access to JAGGAER Assist. When enabled, users will have access to the JAGGAER Assist tool. When disabled, users will not have access to the Assistant tool and will not be able to see it or interact with it within the application. This permission can be applied to both individual users and specific roles.	User, Role	Disabled	Profile > Permission Settings > Administration

The JAGGAER Smart Assistant

Using JAGGAER Assist

Access Assistant

Interactions with the **JAGGAER Assist** tool will be via the smart assistant chatbot, which allows users to engage with the tool in a human-like conversation flow by text or voice. This tool provides an interface for asking questions and receiving answers. If an organization has **JAGGAER Assist** enabled, enabled users will see the smart assistant icon in the lower-right corner of the screen when logged into the JAGGAER site.

If this icon is not visible, JAGGAER Assist has either not been activated or has not been enabled for the user at either the user or role level. Refer to the **Permissions** section for more details.

Upon clicking the smart assistant icon, the assistant opens. The following diagram displays the welcome screen upon freshly launching the chatbot.

The components of the chatbot are:

1. **Assist Greeting** - This is the starting prompt for the chatbot.

2. **Suggestion Chips** - These buttons represent areas of interest to the user. Clicking on a suggestion chip will automatically initiate the process to guide the user towards completing the selected task without requiring a specific request from the user. This is useful if the user is not sure what they need to do, if the user does not have a complete understanding of what options are available to them, or if the user already knows what task they need to perform and does not need to specify it to the chatbot. Suggestion chips may also be presented by the chatbot when the user needs to make a choice during a process.

   > **Note**: The suggestion chips a user sees are determined by what permissions the user has within the JAGGAER application, which determines the actions currently available to that user. If the user does not have the appropriate permissions to interact with contracts, for instance, they will not see the **Contracts** suggestion chip.

3. **Feedback Button** - This button allows the user to provide feedback to JAGGAER to help improve JAGGAER Assist. Refer to the **Providing Feedback** section for more details.

4. **Entry Field** - This field allows the user to enter their own requests and questions into the chatbot. **Note**: Clicking the ▲ arrow takes users to the last query entered by the user (from the current login session only).

5. **Microphone Button** - This button allows the user to interact with the chatbot using voice input. Refer to the **Interacting with the Smart Assistant via Voice** section for more information.

6. **Submit Button** - This button allows the user to submit the contents of the entry field to the chatbot. Alternately, the user may press the **Enter** key.

7. **Audio Support Toggle** - This toggle enables or disables audio support. When enabled, answers provided by the chatbot will be read aloud using a digital voice. By default, this toggle is disabled.

   > **Important Note**: Some web browsers may not support the Microphone and Audio support service.

8. **Close Chatbot Button** - This button will close the chatbot.

FAQ Support

One of the primary functions of the Assistant chatbot is to provide answers to frequently asked questions.

1. Click on the **JAGGAER Assist** icon (💬) to launch the Assistant tool.

2. (Optional) Upon launching the Assistant tool, users have the option of clicking a presented selection chip in the chatbot window. These selection chips represent common functions of interest that can be used to quickly direct a user to the assistance they are seeking.

3. Type a question into the chat field at the bottom of the tool. The default instruction text reads, "Type Here (e.g. "help")."

Important Note: The JAGGAER Assist tool currently only supports the **English** language.

Note: Users may click the microphone icon in the question panel to use a microphone to verbally ask the Assistant a question. Click the icon again to return to the standard view.

4. Press the **Enter** key or press the submit button to submit a question. The question will be displayed within the chatbot response panel. In the following example, the question "how do I create a contract" returns an FAQ explanation of how to perform this action. The suggestion chip "Additional Contract Fields" is presented as a topic that the user may wish to explore based on their query. Clicking on selection chips will provide additional information. **Note**: FAQs may also contain links that redirects users to the **Online Help** once clicked.
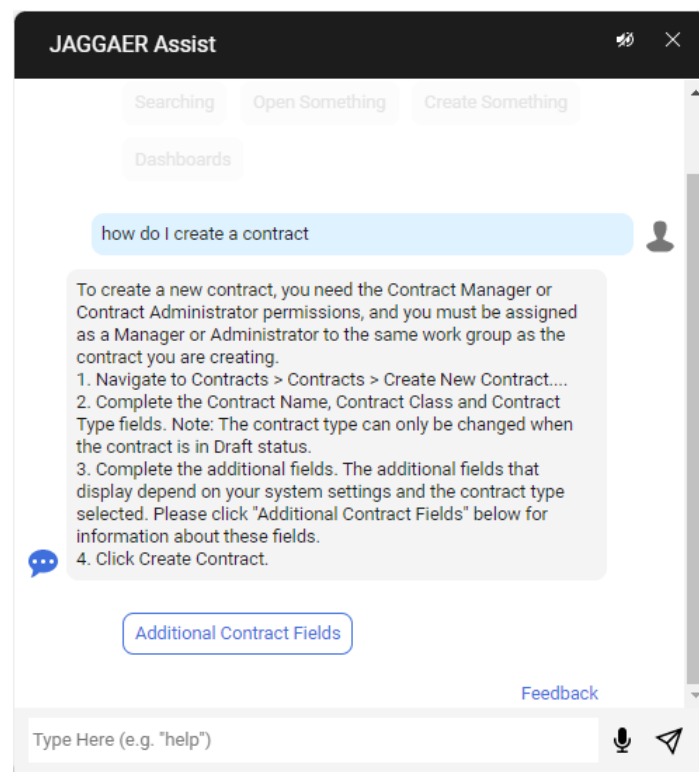

