MarketPlace 10.3 Upgrade Guide

November 2010

MarketPlace is being upgraded to version 10.3. Upgrades happen three times a year – in March, July, and November. For this upgrade, the **MarketPlace Production site will be unavailable beginning Friday, November 5th, 2010, 10 p.m. ET. Production will be back up at approximately Noon ET on Sunday, November 7th, 2010**.

SHOPPING CART AND CHECKOUT ENHANCEMENTS

With this MarketPlace release, **SIGNIFICANT** changes are being made to the cart and checkout process. These changes primarily include:

- **A New Simple Cart Option:** SciQuest has designed a new cart for a more user-friendly and intuitive shopping experience.
- **An Improved Checkout:** Checkout has been improved to walk users through a more streamlined process. The checkout changes are not optional and will be visible to all end users with 10.3.

SIMPLE SHOPPING CART

With the 10.3 release, UMDNJ users will now see a new "Simple Shopping Cart" which is designed to give users an experience more similar to online shopping by ***separating the cart from the checkout process***.

The Simple Cart display offers the following:

- Cart items are grouped by supplier. The supplier heading includes the available supplier contact information and supplier logo, if available.
- The item list includes a link to the product description, Part Number, Manufacturer Information and Contract Information, if applicable. Also, if images are available from the supplier, they will display for cart items.

Users will have the following actions available on the Simple Cart; available actions are based on the user's permissions:

- The ability to search for additional items is available at the top of the shopping cart via the "***Continue Shopping***" link. This link will direct users back to the home/shop page.
- Users can add Non-Catalog items at the supplier header level as well as the top of the cart via the "***Add Non-Catalog Item***" button.
- A multi-select "***Perform an Action***" function is available. The available drop-down actions are:
    - Add to Favorites
    - Remove Selected Items
    - Move to Another Cart
    - Change Supplier
    - Add to Draft Cart or Pending PR/PO
    - Add to PO Revision.

- A “Select All” box is available to the right of the “Perform an Action” drop-down. Users can also select the specific line items or supplier group checkboxes to perform an action.
- A line level drop down called “***More Actions***” is available. The actions are dependent upon the item, supplier and organizational preferences. The potential actions are:
    - Move to Another Cart
    - Add to Draft Cart or Pending PR/PO
- Two additional line-level buttons have been added:
    - Add to Favorites
    - Remove (remove this item)
- If a selected action is not available for a specific line, a notification message will display to the user.

Updates to the Simple Cart items and fields can be made in three ways:

- “Have you made changes?” Update button at the top and bottom of the cart page.
- Update button under the item quantity.
- On “Proceed to checkout”. If you click “Place Order” that will also update your cart changes.

To keep details on the Simple Cart minimal, custom fields such as accounting codes will only be available in checkout and not on the cart. Standard actions and fields are available on the Simple Cart to allow users to edit items (e.g. Commodity Codes).

IMPROVED CHECKOUT PROCESS

This upgrade includes user guided checkout navigation and enhanced error handling. ***The new checkout navigation will replace the current navigation provided on the current cart and checkout screens***. The new checkout navigation guides users through the required sections of the requisition document. An improved visually guided navigation replaces the process flow diagram currently available.

- The navigation allows the user to quickly identify where they are in the checkout process and to visually see the required areas to complete or update in order to checkout.
- The active step of the checkout process is highlighted with the darker color of the organization’s color scheme and the corresponding requisition section will also display.

Other Enhancements to the Checkout Process

- **Users are not required to visit each step of the checkout process**. If they choose, they can manage the entire error list on the Final Review page. The navigation icons will turn green once all of the required sections have been addressed. The place order button will now be activated.
- Hover help is visible for the checkout steps. The hover help can be managed and customized to meet your organization’s needs.
- Improved error handing allows users to more intuitively and easily fix required fields:
- The yellow error and warning boxes have been updated with the ability to click the error and take the required action to update the field and resolve the error.
- The user has the option to complete the necessary information either in the top yellow message box or in the corresponding section of the requisition document. Once the user completes the necessary field(s) and clears the error list for the section, a message box will direct the user to the next section or the final review page.

- The requisition has been updated with edit buttons versus edit text links. The buttons will assist users with being able to easily identify the ability to edit a section.
- **A new link called "*show monetary calculations*" is available in the account split edit overlay that displays a calculated monetary value for each % value entered by the user**. This can be useful in determining the appropriate % to apply. The calculation is for informational purposes only to assist in assigning a value for % of Price or % of Qty splits.
- **An Attachments tab has been added to the Requisition Document. All attachments to the requisition document are now tracked on this tab**. A number of features are also included:
    - **The number of attachments added to the Requisition will display in parenthesis after the tab heading**.
    - Attributes are also tracked for each attachment- the attachment name, type of attachment (file), Location (document or line), Visibility (internal or external), user who attached the file and the timestamp for the file. If a file is attached from a comment, a hyperlink to the comment is available.
    - Users can sort the attachments based on the available attributes.
    - For line level attachments, a hover box will display if the item name is too long for the field display.
- **The Comments tab will now track the number of comments added to the Requisition**. The number will display in parenthesis after the tab heading.
- **The Order confirmation page has been updated with a printer friendly quick view of the requisition summary**.
- Users will also be able to view the PR approvals process flow from the order confirmation page.

