



21.1 Release Notes

For Category Management Enhancements

Version: April 12, 2021 - Final Version

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Welcome

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 21.1 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.

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

Management of Approval Workflows

Activities in a category strategy may be subject to approval workflows, which could unnecessarily impede users' ability to activate a strategy. Previously, customers were unable to deactivate the option to use approval workflows for category strategies. In 21.1, to make approval workflow management in Category Management more consistent with other JAGGAER modules, approval workflows are managed using existing matrix configuration functionality.

To enable this change, in 21.1, the existing approval workflow process has been deactivated for Category Management and the tabs and buttons that are associated with approval workflow have been hidden. Instead, the approval workflow functionality that is used in other modules is available for use with Category Management.

- Customers that managed local approvals in Category Management before 21.1, but do not activate matrix functionality for Category Management, still have access to the Approval Settings page. It is possible to access and manage pre-existing workflows for category strategies on the Approval Settings page, but it is not possible to create or manage new workflows there.
- Customers that need matrix-based approval workflow for Category Management must contact JAGGAER to have this feature activated for their sites. To enable users to manage approvals within category strategies, **Category Management** has been added as an approval object for matrix configuration. As with all other approval objects, administrators can download the appropriate matrix configuration template, configure matrices offline, and import these objects back to the JAGGAER platform.

Customer Impact

- Related Solutions: Category Management
- Feature Activation: 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


- If this feature has not been enabled, workflow approval is not necessary and the **Activate** button is available to users.

Note: Existing customers that managed local approvals for category strategies before 21.1, but do not activate matrix approval functionality for Category Management, still have access to the Approval Settings page. Pre-existing workflows can be accessed and managed on the Approval Settings page, but it is not possible to create or manage new workflows there.

- If this feature is enabled, users with the **Edit Category Strategy Definition** user right may choose whether a category strategy will require workflow approval before it can be activated. User accessibility to the **Request Approval** button and the **Activate** button will depend on whether workflow has been enabled and whether the category strategy elements match the workflow matrix conditions.

- If this feature is enabled and users click the **Request Approval** button, the Approval Settings page is no longer displayed. Instead, approval settings are defined by the matching **Approval Type** configured in the module's matrix settings. Standard matrix approval features such as approver lists, approval pages and portlets, and email alerts are used to manage the approval process.

Administrator Impact

- When this feature is activated, administrators must configure approval matrices for category strategies. **Category Management** has been added as an Approval Object for matrix configuration. Navigate to **Administration**  > **Workflow Management** > **Matrix Configuration** to access this area.
 - **Min Value (Included)** and **Max Value (Excluded)** have not been defined for Category Strategy and cannot be configured in Category Management matrices.
 - Category Management matrices are managed using the same process as other types of approval objects. See **Approval Matrix Configuration** in the Online Help or the Administrator's Handbook for additional information.
- The **Selectable as Approver by Approval Sender** user right is now displayed only if approval workflow has been activated for a site. When approval workflow is activated, existing user accounts and roles that had this user right before 21.1 will retain this permission. New user accounts and roles have a default value of **No** for this user right.
- Standard matrix approval features such as approver lists, pending approval portlets, and email alerts are used to manage the approval process. See **Managing Approval Types** in the Online Help or the Administrator's Handbook for additional information.

Third-Party Integration Impact

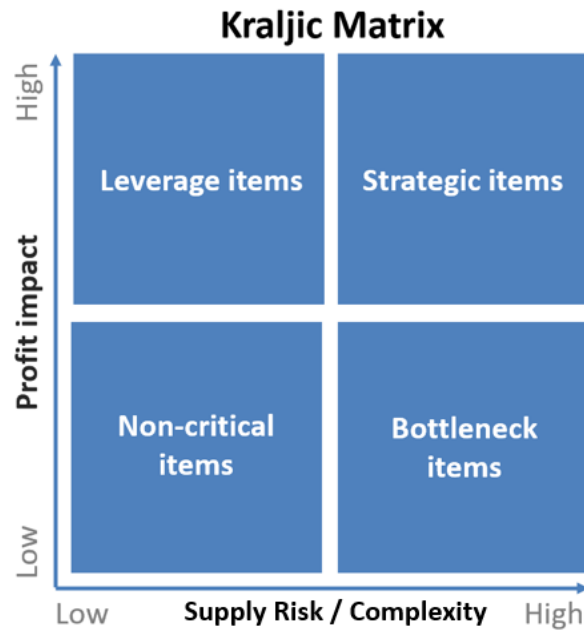
This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Kraljic Matrix Analysis

