

# The Feature Snapshot for 23.1

## UIT Version

The product release provides features that directly impact requisitioners, approvers, administrators, and other system users. These features are listed in summary form in the Feature Snapshot below.

There are three versions of the Feature Snapshot published during a release:

- **Preview** – Contains a list of features planned for the release. It displays only the **Feature Name** and **Related Solutions** columns. It does not display the Impacted Users, Integration Impact, On by Default, Requires Setup, or Contact JAGGAER columns.

Feature Name	Related Solutions
<b>User Interface - Primary Navigation Tab Enhancement</b> An easier navigation from the "Primary Navigation" tabs with only one entry associated.	All

- **UIT/Pre-Production** – Contains a list of features available in your organization's Test environment during the release validation period. The **Impacted Users**, **Integration Impact**, **On by Default**, **Requires Setup**, and **Contact JAGGAER** columns are completed at this time. This document may be updated during the UIT/Pre-Production release.

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<b>User Interface - Primary Navigation Tab Enhancement</b> An easier navigation from the "Primary Navigation" tabs with only one entry associated.	All	End Users		■		

- **Production** – Contains a list of features available in your organization's Production environment on the release date. These are the same features as listed in the UIT/Pre-Production version of the Feature Snapshot, plus any additions or changes made during the release validation period.

# Snapshot Key

There are seven columns in the **Feature Snapshot**. Each of these is explained below:

- **Feature Name** - The feature title matches the heading found in the release notes. For more information on a feature, locate the feature via the table of contents in the release notes for the related solution. The features are listed in the order presented in the document.
- **Related Solutions** - The solution or solutions associated with the enhancement. Use this information to determine if the change impacts your organization. For example, if the change is for Contracts+, only those organizations using this product will be affected by the change.
- **Impacted Users (UIT/Production)** - The user role or roles PRIMARILY affected by the enhancement. For example, if a change is made to the way that a shopper selects a supplier, end user would be listed in this column. For more details, please refer to the feature description.
- **Integration Impact (UIT/Production)** - Indicates if the feature may have impact on integration between JAGGAER Indirect and other third-party systems used by your organization. Examples would be changes to import or export files or features developed expressly for integration. We recommend that administrators review all of these features to determine if there is any integration impact.
- **On by Default (UIT/Production)** - Indicates that the feature is turned on (enabled) by default and no configuration is required to take advantage of the new functionality. This is managed through parameter activation. If the feature is ON by default, it does not require a parameter activation. If the feature is OFF by default, it requires a parameter to be enabled by JAGGAER.
- **Requires Setup (UIT/Production)** - Indicates that some type of setup or configuration is required by administrators or users with the appropriate user rights. In most cases, this is simply enabling one or more configuration options and enabling permissions for the appropriate users.
- **Contact JAGGAER (UIT/Production)** - Indicates that someone at JAGGAER (Customer Support, Customer Success Manager, or Sales) must be involved in order to enable and take advantage of the feature. A new license may be required, workflow changes, etc.

# Feature Snapshot - UIT Version

The following table provides a summary of features available starting March 20, 2023.

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<b>User Interface - Primary Navigation Tab Enhancement</b> An easier navigation from the "Primary Navigation" tabs with only one entry associated.	All	End Users		■		
<b>Addition of a Reference Code to Approval Menus</b> Reference codes are now included on the Mass Approval menu, the My Approvals view, and in a substitute approver's approvals list.	All	End Users		■		
<b>Buyer Management - Data Harmonization</b> Standardization of some fields associated to buyer users' profile.	All	End Users		■		
<b>User Management - Time Zones Enhancements</b> Extension of Time Zones options and addition of Search As You Type functionality.	All	End Users		■		
<b>JAGGAER Compose - Enhancements</b> Includes additional services for process modeling and new form builder options.	All	End Users				■
<b>Ability to Prevent Uploading External Files for Datamart Reports</b> An option to customers to prevent a Datamart report from being generated with an uploaded file.	All (Datamart)	End Users				■