Note: The information in the Assistant will remain in place until the user navigates away from the current page. The last three interactions within the chatbot will be displayed when the chatbot is relaunched. The user may use the scroll bar to view all submitted queries and responses. Suggested topics may only be selected for the current query.

The Voice Interface

If the user has a microphone available, they may interact with the smart assistant chatbot with their voice. Clicking on the microphone button in the **JAGGAER Assist** chatbot will open the voice interface.
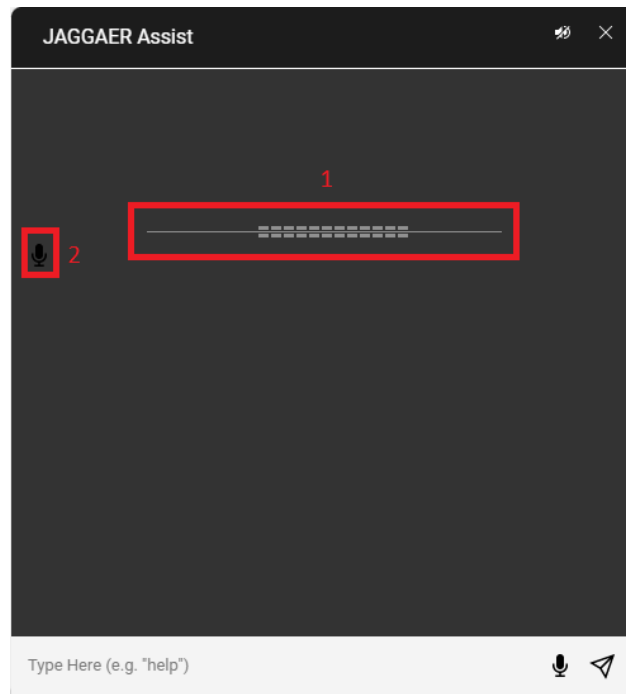
1. **Visualizer** - This bar will animate in response to the user's voice. This provides a visual indication that the chatbot is receiving the user's voice. If this bar does not animate, the user may need to check their microphone settings. In addition, the chatbot will display the user's comment or request in text above the visualizer so that the user can see how the chatbot is interpreting their words. If the text does not match the user's speech, they may need to enunciate, use different words, or check their microphone settings.
2. **Microphone Icon** - This button functions identically to the standard microphone button. Clicking it will close the voice interface.

All other parts of the voice UI function identically to the standard chatbot interface.


Using the Voice Interface

To use the voice interface:

1. Open the voice interface.
2. Using the computer microphone, issue a request to the chatbot. The chatbot will immediately display the results.

Providing Feedback for JAGGAER Assist

JAGGAER Assist is updated on a continual basis in order to provide effective support for those using JAGGAER solutions. User feedback is an important aspect of these updates, and a method has been included for users to provide feedback directly via the JAGGAER Assist chatbot.

1. Open the Assistant chatbot.

2. Click the **Feedback** link at the bottom of the response panel to provide JAGGAER with feedback about the received response. This will open the feedback panel as shown in the following image.
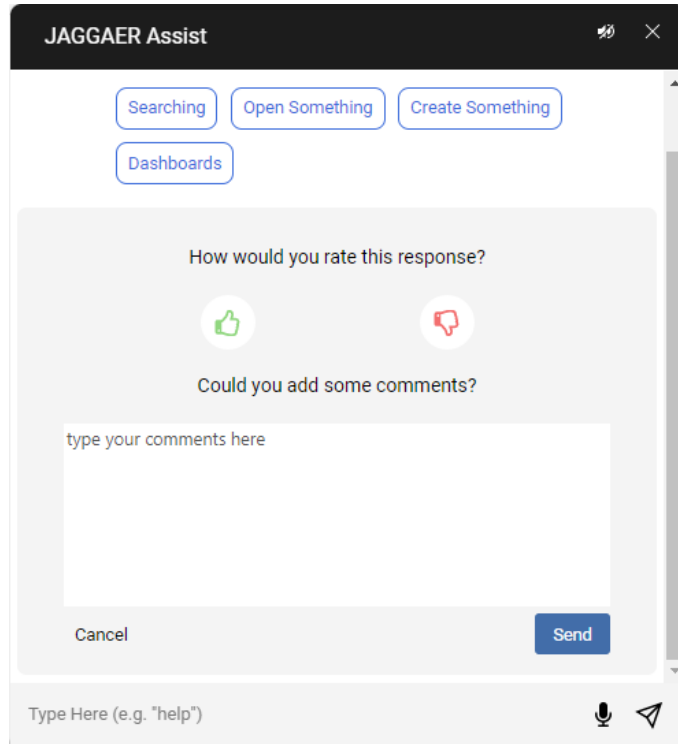
3. Provide feedback and click the **Send** button.

