

20.2 PRODUCT RELEASE NOTES

FOR ANALYTICS ENHANCEMENTS

JULY 20, 2020 - FINAL VERSION



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WELCOME

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 20.2 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.

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.

ANALYTICS ENHANCEMENTS

New *Explore Data* Capability


A new **Explore Data** tab has been added to the top navigation bar in 20.2 to enable fast and easy data exploration capabilities for users via Tableau's **Ask Data** and **Web Edit** features. Within the **Explore Data** tab, users have the option to proceed with Ask Data to run queries, or with Web Edit to build and save new reports.

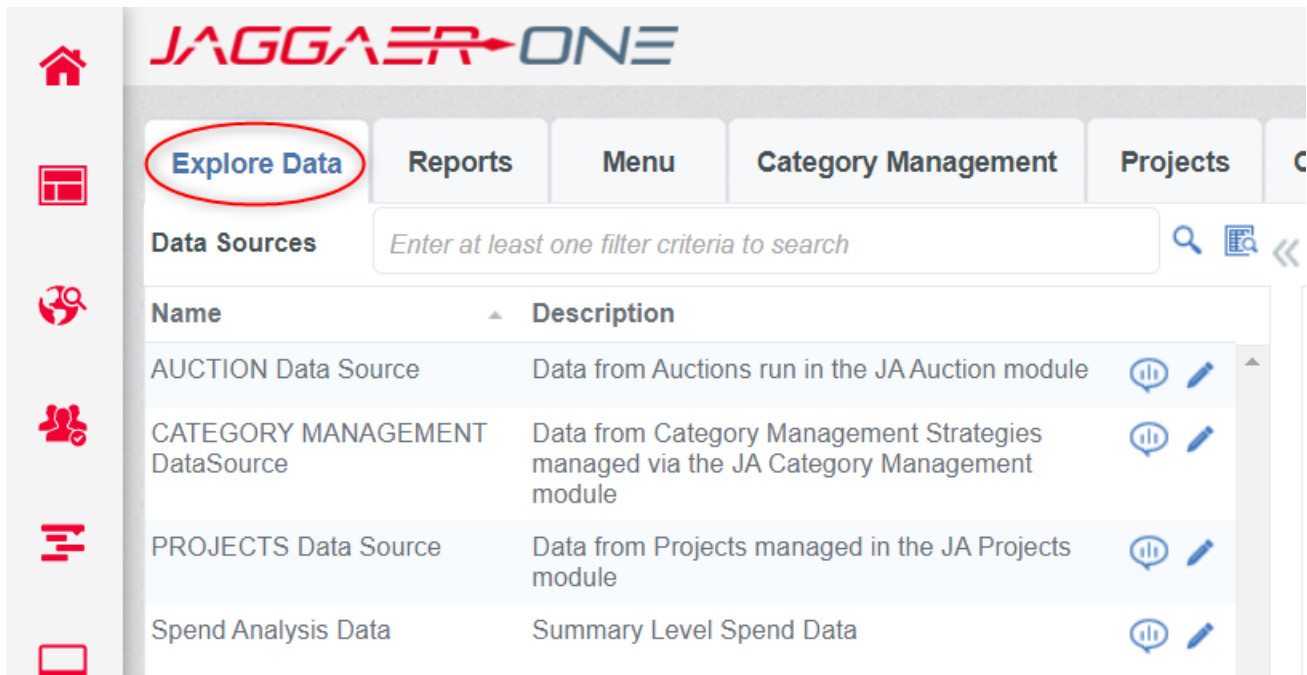
Ask Data, Tableau's natural language query tool, has been integrated into the Analytics module in 20.2 to improve the usability of the module's data exploration. Ask Data allows users to type an English language question and receive an automatic data visualization in response.



