MarketPlace 11.3 Release/Upgrade Notes

GENERAL ENHANCEMENTS

COSMETIC IMPROVEMENTS TO USER INTERFACE

Summary of Feature:

With the 11.3 release, users will be provided a more visually appealing user interface. The goals of these changes are two-fold:

- To provide an interface where the "important" information is easily determined by the end user and is aesthetically pleasing.
- To provide an application that is usable by individuals with disabilities. The guidelines for this initiative are outlined in Section 508 of the US Federal Rehabilitation Act of 1973 (29 U.S.C. 794d).

Some of the changes include updated alignment of title bars (moved from center to left aligned) and modifications to the gradient interface so that the shading "helps" the user focus more easily on information presented. Additional changes are listed below.

Some of the changes for 11.3 include:

- Changes to the gradient interface, which uses different color depth, or "shadowing" on the screens. This change will be seamless to end users, but should help in terms of visibility of information. No changes to color themes are required. All color themes will be observed/used.
- Title bars and sub-titles, which were previously center aligned, will be left aligned. Left alignment provides a better user experience since users read left to right. Examples of this change can be found in tables where the column headings were previously centered.
- Page navigation links are replaced by new "previous" and "next" buttons. Currently black triangles are used to indicate previous and next.
- Tab sets are used in areas of the application such as the user profile, supplier profile, and many more places. The tab order for each of these tab sets has changed to be compliant with 508 regulations.
- Tabbing through screens in the application. The tab order for many of the screens used in the application has been updated. These changes provide a more natural use of the fields and information on the screen. With these changes, users now have the option to use their mouse, or if they prefer, perform data entry through tabbing. These changes are also related to 508 compliance.
- Potential changes related to how field help and access to field management (administrator task) is achieved on a per field basis. This change will most likely include a small icon that represents "help is here" as opposed to the underline and link found currently.

- Potential changes around identifying required elements on the screen. Today, bold is used, but not consistently throughout the application. A more consistent solution is being developed.
- The **User Search popup** window will be modified with 11.3. This screen is used to search for approvers, substitute approvers, used in history searches, etc. The popup window will continue to perform the same task, but the interface will be modified slightly.

IMPORTANT: The list above is not a comprehensive list of changes related to the user interface.

NEW SEARCH FOR REQUISITIONS & PURCHASE ORDERS

Summary of Feature:

With 11.3, searching for requisitions and purchase orders in the application will be a more intuitive process. The improvements with 11.3 will make searching for items easier and the search results will be presented more efficiently (quickly). Users can expect to get a much more simplified user experience while at the same time taking advantage of the improved processing time of the search. Users will be presented with a single text box for input when searching for their documents. Users can enter in a requisition number, purchase order number, catalog number, description, requisition name, supplier name, or contract number. Upon doing so, the application will search for the data that was entered and return all documents where that data was found. This eliminates the user having to select a specific tab when searching and gives them the benefit of a very simple search without the confusing filters. This is similar to how the simple search in product search functions.

Key points of Feature:

The new document search only applies to requisitions and purchase orders for the 11.3 release. In future releases, expect similar enhancements for sales orders and receipts.

How it will work:

There are two ways to use Document Search: Simple Search and Advanced Search (similar concepts to product search options).

- For Simple Search there are three main selections. These include:
  1. What type of documents do you want to search? Select to search on a specific document type (Requisition, Purchase Order, or Invoice) or ALL documents. The default is to search across all documents.
  2. What are you looking for? The following information can be entered in the search box:
  3. Requisition Number, Purchase Order Number, Contract Number, Catalog Number, Requisition Name, and Supplier Name.
  4. What dates do you care about? Users can now select from relative date ranges for the query. They can choose by number of days, calendar span, fiscal year, or other, which allows custom date ranges. Examples of relative ranges include last 30 days, last 60 days, Last Year, etc.
- Advanced Search offers users the option to enter very specific, detailed search criteria. Advanced search offers users the ability to pre-define your search criteria. You can perform an advanced search across multiple documents or select a specific document type. Users should use advance search when they know up front the criteria they are looking for. An example would be Purchase Orders for Supplier X that are still pending for index Y within the last 30 days.

What are documents?

In MarketPlace, document is a term to describe the different purchasing entities. Prior to electronic systems, these entities typically represented a separate piece of paper, or document. Documents include purchase requisitions, purchase orders, and receipts and sales orders (via Supplies Manager).