Assist Functionality

Creating Objects

"Objects" is a term which refers to any document or artifact that is managed within the JAGGAER modules. **JAGGAER Assist** can be used to create objects. By entering an appropriate request in the Assistant, users will be taken directly to the page within the JAGGAER solution that will allow them to create their desired object.

1. Click on the **JAGGAER Assist** icon (💬) to launch the Assistant tool.
2. (Optional) Use the suggestion chips to select the relevant object creation task. If this method is used, proceed to Step 5.
3. Type the object creation request in the chatbot text field. Refer to the chart in the next section for supported object types and example requests.
4. Press the **Enter** key to submit the request. If the request could potentially apply to a number of objects, a choice of objects to create will be presented. Click on the desired object to be redirected to the appropriate page to create that object.
5. If the request targets a specific object, the user will be automatically redirected to the appropriate page to create that object.

Supported Object Types

JAGGAER Assist currently supports the following objects for creation. The following chart presents the object names, synonyms that the smart assistant will recognize, and example requests that would return the desired result.

Object	Synonyms	Example Requests
Invoice	Voucher	Create an invoice
Contract Request	N/A	create a contract request
Sourcing Event	sourcing event	create a new sourcing event, initiate a sourcing event
Contract	N/A	Create a new contract, create a contract
Supplier Form Request	SRF	Create a supplier form request, initiate an SRF
Sourcing Form Request	form request	Create a Sourcing request form, initiate a sourcing request

Navigating Directly to Objects and Locations

JAGGAER Assist can be used to navigate directly to objects, such as contracts and sourcing events, as well as to locations within the JAGGAER modules (e.g., dashboard pages and reports). By entering an appropriate request in the Assistant, users will be taken directly to the desired object or location within the JAGGAER solution. For more information on objects, refer to the previous section, **Creating Objects**.

1. Click on the **JAGGAER Assist** icon (💬) to launch the smart assistant chatbot.

2. Type the desired object request in the question panel. Refer to the chart in the next section for supported object and location types and example requests.

   > **Note**: For this functionality to work, there must be an existing object within the JAGGAER application to which the user has access.
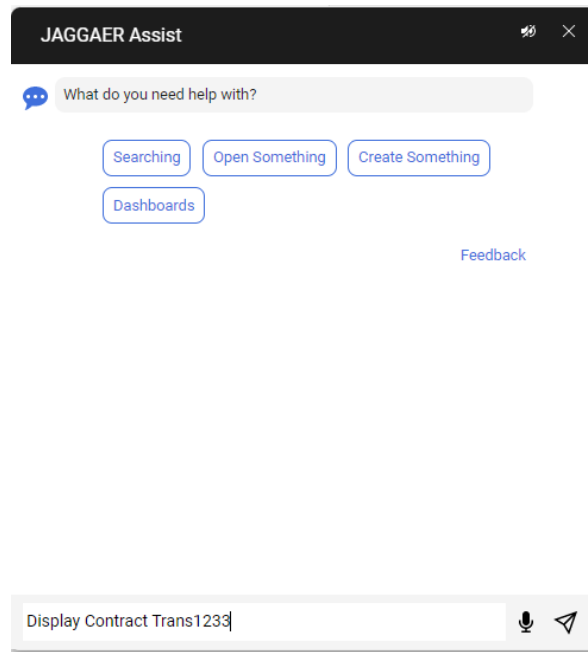
3. Press the **Enter** key to submit the request. The tool will then automatically redirect the user to the appropriate page. The following screenshot shows the redirected location from the object submitted.

