13.3 Release Notes
for SciQuest Products

November 1, 2013 – Final Version
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Welcome

The **13.3 SciQuest Product Release** will be available in the production environment starting November 3, 2013. The release includes features related the SaaS version of the **following SciQuest products**:

- **Shopping Products:** Spend Director, Order Manager, and Requisition Manager
- **Accounts Payable Products:** Accounts Payable Director and Accounts Payable Express (formerly Settlement Manager)
- **Contract Products:** Contract Director
  - Contract management in Spend Director is included in the Shopping and Inventory Products section of this document.
  - Features related to the deployed version of Contract Director are not covered in this document.
- **Inventory Products:** Supplies Manager
- **Spend Analysis Products:** Spend Radar

**Objectives**

The purpose of the **Product Release Notes** is to prepare administrators for the upcoming release from a scheduling and application standpoint. There are two main goals of this document.

- To provide a list of **key dates** associated with the upcoming release, including release availability in both the test and production environment.
- To provide an overview of **key features** that are planned and committed for delivery with the 13.3 release.

As a reminder, please refer to the Product Release Library at any time for updates and additional information regarding the release:

[http://library.scquest.com](http://library.scquest.com)

**Understanding the Format**

The document is grouped first by product. Within each product group, the features in this document are organized by related enhancements.

**Document Key**

**Each documented feature contains three sections:**

- A description and overview of the feature.
- **Impact data** – This section is used to indicate the following:
  - **Products Affected:** The products that are potentially affected by the change are listed. This is a helpful tool to determine whether or not the change applies to your organization.
  - **Role-Based Impact:** This section indicates “who” in the organization the change affects, and how great the impact potentially is to that group of people.
  - **Integration Impact:** This section indicates whether or not there is an impact to one or more integration points, and the level of impact. If the change affects an integration point, it is recommended that you discuss the potential changes with your IT staff.
• **Key Points of the Feature** – This section is used to indicate if there are any new permissions associated with the feature, whether the feature is enabled by default, where to go for more information, and any additional information that is key to understanding/implementing the feature.

**Identification of Features**

In an effort to help you find the information you need quickly, you may notice that some of the feature descriptions contain icons to the left of the title. These icons are designed to help you identify recent changes for features, features added after the initial list of features was published, and features added based on customer requests.

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Features</td>
<td><img src="image" alt="New" /></td>
<td>If a feature was added AFTER the Preview Release Notes were published (approximately 10 weeks prior to the release), the New icon is used to identify these.</td>
</tr>
<tr>
<td>Updated Features</td>
<td><img src="image" alt="Up" /></td>
<td>If a feature changes significantly after it is initially introduced, the Up (Updated) icon is used to identify these.</td>
</tr>
<tr>
<td>Feature Request from Customer</td>
<td><img src="image" alt="FR" /></td>
<td>Features indicated with the FR (Feature Request) icon are a direct result of ideas submitted and prioritized by customers on the SciQuest Idea Community.</td>
</tr>
</tbody>
</table>
13.3 Scheduling

To help prepare our customers for the upcoming 13.3 release, a list of KEY DATES is provided below. Please review the information and mark your calendars accordingly.

Key Dates

The table below provides a list of key dates for the SciQuest 13.3 Product Release.

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Date</th>
<th>Description and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Promotion: Test Sites unavailable</td>
<td>Beginning October 11, 2013 8am ET</td>
<td>The 13.3 release will be promoted to the Test (usertest) environment from Friday, October 11, 2013 8am ET through Sunday, October 13, 2013 12pm ET. An email will be sent out when the promotion is complete.</td>
</tr>
<tr>
<td>Release Validation in Test environment</td>
<td>October 13, 2013 – October 27, 2013 (Three Weeks)</td>
<td>Three weeks prior to General Availability, release enhancements can be viewed and tested in the Test environment. Draft documentation is provided at this time (Release Notes and Handbooks). <strong>Recommendation:</strong> It is recommended that clients perform testing of functionality critical to your business as soon as possible during this period – ideally during the first week. If any issues are encountered, this will allow time for application adjustments and re-testing.</td>
</tr>
<tr>
<td>Production Unavailable (Begin Release Upgrade)</td>
<td>Beginning November 1, 2013, 9pm ET through Sun, November 3, 2013, 12pm ET</td>
<td>The 13.3 release will be promoted to the Production environment from Friday, November 1, 2013 9pm ET through Sunday, November 3, 2013 12pm ET. An email will be sent out when the promotion is complete.</td>
</tr>
<tr>
<td>Release available on Production Sites</td>
<td><strong>Sunday, November 3, 2013</strong></td>
<td>This date indicates when the features and functionality associated with 13.3 will be available on customer Production sites. Final documentation provided at this time (Release Notes and Handbooks).</td>
</tr>
</tbody>
</table>
**Training Opportunities**

To help prepare you for the 13.3 release, various educational opportunities are provided by SciQuest. Each of these webinar sessions is detailed below.

