MARKETPLACE 16.1 RELEASE/UPGRADE NOTES

EFFECTIVE April 10, 2016

New Features Snapshot

Feature Name/ Description	Impacted Users	Brief Description of Feature
Access Points for Action Items and Notifications Changed from Text to Icons	All Users	The **Action Items** and **Notifications** text are no longer displayed as menu options. However, the text is displayed as hover-text when a user rolls over each icon.
New Options for Setting the Default Home Page	All Users	A default user home page can be set via the existing **Set My Home Page** feature on the user menu or by configuring it in the user profile.
Ability to Modify a Saved Search	All Users	Ability to change the parameters of a saved contract search, document search and supplier search
User Search Updates	All Users	The general look and feel of the both the user search and search results pages has been updated to match other areas of the application.
Miscellaneous Updates to the MarketPlace User Interface	All Users	The intention of these enhancements is to improve the user experience with usability and aesthetic updates.
MarketPlace/MarketPlace No Longer Supported on IE Versions Lower than IE11	All Users	SciQuest supports only version 11 in Internet Explorer.
Introduction of Mobile Shopping	All Users	Mobile users can create and submit shopping carts directly from the app.
Mobile App User Interface Update	All Users	The mobile home screen has been updated to include a clearer menu with iconography and text descriptions for each menu item.

IOS8 No Longer Supported by Mobile App	All Users	SciQuest/MarketPlace will no longer support iOS 8 for the mobile app.
Five Mobile Device Limit per User	All Users	The amount of registered devices allowed per user is five.
Contract UI Enhancements	All Users	The Contract Header and Date and Renewals sections of a contract are displayed in one column in narrow browser windows, or two columns in wide browser windows.
New Contract Search Navigation	All Users	When viewing a contract that has been opened from a set of search results, new search navigation at the top of the page allows users to look through the search results from within a contract without returning to the Search Results page.
Ability to Extend Contract End Dates	Contract Administrators	Allows users with the appropriate permission to extend the end date of contracts.

GENERAL MARKETPLACE ENHANCEMENTS INCLUDING USER INTERFACE UPDATES

This section details enhancements that are available in 16.1 that are general to most products in MarketPlace.

Access Points for Action Items and Notifications Changed from Text to Icons

In MarketPlace, a user's action items and notifications are accessed from the top-right banner on the screen. In 16.1, the options for accessing action items and notifications have been changed from text to icons.

- Action items are accessed by clicking the flag icon

- Notifications are accessed by clicking the bell icon

KEY POINTS OF FEATURE

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- The **Action Items** and **Notifications** text is no longer displayed as menu options. However, the text is displayed in as hover-text when a user rolls over each icon.
- This change has no effect on functionality. Once an icon is clicked, action items and notifications are managed in the same manner as they were prior to 16.1.

New Options for Setting the Default Home Page

The home page is the screen that displays to the user upon login to MarketPlace or when the user clicks the **Home** menu option. End-users are able to select and set their own home pages. For example, a user whose primary responsibility is managing suppliers might set the supplier dashboard as the home page.

Users who do not set their own home page will be taken to their default home page based on their permissions, such as Shopping Home. Previously, there were no additional options for managing the home page and a user's specific page could only be set by the user via an action in the user menu. In 16.1, we have added the ability to set a default home page on the organization and role level. In addition, the default home page for a specific user can be set from within the user profile.

KEY POINTS OF FEATURE

- This feature is **On** by default but is optional for use.
- New Permissions related to this Feature: None.
- The default home page can be set on the organization, role and user level. See the descriptions of each home page type for information about how default home pages are inherited.
- If no default home pages are set, the normal standard for the home page prevails. That is, a specific user's home page will be the highest level page (Shopping Home, AP Dashboard) to which that user has access based on role or individual permissions. This is also the case if a user does not have access to the page set as the default home page.
- When configuring a home page at any level, the user or administrator can only view and select from pages they have permission to access.

- **User-Level Default Home Page**
- A default user home page can be set via the existing **Set My Home Page** feature on the user menu or by configuring it in the user profile. When a user sets the home page with the Set My Home Page feature, that page is automatically populated in the user profile.
- To set a user-specific home page, open the user profile and go to **User Profile and Preferences Language, Time Zone and Display Settings**. The **Home Page** field displays the current default home page. Set a new default page for the role by overriding the current default page.
- For additional information about configuring this user setting, please see Updating Language, Time Zone and Display Settings in the User Profile in the **Site Basics Handbook** or the online searchable help.

