MARKETPLACE 16.3 RELEASE/UPGRADE NOTES

IN PRODUCTION STARTING NOVEMBER 13, 2016

New Features Snapshot

The following table provides a summary of features available starting November 13, 2016.

Feature Name/ Description	Impacted Users	Brief Description of Feature
Main Navigation Menu Item Updates	All	The name of menu options displays along with the icon. The titles some menu options
New Advanced Search Setting for Document Search and Contract Search	All	Advanced search functionality allows you to search for items based on related users.
Navigation and Save Buttons Display without Scrolling	All	Users can navigate through the wizard and save their progress using buttons on each configuration screen.
Contract Dashboard Renamed to Contract Home	All CLM Products	Contract Dashboard has been renamed to **Contract Home**. The page is in the same location; **Contracts > Contract > Contract Home**.
Usability Evaluation	All	No more than once per month, a user may be invited to answer a few simple questions about a task they just completed.
New Supplier Search Widget	All	This widget allows users to perform a **simple** supplier search directly from the dashboard.
Update to Approvals Widget	All	This widget allows users to perform a **simple** supplier search directly from the dashboard.

Contract Navigation and Save Buttons Display without Scrolling	All	Contract pages will be updated so that the Previous, Next, and Save Progress buttons are always displayed at the bottom of the screen no matter where the user is on the page.
Updates to Contract Advanced Search	All	A new option will be added to the Contract Manager search filter on Contract Advanced Search.

GENERAL ENHANCEMENTS

This section details general MarketPlace enhancements that will be available in the 16.3 release.

Main Navigation Menu Item Updates

In release 16.3, updates have been made to the way the main menu items (located along the left side of the interface) are displayed. Previously, the menu options were displayed only as icons. As of the 16.3 release, the name of the menu option displays along with the icon for users with browser resolutions set to 1440 pixels or wider. The titles of several menu options have also be changed. These changes include the following:

- The **Orders & Documents** menu option has been renamed to **Documents**.
- The **Catalogs and Contracts** menu option has been renamed to **Contracts**.
- The **Supplier Management** menu option has been renamed to **Suppliers**.
- The **Site Administration** menu option has been renamed to **Administer**.
- The **Site Configuration** menu option has been renamed to **Setup**.

KEY POINTS OF FEATURE

- This feature is **ON** by default.
- New Permissions related to this Feature: None
- The main menu option text displays only when a user's browser resolution is set to 1440 pixels wide or higher. If the browser resolution is smaller than 1440 pixels, only the icon displays.
- The main menu item name changes are reflected in the text that displays with the icons on the left navigation menu. In addition, they are reflected anywhere the navigation path displays in the application, such as the top of each screen.
- Main menu options can still be renamed in field management. If an organization previously made changes to any of the main menu options, those updates have not been overwritten by the updated menu option names.
- There is an icon on the bottom of the menu that allows users to hide the labels.

New Advanced Search Setting for Document Search and Contract Search

Advanced search functionality allows you to search for items based on related users. For document search, this includes "participants" or anyone who touched a document and is in the audit trail for that document. For contract search, this includes specifying one or more contract managers. Previously, participants or contract managers had to be manually selected for the search. In 16.3, we have added a setting that will indicate that the items returned should be those for which the user searching is the

participant (document search) or contract manager (contract search). The primary purpose of this feature update is to allow a search to be saved with this criteria. The saved search can be used on a dashboard in a saved search widget. When the saved search is run from the widget, the results always display documents or contracts related to the user who is searching from the dashboard.

KEY POINTS OF FEATURE

- The updated search option allows advanced document and contract searches to search for documents or contracts for the current user. The ability to pick users for both searches is still available.
- The **Participant** search field is available on advanced document search for requisitions, purchase orders, invoices, receipts, sales orders and sourcing events. In addition, the option is available when searching all documents. Previously, this was simply a text entry field in which the user names could be searched for or entered. In 16.3, there are three options to choose from.
- **Any** - This option returns documents for all participants.
- **Me** - This option returns documents on which the current user is a participant.
- **Pick** - This option allows the user to select participants for the search. When this option is selected a field displays below in which the users can be searched for or entered.

Navigation and Save Buttons Display without Scrolling

Several features in the application use wizard-like interfaces for setup and configuration. Some examples include form request template setup, submitting form requests, contract setup and more. Users can navigate through the wizard and save their progress using buttons on each configuration screen. Previously, if

the configuration screen was longer than the available screen size, the user was required to scroll down to access the buttons. As of 16.3, the buttons display, or "stick" in the available screen space. This eliminates the need to scroll all the way down the screen to access the buttons.