---

**NOTE: Additional webinars and training events will be conducted prior to the release. Once the details of these events are finalized, the information will be available from the Product Release Library.**

<table>
<thead>
<tr>
<th>Webinar Name</th>
<th>Date and Time</th>
<th>Description and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Preview Webinar (Approximately two months prior to release)</td>
<td>Thursday, September 12, 2013 9 a.m. ET 2 p.m. ET</td>
<td>The primary goal of this webinar is to introduce customers to planned functionality <strong>across all products</strong> for the upcoming release. Additionally, SciQuest will review the product calendar and events related to the upcoming release. Recommended Audience: System Administrators</td>
</tr>
<tr>
<td>Release Overview Webinar – Shopping Products (13.3 is available in the Test environment prior to this webinar)</td>
<td>Wednesday, October 16, 2013 9 a.m. ET 2 p.m. ET</td>
<td>This webinar provides an overview of new features for the following products: Spend Director, Requisition Manager, Order Manager, and Supplies Manager. Recommended Audience: System Administrators and Trainers</td>
</tr>
<tr>
<td>Release Overview Webinar – AP Products (13.3 is available in the Test environment prior to this webinar)</td>
<td>Friday, October 18, 2013 1 p.m. ET</td>
<td>This webinar provides an overview of the features specific to AP Director and AP Express (formerly Settlement Manager). Recommended Audience: System Administrators and Trainers</td>
</tr>
</tbody>
</table>
The Feature Snapshot for 13.3

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

Snapshot Key

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

- **Feature name/description** – The feature title matches the heading found in the Preview Release Notes (this document). For more information on the feature, locate the feature via the table of contents. The features are listed in the order presented in the document.

- **Related products** – The product or products associated with the enhancement. Use this information to determine if the change impacts your organization. For example, if the change is for AP Director, only those organizations using this product will be affected by the change.

- **Impacted roles** – 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, such as level of impact (low, medium, or high), please refer to the feature description.

- **On by Default** – Indicates that the feature is turned on (enabled) by default and no configuration is required to take advantage of the new functionality. To determine if the feature can be disabled, please refer to the feature description.

- **Requires some setup** – Indicates that some type of setup or configuration is required. In most cases, this is simply enabling one or more configuration options and enabling permissions for the appropriate users.

- **Contact SQ to enable** – Indicates that someone at SciQuest (Customer Support, Client Partner, or Sales) must be involved in order to take advantage of the feature. A new license may be required, workflow changes, etc.

Feature Snapshot

The following table provides a summary of features available starting November 3, 2013, along with an overview of who the change impacts, and how it is enabled in the system.

<table>
<thead>
<tr>
<th>Feature name</th>
<th>Related products</th>
<th>Impacted users</th>
<th>Setup / Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Organization Message</strong></td>
<td>All Shopping and AP Products, Supplies</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td><strong>Configurations</strong></td>
<td>Manager</td>
<td>Admins</td>
<td></td>
</tr>
<tr>
<td><strong>Ability to Override User</strong></td>
<td>All Shopping and AP Products, Supplies</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td><strong>Interface Settings</strong></td>
<td>Manager</td>
<td>Admins</td>
<td></td>
</tr>
<tr>
<td><strong>Visual Enhancements in the</strong></td>
<td>All Shopping and AP Products, Supplies</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td><strong>Phoenix Interface</strong></td>
<td>Manager</td>
<td>Admins</td>
<td></td>
</tr>
<tr>
<td>Feature name</td>
<td>Related products</td>
<td>Impacted users</td>
<td>Setup / Visibility</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>----------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Remove Comments from Purchasing Documents</td>
<td>Requisition Manager, Order Manager, All AP Products</td>
<td>End Users, Admins</td>
<td>[✓]</td>
</tr>
<tr>
<td>Updated Automated Workflow Steps</td>
<td>All Shopping and AP Products</td>
<td>End Users, Admins</td>
<td>[✓]</td>
</tr>
<tr>
<td>Updated Product Documentation and Training Videos</td>
<td>All Shopping and AP Products, Supplies Manager</td>
<td>End Users, Admins</td>
<td>[✓]</td>
</tr>
<tr>
<td>Streamlined Supplier Search</td>
<td>All Shopping and AP Products</td>
<td>Admins</td>
<td>[✓]</td>
</tr>
<tr>
<td>Promotional Text Configuration Field Moved</td>
<td>All Shopping and AP Products</td>
<td>Admins</td>
<td>[✓]</td>
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<td>Internal and External Notes Available in Express Checkout</td>
<td>Spend Director</td>
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<td>Order Manager, Requisition Manager</td>
<td>End Users, Admins</td>
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<td>Order Manager</td>
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<td>All Shopping and AP Products</td>
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</tr>
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<td>All Shopping and AP Products</td>
<td>End Users Admins</td>
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<td>Supplier Profile History Enhanced</td>
<td>AP Director</td>
<td>Admins</td>
<td>✅</td>
</tr>
</tbody>
</table>
Shopping Products