The Kraljic Matrix is used to segment the supplier base against risk and profitability. This model divides goods and services into four quadrants, which allows customers to define the optimal purchasing strategies for each of the four divisions:



- **Strategic Items** - High profit impact, high supply risk
- **Leverage Items** - High profit impact, low supply risk
- **Bottleneck Items** - Low profit impact, high supply risk
- **Non-Critical Items** - Low profit impact, low supply risk

Bubble sizes in these matrices indicate the relative importance of the corresponding category or supplier to a customer.

Two Kraljic Matrix tables have been introduced in the **Strategy Summary** area in 21.1:

1. **Classification Analysis** (category-based)
2. **Balance of Power** (supplier-based)

Customer Impact

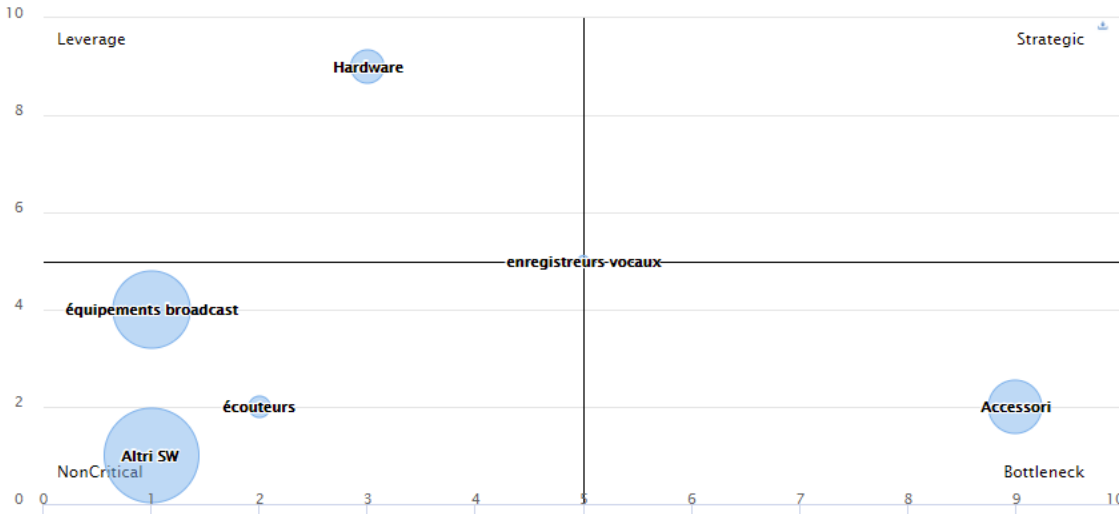
- Related Solutions: Category Management
- Feature Activation: This feature is **ON** by default but optional for use.
- New User Rights related to this feature: None
- New Notifications related to this feature: None

User Impact

Two new charts based on Kraljic Matrix are available in category strategies' **Strategy Summary** area:

Classification Analysis Chart (based on categories)