Customer Impact

- Related Solutions: Analytics
- Feature Activation: This feature is **ON** by default.
- New User Rights related to this feature: **ExploreData**
- New Notifications related to this feature: None

USER IMPACT

- A new **Explore Data** tab appears as the first tab when users navigate to **Reporting**  > **Analytics** > **Reports**:




- A list of data sources is displayed on the left side of the page. These data sources meet the following criteria:
 - The data source is in *Published* or *Draft Published* status.
 - The **Create Tableau Data Source** checkbox has been selected in Data Source Manager.
 - The **Enabled Explore Data** checkbox has been selected in Data Source Manager.
- The list can be searched/filtered with standard search functionality. It can also be resized or hidden with standard functionality found in the Analytics solution.
- The following icons appear beside each data source. Click the appropriate icon to open the data source in either Web Edit or Ask Data:
 -  - Launches Web Edit
 -  - Launches Ask Data

Note: Search results from **Ask Data** cannot currently be saved. This is a limitation of Tableau functionality. As before, the results of a **Web Edit** session can be saved as a new workbook and added to the report tree as a public or private report.

Making a Data Source Available in Explore Data

Users can create a new data source or update an existing data source to be used in the Explore Data tab:

1. Navigate to **Reporting**  > **Analytics Administration** > **Data Source Manager**.
2. Select an existing data source to update or create a new one.
3. Click the **Publish Tableau Data Source** button on the Details page to reveal a checkbox called **Enable Explore Data**.
4. Select the **Enable Explore Data** checkbox.
5. Click the **Publish** button.

Accessing Ask Data Directly from a Report or Dashboard

- If any of the data sources that is accessed through a report or dashboard has Explore Data enabled, an **Ask Data** option appears in the Tableau toolbar at the bottom of the page.
- When a user clicks **Ask Data**, they are presented with a list of data sources connected to the report or dashboard from which they can launch the Ask Data tool.
- Ask Data launches in a new window.

ADMINISTRATION IMPACT

Permissions

- In order for users to access the Explore Data tab, the following permissions are required:
 - **AccessTableauServer** - This prerequisite permission allows users to view data sources and Analytics reports/dashboards.
 - **ExploreData** (new feature) - Gives access to the **Explore Data** tab.
 - **SpendAnalysisTab** (recommended) - Enables users to create private reports within the report tree from the workbooks they create and save in web edit sessions on the Explore Data tab.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Improved Process to Update Reports and Dashboards

Before 20.2, the **Tableau URL** value that contains report/dashboard locations in Analytics was used by administrators to identify these reports/dashboards when they were managing user roles for the Analytics module. Because the **Tableau URL** field was used as the report identifier, it could not be changed when a report needed to be updated. Instead, administrators had to create a new report containing the updated data, add it to the report tree, and authorize the new report to all relevant users.

In 20.2, administrators can edit the values in the **Tableau Workbook**, **Tableau Views**, and **Tableau View URL Parameters** fields, which are combined to generate the Tableau URL. As a result, it is possible to update a report by changing the Tableau workbook and view and its corresponding Tableau URL field(s).

Customer Impact


- Related Solutions: Analytics
- Feature Activation: This feature is **ON** by default
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT



This feature does not impact end users.

ADMINISTRATOR IMPACT

Administrators can edit the values of the **Tableau Workbook**, **Tableau Views**, and **Tableau View URL Parameters** fields, which are combined to generate the **Tableau URL**:

1. Navigate to **Reporting**  > **Analytics Administration** > **Content Management**.
2. Locate the appropriate dashboard/report in the **Analytics Content** list and click the corresponding arrow in the **Actions** column. Click **Edit**.
3. Make changes to the report name and/or URL:
 - **Report Name**: Change the entry in the **Report Name (Default Language)** field.
 - **Report Description**: Change the entry in the **Report Description (Default Language)** field.
 - **Workbook** or **Worksheet**: Users can select a different **Tableau Workbook** or **Tableau Views** from these drop-down lists. **Note**: Any URL parameters that were set on the original URL remain unchanged.
 - **URL**: Add any **Tableau View URL Parameters** that are needed at the end of the report URL.

