

20.1 PRODUCT RELEASE NOTES

FOR CATEGORY MANAGEMENT ENHANCEMENTS

APRIL 6, 2020 - FINAL VERSION



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WELCOME

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 20.1 release. The main goal of this document is to provide an overview of key features that are planned and committed for delivery.

Important: Please see the General release notes document for information about features that affect all modules, as well as some features that are intended for multiple modules. These include:

Objects Deletion Consolidation

Objects Administrative Deletion

Visibility on Archived Object Lists of Other Buyer Organizations

Redefine Rights in Objects - "Select All" Option

Ability to Search on Project Team when Adding Users to Objects

Ability to Restrict Users to Creating Objects from Templates

Template Name Visibility in Object Details

Separate Access Right for RFx, Auction and Contract Attachments

FEATURE ICON KEY

Features may be added after publication of the Release Preview document. Additionally, in some cases, a feature may be included with a specific Product group for the Release Preview, but moved to another Product group for the full Product Release Notes. If there is a noteworthy change to a feature, the release note will be marked with one of the following icons:

New!	Indicates that the feature release note was added since the initial version of the release notes was published with the push to the test environment.
Updated!	Indicates that the feature release note has had a major update since the initial version of the release notes was published with the push to the test environment.
Moved!	Indicates that the feature release note has been moved to a different document since the initial version of the release notes was published with the push to the test environment.

CATEGORY MANAGEMENT ENHANCEMENTS

Automatic Transfer of Data from Category Strategies to Projects

Previously, the strategy data that is entered into a Category Strategy could not be transferred to any object types during object creation. As a result, buyers could find it necessary to input the same data twice.

In 20.1, buyers have the option to transfer the data that is stored in a Category Strategy into new **project** activities during the project creation. The data transfer can be completed regardless of whether the project is created from scratch or from a template.

Customer Impact

- Related Solutions: Category Management
- Feature Impact: This feature is **ON** by default but optional for use.
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- When a user expands the **Start Activity** drop-down for a **project** activity and chooses either **Create New Project**, or **Create Project from Template**, a new field labeled **Transfer Additional Information Values** is displayed on the project creation page. The drop-down choices vary depending on the creation method selected:
 - Choices when user **Creates Project from Template**:
 - From the Strategy
 - From the Template
 - Do Not Copy
 - Choices when user **Creates New Project** (from scratch):
 - From the Strategy
 - Do Not Copy
- When users choose to transfer data to a new project, the data from all additional fields that match the new project's **Project Type** are transferred.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Mandatory Dates for Planned Start and End Date

Previously, the **Planned Start Date** and **Planned End Date** fields could not be made mandatory. As a result, it was possible to create Category Strategies without this data, even when customers have internal guidelines that require these fields to be configured for all Category Strategies.

With this enhancement, customers have the option to configure their sites so that data entry in the **Planned Start Date** and **Planned End Date** fields is a mandatory step in Category Strategy creation.

Customer Impact

- Related Solutions: Category Management
- Feature Impact: This feature is **OFF** by default and must be enabled by JAGGAER
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- Depending on site configuration, it may be mandatory for buyers to enter a **Planned Start Date** and **Planned End Date** field when they create Category Strategies.

ADMINISTRATOR IMPACT

- Contact JAGGAER to enable this enhancement.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Ability to Add Suppliers Outside the Strategy's Supplier Portfolio

Previously, when users created an Activity, they could only associate suppliers from the strategy's Supplier Portfolio. In order to select other suppliers, they had to navigate away from the **Activity Details** page, over to the **Supplier Portfolio** page, add the appropriate suppliers, and then return to the **Activity Details** page to complete the Activity creation process.