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<b>Expanded RFQ Statuses for Push Service API</b> The Push Service API supports all RFQ statuses.	All	N/A				■
<b>Improved Ability to Manage Access to Recommendation Lists and Alerts</b> New user rights control access to specific types of recommendations and related alerts.	Advise	Admins, End Users			■	
<b>New User Right to Access Rules Configuration</b> A new user right controls access to a site's recommendation rule settings through a new link in the left navigation bar.	Advise	Admins, End Users			■	■
<b>Increased Coverage of Invoicing and eProcurement Data Sources</b> JAGGAER ONE Analytics data sources will now have additional data.	Analytics	End Users		■		
<b>JAGGAER Indirect Dashboards Point at Expanded Data Sources</b> JI Dashboards will benefit from data sources that support a wider range of fields.	Analytics	End Users		■		
<b>Report Search Icon on Analytics Toolbar</b> Users will be able to perform a report search without leaving Analytics workflow.	Analytics	End Users		■		
<b>Favorite Report Icon on Analytics Toolbar</b> Users will be able to favor a report without leaving Analytics workflow.	Analytics	End Users		■		

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>Addition of Stakeholder Analysis and Mapping to Category Management</b></p> <p>Users can define the level of interest and influence of key stakeholders to map the level and frequency of communication regarding a strategy.</p>	Category Management	Admins, End Users		■	■	
<p><b>Strategy Creation Wizard Improvements</b></p> <p>Refinements to the creation wizard include an Additional Information area, the option to include the Analysis area, and the ability to continue in the wizard after selecting a template.</p>	Category Management	Admins, End Users		■	■	
<p><b>Improved Flow of Spend Analytics Data to Category Management</b></p> <p>MVP FEATURE. Early adopters can integrate Spend Management+ data to a category strategy without manual import.</p>	Category Management	Admins, End Users				■
<p><b>Update of Category Analysis PEST to PESTLE Model</b></p> <p>The addition of Legal and Environmental aspects updates the existing PEST model to the more comprehensive PESTLE model.</p>	Category Management	End Users		■		
<p><b>Updated Strategy Spend and Demand Analysis Visualizations</b></p> <p>Several of the pie charts on the Spend tab and Demand Forecast tab have been converted to stacked column and bar charts.</p>	Category Management	End Users		■		

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>Integration of JAGGAER Direct with Category Management</b></p> <p>Users can create new JAGGAER Direct RFQs, link existing RFQs, view RFQ statuses, and unlink RFQs from within the Implementation area of a CTM strategy.</p>	Category Management	End Users				■
<p><b>Split Attachment Rights for Created and Activated Contracts</b></p> <p>Organizations will be able to better control which users are allowed to edit contracts in different stages of completion.</p>	Contracts	Admins, End Users		■		
<p><b>Parameter to Limit Number of Manageable Price List Proposals</b></p> <p>Organizations will be limited to 100 price list proposals per contract to improve contract manageability.</p>	Contracts	End Users, Admins			■	■
<p><b>Updated Editing Process for Amendment Content Area</b></p> <p>Organizations will be able to better control which users are able to edit the Content area of contracts.</p>	Contracts	End Users		■		
<p><b>Improved Activity Filter for Awarding</b></p> <p>The Award user right and activity filter have been adjusted so they no longer control transforming actions.</p>	Program Management	Admins, End Users		■	■	
<p><b>Ability to Copy a Workflow from a UIT Site to a Production Site</b></p> <p>Excel import enables users to copy a UIT site to a production site or to correct existing workflows offline.</p>	Program Management	End Users		■		

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>Ability to Filter on Project Status when Program Manager is Not Activated</b></p> <p>Users can filter by status and add a Status column to their project pages regardless of whether they use workflow in their projects.</p>	Program Management	End Users				■
<p><b>Improvements to the Program Management Process Flow</b></p> <p>Users can link existing contracts to existing projects/tasks and make project/task selection mandatory in Contracts+.</p>	Program Management	Admins, End Users		■	■	
<p><b>Addition of the Project Title to Sourcing+ Emails</b></p> <p>The Project Title field can be added to the subject line of several email alerts sent to project team members.</p>	Program Management	End Users				■
<p><b>Formula Column</b></p> <p>A new formula column in which formulas are defined at column-level and inherited by all items that are added to a Commercial envelope.</p>	Sourcing+	End Users		■		
<p><b>Addition of an Approval Process for Running RFx</b></p> <p>Through RFx Amendment, users can manage a customizable approval process for editing some configuration fields of an RFx in Running status.</p>	Sourcing+	Admins, End Users			■	■
<p><b>Template Section Requirements</b></p> <p>Template sections can be configured as editable or locked so that sections cannot be altered or removed.</p>	Sourcing+	Admins, End Users			■	