Note: The Tableau URL character limit has been increased to 150 characters to allow users to employ more specific naming conventions when building and searching for reports.

4. Save the changes.
 - All reports in the **Features Selected** and **Features Available** lists on the Role Management pages now appear with the prefix **RPT**. Example: **RPT Spend by Category**. To access these lists, navigate to **Reporting**  > **Analytics Administration** > **Analytics & Spend Profiles** for Analytics or **Spend Back Office**  > **Manage Roles** for Spend.
 - All tooltips for reports in the **Features Selected** and **Features Available** lists now display the report URL. If the URL was edited, the new URL is displayed.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Updated User Interface for Analytics & Spend Profile Administration

Previously, when administrators authorized reports/dashboards for Analytics roles, they had to select the applicable reports/dashboards from a list displaying the **Tableau URLs** of the available reports/dashboards, instead of the more user-friendly **Report Names**. In 20.2, the **Analytics & Spend Profiles** page has been updated so that report names, not Tableau URLs, are displayed in the **Features Available** and **Features Selected** lists.


Customer Impact

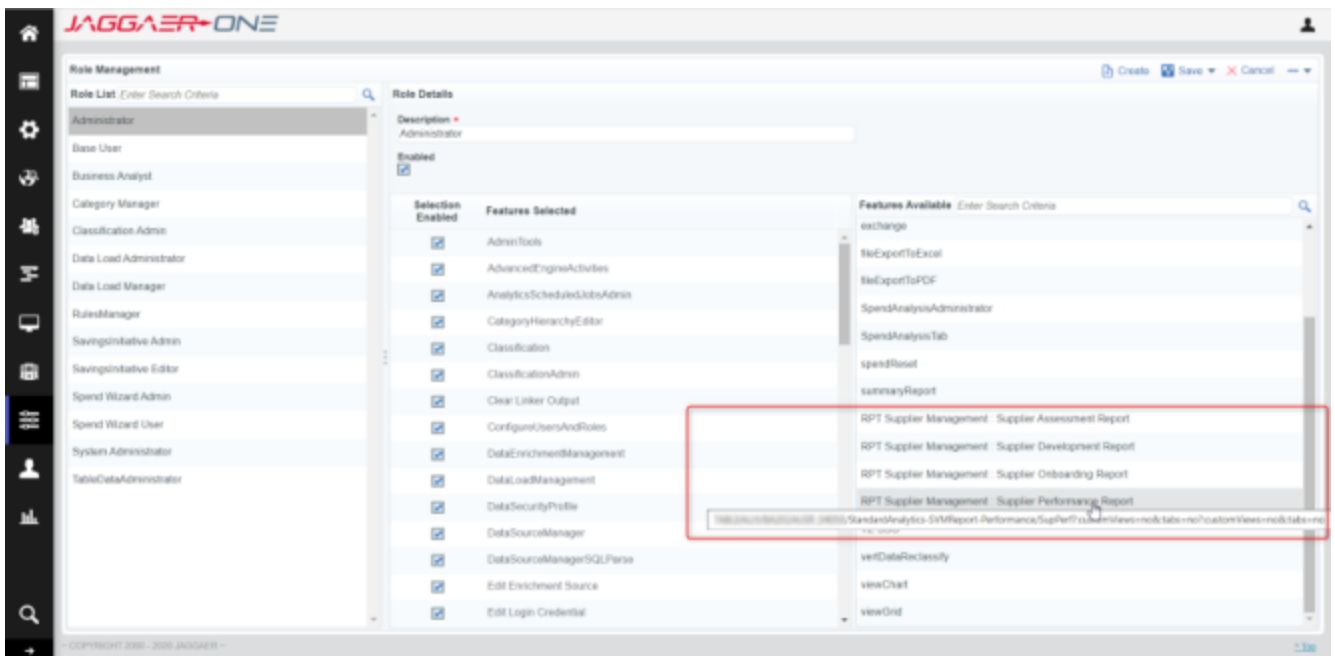
- Related Solutions: Analytics
- Feature Activation: This feature is **ON** by default
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

This feature does not impact end users.