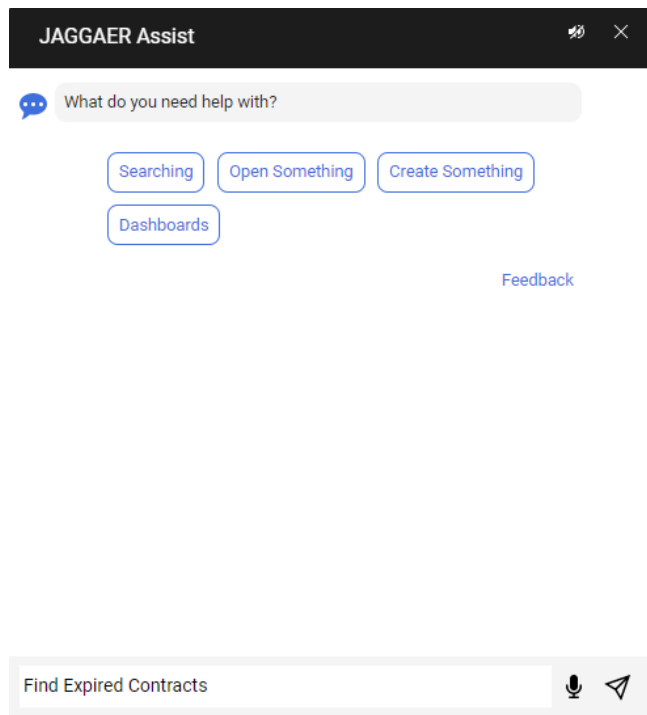## Supported Object and Location Types

JAGGAER Assist currently supports the following objects and locations for direct navigation. The following chart presents the object and location names and sample requests that would return the desired result.

| Object or Location	Example Requests
Supplier	open Supplier P2608
Purchase Order	open purchase order 13345, open po 1279
Contract	Display Contract C2345
Invoice	open invoice 899
Sourcing Dashboard	go to sourcing dashboard
Supplier Management Dashboard	open supplier management dashboard
AP Dashboard	open ap dashboard
Inventory Dashboard	go to inventory dashboard
Purchase Requisition	open purchase requisition 17383
Contract Dashboard	total contract dashboard, open contract dashboard
Cycle Time Report	go to contract cycle time report, open cycle time report
Field Management	go to field management, open field management
Receipts	go to receipts created on 1/2/22
Sales Orders	go to sales orders for Supplier1
Change Requests	open change requests for PO 12345

Enhanced Search Capabilities - Filter and Go

JAGGAER Assist can be used to directly search for and be redirected to an object using filters. This functionality is referred to as **Filter and Go**.

1. Click on the **JAGGAER Assist** icon ( ) to launch the smart assistant chatbot.

2. Type the Filter and Go request in the question panel. Refer to the chart in the next section for supported object types and example requests. The following screenshot shows an example of a Filter and Go request.

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3. Press the **Enter** key to submit the request. Up to five filtered results will be displayed directly in the assistant. The following screenshot shows the results returned by the contract example.
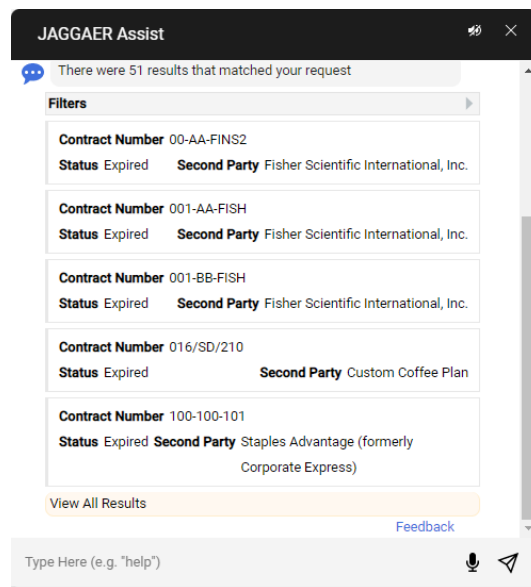
4. Click on the expand arrow in the **Filters** line to review the filters that were applied by the chatbot. If the applied filters do not reflect what the user desired, it may be necessary to perform the request again with more specific language.
5. Click on one of the objects listed to go directly to it within the application. Only a maximum of five results can be displayed directly within the chatbot, but all applicable results are

14

returned by the search functionality. Click on **View All Results** to be redirected to the full search results.

Supported Object Types

JAGGAER Assist currently supports the following objects for Filter and Go. The following chart presents the object names, search parameters that can currently be applied, and example requests that would return a search result.

> **Note**: The Filter and Go functionality can only return results for a single search at a time, but it can apply multiple filters to the search. Refer to the Example Requests column in the table below for examples of how to format Filter and Go requests to apply multiple filters.

