# May 2026 Release Notes (date of release May 29, 2026)

| Key | Audience | Components | Summary | Description |
|---|---|---|---|---|
| 2407 | Buyers | Contracting | Remove edit and delete options from users On Browse Contract Documents page | from this page are now read-only. Users can still edit and delete contract documents from within the contract record itself.<br><br>Why it matters: Previously, any internal user with access to the Browse Contract Documents page could see, edit, and delete contract documents for all contracts — even contracts they were not assigned to. This posed a security risk and could lead to accidental or unauthorized changes to contract documents.<br><br>What to expect:<br><br>- The edit (pencil) and delete (trash can) icons are no longer available on the Browse Contract Documents page.<br><br>- Clicking a document link from this page will open the document in read-only mode. |
| 2387 | Buyers | P2P | Receipt: Request to remove "Create Return" button from Draft Receipt | What changed: The "Create Return" button is no longer visible on receipts that are still in Draft status. The button will only appear once a receipt has been approved.<br><br>Why this matters: Previously, the "Create Return" button was accessible on draft receipts, which could allow users to inadvertently over-receive on a Purchase Order. By restricting the button to approved receipts only, the system now ensures returns can only be initiated against finalized receipts, reducing the risk of receiving errors.<br><br>What you need to know: No action is required. If you need to create a return against a receipt, simply ensure the receipt has been submitted and approved first — the "Create Return" button will appear as expected at that point. |
| 2414 | Buyers | P2P | Make Order field in Receipt to be Read Only to fix Receipt visibility in Receipt tab of PO | PO value once it has been linked to a receipt.<br><br>Why it matters: Previously, users could manually delete the Order value from a receipt that was linked to a purchase order. When this happened, the receipt would no longer appear in the Receipts tab of the PO, making it invisible to users working from the PO. This prevented users from being able to create returns against those receipts from the PO screen, disrupting the receiving and returns workflow.<br><br>What to expect: When creating or viewing a receipt that is linked to a PO — whether created from the PO's delivery truck icon, from Browse Receipts, or directly from the order — the Order field will now be automatically populated and locked as read-only. Users will not be able to modify or remove the PO association. This ensures receipts remain properly linked and visible in the PO's Receipts tab at all times. |
| 2384 | Buyers / Accounts Payable | Invoice | ALREADY IN PROD: Invoice: Update workflow steps status from 'denied' to 'cancelled' for reject action | "Denied."<br><br>Why it matters: Previously, when an invoice was rejected during the approval process, its value was still being counted toward the total amount invoiced against the purchase order. This meant PO balances could appear overstated, potentially preventing new invoices from being submitted or causing inaccurate financial reporting. The issue affected rejections at all major approval stages — AP Review, Business OK to Pay, PO Assignment, Non-PO Assignment, and Payment Integration.<br><br>What to expect: Rejected invoices will now be properly excluded from PO invoiced totals. Users may notice that rejected invoices show a status of "Cancelled" rather than "Denied." No changes to the rejection process itself — approvers still reject invoices the same way. |