ADMINISTRATOR IMPACT

- The Analytics & Spend Profiles page has been updated so that report names, not Tableau URLs, are displayed in the **Features Available** and **Features Selected** lists:
 - Navigate to **Reporting**  > **Analytics Administration** > **Analytics & Spend Profiles**.



- A tooltip containing the report URL is revealed when a computer mouse pauses over a report name in either list.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Improved Process to Deploy and Update Standard Analytics Content

Previously, the process of updating standard Analytics content was performed by JAGGAER professional services with configuration managed by site administrators. In 20.2, this process has been simplified so that standard content can be updated to the latest version more easily. For customers that are using customized Analytics content, the new process does not override their existing content. Instead, an option is provided for these customers to also deploy the standard Analytic content, which is managed at the administration level.

Customer Impact

- Related Solutions: Analytics
- Feature Activation: This feature is **ON** by default
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT





New reports/dashboards and enhancements to existing standard reports/dashboards are made more readily available to end users due to the simplification of the deployment process on the administration side.

ADMINISTRATOR IMPACT

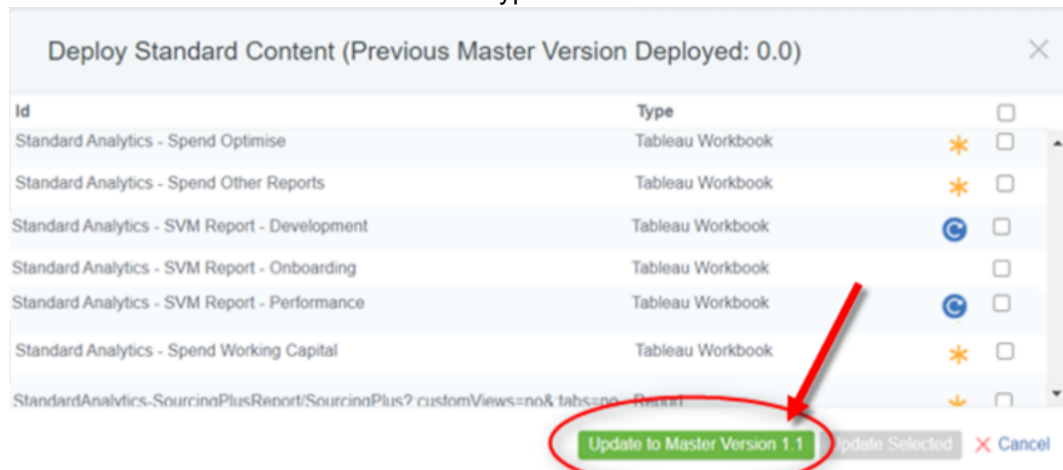
- The process to deploy a new standard report/dashboard or an enhancement to an existing standard report/dashboard is simplified with this feature.
- If a customer has implemented the standard reports and dashboards, this feature allows updates to these reports/dashboards to be automatically applied by an administrator.
- If a customer is using customized versions of the standard reports/dashboards, this feature allows updated versions of the standard reports and dashboards to be deployed into a separate area away

from existing customized versions. This allows administrators to compare the versions and to make any changes to the customized versions if deemed necessary.

- This feature requires configuration by administrator super users. Follow these steps to deploy or update Standard Content:

1. Navigate to **Reporting**  > **Analytics Administration** > **Content Management**.
2. Expand the **More**  drop-down menu at the top of a page and click **Deploy Standard Content**. A screen overlay containing a list of all available standard data sources, Tableau workbooks, and reports is displayed.
 - Only content that is related to modules that have been enabled for that customer instance are displayed within this list.
 - The following icons appear beside a content object in the following scenarios:
 -  - New content available to be deployed
 -  - An update to the respective content is available
3. To deploy all new or updated content (and any dependencies) that have been added or updated since the last time a full update was processed on that instance, click the **Update to Master Version** button.