Object	Supported Filters	Example Requests
Contract	• Contract Status • Supplier Name • Start Date • End Date • Work Group • Contract Type	• Show me expired contracts that ended last year for SupplyEx • Find Expired Contracts • Show me active contracts with supplier SupplyEx • Show me active contracts with supplier SupplyEx ending next year • Show me contracts I recently viewed ending next year for SupplyEx
Purchase Requisitions	• Doc Type • Status: Pending/Completed/Rejected • Supplier • Prepared/created for/by user	• Purchase requisitions prepared by me • Purchase requisitions created for Jane Doe • Show me purchase requisitions from SupplyEx • Display pending purchase requisitions
Purchase Orders	• Prepared by user • Owned by user • Missing receipt	• Show me purchase orders prepared by John Doe • Purchase orders owned by me
Invoices	• Invoice status • Created/Completed/Submitted date • Supplier • Invoiced by user • Owned by user • Due dates • Missing receipts • Price/quantity mismatch	• Show me invoices from Jane Doe • Invoices owned by me
Supplier Profiles	• Supplier Name • In-network/out-of-network	• Show me inactive supplier profiles

		• Supplier profiles from in-network suppliers • Show me out-of-network suppliers
Sourcing Events	• Event Status • Event Type • Work Group • Open/Close/Create date • Suppliers	• Show sourcing events from SupplyEx • sourcing events from group A • Find sourcing events created in February 2020

Organization-Specific Assistance

JAGGAER Assist provides an organization-specific form of guided assistance for selected actions. When the Assistant tool is asked to provide help for performing these actions, it will provide a series of responses tailored for the organization that will lead the user to successfully complete their requested task.

> **Important Note**: As of the 21.3 release, only contract creation currently supports this feature. Users will receive guided assistance **ONLY** when using the smart assistant tool to create a new contract. This functionality currently only guides users in the selection of the appropriate Contract Type for their contract. Additional support will be added in future releases.

> **Important Note**: Guided Assistance functionality must be configured for **EACH** form of guided assistance you wish to offer. Refer to **Setting Up Guided Assistance** for more information.

Step-by-Step

1. Click on the JAGGAER Assist button to launch the Assistant tool. Alternately, click on the **Help** button associated with the task. In the following screenshot, the Help button below the **Contract Type** field will open the smart assistant tool to begin guided assistance for

selecting the appropriate Contract Type for a new contract.

2. Type your request in the question panel. If your request supports guided assistance, the smart assistant will present questions for you to answer. These questions will guide you in performing the task. The example in the following screenshot shows a request to create a new contract, which results in the assistant asking if the user knows which Contract Type is appropriate.

3. Respond to all presented questions. The precise questions you are asked and the options you are presented with will depend on your site's configuration. In the above example, answering **Yes** to the question will immediately redirect the user to the contract creation screen to create a contract. Answering **No** will continue the guided assistance to help the user select the appropriate Contract Type.

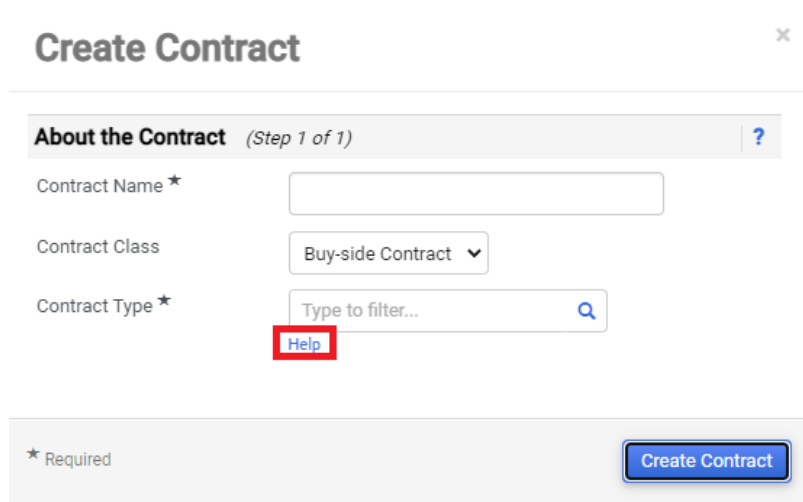# Contract Type Selection Assistance

Assist is able to offer a guided experience specifically for helping a user select the appropriate "contract type" when creating a new contract.

When Assist is enabled for the user and this functionality has been configured by an administrator, this feature may be accessed directly from the Contracts+ solution or via the Assist chatbot.

> **Note**: The screenshots in the following procedure reflect the unique settings for an organization created for demonstration purposes. The suggestion chips that a user sees will be determined by the categories, keywords, and locations that have been set for their organization. Refer to the **Setting Up Enhanced Functionality** section of this guide for additional information.

