

19.3 RELEASE NOTES

FOR SOURCING ENHANCEMENTS

NOVEMBER 11, 2019 - FINAL VERSION



TABLE OF CONTENTS

WELCOME	II
SOURCING	III
Event Data Export Enhancement	iii
Ability to Leverage Supplier Performance Data for Sourcing Event Evaluations	iv
Introduction of Diversity and Supplier Class Filters in the “Supplier Award Summary” Report	v
New Menu Navigation for Sourcing Approvals	vii

WELCOME

The **19.3 JAGGAER One Product Release** will be available in the production environment starting November 11, 2019. The purpose of Release Notes is to prepare administrators for the upcoming release from an application standpoint.

This document provides release notes for the **Sourcing** solution. General release notes, additional solution-specific release notes, and other supplemental information such as a Feature Snapshot, are available on the Product Release Library:

<https://library.jaggaer.com>

Note: Please see the **19.3 Release Notes for General Enhancements** for information about key release dates and training opportunities.

This document will help you:

- Understand the impacts of new features on your end-users, approvers, administrators, and other individuals using the system.
- Understand any changes required on your part to enable a feature of the system.
- Provide a starting point of “where to go” to learn more about the features and functionality discussed in this document.

SOURCING

The features listed in this section apply to the JAGGAER Indirect Sourcing solution.

Event Data Export Enhancement

The standard reports in Sourcing have targeted objectives based on curated data and include only the data points that are relevant to these objectives. The Looker tool does not yet identify Sourcing availability and cannot currently be used to gather and report on sourcing data. As a result, there has been a gap in the ability of the Sourcing reporting tools to meet customer-specific reporting needs.

With this enhancement, a new export option called **Export Evaluation Spreadsheet** has been added to the **Evaluation Actions** drop-down, enabling users to scrub and evaluate their custom data sets outside of the JAGGAER ONE platform. Key item and supplier data points are included in the flattened, multiple-sheet Excel files, allowing users to focus only on the response data that is most important to them and to facilitate maximum data manipulation.

Customer Impact

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

USER IMPACT

- A new data export option called **Export Evaluation Spreadsheet** appears in the **Evaluation Actions** drop-down located on the **Evaluations > Supplier Responses** page within sourcing events that have closed.
- When users choose to **Export Evaluation Spreadsheet**, an **Evaluation Export** screen overlay appears. Users may accept the default **Description**, which is the Event Title, or they may enter a new **Description**.
- When the request is submitted, the screen overlay presents a link to navigate the user to the **Sourcing > Sourcing Events > View Exports > Evaluations > Sourcing Evaluation Exports** page from which they can download their export files.
 - **Note:** If the requested export file is not available immediately, a **Refresh this Page** link is available on the **Sourcing Evaluation Exports** page.
- The export file consists of three worksheets containing flattened, unfiltered event data in individual columns that can be filtered and manipulated by users within their Excel software. The three worksheets are comprised of:
 1. **Summary:** A cover page containing event details to identify the corresponding event
 2. **Items:** Supplier bid information
 3. **Questions:** Event questions and responses from participating suppliers

- Worksheet cells for items and questions in the download file have contrasting shading for easier identification.
- Alternate items proposed by suppliers are included in the data downloads.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Ability to Leverage Supplier Performance Data for Sourcing Event Evaluations

Supplier Management provides a solid framework whereby clients can establish performance metrics for use in evaluating and comparing the suppliers with which they do business. Previously, the Sourcing solution did not leverage this data in the administration of sourcing events. As a result, buyers were unable to easily capitalize on the value of this data when managing and evaluating sourcing events.

In 19.3, JAGGAER ONE has integrated performance data from Supplier Management for use in Sourcing event evaluations. With this enhancement, event evaluators have the ability to leverage comparative Scorecard data during the evaluation process. Evaluators can also disqualify suppliers from event award consideration when reviewing the Scorecard comparison data.

Customer Impact

- Related Solutions: Sourcing and Supplier Management
- Feature Activation: This feature is **ON** by default but optional for use.
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- A new option called **Compare Selected Supplier Scorecards (#)** appears under the **Evaluation Actions** drop-down menu on the **Supplier Responses** page of sourcing events with *Under Evaluation*, *Awarded*, or *Closed Without Awarding* status.
 - As with other options in **Evaluation Actions**, evaluators select the checkbox for each supplier to evaluate before clicking **Compare Selected Supplier Scorecards (#)**. **Note:** (#) indicates the number of selected suppliers.

- Selecting the option opens a **Supplier Scorecard Comparison** page from which evaluators may make selections from the following drop-downs:
 - **Scorecard** (mandatory) - Select the type of scorecard to evaluate.
 - **Reporting Period** - Use the default **Most Recent** option, or if the selected scorecard is a reoccurring scorecard, select the number of reporting periods to include.
 - **Category** - Select a category within the scorecard.
 - **KPI** - Select a KPI within the scorecard.
- When evaluators make their selections and click **Compare**, a **Graphs** area and a **Details** area are exposed. These areas contain the following information:
 - **Graphs** displays a bar chart of the suppliers' performance based on the metrics contained in the **Details** area.
 - **Details** consist of the percentage grade for each supplier in the selected scorecard time-frame(s) and the supplier's **Average** grade overall, which is meaningful in the analysis of multiple reporting periods. These columns can be sorted by clicking the down arrow in the column header.
 - Underlying supplier scorecards can be accessed by clicking the associated percentage score within the **Details** columns. Entries in these columns are a link to the associated scorecards.
 - A **Disqualify / Re-Qualify** toggle button is available for each supplier in the **Details** section, giving evaluators the option to disqualify any suppliers from award consideration if it should happen that such a decision can be made based on the data presented in the performance comparison.
- Evaluators may change selections in the Supplier Scorecard Comparison drop-downs and click **Compare** to rebuild graphs and recalculate percentage grades.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

Introduction of Diversity and Supplier Class Filters in the “Supplier Award Summary” Report

Previously, there was no easy way in the Sourcing solution for users to quickly determine the amount of business awarded to suppliers based on the suppliers' diversity assignments or the categorical classes to which they have

been assigned. In 19.3, new filter options have been added to the Supplier Award Summary report to allow users to quickly assess their event award history to **Diverse Suppliers** and to suppliers within targeted **Supplier Classes**. New columns have been introduced into the report itself to expose these supplier attributes and categories.