Note: Only existing standard Tableau Workbooks will be overwritten if an update is available in the latest master version. All other content types will not be overwritten.



4. Alternatively, users can manually select specific content to deploy. Use the checkboxes on the right side of the list to select the content to deploy or update.
5. Click the **Update Selected** button to deploy the selected content and any dependencies.

Note: Only existing standard Tableau Workbooks will be overwritten if selected to be updated. All other content types will not be overwritten.



- For every Tableau Workbook that is deployed using this feature, the corresponding translated language version(s) of the workbook are also deployed for all other available languages that are enabled for that instance.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Improved Management of Standard Tableau Server Projects

Previously, a very basic hierarchy structure was used to organize projects in the Tableau Server environment. As a result, it was difficult to manage Analytics content and to control the visibility of data by individual users in edit mode. In 20.2, a new project folder structure has been introduced to enable administrators to more easily manage and control Analytics content.

Customer Impact

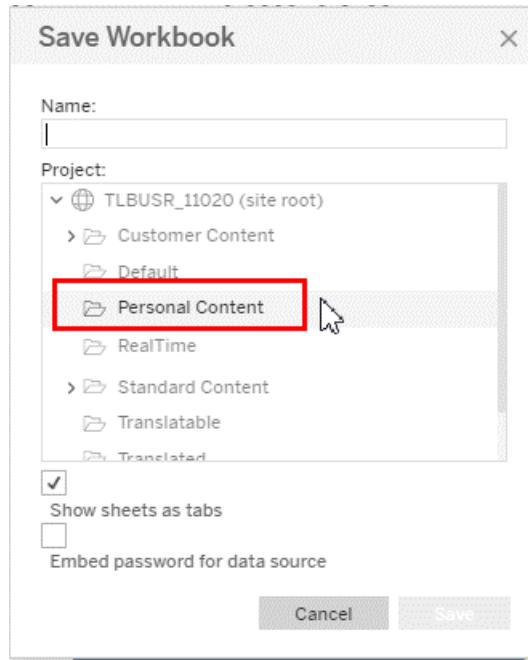
- Related Solutions: Analytics
- Feature Activation: This feature is **ON** by default
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

A new folder structure has been introduced to the Tableau Server as illustrated below. Indented lines represent sub-projects or sub-folders on the Tableau Server:

Folder Name	Description of Change	Usage
Standard Content	New Project	For standard reports/dashboard workbooks and data sources deployed via standard content deployment only
Standard language versions	New Sub-project	Corresponding translated language versions of any workbook deployed in the Standard Content project
Customer Content	New Project	For customized versions of standard reports/dashboard workbooks. Also for bespoke dashboards created for the customer
Customer language versions	New Sub-project	Corresponding translated language versions of any workbook in the Customer Content project
Default	No change	This area will be deprecated. Any workbook or data source in this project should be moved to the Customer Content project
Personal Content	*Project renamed (previously named Custom)	For any content created in a Web Edit session by a user
Real Time	No change	For system-deployed real time data sources and workbooks
Translatable	No change	For workbooks to be translated using the workbook translation tool
Translated	No change	Translated workbooks created from the workbook translation tool

***Custom** has been replaced with **Personal Content** as the folder location for reports that are saved in Web Edit:



ADMINISTRATOR IMPACT

This feature does not impact administrators.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Contract Summary Dashboard

The new **Contract Summary Dashboard** provides a one-page summary of contracts managed in the Contracts module. The dashboard provides users with a summary of the number of contracts and total contract value broken down by key contract-related dimensions. Users can click and apply filters to explore and analyze their contract data using the dashboard.