Step-by-Step

1. To access this feature from the Contracts+ interface, navigate to **Contracts** ⊕ **> Contracts > Create New Contract...**. To access this feature from the JAGGAER Assist chatbot, proceed to Step 4.
2. The **Create Contract** window opens. Click the **Help** button that now appears below the **Contract Type** field. The following screenshot shows the button:


3. Click the Help button to open the JAGGAER Assist chatbot. Proceed to Step 5.
4. Alternately, open the JAGGAER Assist chatbot and issue the request **create a contract**. Select the **No** suggestion chip to proceed with the contract type selection assistance
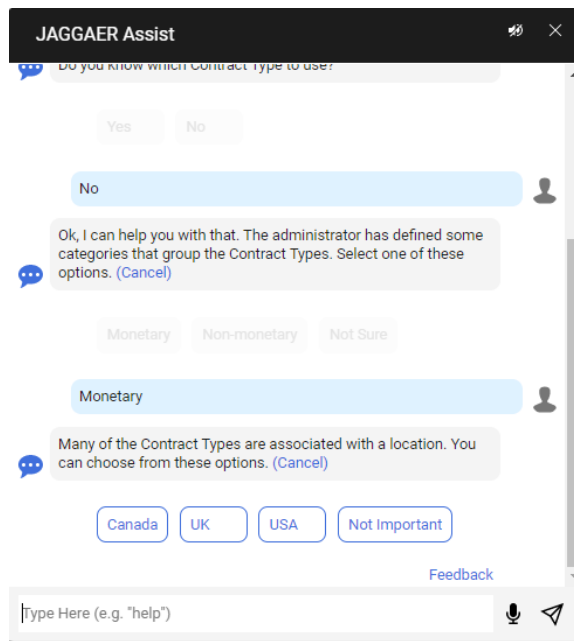
process. Selecting **Yes** will redirect the user to the Create Contract window.
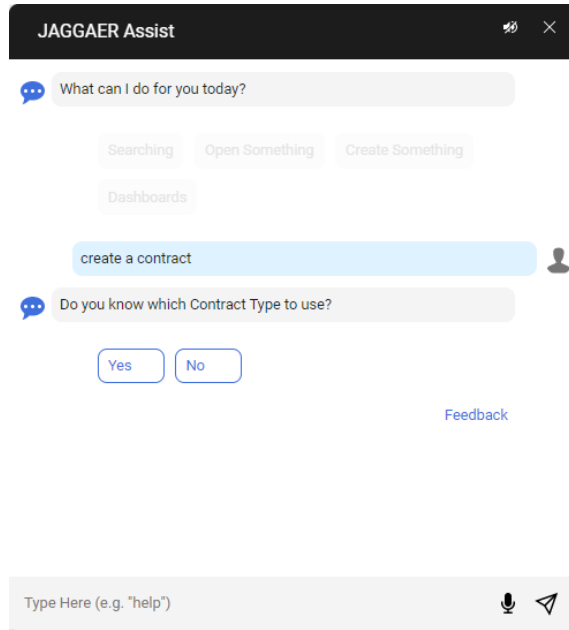

5. The user is presented with the first step in completing the task by being asked to select a category of contract type:
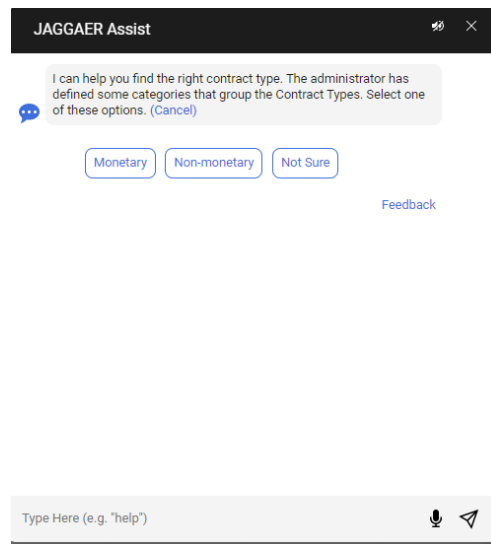
6. Once a choice has been made regarding category, the user is asked to select a location associated with the organization's contract types:

7. Once a choice has been made regarding location, the user is asked to provide any keywords that could apply to the contract they wish to create. The user must enter these keywords in the chatbot entry field:
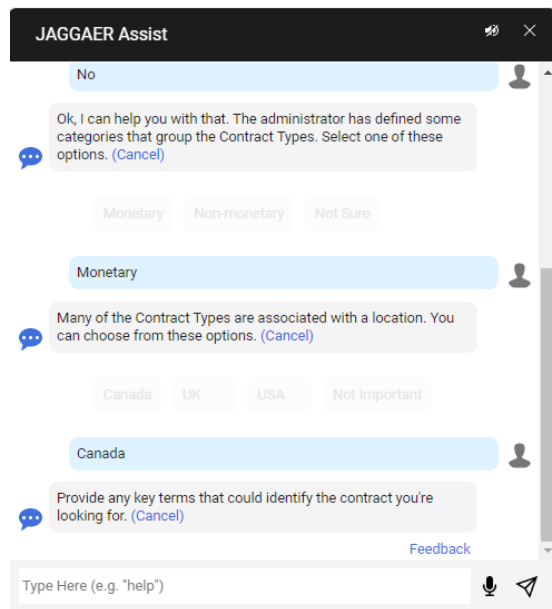

