

19.1 PRODUCT RELEASE NOTES FOR JAGGAER ADVANTAGE SAVING INITIATIVES

MARCH 1, 2019 - FINAL VERSION



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Welcome

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming 19.1 release. The main goal of this document is to provide an overview of key features that are planned and committed for delivery.

Note: The release will be available in the Prep environment prior to the release in Production. We recommend that customers use the prep period to test the features.

JAGGAER Advantage Saving Initiatives Enhancements

Associate Suppliers with Saving Initiatives

With this release, users are able to associate suppliers with saving initiatives, one supplier per saving initiative. This allows customers to report on the savings related to particular suppliers.

Additionally, the new **Associated Supplier** search filter is available on the My Saving Initiatives and Saving Initiative Templates pages.

Customer Impact

- Feature Activation: This feature is **Off** by default and must be enabled by JAGGAER.
- New Permissions related to this feature: None.

USER IMPACT

- To associate a supplier with a saving initiative:
 - On the **Settings** page of the initiative, click the **Edit** button.
 - In the **Associated Supplier** field, begin entering the name of the supplier to associate and select it when it appears from the listed suppliers. Alternatively, click the **Select Supplier** button beside the field to open the **Supplier Directory Search**, and search for and select the supplier from there.

Registered, active, and de-activated suppliers can be selected. Deleted and archived suppliers do not appear for selection.
 - Click **Save**. The configuration is saved and the user is returned to the **Settings** page. A link to the associated supplier's profile appears on the page under the Associated Supplier heading.
 - The associated supplier can be changed while the saving initiative is in Idea, Proposal, and Action Plan status.
- Associated supplier information is copied when using Save As, Save As Multiple, and Create from Template.
- The new **Associated Supplier** search filter is available on the My Saving Initiatives and Saving Initiative Templates pages.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Enter Savings Amounts as Percentage

Save as Multiple Saving Initiatives Enhancements

Previously, when using the **Save as Multiple Saving Initiatives** function on a saving initiative, the application automatically proposed the same total planned saving amounts as the source saving initiative for all selected business units.

With this release, users can optionally enter percentages to calculate the total planned saving for each new saving initiative when using Save as Multiple Saving Initiatives.

Percentages are also recalculated automatically in case the user changes the total value. When saving the configuration, a warning message will appear if the sum of all given percentages is greater than 100%.

Total Planned Savings Definition Enhancements

When defining **Total Planned Savings** on a saving initiative, users can now optionally enter a percentage that will be used to calculate the Total Planned Savings based on the Historical Total Cost.

When saving the changes, a warning message will display if the Total Planned Saving is greater than or equal to the Historical Total Cost.

Ability to Redefine Saving Category Percentages

For saving initiatives with more than one saving category, users are able to change the percentage value of the saving categories with the new **Edit Percentage** feature. This option is only available for users who can edit saving data.

The following rules for redefining saving category percentages are used:

- All saving categories must have either a blank value or a percentage value.
- If a user enters a value for all saving categories, the sum percentage must be 100.

- The sum of percentages for the selected saving categories must be less than or equal to 100. If less than 100, the remaining amount is distributed across saving categories with blank values, maintaining previous proportions.

Customer Impact

- Feature Activation: This feature is **On** by default but optional for use.
- New Permissions related to this feature: None.

USER IMPACT

- To use percentages when using **Save as Multiple Saving Initiatives**:
 - Optionally enter percentages to calculate the total planned saving for each new saving initiative in the **Percentage Saving** column. The total planned savings amounts are automatically recalculated using the percentages entered.
 - When saving the configuration, a warning message will appear if the sum of all given percentages is greater than 100%.
- To change the **Total Planned Savings** of an initiative using percentage value:
 - Navigate to **Saving > Saving Data** on a saving initiative.
 - Click **Edit Summary**. The Saving Data Summary page becomes editable.
 - Instead of entering an amount in the **Total Planned Saving** field, users can optionally enter a **percentage** beside this field. The Total Planned Saving amount is automatically recalculated based on the Historical Total Cost.
 - Click **Save**. The saving initiative is updated with the new Total Planned Saving amount.
- To change the percentage value of the saving categories with **Edit Percentage**:
 - This option is only available for users who can edit saving data.
 - Navigate to **Saving > Saving Data** on a saving initiative with more than one saving category.
 - Click **Edit Percentages**. The Saving Record Data page opens.
 - Enter new percentages for the categories in the available fields.
 - All saving categories must have either a blank value or a percentage value.
 - If a user enters a value for all saving categories, the sum percentage must be 100.

- The sum of percentages for the selected saving categories must be less than or equal to 100. If less than 100, the remaining amount is distributed across all saving categories with blank values, maintaining previous proportions.
- Click **Save**. The changes are saved and the user is returned to the Saving Data page of the saving initiative.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.

Undo Savings Validations

Previously, if users prematurely or incorrectly marked savings as validated, there was no process for undoing the validation.

With this release, users with the new **Undo Validation** user right are able to undo the validation of time periods and return them to **Actual Draft** status. Once a selected period is returned to Actual Draft status, it is editable, and a new approval process is required to move it to Validated status.

Customer Impact

- Feature Activation: This feature is **On** by default but optional for use.
- New Permissions related to this feature: **Undo Validation** (User Rights > Saving Initiatives > Undo Validation).

USER IMPACT

- A user must have the **Undo Validation** permission to use this feature.
- To undo a savings validation:
 - On the **Saving Data** page of the initiative, click the **...** dropdown button and select **Undo Validation**. A page listing all periods in validated status opens.
 - Select the **time periods** to be returned to Actual Draft status.
 - Click **Confirm**. The selected time periods are returned to Actual Draft status.

ADMINISTRATOR IMPACT

- The new **Undo Validation** user right is located under **User Rights > Saving Initiatives > Undo Validation**.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

This feature does not impact suppliers.