Customer Impact

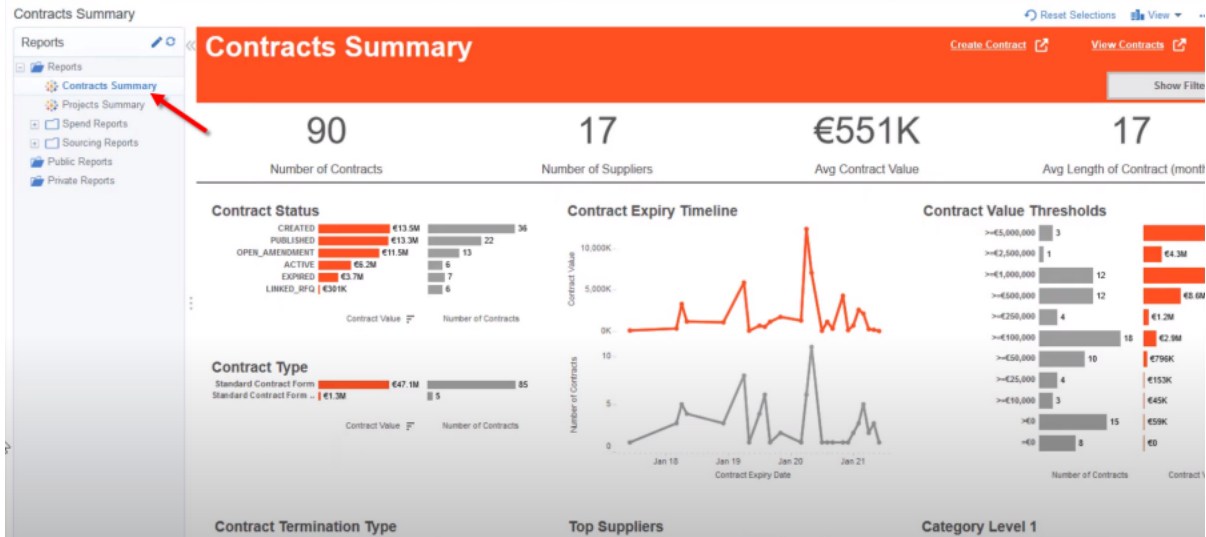
- Related Solutions: Analytics
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization

administrator.

- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- Authorized users can access and view the Contract Summary Dashboard in **Reporting > Analytics > Reports:**



- Click **Show Details** at the bottom of the dashboard to access a list of all contracts contained in the Contracts module and view information at an individual contract-level:

Contract Details

Contract Reference	Division	Contract Type	Contract Status	Contract Short Description	Project Title	Category 1	Category 2	Contract Manager	Supplier Company Name	Start Date	End Date	Contract Length (months)
con_101	Division	Standard Contract Form	LINKED_RFG	Generic Linked Contract	19.1 User Group MG No.	DIRECT	PLANT SERVICES	Matthew Gradl	Null	Null	Null	Null
con_102	Division	Standard Contract Form	LINKED_RFG	Specific contract	19.1 User Group MG No.	DIRECT	PLANT SERVICES	Matthew Gradl	ACPS Supplier	Null	Null	Null
con_103	Division	Standard Contract Form	LINKED_RFG	Specific Contract With Clause MCD	19.1 User Group MG No.	DIRECT	PLANT SERVICES	Matthew Gradl	Wunderbrandt Ltd	Null	Null	Null
con_104	Enterprise Bu.	Standard Contract Form	LINKED_RFG	Specific Contract MCD For ACME	19.1 User Group MG No.	DIRECT	PLANT SERVICES	Radu Zahreanu	ACME Ltd	Null	Null	Null
con_105	Division	Standard Contract Form	PUBLISHED	MCD Approval	19.1 User Group MG No.	DIRECT	METALS	Matthew Gradl	ACPS Supplier	Null	Null	Null
con_106	Division	Standard Contract Form	CREATED	Widgets 2019	19.1 Ad Hoc Activity	DIRECT	ABRASIVES	Andrew Smith	Null	Null	Null	Null
con_107	Division	Standard Contract Form	CREATED	Test	Herz HGS Scorecard 1	INDIRECT	HR AND BENEFITS	Andrew Smith	Null	Null	Null	Null
con_108	Division	Standard Contract Form	CREATED	Cleaning 2016 RFG_Mile_Contract	Cleaning Project 2016	DIRECT	ELECTRONICS	Andrew Smith	Mile Cleaning Services	03/05/2017	Null	Null
con_109	Division	Standard Contract Form	PUBLISHED	IT Hardware & Consumables Contr	JAGGAER ADVANTAGE	DIRECT	FASTENING COMPONE.	Andrew Smith	Aglant Technologies Ltd	09/05/2018	Null	Null
con_110	Division	Standard Contract Form	CREATED	Web Development Contract	Ad-Hoc Projects	DIRECT	ELECTRONICS	Andrew Smith	Aglant Technologies Ltd	Null	Null	Null