# May 2026 Release Notes (date of release May 29, 2026)

| Key | Audience | Components | Summary | Description |
|---|---|---|---|---|
| 2389 | Buyers / Accounts Payable | Invoice | Invoice: System parameter updates | "Awaiting Assignment" status has been added as a recognized order status for invoice processing.<br><br>A configuration value referencing P-Card charges has been corrected (from pending_charge to pending_pcard_charge).<br><br>These changes apply to both the invoice-to-contract/order status mapping and the active order status settings used during invoicing.<br><br>Why it matters: Previously, orders in "Awaiting Assignment" status were not recognized by the invoice system, which could prevent invoices from being properly created or matched against those orders. Additionally, the incorrect P-Card charge value could cause issues when processing P-Card-related invoices. |
| 2406 | Buyers / Accounts Payable | Invoice | Invoice: Add Account Cross Reference to the Invoice allocations section UI/XML | created from a PO, the ACR value is now automatically copied from the PO allocation to the invoice allocation. The ACR value is also now included in the Invoice XML sent to the ERP system.<br><br>Why it matters: Previously, even though users could enter an Account Cross Reference when creating a purchase order, the value was not visible on the Invoice allocation screen — making it impossible for Business users and Accounts Payable to validate it during the approval process. Additionally, while the ACR XML tag existed in the integration file sent to the ERP, no data was actually being passed, meaning the ERP could not consume this information.<br><br>What to expect: Users will now see an "Account Cross Reference" column in the Invoice Allocations section. The value will be automatically populated from the associated PO, so no manual entry is needed. The ACR data will also be transmitted in the invoice XML file to the ERP system, ensuring complete and accurate |
| 2409 | Buyers / Accounts Payable | Invoice | Invoice - Unlock invoices when they are sent back from AP Review to Business Review by AP team | What changed: Invoices are now automatically unlocked when they are sent back to a previous step in the approval workflow using the "Send Back" action. This applies to both send-back scenarios: AP Review sending back to Business Review, and Business Review sending back to the Assignment step.<br><br>Why it matters: Previously, when an AP team member opened an invoice and then sent it back to the Business Review step, the invoice remained locked under the AP user's session. The Business Review approver could not approve, reject, or take any action on the invoice until the AP user manually unlocked it. This created unnecessary delays in the approval process and could impact Prompt Pay compliance.<br><br>What to expect: When an invoice is sent back to a previous workflow step, it will now be automatically unlocked, allowing the next approver to immediately take action. No manual unlocking is required. The invoice can then continue moving through the remaining workflow steps to completion without interruption. |
| 2442 | Buyers / Accounts Payable | Invoice | ALREADY IN PROD: Invoice: Update the Invoice amount parameter to be 2 digits vs 5. | line totals, allocation amounts, and allocation totals. This change also applies to amount totals shown on the Invoice Browse, Receipt Browse, and Order Browse screens.<br><br>Why it matters: When the system was originally configured — before invoicing was in use — all currency amounts were set to display 5 decimal places as a standard across purchasing and invoicing. While 5 decimal places are still appropriate for purchasing (unit prices and quantities), invoice amounts should reflect standard currency formatting with 2 decimal places. The extra decimal places on invoices created unnecessary complexity and could cause confusion during invoice review, approval, and financial reporting.<br><br>What to expect:<br><br>- Invoice line amounts, totals, allocation amounts, and allocation totals will now display with 2 decimal places.<br><br>- Amount totals on Invoice Browse, Receipt Browse, and Order Browse will also show 2 decimal places. |

# May 2026 Release Notes (date of release May 29, 2026)

| Key | Audience | Components | Summary | Description |
|---|---|---|---|---|
| 2411 | Catalog | Catalog | Incorrect supplier contact (deleted contact) showing in REQ line item - Code Fix | What changed: The system now automatically removes the association between a supplier contact and catalog/punchout items when that contact is deleted — regardless of where the deletion occurs in the application.<br><br>Why it matters: Previously, when a supplier contact was deleted, the system continued to associate that deleted contact with punchout and catalog items. When users brought items back from a punchout to create a requisition, the deleted contact would still populate in the supplier contact field, triggering a blocking error. Users had to manually change the contact on every affected line item, which was time-consuming — especially for requisitions with multiple lines.<br><br>What to expect: When a supplier contact is deleted from any area of the application — including the internal or external Supplier Contacts page, Manage Users, or Manage Contacts — the contact will be automatically removed from all associated catalog and punchout items. Requisitions created from punchout will no longer default to a deleted contact, and users will no longer encounter the related blocking error. The supplier contact field will display as empty, allowing normal processing to continue. |
| 2464 | Data Retention | Contracting | DR: Main Contract Document 'MS Authoring' type not retained | What changed: The Data Retention (DR) process has been updated to ensure that Main Contract documents created using MS Word Authoring are properly retained alongside all other contract documents.<br><br>Why it matters: Previously, the Data Retention process was only retaining contract documents of the "Other" type and Main Contract documents created using Native Authoring. Main Contract documents created using MS Word Authoring were being excluded from Data Retention entirely. This meant that if a contract's primary document was authored in MS Word, it would be missing from the retained contract record — creating a gap in the organization's data retention and compliance records.<br><br>What to expect: All contract documents — including Main Contract documents created via MS Word Authoring, Native Authoring, and Other document attachments — will now be fully retained during the Data Retention cycle. This applies to both new contracts and contract amendments. No changes to how users create or manage contract documents — this is a backend data retention processing fix.<br><br>Note: Previously retained contracts that were missing MS Word Authored Main documents will need to be re-retained to capture the missing files. This will be addressed separately. |
| 2340 | Data Retention | Data Retention | DR:  Error received sporadically when attempting to download JSON file | What changed: A fix was applied to resolve sporadic "System Error processing download" errors that occurred when attempting to download retained files — particularly proposal documents — from the Data Retriever application.<br><br>Why it matters: Users occasionally encountered download failures when clicking Retention file links for proposals and solicitations. The root cause was a filename mismatch: the system was only generating the correct filename for proposals that had been awarded, so non-awarded proposals could produce files that didn't match what was stored, resulting in download errors.<br><br>What to expect: Retained file downloads from the Data Retriever application should now work consistently for all proposals, regardless of award status. Users should no longer encounter the intermittent "System Error processing download" message when accessing retention files. |