Ability to Modify a Saved Search

Saved searches help save time by allowing you to quickly access common searches without having to enter search criteria every time. There may be instances when a user needs to add or remove filters in an existing saved search. Previously, existing saved searches could not be modified. A new saved search had to be created to incorporate the updated filters. This was causing issues when the saved searches were used in other areas of the application, such as in a dashboard widget. The widget needed to be edited to access the new saved search. In 16.1, we have added the ability to change the parameters of a saved contract search, document search and supplier search.
Note: The option to create a new saved search is still available.

KEY POINTS OF FEATURE

- This feature is **On** by default but is optional for use.

New Permissions related to this Feature: None.

This feature is available for contract, document and supplier saved searches.

- The button to save changes to the search is located in the **Filtered By** section of the search results page generated from a saved search. The **Save Changes** button replaces the **Save Search** button that previously displayed. **Note**: If you are conducting new search the **Save Search** button still displays.
  - To modify the current search with new filters, add the filters and then click the **Save Changes** button.
  - To create a new search with the new filters, add the filters and click the drop-down arrow on the Save Changes button. Select **Save New Search**.
- Modified saved searches are noted by the word ***modified*** displayed with the saved search name.
- Users can modify their personal saved searches. Shared saved searches can be modified by users with appropriate permissions (**Administer Shared Favorites or Import/Export** or **Administer Shared Favorites**). If a user does not have permission to administer saved searches, the option to save changes is not available.

User Search Updates

In 16.1, several updates to the user interface and behavior of the user search have been made. These changes are intended to enhance the look and feel of the user search, as well as improve usability. The updates have no impact on functionality.

KEY POINTS OF FEATURE

- This feature is **On** by default.
- New Permissions related to this Feature: None.
- The general look and feel of the both the user search and search results pages has been updated to match other areas of the application.
- Changes applicable to the **User Search** page.
- Previously, the input fields (First Name, Last Name, etc.) on the main user search page were in a single column. In 16.1, the fields are in two side-by-side columns.
- The Business Unit search input field has been changed from a drop-down field to a type-ahead field that displays options based on what is typed in the field. Note: This change is also applicable to the Business Unit fields for pending users and all user pop-ups.
- If you input a name with a space (e.g. Mary Jane) in the First Name or Last Name field, the search will return all users with either name (Mary or Jane).
- Changes applicable in the search results.
- If the user has more than three roles, instead of displaying all of the roles, a link indicating the number of roles displays. Users can click on the link to view the roles.
- All user import and export actions have been consolidated in a single drop-down menu.

Miscellaneous Updates to the MarketPlace User Interface
In 16.1, SciQuest has made several minor enhancements to the user interface. The intention of these enhancements is to improve the user experience with usability and aesthetic updates. The updates have no effect on application functionality.

KEY POINTS OF FEATURE
- This feature is **On** by default.
- New Permissions related to this Feature: None.
- **Required Fields** - Previously some required fields were indicated by an asterisk icon *. As of 16.1, some of the required fields that were previously indicated by the asterisk are now indicated with the star icon. **Note**: In some areas of the application required fields are still indicated by * or by the field name displaying in bold.
- **Links** - Throughout the application, you may notice some differences in the way links behave when you hover over them (i.e. what previously was an arrow on hover is now a hand icon or the color of the link changes on hover). These changes are expected and were updated to improve visibility of the links.
- **Quick Search** - When the quick search input is clicked, the search filter and input field expand to fill the banner.
- **Quick Search and Menu Search Results** - Users are now able to use the up and down keys to scroll through search results from these two types of searches.
- **Role Tree (Roles Management)** - When the **Show Roles** option is selected, the role tree will remains displayed. Previously, the role tree would be hidden when a role was selected. The option to hide the role tree is available.
- **Saved Search Name on Contract and Document Search Results Pages** - As of 16.1, when a user runs a saved contract or document search, the name of the saved search displays on the search results page in the **Search Details** section. If a user modifies the saved search within the same search session, the saved search name will display with "modified" displayed in parentheses to the right of the name.
- **Cart Message** - The message displayed when an item has been successfully added to a cart has been updated.

MarketPlace No Longer Supported on IE Versions Lower than IE11
Effective January 2016 Microsoft supports only browser version IE11. In keeping with SciQuest policy to support only browsers that are supported by the vendor, SciQuest supports only browser version IE11.

Per Microsoft, please note that running older versions of Internet Explorer may expose you to potential security and other risks, as described in the following Microsoft IE support communication:

https://www.microsoft.com/en-us/WindowsForBusiness/End-of-IE-support

Introduction of Mobile Shopping

In 16.1, we are introducing the capability to shop via the mobile app. Mobile users can create and submit shopping carts directly from the app. The following shopping capabilities are available:

Hosted Catalog Shopping - Shoppers can purchase items from their organization's hosted catalogs. Bio Rad, DePuy Synthes Sales Inc, Cardinal Health Medical and Lab Products and UH General Stores.