- Click the actionable link for any of the contracts in the **Contract Details** list to access the details for that contract in the JAGGAER ONE Contracts module.
- The dashboard also allows users to access the Web Edit capability to further analyze their contract data and to adapt and customize the dashboard to meet their requirements.

ADMINISTRATION IMPACT

An administrator is required to deploy the relevant Tableau workbook, set up the dashboard feature in content management, and authorize users to access the dashboard. See [Improved Process to Deploy and Update Standard Analytics Content](#), on page 7 for additional information.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

New Project Summary Dashboard

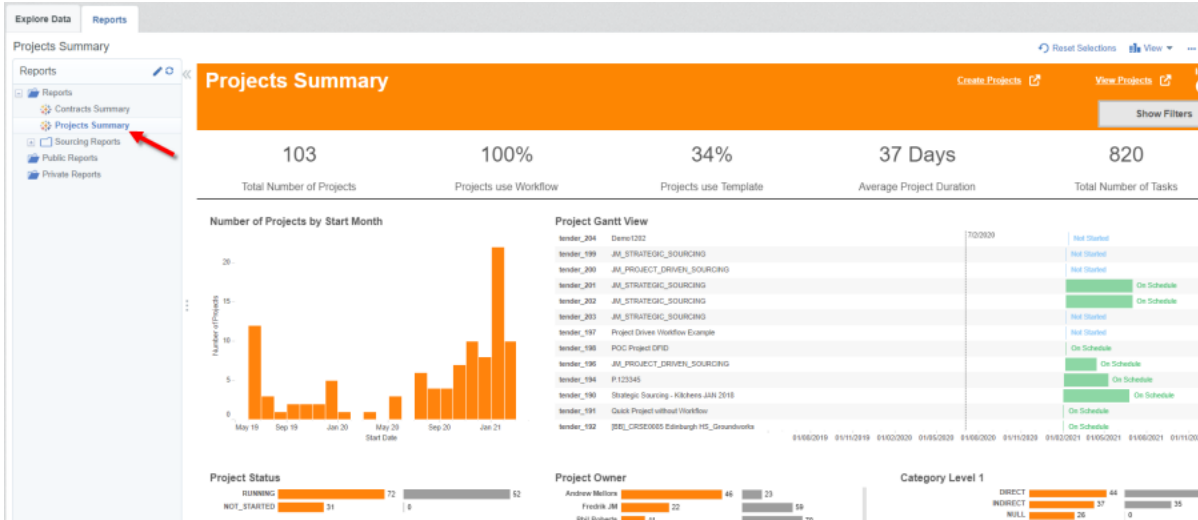
The new [Project Summary Dashboard](#) provides a one-page summary of projects managed in the Sourcing+ module. The dashboard provides users with a summary of the number of projects and average project duration broken down by the key project related dimensions. Users can click and apply filters to explore and analyze their project data using the dashboard.