# May 2026 Release Notes (date of release May 29, 2026)

| Key | Audience | Components | Summary | Description |
|---|---|---|---|---|
| 2361 | Data Retention | Data Retention | DR: Main Contract Document type not retained | What changed: The Data Retention process has been corrected to properly retain Main Contract documents created using MS Word Authoring. Previously, only documents uploaded via Native Authoring and "Other" attachment types were being retained.<br><br>Why it matters: When a contract's Main Document was authored using MS Word Authoring, it was silently excluded from Data Retention. This meant retained contract records could be incomplete — missing the primary contract document — which posed a risk for records management and compliance.<br><br>What to expect: Going forward, all contract documents — including Main Documents created via MS Word Authoring — will be captured during the Data Retention cycle. No action is needed from users. Previously retained contracts that are missing their Main Document may need to be re-retained in a future update. |
| 2377 | Data Warehouse | Data Warehouse | DW: Update status for deleted contract documents(ETL) | What changed: The Data Warehouse ETL process has been updated so that when a contract document is deleted in Ivalua, its status is correctly updated to "Deleted" in the Data Warehouse after the next extract cycle.<br><br>Why it matters: Previously, if a user deleted a document from a contract's Documents tab in Ivalua, the Data Warehouse continued to show that document as active — even after new extract cycles ran. This resulted in inaccurate data in the Data Warehouse that did not match what was actually stored in the contracting system, potentially causing confusion in reporting and audits.<br><br>What to expect: Going forward, any contract document deleted in Ivalua will be accurately reflected in the Data Warehouse following the next DW cycle. No user action is required — the fix is applied to the backend ETL process. |
| 2408 | Data Warehouse | Data Warehouse | DW: Date extract with Approvals information (FACT_WORKFLOW_APPROVALS) (ETL) | What changed: The Data Warehouse ETL process has been updated to improve how approval dates are extracted and stored in the Workflow Approvals (FACT_WORKFLOW_APPROVALS) table. The "Approved On" date is now extracted directly as a proper date value, eliminating unnecessary intermediate processing.<br><br>Why it matters: Previously, the approval date was extracted in a format that required additional processing during the ETL cycle, which could introduce inconsistencies or delays in how approval dates appeared in the Data Warehouse. This improvement ensures that approval dates for workflow actions — such as requisition approvals — are stored more accurately and reliably.<br><br>What to expect: Approval date values in the Data Warehouse will be more consistently formatted and accurate. Users who run reports or queries against Workflow Approvals data in Logi Ad Hoc will see cleaner, more reliable date information. No changes to how users interact with the system — this is a backend data processing improvement. |
| 2413 | Data Warehouse | Data Warehouse | DW: Date extract with Approvals information (FACT_WORKFLOW_APPROVALS) (EAI) | On" field is now extracted as a proper date value instead of as a text/character value.<br><br>Why it matters: Previously, the approval date was being stored as plain text rather than as a recognized date format in the Data Warehouse. This could cause issues when running date-based filters, sorting, or calculations in reports — since text-based dates do not behave the same way as true date values. Reports relying on approval date ranges or date comparisons may have returned inaccurate or unexpected results.<br><br>What to expect: Approval dates in the Workflow Approvals data will now be stored as proper date values, enabling accurate date filtering, sorting, and calculations in Logi Ad Hoc reports. No changes to how users interact with the system — this is a backend data extraction improvement.<br><br>Note: This fix is related to the broader Workflow Approvals data improvement in Key 2408. |