Customer Impact

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

USER IMPACT

- New filters for **Diverse Suppliers** and **Supplier Class** have been added to the bottom of the Supplier Award Summary Report search page. This page is accessed by navigating to **Sourcing > Reports > Supplier Award Summary**.

Supplier Award Summary Report

The screenshot shows the search filters for the Supplier Award Summary Report. The filters are arranged in a list:

- Awarded Within [★]: 4 Previous Fiscal Years (dropdown)
- Suppliers: Supplier Name (text input with search icon)
- Invitation Type: Registered Suppliers Manually Invited Suppliers
- Work Groups: Work Group Name (text input with search icon)
- Diverse Suppliers: Type to filter... (text input with search icon)
- Supplier Class: (dropdown)

The 'Diverse Suppliers' and 'Supplier Class' filters are highlighted with a red rectangular box.

- Export files of Supplier Award Summary Reports now contain columns for **Diverse Suppliers** and **Supplier Class** data.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature does not impact integration.

Supplier Impact

- This feature does not impact suppliers.

New Menu Navigation for Sourcing Approvals

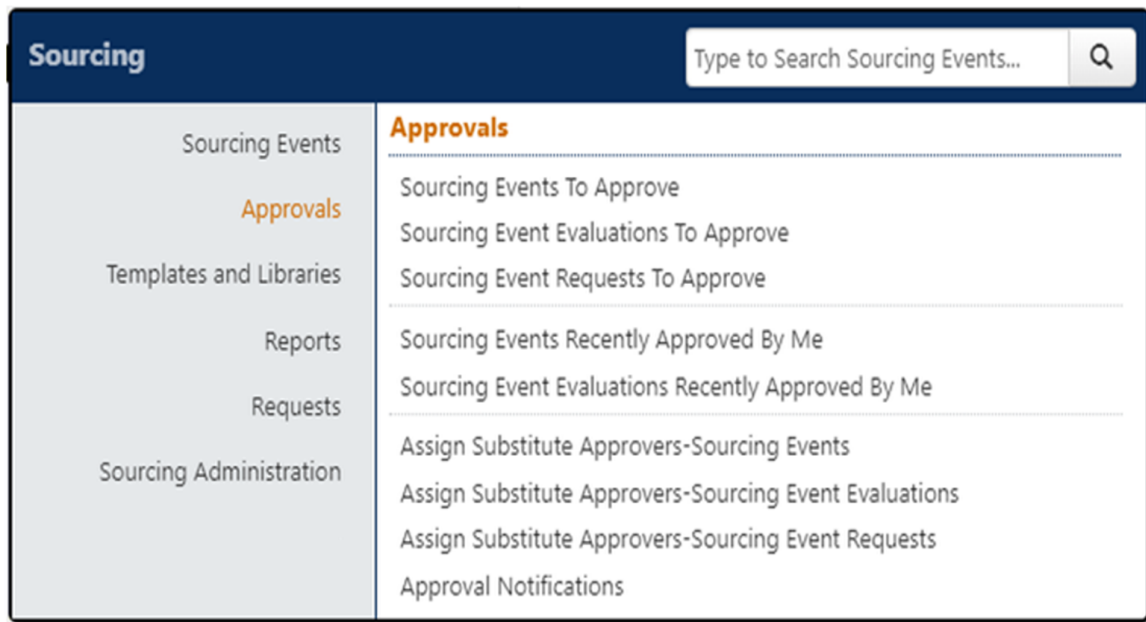
With the 19.3 release, access to approvals has been separated from document search, and each product has its own **Approvals** sub-menu (see **Document Search and Approval Menu Changes** in the General Release Notes for additional information). Specifically, Sourcing customers will now see the approval related actions for Sourcing under the new **Sourcing > Approvals** menu option.

Customer Impact

- Related Solutions: Sourcing
- Feature Activation: This feature is **ON** by default
- New Permissions related to this feature: None
- New Notifications related to this feature: None

USER IMPACT

- A new **Approvals** selection is available under the **Sourcing** menu navigation:



- The user's list of approvals (formerly My Approvals) is now available via:
 - Sourcing Events to Approve
 - Sourcing Event Evaluations to Approve
 - Sourcing Event Requests to Approve

- The user's recent approvals are available via:
 - Sourcing Events Recently Approved By Me
 - Sourcing Event Evaluations Recently Approved By Me
- To assign substitute approvers for a particular workflow, navigate to:
 - Assign Substitute Approvers - Sourcing Events
 - Assign Substitute Approvers - Sourcing Event Evaluations
 - Assign Substitute Approvers - Sourcing Event Requests
- Approval notifications are available as a separate page under the Approvals menu option.

ADMINISTRATOR IMPACT

- This feature does not impact administrators.

INTEGRATION IMPACT

- This feature impacts integration.

Supplier Impact

This feature does not impact suppliers.