Customer Impact

- Related Solutions: Analytics
- Feature Activation: This feature is **OFF** by default but can be enabled by an organization administrator.
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- Authorized users can access and view the Project Summary Dashboard in [Reporting !\[\]\(029651ce9ee64da8525b17c64e266edc_img.jpg\) > Analytics > Reports:](#)



- Click **Show Details** at the bottom of the dashboard to access a list of all Sourcing+ projects and view information at an individual project-level:

Project Reference Code	Project Short Description	Project Owner	Workflow Type	Division Name	Category String	Project Actual Start Date	Project Actual End Date	Actual Project Duration	Number of Tasks
tender_204	Comet1202	Andrew Mellors	With a Workflow	EMEA	NULL-NULL-NULL	2/12/2021	12/02/2021	0	0
tender_199	JM_STRATEGIC_SOURCING	Fredrik JM	With a Workflow	EMEA	INDIRECT-PROPERTY PLANTS, AND EQUIPMENT-KITCHEN	3/7/2021	07/02/2021	0	7
tender_200	JM_PROJECT_DRIVEN_SOU	Fredrik JM	With a Workflow	EMEA	DIRECT-PLANT SERVICES-CONSTRUCTION	3/7/2021	07/02/2021	0	2
tender_201	JM_STRATEGIC_SOURCING	Fredrik JM	With a Workflow	EMEA	INDIRECT-PROPERTY PLANTS, AND EQUIPMENT-KITCHEN	3/7/2021	02/07/2021	145	7
tender_202	tender_201	NG	With a Workflow	EMEA	INDIRECT-PROPERTY PLANTS, AND EQUIPMENT-KITCHEN	3/7/2021	02/07/2021	145	7
tender_203	tender_201	NG	With a Workflow	EMEA	INDIRECT-PROPERTY PLANTS, AND EQUIPMENT-KITCHEN	3/7/2021	07/02/2021	0	7
tender_197	amp	Andrew Mellors	With a Workflow	EMEA	DIRECT-PLANT SERVICES-CONSTRUCTION	2/6/2021	06/02/2021	0	2
tender_196	POC Project DFID	poc admin	NULL	Division	NULL-NULL-NULL	2/6/2021	06/02/2021	0	0

- Click the actionable link for any of the projects in the **Project Details** list to access the details for that project on the JAGGAER ONE **Sourcing** > **Projects** > **My Projects** page.
- The dashboard also allows users to access the Web Edit capability to further analyze their project data and to adapt and customize the dashboard to meet their requirements.

ADMINISTRATION IMPACT

An administrator is required to deploy the relevant Tableau workbook, set up the dashboard feature in content management and authorize users to access the dashboard. See **Improved Process to Deploy and Update Standard Analytics Content**, on page 7 for additional information.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.

Data Warehouse Schema Definition Available **New!**

An updated Data Warehouse Schema is available. This document provides details of all of the available database views in the JAGGAER Advantage Public Sourcing Data 'PSD' datawarehouse schema. In addition, release 20.2 changes are highlighted.

Customers who have access to the Online Help in the application can retrieve the document from the Welcome page. If you do not have access to the Online Help, please contact your JAGGAER representative for a copy of the document.

Note: The Online Help can be turned on for your organization by JAGGAER. Please contact a JAGGAER representative to have it enabled.

Customer Impact

- Related Solutions: Analytics and Datamart
- Feature Activation: This feature is **ON** by default
- New User Rights related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

Please see [Administrator Impact](#) below.

ADMINISTRATOR IMPACT

- If enabled, the document can be retrieved from the Welcome page of the Online Help. Click on your User Profile icon and select Online Help. The help will open with the Welcome page active. The document is located in the Documents section of the Welcome page.
- If your organization does not have access to the Online Help, please contact JAGGAER to request a copy of the document.

THIRD-PARTY INTEGRATION IMPACT

This feature does not impact any third-party integrations.

Supplier Impact

This feature does not impact suppliers.