- **Shopping from Favorites** - Shoppers who can save and access favorites in the desktop application are able to access their favorites folders in the mobile app. Items can be selected from the folders (both personal and shared) for purchase in the mobile app. This includes items from hosted catalogs, punch-out items, non-catalog items and completed forms.

When shopping, users have access to their active cart as well as draft carts that were created in the desktop application. They also have the ability to create new carts. The checkout process is similar to express checkout on the desktop application.

KEY POINTS OF FEATURE

- This feature is **Off** by default but can be enabled upon request.
- New Permissions related to this Feature: **Mobile Shopping**. This is a general permission that allows the user to shop via mobile, but is NOT turned on by default. Users must request that this permission be added to their profiles. The actual shopping tasks a user can perform depends on other shopping permissions
- To access mobile shopping, click the **Shop** option on the main mobile app menu to open the shopping interface.
- **Hosted Catalog Searching** - Users with the appropriate permissions can search and select hosted catalog items for purchase.
- The Searching menu on the shopping screen allows the user to choose a vertical to search or the Everything option can be selected to search from all items in the hosted catalog. Note: For users who have access to favorites the Searching menu will always default to Favorites.
- Users can enter terms in the search field below the Searching menu and execute the search. The number of search results displays to the right of the search field.
- Search results can be filtered. To filter, click and select from the filter options.
- Search results can be sorted. To sort, click and select from the sort options. Note: If there are more than 200 results, they cannot be sorted by price. Those options will be disabled.
- The mobile app supports the live price feature. If live price is active for a hosted catalog in the desktop application it will also be available in the mobile app.

- **Choosing Item Favorites** - Users with appropriate permissions can select items for purchase from their personal or shared favorites folders. This includes catalog items, non-catalog items, *completed* forms and punchout items.
- The Searching menu should be set to Favorites. Note: This is the default selection for users with permission to access favorites. The available Favorites folders display.
- Users can select from favorites by browsing through the folders or by executing a search from the search field.
- **Adding an Item to a Cart** - Clicking on an item from the search results or favorites folder opens a screen with the item details. An **Add to Cart** option is available. Clicking this option will add the item to the active cart.

- Clicking takes the user to the shopping cart where the user can review and update the items and also check out.
- The **Your Cart** option on the home screen gives the user access to all active, draft and assigned carts.

Mobile App User Interface Update

In 16.1, mobile app users will notice updates to the user interface. These changes do not have any effect on functionality, but are being included for aesthetic purposes and to improve ease-of-use. The app look and feel has been updated to reflect SciQuest's new branding. The home screen and approvals screen have been enhanced for easier and clearer navigation. Users who have access to documents will notice that the document details screens have been enhanced for easier viewing.

KEY POINTS OF FEATURE

- This feature is On by default.
- New Permissions related to this Feature: None.
- The mobile home screen has been updated to include a clearer menu with iconography and text descriptions for each menu item. The home screen, as well as all screens in the app, have been updated to reflect SciQuest's new branding.
- Users with permission to shop via the mobile app will notice two additional menu items; Shop and Your Cart. For additional information about the mobile shopping feature, available as of release 16.1, please see Introduction of Mobile Shopping.
- The Approvals screen has several UI updates including:
  - When in list view, approval documents that include an attachment display icon.
  - Approval documents with line items for multiple suppliers are organized by supplier.
  - UI styling has been updated.
  - The ability to scroll through approval documents (previous and next) has been added.

IOS8 No Longer Supported by Mobile App

As of release 16.1, SciQuest will no longer support iOS 8 for the mobile app. The updated app for 16.1 will be compatible only to iOS 9 and up. Mobile devices with iOS 8 will not be able to get the latest update. For additional information about supported devices please see the **Supported Browsers/Devices** document on the Product Release Library (http://library.sciquest.com/resources).

Five Mobile Device Limit per User

As of release 16.1, we have limited the amount of registered devices allowed per user to five.

Contract UI Enhancements

The following changes have been made to the UI:

- The Contract Header, and Dates and Renewals sections of contracts have been updated so that the fields are displayed in one column in narrow browser windows, or two columns in wide browser windows.
- Search filters on the **Contracts Dashboard** have moved to a table format so they are aligned and will stack above each other in narrow browser windows. The search filter labels now appear above the search filter rather than to the left.
- A new Contracts widget is available for configurable dashboards. The Contract Summary Widget displays the same information that is displayed on the Contracts Dashboard, and it can now be added to an organization or personal dashboard. See New Contract Summary Widget for Organization Dashboards for more information.