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>New User Right for RFQ Transforming Actions</b></p> <p>The Award user right and activity filter have been adjusted so they no longer control transforming actions.</p>	Sourcing+	Admins, End Users			■	
<p><b>Percentage Split Awarding at Item Level</b></p> <p>Buyers can assign a percentage of an awarded quantity to up to 5 suppliers and it is not necessary to manually enter price information.</p>	Sourcing+	End Users		■		
<p><b>Improved User Interface for Offline Awarding</b></p> <p>The Offline Awarding UI has been improved with a new button and simplified navigation.</p>	Sourcing+	End Users		■		
<p><b>Permission to Undo Awarding for RFQs Awarded to Offline Responses</b></p> <p>The Undo Confirm action is now controlled by the pre-existing Undo Awarding Decision user right.</p>	Sourcing+	Admins, End Users			■	
<p><b>Ability to Hide the Option to Create RFx Evaluation Sections</b></p> <p>Customers can remove the option to create Evaluation sections when users add new sections to an RFx envelope.</p>	Sourcing+	End Users				■
<p><b>Improved Evaluation User Interface</b></p> <p>The RFx evaluation pages have been simplified with improved navigation and messaging.</p>	Sourcing+	End Users		■		



Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>New Recipient Selection Options for Messages to Suppliers</b></p> <p>New selection options are available for choosing message recipients based on who accepted the Supplier Agreement Terms.</p>	Sourcing+	End Users		■		
<p><b>Ability to Enable/Disable Digital Signatures in Each Envelope of Running RFx</b></p> <p>JAGGAER GCC can reconfigure suppliers' digital signatures in selected envelopes of Running RFx if no suppliers have published an answer to the RFx.</p>	Sourcing+	End Users		■		■
<p><b>Ability to Disable/Edit Payment Fees in Running RFx</b></p> <p>JAGGAER GCC can disable RFx payment fees and edit the fees in Running RFx.</p>	Sourcing+	End Users		■		■
<p><b>Supplier Verification Required to Publish Response or Submit Changes</b></p> <p>Customers can require suppliers to provide a password or secure token when publishing or editing a submitted RFx response.</p>	Sourcing+	End Users				■
<p><b>Highlighting of Mandatory Information for Bidding Groups</b></p> <p>A message box appears in the bidding group section of the supplier response form to indicate errors or to confirm a correct configuration.</p>	Sourcing+	End Users		■		

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>Improved Process for Sending Notices to the OJEU</b></p> <p>The email process used to send notices to the OJEU has been replaced by a more efficient web service.</p>	Sourcing+	End Users		■		
<p><b>Alignment of Section Limitations Between JAGGAER and the OJEU</b></p> <p>Forms containing Annex V now have a limit of 200 sections.</p>	Sourcing+	End Users		■		
<p><b>Alignment of Character Limitations Between JAGGAER and the FTS</b></p> <p>The II.2.4) Description of the Procurement field is no longer truncated at 4,000 characters.</p>	Sourcing+	End Users		■		
<p><b>Spend Data Available for Category Strategy Consumption</b></p> <p>Spend data will be available in the Category Management area without a manual import. Mappings between Spend and Category Strategy can be created and edited within this new UI area.</p>	Spend Analytics+	Admins, End Users		■		
<p><b>Ability to Search across Classification Rule Groups</b></p> <p>Users can apply a filter to the category tree to view all rules for the desired RuleGroup that currently have Spend associated to that category.</p>	Spend Analytics+	End Users		■		

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>Display Full Export List when Managing Exports</b></p> <p>We have added an initial view that shows a complete list of available exports that can then be filtered by export type.</p>	Spend Analytics+	End Users		■		
<p><b>New GUI for Managing Star Schema Definitions for Standard Content</b></p> <p>Users will be able to configure Standard Content Star Schema Definitions using a standard UI within Spend Analytics+.</p>	Spend Analytics+	End Users		■		
<p><b>Ability to Search by Wildcard Percentage</b></p> <p>Users will be able to search by wildcard percentage rates in Spend Analytics+.</p>	Spend Analytics+	End Users		■		
<p><b>Ability to Block Suppliers From Category Selections</b></p> <p>A new option that allows buyers to search for supplier's email addresses (Primary, Additional and PEC).</p>	Supplier Management+	Admins, End Users		■		
<p><b>Supplier Directory - Ability to Search For Supplier User Email Addresses</b></p> <p>A new option that allows buyers to search for supplier's email addresses (Primary, Additional and PEC).</p>	Supplier Management+	End Users		■		
<p><b>Supplier Directory - Ability to Export Assessment Statuses</b></p> <p>New columns to include Assessment Statuses (S,Q,R) when exporting supplier data via excel.</p>	Supplier Management+	End Users		■		