The features in this section are organized by the following enhancements:

- **General Enhancements** – This section focuses on general product enhancements including new functionality related to Phoenix interface.
- **Spend Director Enhancements** – This section focuses on enhancements related to Spend Director.
- **Order Manager Enhancements** – This section focuses on enhancements related to Order Manager.
- **Reporting Enhancements** – This section focuses on enhancements related to reporting.
- **Supplier Management Enhancements** – This section focuses on enhancements related to supplier management from Spend Director, including key updates to the Supplier Profile.

General Enhancements

**Organization Message Configurations**

Organizations that share information with their users by using the Organization Message feature now have the ability to turn the message on or off for individual home pages, dashboards, and the bookmarks menu. Additionally, users who are using the enhanced interface (referred to in the application as the Phoenix interface) have the ability to access the organization message through the Bookmarks menu.

**Impact**

- Products Affected: All Shopping and Accounts Payable Products, Supplies Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**

- This feature is ON (enabled) by default and can be disabled by an administrator.
- New Permissions related to this Feature: None
- Administrators can configure the visibility of the organization message for each individual homepage, dashboard, or the bookmarks menu. (Such as Shopping Home, Admin Dashboard, etc.). A new section is displayed on the Message Board page that is **Show Message in the Following Locations**, with all applicable home pages and dashboards listed for your organization.
- An option in the **Show Message in the Following Locations** is to show a link to the Organization Message in the Bookmarks menu for all users. This option is enabled by default, and is only applicable to users in the Phoenix interface.
  - When a user selects the Organization Message link from the Bookmarks menu, the organization message appears as an overlay in the current window.
  - **Note:** For the 13.3 release, enabling the Phoenix interface continues to be optional. By March 2014, we anticipate all customers will have moved to the new interface.
- Administrators with permission to edit the organization message can continue to update the message by accessing the **Update Message** link on the Organization Message. The link is shown
when the Organization Message link is selected from the Bookmarks menu, from anywhere the Organization Message is displayed, or by navigating directly to Site Configuration > Site Appearance and Behavior > Organization Message And Site Logos > Message Board.

- A new option is available on the organization message to Notify Users of Change to Organization Message.
  - This option shows for the Organization default message, and for any business unit messages that are different than the default message.
  - When this option is selected, the appropriate active users will receive a notification in the Notification section of the top right banner. If selected for a Business Unit message, active users in that Business Unit will see the notification. If selected for the Default message, all active users viewing that message will receive the notification – including any Business Unit users who are viewing the default message.
  - With the 13.3 release, this option is OFF by default.

- For additional information about organization message setup, please refer to the online help or the Configuration Handbook for Shopping, Accounts Payable and Inventory Products.

### Ability to Override User Interface settings

While the enhanced (Phoenix) interface is still optional, organizations can configure the interface style (Classic vs. Phoenix) at the organization level. Previously, a setting existed that allowed users to override the org-level interface style. As a result, many organizations have some users utilizing Classic interface and other users utilizing the enhanced (Phoenix) interface. In 13.3, this setting has been updated with options that give organizations more control over which interface its users are using. This is especially helpful to organizations who wish to transition to the enhanced interface and want to ensure all users are utilizing it.