KEY POINTS OF FEATURE

- Buttons display at the bottom of the active screen. If the buttons are displayed within a rectangular background this indicates that the page is scrollable. If the page is not scrollable, or if you have reached the end of the page, the buttons simply display on the screen in the same way they were previously displayed.

Usability Evaluation

Because SciQuest (makers of MarketPlace) is a software-as-a-service company, they are always measuring product usage to inform future improvements. Starting in 16.3, they are honing their focus on measuring usability. The approach is lightweight and unobtrusive. No more than once per month, a user may be invited to answer a few simple questions about a task they just completed. Participation is anonymous, fast, and optional. It takes less than 1 minute to complete, and when dismissed will not appear again for at least a month.

They piloted the approach with several hundred end-users and received an impressive 60% response rate. The insights gleaned will improve SciQuest's product and future development. An example question is, "I find the checkout process easy to use," which a user might be asked immediately after checking out.

Update to the Approvals Widget

The **My Approvals** widget displays pending approvals that are located in approval folders to which the user viewing the dashboard is assigned. In 16.3, the widget has been updated to allow users to group approvals by approval folder.

KEY POINTS OF FEATURE

- A new **Group By Folder** field is available on the widget. Selecting *Yes* groups the approvals by folder. Selecting *No* means the approval will display in a list format.
- When grouped by folder, the following information is displayed for each folder:
    - **Folder** - The name of the approval folder. Clicking on the folder name opens the folder with all approvals displaying.
    - **Total** - The total number of approvals in the approval folder. Clicking on the total opens the folder with all approvals displaying.
    - **Assigned to Me** - The total number of approvals in the approval folder assigned to the user who is viewing the dashboard. Clicking on the number opens the approval folder with only those approvals displaying.
    - **Other** - The total number of approvals in the approval folder assigned to users other than the user who is viewing the dashboard. Clicking on the number opens the approval folder with only those approvals displaying.
    - **None** - The total number of approvals in the approval folder that are not assigned to any user. Clicking on the number opens the approval folder with only those approvals displaying.
- For additional information about this widget, please see General Widgets in the online help or **Site Basics Handbook**.

Contracts Menu Name Changes

As part of multiple menu name changes, the **Catalogs and Contracts** menu item will be renamed to **Contracts**. In addition, the **Contracts Dashboard** menu item will be renamed to **Contracts Home** to correspond with naming conventions in other areas of the system.

Contract Navigation and Save Buttons Display without Scrolling

Contract pages will be updated so that the Previous, Next, and Save Progress buttons are always displayed at the bottom of the screen no matter where the user is on the page.

This update is part of a change that affects other areas of the application. See Navigation and Save Buttons Display without Scrolling for more information.

Updates to Contract Advanced Search

A new option will be added to the Contract Manager search filter on Contract Advanced Search. If this option is selected, the search results will only display contracts that have the person who is currently logged into the application listed as a contract manager. This will also affect **Saved Search: Contracts** widgets added to contract dashboards - if the option is selected on the saved search used for the widget, the system will display contracts for whoever is logged into the system.

New search filters have also been added to the eProcurement section allowing users to search for contracts based on contract codes.

KEY POINTS OF FEATURE

- On the **Search Contracts - Advanced** page, new settings on **Contract Manager** search filter determine which contracts are displayed in the search results. Choose one of the following radio buttons:
    - **Any** - This is the default setting. Selecting this option does not filter for contract managers on the contract.
    - **Me** - Select to display only those contracts where **the person currently logged into the system** is a contract manager. This means contract managers will only see their own contracts in the search results.
    - **Pick...** - Select to display only those contracts that have the individuals selected in the Contract Manager search filter listed as contract manager. If this option is selected, an additional field is displayed where you can search for and select users by using the type ahead or clicking the search icon.

If the **Me** setting on the Contract Manager filter is used in a saved search, and the saved search is added as a **Saved Search: Contracts** widget to a contracts

dashboard, the results displayed in the widget will change based on who is logged into the system, so that a contract manager will only see their own contracts. For example, Contract Manager A will only see contracts that have Contract Manager A listed as a contract manager. Contract Manager B will only see contracts that have Contract Manager B listed as contract manager.

Note: This option is also be available for Document Search. See New Advanced Search Setting for Document Search and Contract Search for more information.