- From 11.3 until 12.1 – purchase requisitions and purchase orders can be searched using the Document Search. After 12.1, ALL document types can be searched.

Efficiency Improvements!

The behind the scenes processes uses for Document Search are different than those used with History Search. Because of this, document search will allow users to experience a more efficient search process. Users will not notice a lag time when they are running searches and exports at the same time as other users within their organization. Because of the type of search logic that is in place users are free to run searches simultaneously with other users and as often as they like.

What will happen to the History tab?

Enabling the Document Search enables the Document Search tab, but it does NOT disable the History tab. That being said, SciQuest recommends using the document search tab for all of your searches that do not involve sales orders or receipts.

When 12.1 is released into production in March 2012, the existing History tab will no longer be available and the document search tab will become the primary way for searching for your documents.

Important Features of Document Search:

- **Relative Date Ranges** are available when performing a document search. After the search results display, you can filter your search results by a different date range. Date range selection can happen four different ways:
  1. Day: Last 7 days, Last 30 days, Last 60 days, Last 90 days, Last 120 days, Yesterday, Today, Last Week, This Week.
  2. Calendar: Month To Date, Last Month, Year To Date, Previous Year.
  3. Fiscal: Year To Date, Previous Year. This will look at the fiscal year settings for the University. It will take the starting month of our fiscal year and use that to calculate the date ranges for Fiscal.
  4. Other: All Dates, Custom Date.
- **Filter Options after performing your initial document search:** With Document Search, post-search filters are available that allow the user to define additional criteria for the search results. For example, if you perform a search for POs, you can narrow your results by a specific department. The filter options, which display on the left side of the search results, function similar to those in Product Search. These post filters look and act just like the post filters that are available with product search. Post filtering allows the user to further narrow down their results.
- **Searches can be saved and executed at any time.** Saved searches use relevant date information (instead of static dates like history searches use). For example, if you save a search for all POs for the last 7 days, it will show exactly that, no matter what date it is executed. Saved searches are accessed through the Document Search tab, and are saved by name and description. NOTE: Currently, searches are only saved on a "per user" basis and cannot be shared or saved globally.
- **Searching by Custom Fields.** Users can search by custom fields (index, account codes, etc). ***Searching across documents by custom fields is available as part of the advanced search.*** Additionally, users can now choose a span of values or a "starts with" option for custom fields.
- **Exporting Search Results:** As with History, data exports are available after a search is performed. The user is provided the same options as with History: transaction export, screen export, or full export. NOTE: Results for an "All Documents" search is not available. The export button is located within the selected filters section of your search results.

DOCUMENTS OPTION IN THE QUICK SEARCH

Summary of Feature:

Quick Search allows users to quickly locate various types of information in MarketPlace. This keyword box, which is located in the upper right-hand corner of the application, allows users to search for products, suppliers, and more. With 11.3 the quick search can also be used to search for documents (requisitions and purchase orders). A new option has been added to the drop down called Documents. This option allows users to search across all documents (Requisitions & Purchase Orders). The Document option in Quick Search provides an efficient way to locate information. The other document-type options are still available (PR No, PO No). Having Documents available in the quick search will allow a quick way to access document search. The other document specific options such as PR No, PO No will still be there. The new option is good if a user had a specific number but was unsure if that number was a PR number or a PO number. The user would then be presented with any requisitions, purchase orders, or invoices that contain that number.

- The quick search will remember your last option so if you go in and pick Documents then the next time you access the quick search Documents will be selected by default.
- The following fields are available as search terms for Documents: Requisition Number, Purchase Order Number, Contract Number, Catalog Number, Requisition Name, and Supplier Name.
- When you use the new Documents option, you will be taken to Document search and presented with a list of search results.

SEARCH FOR DOCUMENTS BY WORKFLOW STEP

Summary of Feature:

With the new Document Search functionality, you can filter results based on current workflow step. For example, you can view all pending requisitions in the IT approval step. If you have requisitions that are pending approval you will be able to perform a requisition search then select the specific workflow step. This will present you with a view of all pending requisitions that are in that particular workflow step.