8. If there are too many possible contract types to list, the chatbot will display a message to that effect along with selection chips to proceed with the contract creation process or to

restart the contract type assistance process:
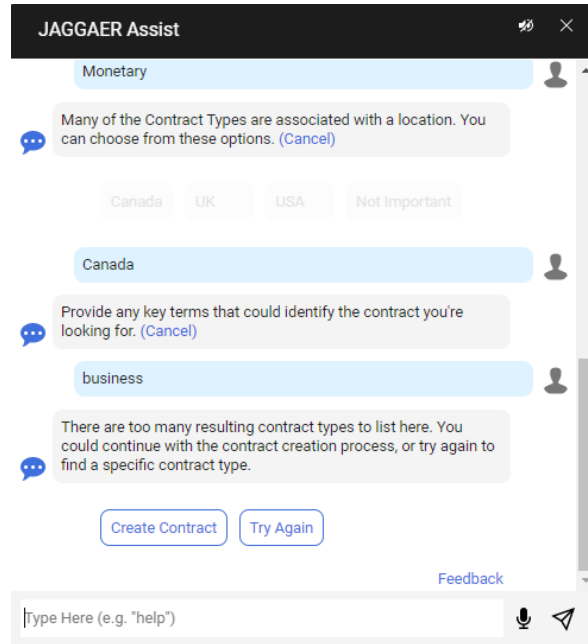
9. If JAGGAER Assist identifies a contract type that seems to match all the criteria, it will present it to the user with the response, "This is your best bet." Clicking on the presented contract type will launch the Create Contract window with the Contract Type field already completed.
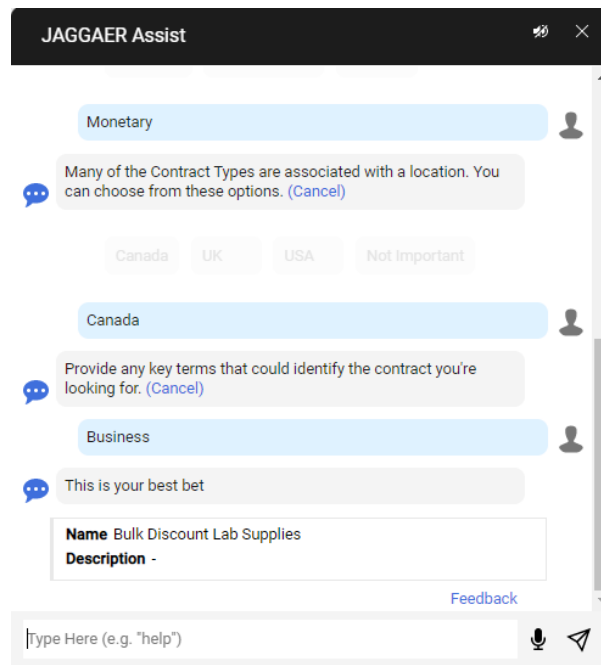
> **Note**: This functionality must be configured by an administrator. Refer to the **Setting up Enhanced Functionality** section for full details.

Enhanced Shopping Experience

In addition to using JAGGAER Assist to perform various tasks within the application, users can also use JAGGAER Assist to enhance their shopping experience.

Navigating to Supplier Sites

If a user has set one or more supplier sites as a favorite, they may navigate directly to that site through the JAGGAER Assist chatbot. To do so, the user must issue a request such as **show my favorites** or **shop favorites** to the chatbot. A list of favorite sites will be displayed, allowing the user to navigate directly to their desired site.

Users may also navigate to supplier sites that are simply associated with the organization (i.e., if they are a "Punchout" supplier, a hosted-catalog supplier, or a supplier with both a catalog presence and a level-2 Punchout site). To do so, the user must issue a request such as **I want to shop [SUPPLIER NAME]** to the chatbot. If one of the suppliers has a catalog and available products, the user is navigated to the product search results page, where they can filter for the specific supplier of interest using the available filtering options. In the case of Punchout suppliers, the user is directed to the relevant Punchout window (if only one result is found) or the user is presented with selection chips to indicate the exact supplier shopping site they wish to visit.

Shopping for Non-Catalog Items

If an organization has been configured to support non-category item orders, users may navigate directly to ordering a non-catalog item. To do so, the user must simply issue a request such as **I want to order a non-catalog item** or **submit a non-catalog order** to the chatbot.

Setting Up Enhanced Functionality

Some JAGGAER Assist functions must be set up by an administrator prior to use. This section details how to do so for each function that requires setup.

Contract Type Selection Assistance

This section instructs administrators on how to configure JAGGAER Assist to support Contract Type selection when a new contract is being created. If this administrative process is not

addressed, users will be unable to use JAGGAER Assist to select the appropriate contract type during the contract creation process.