# May 2026 Release Notes (date of release May 29, 2026)

| Key | Audience | Components | Summary | Description |
|---|---|---|---|---|
| 2427 | Data Warehouse | Data Warehouse | DW: Update status for deleted contract documents(EAI) | What changed: The Data Warehouse integration queries for contract documents (FACT_CTRDOCUMENTS and CGI_FACT_CTRDOCUMENTS) have been updated to use the Modified date that Ivalua stores, ensuring that document deletions are properly captured during extract cycles.<br><br>Why it matters: Previously, when a contract document was deleted in Ivalua, the integration queries used to populate the Data Warehouse did not pick up the change. The deleted document continued to appear as active in the Data Warehouse even after new extract cycles ran, resulting in inaccurate data that did not match what was actually stored in Ivalua. This could lead to confusion in reporting and audits.<br><br>What to expect: Going forward, any contract document deleted in Ivalua will be accurately reflected in the Data Warehouse after the next extract cycle. No user action is required — this is a backend integration query update.<br><br>Note: This fix complements the related ETL update in Key 2377, which addressed the same issue from the ETL processing side. Together, these changes ensure complete accuracy for deleted contract document data in the Data Warehouse. |
| 2429 | Data Warehouse | Data Warehouse | DW: Load orders with correct vendor key (FACT_POHDRS) | What changed: The Data Warehouse ETL process has been updated to correctly identify and load vendor information for purchase orders, even when the supplier is not populated on the order header in Ivalua.<br><br>Why it matters: Previously, when an order in Ivalua did not have a supplier populated at the order header level — even though the supplier was present on the order line items — the Data Warehouse loaded the order with a missing vendor key (vendor_key = -1). This resulted in purchase orders appearing without vendor information in Data Warehouse reports, making it difficult to accurately report on or analyze spending by supplier.<br><br>What to expect: Going forward, the Data Warehouse will correctly populate vendor information for all purchase orders. If the supplier is not available on the order header, the system will now automatically use the supplier from the order line item. Users running reports in Logi Ad Hoc against PO data will see accurate vendor information without gaps. No user action is required — this is a backend data processing improvement. |
| 2488 | Data Warehouse | Invoice | Invoice: Make Account Cross Reference visible in Invoice Allocations during Save stage | What changed: The Account Cross Reference (ACR) value in the Invoice Allocations section is now displayed as soon as the invoice is saved, rather than only after it has been submitted.<br><br>Why this matters: Previously, the ACR value did not appear in the allocations until the invoice was submitted for approval. This meant AP reviewers could encounter discrepancies during the approval process and need to correct the ACR before the invoice could move forward — adding unnecessary back-and-forth. Showing the value at the Save stage gives users earlier visibility to verify accuracy before submission.<br><br>What you need to know: No action is required. When you save an invoice with an Account Cross Reference value, it will now appear in the Invoice Allocations section right away. The ACR field is read-only at this stage; editability of the ACR upon save is being tracked separately under Key 2490: Invoice: Make Account Cross Reference editable in Invoice Allocations/Visible for Supplier Submitted Invoices. |

# May 2026 Release Notes (date of release May 29, 2026)

| Key | Audience | Components | Summary | Description |
|---|---|---|---|---|
| 2388 | Integration & Interface | Invoice | Invoice: Add Revisit step to the Invoice - Integration Send | What changed: A new "Revisit" action has been added to the Invoice – Integration Send step in the invoice workflow. A similar action was also added to the Integration Response step.<br><br>Why it matters: Previously, if an invoice became stuck at the Integration Send step, there was no way to revisit and resend it from that point in the workflow. Users had to route the invoice back through the full approval process — including getting AP to re-approve — just to retry the integration, causing unnecessary delays in invoice processing and payment.<br><br>What to expect: When an invoice is stuck at the Integration Send or Integration Response step, approvers will now see a "Revisit" action available in the workflow tab. Clicking it allows the invoice to be resent through integration without requiring a full re-approval cycle. The invoice can then continue through the remaining workflow steps to completion. |
| 2422 | Integration & Interface | Invoice | Invoice: Update Payment Integration workflow step status from 'denied' to 'cancelled' for reject action | What changed: The Payment Integration Rejection step in the invoice workflow has been updated so that when an invoice is rejected at this step, its status is now set to "Cancelled" instead of "Denied."<br><br>Why it matters: Previously, when an invoice was rejected at the Payment Integration step, it was set to "Denied" status. However, Ivalua's system is hardcoded to still count "Denied" invoices toward the total value invoiced against a purchase order. This meant rejected invoice amounts continued to be included in PO totals, potentially preventing new invoices from being submitted against the PO or causing inaccurate financial reporting.<br><br>What to expect: Invoices rejected at the Payment Integration step will now receive a "Cancelled" status, which Ivalua's system correctly excludes from PO invoiced amount calculations. Rejected invoice values will no longer inflate PO totals. No changes to the rejection process itself — the workflow operates the same way for approvers.<br><br>Note: This fix complements the related update in Key 2384, which applied the same correction to other invoice approval steps (AP Review, Business OK to Pay, PO Assignment, and Non-PO Assignment). |
| 1974 | Integration & Interface | P2P | Null value initially for Quantity on order allocation in Ivalua, populated later. | What changed: The system now validates that an allocation quantity is present on requisitions and purchase orders during the import process. If the quantity is missing, a blocking alert will prevent the order from advancing in the workflow.<br><br>Why it matters: Previously, orders imported through the interface could proceed to completion even when the allocation quantity was missing, leading to data discrepancies between eVA and the Data Warehouse. Users might not realize the quantity was blank until later, requiring manual correction across systems.<br><br>What to expect: If a requisition or purchase order is imported without an allocation quantity, it will remain in Draft status and display a blocking alert. Users will need to enter the allocation quantity and resubmit for the order to continue through the approval workflow. Normal orders with quantities populated will not be affected. |