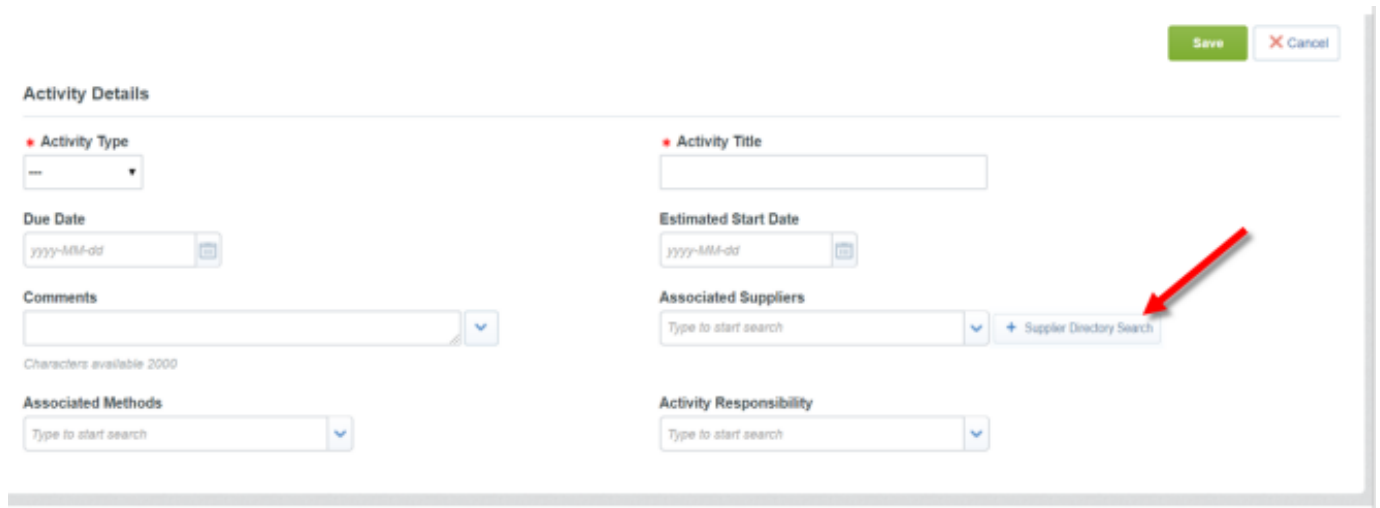
In 20.1, this process has been streamlined with the addition of a **Supplier Directory Search** button on the **Activity Details** page. When users search for and select suppliers that are not currently in the Supplier Portfolio, these suppliers are added automatically to the strategy's Supplier Portfolio.

Customer Impact

- Related Solutions: Category Management
- Feature Activation: This feature is **ON** by default but optional for use
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- When users create a new activity, a button called **Supplier Directory Search** is available beside the **Associated Suppliers** drop-down. If the appropriate supplier does not appear in the **Associated Suppliers** drop-down, users can click the **Supplier Directory Search** button to search for and add other suppliers.



The screenshot displays the 'Activity Details' form. At the top right, there are 'Save' and 'Cancel' buttons. The form is divided into two columns. The left column contains: 'Activity Type' (dropdown), 'Due Date' (calendar), 'Comments' (text area with a character count of 2000), and 'Associated Methods' (dropdown). The right column contains: 'Activity Title' (text field), 'Estimated Start Date' (calendar), 'Associated Suppliers' (dropdown with a '+ Supplier Directory Search' button next to it, highlighted by a red arrow), and 'Activity Responsibility' (dropdown).

- When a supplier is selected through this option, the supplier is automatically added to the Category Strategy's Supplier Portfolio.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Addition of an Activity Status Filter to the My Activities Page

The usability of the Category Management solution has been expanded in 20.1 with the addition of a new **Activity Status** filter on the **My Activities** page. This allows users to filter activities by status.

Customer Impact

- Related Solutions: Category Management
- Feature Activation: This feature is **ON** by default but optional for use.
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- An option to search by **Activity Status** has been added to the filter on the **My Activities** page. This filter option appears between the options to search by **Activity Title** and **Created By**.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Process Flow Enablement to Contracts+ **New!**

Previously, the Category Management solution did not provide users with visibility to objects or suppliers' activities in the Contracts+ solution. In 20.1, the widget that integrates data from the Contracts solution to Category Management has been expanded to include Contracts+ data.

Customer Impact

- Related Solutions: Category Management, Contracts+
- Feature Impact: This feature is **OFF** by default and you must contact JAGGAER to enable
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

Supplier Portfolio

- Information is displayed in a column labeled **Contracts** for contracts created through both the Contracts+ solution and the Contracts solution.

Contract Creation

- If this enhancement has been activated, it is possible to create contracts from the **Activity Progress** area when the selected **Activity Type** is **Contract** and the **Activity Status** is *Start Activity*. The following options are available:
 - **Create New Contract**
 - **Create Contract with Supplier**
 - **Note:** Users are redirected to Contracts or Contracts+ to finalize contract creation. If customers use both Contracts and Contracts+, options to create contracts for both solutions are available.
- When a contract is created, the **Activity Status** is updated to *Running* and a link is maintained between the Category Management solution and Contracts(+) solution(s) via the **Contract Title** and **Contract Code** fields.
- If the contract cannot be created, the standard error message is displayed on the **Activity Progress** page. In these cases, users must click **Unlink Activity** to clear the error.

ADMINISTRATOR IMPACT

- System administrators should work with JAGGAER to have this functionality enabled and configured.
- The Category Trees for Contracts and Category Management are updated manually and independently of each other by administrators. If the Category Trees are misaligned, an error message will be displayed instead of contract data.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.