Classification Analysis

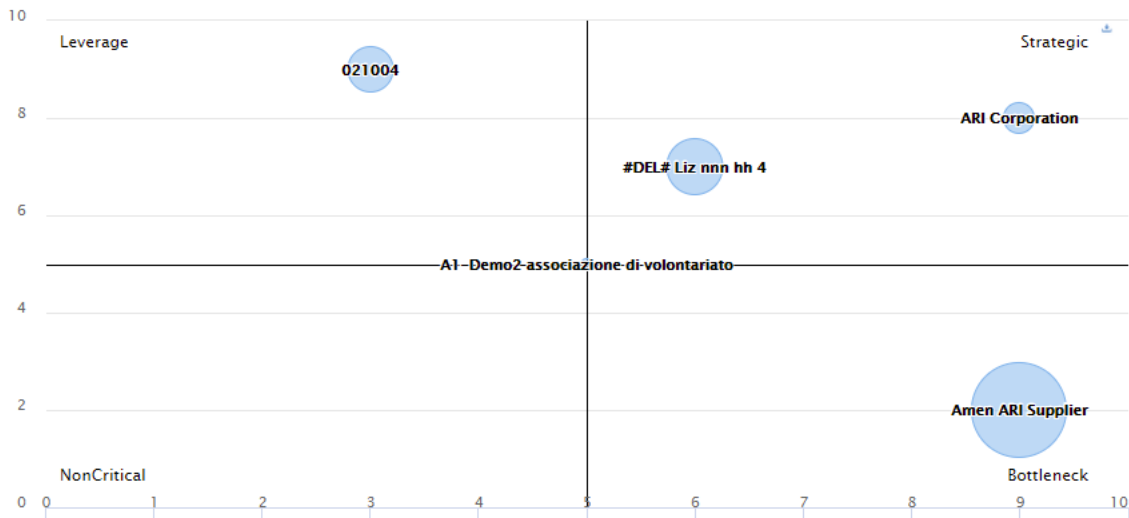


This chart is built from the following fields:

- **Category Code** - Unique identifiers for the classification categories assigned to the goods and services a customer seeks.
- **Spend by Category** - The sum of the spend amounts for each category. This number is represented by the size of the bubble.
- **Purchasing Value** (new field) - This field is used to populate the profit value located on the X axis. It is a numeric spectrum from 0 (low) to 10 (high).
- **Purchasing Complexity** (new field) - This field is used to populate the risk/complexity located on the Y axis. It is a numeric spectrum from 0 (low) to 10 (high).

Balance of Power Chart

Balance of Power



This chart is built from the following fields:

- **Supplier Code** - Unique identifiers for each supplier.
- **Category Code** - Unique identifiers for the classification categories assigned to the goods and services a customer seeks.
- **Spend by Supplier by Category** - The sum of the spend amounts for each for each supplier in each category. This number is represented by the size of the bubble.
- **Customer Power** (new field) - This field is used to populate the complexity value located on the X axis. It is a numeric spectrum from **0** (low) to **10** (high).
- **Supplier Complexity** (new field) - This field is used to populate the power of the supplier located on the Y axis. It is a numeric spectrum from **0** (low) to **10** (high).

To populate the Kraljic graphs:

1. Navigate to **Category Analysis > Spend** or **Category Analysis > Demand Forecast** within a category strategy.
2. Expand the **More** drop-down menu located within the strategy and select **Import Kraljic**.
3. Fill in the **Purchasing Value** and **Purchasing Complexity** columns for each category.
 - Acceptable values are from **0** to **10**.
 - **0** is low. **5** is medium. **10** is high.

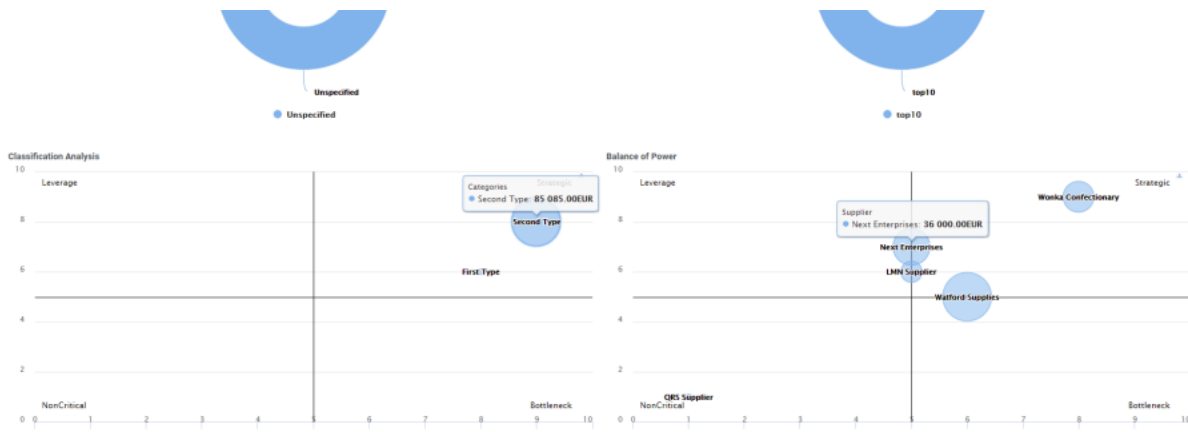
Categories		
Category	Purchasing Value	Purchasing Complexity
First Type	<input type="text" value="8"/>	<input type="text" value="9"/>
Second Type	<input type="text" value="6"/>	<input type="text" value="8"/>

4. Fill in the **Customer Power** and **Supplier Power** for each supplier.
 - Acceptable values are from **0** to **10**.
 - **0** is low. **5** is medium. **10** is high.