Step-by-Step

1. Navigate to **Contracts⊕ > Contract Administration > Contract Type Search Properties**.

2. Create category options that can be used to effectively characterize the Contract Types established within the module by clicking the **Create Category** button in the Categories section. The term **category** in this instance refers to a broad, descriptive title that applies to one or more contract types. For example, an organization may create a "Purchase" category to all contracts that specifically pertain to the organization purchasing goods or services.

3. Create keyword options that can be used to effectively characterize the Contract Types established within the module by clicking the **Create Keyword** button in the Keywords section. The term **keyword** in this instance refers to a word that a user may be expected to associate with one or more contract types. For example, the keyword "purchase receipt" may be used to denote contract types where users may expect a purchase receipt to be specified under the terms of the contract.

4. Create location options that can be used to effectively characterize the Contract Types established within the module by clicking the **Create Location** button in the Locations section. The term **location** in this instance refers to a destination that applies to a contract type, most typically a geographical region where the contract type is used. For example, an organization may use the "United States" location for contract types that may be used in the United States.

5. Once the category, keyword, and location filtering options relevant to the contract types established for the organization have been defined, navigate to **Contracts⊕ > Contract Administration > Contract Types**.

6. Select a contract type from the **Contract Types** list. Once selected, you may use the checkboxes in the Contract Type list to select additional contract types. Any changes you make in the following steps will be applied to **all** selected contract types.

7. Select the **Search Property Mapping** tab in the contract type pane.

8. Use the checkboxes to select the categories, locations, and/or keywords you wish to associate to this contract type.
9. Click the **Save** button.
10. Repeat this process for all contract types for which you wish JAGGAER Assist to offer guided assistance.
11. Navigate to **Contracts▢ > Contract Administration > Contract Type Search Properties**.
12. In the associated area, the Is Used field will display whether or not a search property is currently applied to one or more contract types. In the following screenshot, both the Monetary and Non-monetary categories are in use, as shown by the associated check marks.

13. Ensure the Enable Contract Type Search Assist checkbox is selected. **Note**: This should not be done until all filtering parameters have been defined and appropriately associated with the Contract Types as outlined in the preceding steps. This should only be enabled once the administrator is satisfied with the effectiveness of the support provided.

Important Note: The labels used to define these parameters--categories, locations, and keywords--are field managed. If these titles do not align with the filtering categories that best map to your defined Contract Types, you can change these titles by editing the associated fields. For example, you may wish to change "locations" to "departments." Additionally, if the field names displayed in your JAGGAER environment do not reflect the screenshots provided, it is because an administrator has already updated the field values for these labels.

Note: For best results, provide as much information as possible. More categories, keywords, and locations help JAGGAER Assist provide more accurate results.

Importing and Exporting Contract Type Selection Assistance Properties

Once an administrator has configured the categories, locations, and keywords associated with a contract type, those properties can be exported. The exported properties can then be imported to another site. This allows an organization to quickly establish identical contract type selection assistance properties across multiple sites.

Step-by-Step

1. Navigate to **Contracts** ⊞ **> Contract Administration > Contract Type Search Properties**.

2. Create category, keyword, and location property options that can be used to effectively characterize the Contract Types established within the module.

3. Once all categories, keywords, and locations have been configured, click the Import/Export button at the top of the page. This will open the **Contract Type Search Property Export** overlay.

Contract Type Search Properties	Import / Export History ?
These properties can be assigned directly to contract types to enable enhanced search capabilities	?

4. Use the drop-down menu to select the desired **Action**. The default setting is **Export**.
   a. If **Export** is selected:
      i. Click the **Submit** button to proceed.
      ii. The Contract Type properties are saved as an Excel file. A green **Success** notification will appear on screen. Use the **Click here** link to proceed to the Contract Import/Export Results page.
      Alternately, navigate to **Contracts** ⊞ **> Contracts > View Import/Export Results**.
      iii. The list of export files is displayed at the bottom of the page. Locate the exported file, which will be labeled "Export of Contract Type Search Property Export" in the **Details** column of the list.
      iv. Click on the name of the file in the **File** column to download it.
      v. Open the file using Excel to view it. Each export file is divided into three tabs: Instructions, Properties, and Mappings. Instructions provides detailed information on how the export file is structured and how it can be edited and managed for import.

      > **Note**: It is best to establish properties within the application prior to export. It is not necessary to modify the Excel file to perform an import.

   b. If **Import** is selected:
      i. The **File Name** field appears.
      ii. Click the **Choose File** button to select a properly formatted Excel file to import. **Note**: It is most efficient to use a previously exported Contract Type Search Property file.

iii. Click the **Submit** button.

> **Important Note**: When performing an import, the entire document is validated before changes are made in the application. If the validation passes, all pre-existing properties and mappings are deleted from the module before the import begins, with the deleted content being replaced by the content of the import document. The import process is a **complete** replacement process. If the validation fails, the import is not performed, and an error report is generated.

c. A green Success notification will appear on the screen, and the user will be automatically redirected to the Contract Type Search Properties page.