GENERAL ENHANCEMENTS

INCREASED FONT SIZE THROUGHOUT THE MARKETPLACE APPLICATION

A new font size selector is available in the main menu bar for users to quickly increase or decrease the font size of the application. With this feature, we are also increasing the default font size of the application for all users. Users can select from three font sizes for a personal setting that the application will remember for subsequent logins.

- Three font size configurations are available – small, medium, and large. Small is the font size in the application today, medium will be the default font size after this upgrade.
- Font size configuration is available to users via a widget on the right side of the application navigation bar. If a user sets their preferred font size using this widget, the font size will remain until the user chooses to change it.

IMPROVED ERROR HANDLING

This release includes improved error handling through the entire application. The message display is more intuitive to the end user. The warnings, errors and informational messages are accompanied by an icon to indicate the type of message provided.

- Errors will display with a yellow box highlighting the required field and an icon. Errors will be displayed in the top message dialog box for both the Simple and Advanced Carts as well as during the checkout process.
- Warning messages will be identified by an icon. Warning messages will display in the top message dialog box for both the Simple and Advanced Carts as well as during the checkout process. At the field level, the field will be indicated by the icon and a black box border with no highlight color.
- Informational messages will display with an icon next to the field containing information that may be of importance to the user.

APPROVERS NOW HAVE A REJECTION ACTION

Approvers now have the ability to reject all lines of a requisition in one single action rather than line by line. This feature provides approvers a streamlined process for rejecting requisitions and storing the reason for the rejection in the document history.

A Reject Requisition option is now an option in the Available Actions dropdown for Approvers. Approvals tab > requisition tab > Select a requisition from the list >Available Actions > Reject Requisition.

- Selecting Reject Requisition will launch a pop-up asking the user to add a comment to the requisition regarding the reason for the rejection. The note will be added to the document history.
- Users must have the Approve/Reject permission to have this new action available in the Available Actions dropdown.

VENDOR DISPLAY IN REQUISITION SEARCH RESULTS

When viewing Requisition search results, the vendor will now be displayed , even if there are multiple vendors on a single requisition. This list will also be available when viewing requisition approvals.

- The first three suppliers on the requisition will be visible in the new Supplier column. If there are more than three suppliers on the requisition, then a **"more…"** link will appear and upon clicking this link a small overlay containing all suppliers on the requisition will be listed.
- The "screen" export of the search results will also include the Supplier column, with multiple suppliers separated by a "|" delimiter.

PREVIEW REQUISITION AND PURCHASE ORDER IN SEARCH RESULTS AND APPROVALS

When viewing search results or approval folders for Requisitions and Purchase Orders, the user will be able to see a quick "preview" of the document without having to leave the search results screen. The preview will contain document-specific information that will help the user identify the required requisition or purchase order.

- When viewing a list of requisitions or purchase orders in history search results or in a list of approvals, a **small icon will appear next to each document. Clicking on this icon will show an overlay that displays information about that document**, including supplier and line data.

- The overlay will be the printable version of the Summary tab on the document. This means that all of the header and line data that appears on the document will be visible in the overlay.
- When viewing the overlay in the approvals tab, if the document is assigned to the user, it can be approved directly from the overlay without having to open the document.
- Viewing the document details will not change the search results, or take the user away from the search results screen to find the document they are looking for before opening it.

REMOVE COPY OF TRANSACTION DATE WHEN USER COPIES REQUISITION TO NEW CART

When a user copies a requisition into a new cart using the "Copy to Cart" functionality, the default behavior is to copy all elements of the requisition into the new cart, including Transaction Date. Beginning with this release, Transaction Date will NOT be copied over when a user uses the "Copy to Cart" feature.

- Other than Trans. Date, the existing Copy to Cart functionality will not be affected.
- This will not affect the behavior of "adding" lines from a requisition to an existing cart. In that case, only the item data gets added to the cart and all other data (including line-level custom fields) does not get copied.

Note: Because the system administrators have elected NOT to copy the Transaction Date field, this field will be blank in the new cart. Once the user starts the checkout process, the Transaction Date will get automatically populated to the current date when the cart is submitted.

COMMODITY CODE DESCRIPTION

Users will now be able to select the commodity code and associated description in the drop-down box during the Cart and checkout process. The description for the commodity code has been appended to the numeric value in order to allow users to easily identify the proper commodity code to associate to the item.