Suppliers		
Supplier	Customer Power	Supplier Power
Wonka Confectionary	<input type="text" value="1"/>	<input type="text" value="1"/>
Next Enterprises	<input type="text" value="6"/>	<input type="text" value="5"/>
Watford Supplies	<input type="text" value="5"/>	<input type="text" value="7"/>
QRS Supplier	<input type="text" value="8"/>	<input type="text" value="9"/>
LMN Supplier	<input type="text" value="5"/>	<input type="text" value="6"/>

5. Click **Save**.

A **Classification Analysis** and a **Balance of Power** chart will appear beside each other with the other populated charts.



Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

SWOT Analysis

A SWOT Analysis is a compilation of a company's strengths, weaknesses, opportunities, and threats. This framework can be used to help in identifying the merits and suitability of procurement strategies.



In 21.1, new text fields have been added for each element of SWOT analysis: **Strengths**, **Weakness**, **Opportunity**, and **Threat**. These fields are the basis of a new SWOT analysis table that is located in the **Strategy Summary** area. The SWOT table is also available in the category strategy **Summary Report**.

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

- **SWOT Analysis** is now available as a graph in the **Strategy Summary** area of the **Category Analysis > Analysis** page.
 - Click **Edit** and scroll to the **SWOT Analysis** section.
 - Fill in the **Strengths**, **Weakness**, **Opportunity**, and **Threat** text boxes. Up to 2000 characters may be entered into each box.
 - **Save** the changes. A **SWOT Analysis** graph will appear onscreen. The graph is also available in the **Summary Report**.

Business Needs		Impact Description	
Description Summary		SWOT Analysis	
SWOT Analysis		Helpful	Harmful
Internal	Strengths Same-day delivery within the city Urban core has under 1 hour delivery	Weakness No monthly subscription options Inaccessible to a larger consumer audience	
External	Opportunity Optimize current mobile app for built-in feedback		Threat Competitors can operate at a loss to drive away competition

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Porter's Five Forces Analysis

Porter's Five Forces analytical tool is used to describe competitive forces in a market economy. With this framework, customers can evaluate the strength of their company's relative negotiating position based on the following forces:



1. **Competitive Rivalry** - The number and strength of your competitors.
2. **Supplier Power** - The ease with which your suppliers can increase their prices.
3. **Buyer Power** - The ease with which your customers can drive down your prices.
4. **Threat of Substitution** - The likelihood of your customers finding goods or services in another market that can be used in place of your company's products or services.
5. **Threat of New Entry** - How easily new competitors can enter your market.

In 21.1, **Porter's Five Forces** analytical tool is presented as a new table that is available in the **Strategy Summary** area and in the downloadable **Strategy Summary Report**.

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

- **Porter's Five Forces Analysis** is now available as a graph in the **Strategy Summary** area of the **Category Analysis > Analysis** page.
- Click **Edit** and scroll to the **Porter's Five Forces Analysis** section.
- Fill in the following text boxes. Up to 2000 characters may be entered into each box.
 - **Threat of New Entry**
 - **Buyer's Power**
 - **Supplier's Power**
 - **Threat of Substitution**
 - **Competitive Rivalry**
- **Save** the changes. A **Porter's Five Forces Analysis** graph will appear onscreen.