Key points of Feature:

- To search by workflow step, you must select a specific type of document to search OR filter on a specific document type (PR, PO).
- Advanced Dynamic Workflow steps will also be included in the workflow step post-results filter. If you wish to review documents that are pending for a specific advanced dynamic workflow step, you can search for your documents and then filter by that specific ADW step.
- Selecting multiple workflow steps is available. If you wish to see pending documents for multiple workflow steps you can select the multi-select icon and choose as may workflow steps as you wish in order to review.

DATE RANGES FOR MY REQUISITONS & MY PURCHASE ORDERS

Summary of Feature:

The **My Requisitions** and **My Purchase Orders** sub-tabs are frequently used to view orders that the system user has placed. By default, requisitions and orders from the last 90 days display, and the user cannot specify a date range. With 11.3, users will have the ability to specify a date range, enabling the user to view requisitions and orders that they placed during the specific time frame.

Key points of Feature:

- When using **My Requisitions** or **My Purchase Orders**, users can enter in a custom date range to further refine their results.
- Users are not required to enter a date range. They can still view the information as they do today without making further refinements.
- If no date range is specified, then My Requisitions & My Purchase Orders will display orders from the last 90 days.

"NEXT" &"PREVIOUS" OPTION WHEN VIEWING REQUISITIONS & PURCHASE ORDERS IN QUICK VIEW

Summary of Feature:

Searches are commonly performed for requisitions and purchase orders. When the user begins looking at the purchasing document, oftentimes they realize they would like to look at the next or previous document. For 11.3, we are adding functionality that allows the user to quickly move from document to document. This can be helpful when comparing information, helping the user quickly get to the "right" document, and more. The next and previous options are commonly found in applications, and users should find this functionality easy to use and familiar. This change allows users to view the subsequent document in search results without having to go back and click on the different number from the search results.

Key points of Feature:

- When viewing a document (PR, PO) the user will have the ability to see the next and previous document in the search results.
- A link will be present enabling them to simply click the link and view the next in line or previous document.

WORKFLOW AND APPROVAL ENHANCEMENTS

REMEMBER USER SORTING ON APPROVAL SCREENS

Summary of Feature:

This feature benefits approvers who work from the approvals navigation tab. With 11.3, the sort order for documents will be remembered when an approver leaves the screen and returns. Users with a preference can sort documents by a specific column and have that order used each time they visit the screen. The sort preference affects all workflow queues that the user has access to. For example, if the approver is responsible for approving orders for three different account codes, he might choose to sort them by requisitioner. The next time he logs in to approve an order, this sort preference is remembered.

Key points of Feature:

- Approvers will be able to click on any ***sortable*** column and the sort will be remembered each time the user visits the page.

ASSIGN SUBSTITUTE NOW AVAILABLE FOR ALL APPROVAL FOLDERS

Summary of Feature:

Approvers oftentimes assign a substitute approver when they are on vacation or leave. A new feature available with 11.3 allows an approver to assign a substitute and end substitution for all folders at one time rather than individually for each folder.

Key points of Feature:

- Users that have permission to **Assign Substitute Approver** will be able to select a button that will allow them to assign a substitute to all folders of a given type to one approver. This will apply to all folders regardless of whether there are documents pending approval in them.
- A new link will also be available to end substitution for all re-assigned folders when an approver is ready to take their folders back.

CONTRACT ENHANCEMENTS

CONTRACT BUDGET MANAGEMENT AND RESTRICTIONS

Summary of Feature:

With the 11.3 release, organizations will be able to manage contract and budget restrictions in the cart as well as in workflow. Contract owners will be able to configure and enforce budget maximums for blanket orders. They will also be able to manage document restrictions by contract including PR maximum spend, PR minimum spend and line quantity maximums. Contract Manager can choose to simply warn the user in the cart when specified requirements are not met, or an error can prevent cart submission. In addition, organizations using PR workflow can choose to route documents to workflow for all contract restrictions as well as warn approvers or prohibit document approval in a workflow step.

Key points of Feature:

- This feature is **OFF** (disabled) by default, but can be enabled, as described below.
- Contract administrators will be able to enforce contract budget maximums as well as PR restrictions for contracts.
- Cart can display warning or restrict check out for shopper
- Restrictions include:

    - Contract budget maximum
    - Minimum contract spend per PR
    - Maximum contract spend per PR
    - Maximum line item quantity per PR
- PR workflow can be routed on:
    - Actual contract spend (or percentage)
    - Minimum contract spend per PR not met
    - Maximum contract spend per PR exceeded