KEY POINTS OF FEATURE

- This feature is On by default.
- New Permissions related to this Feature: None
- The Contract Header and Date and Renewals sections of a contract are displayed in one   column in narrow browser windows, or two columns in wide browser windows.

New Contract Search Navigation

When viewing a contract that has been opened from a set of search results, new search navigation at the top of the page allows users to look through the search results from within a contract without returning to the Search Results page.

KEY POINTS OF FEATURE

- This feature is On by default.
- New Permissions related to this Feature: None
- On a contract that has been opened from Contract Search, click the results link (# of # Results)   at the top of the page to view contracts from the search

results, listed by contract number. Click on a contract number to open the contract. Use the < and > arrows to page through the contract headers of contracts on the list.

Ability to Extend Contract End Dates

A new feature in 16.1 allows users with the appropriate permission to extend the end date of contracts. This allows contracts to remain in effect while a renewal, amendment or a new contract is being created. For contract managers, it reduces exposure to lapsing contracts across their portfolio and provides business continuity.

On extended contracts, a note next to the contract status indicates that a contract has been extended, and the status of the contract will change if appropriate. For example, the status of expired contracts will change to *Executed: In Effect*.

A new field on Advanced Search provides the option to search for extended contracts. An Extension Count field in the contract search results indicates the number of times a contract has been extended.

Contracts can also be extended using the CSV Import/Export, and XML Import/Export features. A new report identifies contracts that are about to expire. See Reports for Contracts That Require Attention for more information.

KEY POINTS OF FEATURE

- This feature is On by default.
- New Permissions related to this Feature: Extend Contract End Date (Permissions Settings > Contracts > Extend Contract End Date).
- The ability to extend a contract assumes that the original contract has language that allows the end date to be extended at any time.
- This option is available for contracts, amendments and renewals in the following statuses:
- Executed: In Effect
- Executed: Future
- Expired
- There is no limit to how long a contract may extended, but the extended end date must be beyond the original end date.
- Users cannot change a contract with an end date to one that does not have an end date (i.e., an evergreen contract), nor extend the end date on a contract that has been superseded.
- Users with the appropriate permission may extend the end date of contracts by checking out the contract for internal edits, and then selecting the Extend Expiration Date button that is displayed underneath the End Date field on the contract header. They can also create amendments to expired contracts. No new or special permission is required to create an amendment to an expired contract.
- When extending contracts that have renewals remaining but not yet created, the next renewal will not be auto-created until the extended end date is

reached. Once the renewal reaches Executed: In Effect status it will supersede the extended contract.

- When extending contracts that have renewals or amendments in progress but they have not reached Executed: In Effect status, a warning appears in the following situations to identify potential gaps or overlaps between extended contracts and their renewals or amendments:
- If the extended end date is later than the start date of the renewal or amendment. This identifies an overlap, where the renewal or amendment in progress is scheduled to begin before the extended contract ends.
- If the extended end date is earlier than the start date of the renewal or amendment. This identifies a gap between the end date of the extended contract and the start date of the renewal or amendment contract.
- An error appears in the following situations and the user will not be able to proceed:
- If the extended end date is later than the end date of a renewal or amendment. This identifies situations where the original contract would be in effect longer than the renewal or amendment and the dates must be revised.
- If the extended end date is prior to the original end date. This identifies situations where the extended contract would be shorter than the original contract and the dates must be revised.
- If the contract has a status of Expired and a supplier selected as a primary or additional second party on the contract has been deleted from the system.
- Extended contracts do not go through workflow for approval.
- If an expired contract has been extended, its contract status will be moved from Expired to Executed: In Effect. The status of contracts that are already in Executed: In Effect or Executed: Future status will not change.
- A note next to the contract status at the top of the contract page indicates that a contract has been extended.
- When searching for extended contracts:
- The Contract Term Extended field on Advanced Search allows users to search for extended contracts. Select Yes to include extended contracts in the search results (including amendments and renewals). Select No if extended contracts should not be included in the search results (default setting).
- The Extension Count field in contract search results indicates the number of times a contract has been extended.
- Extending a contract through CSV or XML Import/Export:
- Important! If an organization uses contract import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.
- Contracts can be extended through CSV or XML Import/Export as long as the user performing the import or export has the Extend Contract End Date permission and access to the contract.
- Users can change the contract end date to a date in the past when importing contracts via XML or CSV Import/Export. The system will issue a warning.