Business Needs		
Description Summary	Impact Description	
SWOT Analysis		
	Helpful	Harmful
Internal	Strengths Same day delivery within the city Urban core has under 1 hour delivery	Weakness No monthly subscription options Inaccessible to a larger consumer audience
External	Opportunity Optimize current mobile app for built-in feedback	Threat Competitors can operate at a loss to drive away competition

Porter's Five Forces analysis		
Porter's Five Forces analysis		
Supplier's Power Few suppliers for rural deliveries High cost of switching suppliers	Threat of New Entry Small capital requirements Few government regulations	Buyer's Power Easy to switch between providers Price comparisons are available online
	Competitive Rivalry High barriers to exit High industrial concentration ratio	
	Threat of Substitution Customers could choose to ship by alternative modes of transportation	

Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Ability to Filter on Additional Fields

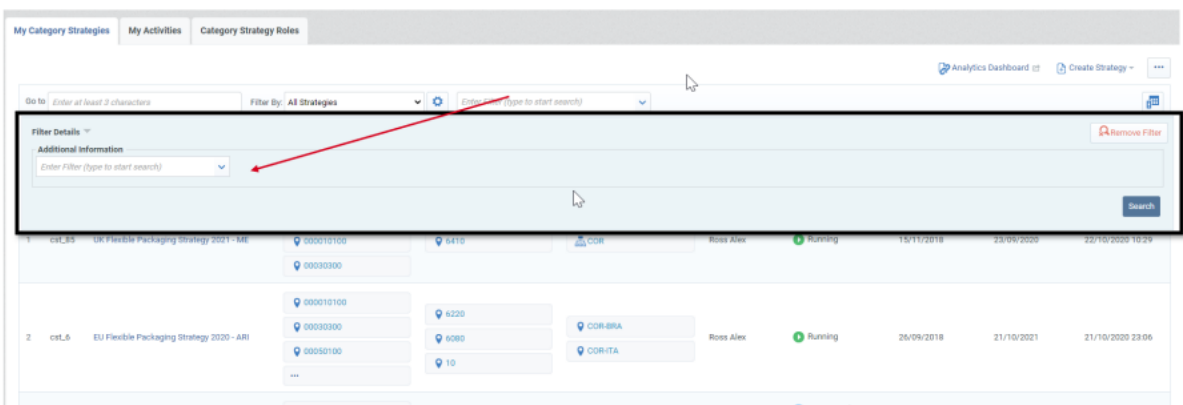
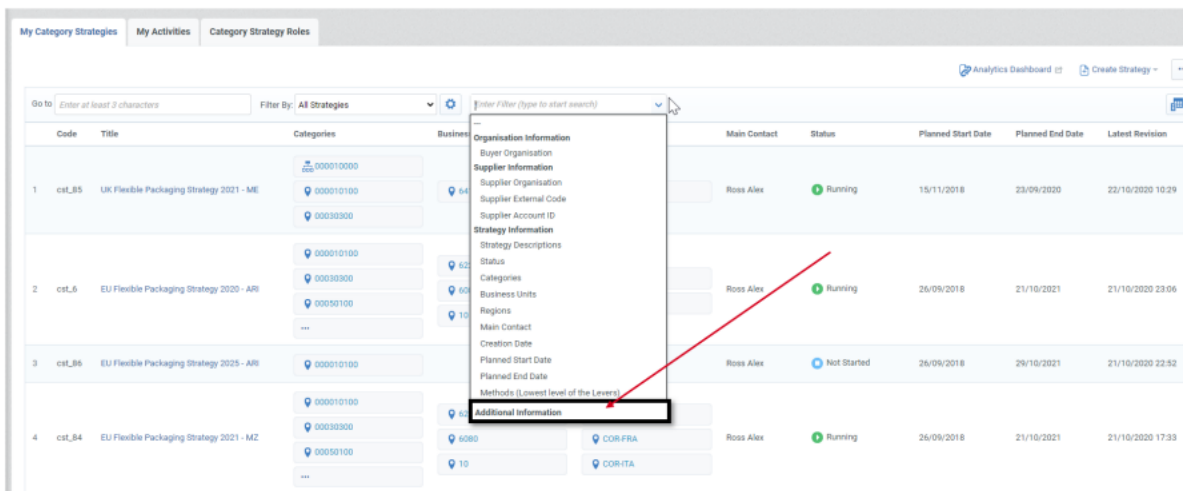
The usability of the Category Management solution has been expanded in 21.1 with the addition of a new **Additional Information** filter on the **My Activities** page. This allows users to filter activities by **Additional Information** fields.

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 **Additional Information** has been added to the filter list on the **My Category Strategies** page.



Administrator Impact

This feature does not impact administrators.

Third-Party Integration Impact

This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.