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>Supplier Profile - Ability to Hide Certificates From Certificates Tab</b></p> <p>A new configuration allowing Admins to decide which attachments should be visible in the "Certificates" tab.</p>	Supplier Management+	Admins, End Users			■	■
<p><b>Supplier Onboarding - Improved Registration User Interface</b></p> <p>Supplier registration and onboarding user interface is enhanced allowing each client to define their own sections.</p>	Supplier Management+	End Users		■		
<p><b>Ability to Configure Conditional Forms From Yes/No Question Type</b></p> <p>The activating condition of the Conditional Forms can now be linked to the "Yes/No" Question Type.</p>	Supplier Management+	Admins		■		
<p><b>Ability to Set Recommended Value For Profile Data Elements</b></p> <p>Administrator can now set a "Recommended Value" for some of the Profile Questions.</p>	Supplier Management+	Admins, End Users			■	
<p><b>New Filters In Assessments Lists</b></p> <p>New filters are added to all Assessments lists of all Assessment Types.</p>	Supplier Management+	End Users		■		
<p><b>Ability to Add Supplier Sub-Users in Assessments</b></p> <p>A new "Contacts" Section added to all Assessment Dimensions allowing buyers to define the list of supplier's sub-users who are recipients of the notifications.</p>	Supplier Management+	End Users		■		

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>Ability to Automatically Assign Category Code As "Designation"</b></p> <p>A new configuration that allows the "Category Code" to be populated as an Assessment Designation.</p>	Supplier Management+	Admins, End Users		■		
<p><b>The "Mark Changes As Reviewed" Relocated in Assessments</b></p> <p>The improvement of "Mark Unseen Changes" option to a more visible/accessible button in Assessment pages.</p>	Supplier Management+	End Users		■		
<p><b>Assessment Manual Creation - Lock Initial Status Defined at AG Level</b></p> <p>A new configuration to block users from modifying the Initial Assessment Status during Assessment creation.</p>	Supplier Management+	Admins, End Users			■	
<p><b>Ability to Translate Step Information in Multiple Languages in Assessments</b></p> <p>The Step Name, Step Instructions and Step Transition Names can be translated in multiple languages.</p>	Supplier Management+	Admins, End Users		■		
<p><b>Assessments - Improved Suppliers Experience When Returning Forms to Buyer</b></p> <p>A simpler navigation and user experience when returning the forms to buyers during the assessment process.</p>	Supplier Management+	End Users (Suppliers)		■		

Feature Name	Related Solutions	Impacted Users	Integration Impact	On by Default	Requires Setup	Contact JAGGAER
<p><b>Assessments - Improved Notifications When Suppliers Returning Forms to Buyer</b></p> <p>A new option allowing the notifications to be sent to PSO only when supplier returned the forms to buyers.</p>	Supplier Management+	Admins, End Users			■	
<p><b>TealBook Data Enrichment Enhancement</b></p> <p>A new automatic process is introduced for data enrichment.</p>	Supplier Management+	End Users				■
<p><b>Ability to Manage Scorecards Massively</b></p> <p>A new option to massively manage Scorecards (i.e. Mass Publish/Terminate/etc.).</p>	Supplier Management+ (Performance Management)	Admins, End Users			■	
<p><b>KPI Creation with Administrative Permission</b></p> <p>A new Scorecard Settings navigation menu under the Administration area allowing the SC configurations in a dedicated area.</p>	Supplier Management+ (Performance Management)	Admins, End Users			■	■
<p><b>Include Supplier Platform/Secondary Status Filters in Scorecard Lists</b></p> <p>Ability to search for Scorecards by supplier "Platform Access" and "Secondary" Statuses.</p>	Supplier Management+ (Performance Management)	End Users		■		
<p><b>Ability to Link and Unlink Development Plans to Contracts</b></p> <p>A new "Link Contract" permission allowing users to link/unlink the plan to existing objects (Contracts, Scorecards).</p>	Supplier Management+ (Development Plan)	Admins, End Users			■	■