**Impact**

- Products Affected: All Shopping and Accounts Payable products, Supplies Manager
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: None

**Key points of Feature**

- This feature is ON (enabled) by default but must be configured for use.
- New Permissions related to this Feature: None
- Previously, the organization-level Allow users to change their own interface style setting could be checked or unchecked, simply allowing, or disallowing, users to select their preferred interface style. In the 13.3, this setting has been changed to a dropdown with three options:
  - **Users can change their own Interface style** – This option is the previous checkmark setting that allows users to modify their Interface style in the user profile.
  - **Only user administrators can change Interface style** – When this option is selected, only administrators can change a user’s interface style from the style configured on the organization level. Individual users do not have the ability to change the style.
  - **No one can change Interface style** – When this new option is selected, neither users nor administrators can change the interface style. All users utilize the style configured on the org level.
With 13.3, any organizations with the current **Allow users to change their own interface style** ENABLED will have the setting **Users can change their own Interface style** selected. Any organizations with **Allow users to change their own interface style** DISABLED will have the **Only user administrators can change Interface style** selected.

For additional information about changing the user interface style, please refer to the online help or the **Configuration Handbook for Shopping, Accounts Payable and Inventory Products**.

**Visual Enhancements in the Phoenix Interface**

In addition to a new interface, the Phoenix interface strives to provide an enhanced user experience. As part of 13.3, some features have a new look and feel when accessed through the Phoenix interface.

**Impact**

- **Products Affected:** All Shopping and AP Products, Supplies Manager
- **End User Impact:** Low
- **Admin User Impact:** Low
- **Integration Impact:** None

**Key points of Feature**

- This feature is ON (enabled) by default and cannot be disabled.
  - These updated features are only available for users using the new Phoenix interface.
- **New Permissions related to this Feature:** None
- **Features that have an improved look and feel:**
  - **Breadcrumbs** - Visible at the top of every page in the application, users will now see the breadcrumbs in their own bar. The functionality of the breadcrumbs has not changed.
  - **Date picker** - **Express Checkout** includes a new calendar icon and updated date picker.
  - **Image Selector** – Organizations will have a more user-friendly way to manage their organization logos and login page images. Below each image type is a manage button drop-down that allows you to select an image, upload an image, or stop using an image. Once an option has been selected, the user is taken to a new image selector, which allows them to perform the chosen action.

**Remove Comments from Purchasing Documents**

Previously, erroneous and/or outdated comments could not be removed from purchasing documents. In 13.3, we are including the option to delete these comments.

**Impact**

- **Products Affected:** Requisition Manager, Order Manager, All AP Products
- **End User Impact:** Medium
- **Admin User Impact:** **High**
- **Integration Impact:** None

**Key points of Feature**

- This feature is OFF by default and can be turned on for users or roles using two new permissions.
- **New Permissions related to this Feature:** **Remove My Comments** and **Remove All Comments**
• Users with the **Remove All Comments** permission can remove any comment in the application. Users with the **Remove My Comments** permission can only remove comments they created.

• A **Remove** link is displayed on the comment. When this link is selected the comment will be deleted. **Note:** The link will display only to users with the permissions described above.

• The entry for the comment on the history tab will be replaced with a note explaining the comment has been removed and the user who removed it will be listed.

• Any attachment to the comment will also be removed.

• For additional information about purchasing document comments please refer to the online help or the **Shopping Handbook**.

### Updated Automated Workflow Steps

An automated workflow step is a workflow step that the system performs for you. This type of workflow step doesn’t require someone to physically go in and approve or reject the document. Examples of automated steps include PR, PO, and Invoice Exports. With 13.3, we have made a change to how these steps appear on the approvals tab of documents. Prior to 13.3, when an automated step completed the system would show that it was “approved”. That has been changed to now say “completed”. This change helps users to better understand that an automated process has completed instead of the user assuming that because the automated process finished it was approved.

Another form of automation within workflow is a notification step. A notification step is simply a workflow step that generates an email or an action item (Phoenix UI only). When a notification step sends out the email or action item, it will now say “notification sent” when looking at the workflow step on the approvals tab. Prior to 13.3, it simply said “notification”. By changing this to “notification sent” we’re helping users understand that the workflow step performed an action of sending a notification automatically.

### Impact

- **Products Affected:** All Shopping and Accounts Payable Products
- **End User Impact:** Low
- **Admin User Impact:** Low
- **Integration Impact:** None

### Key points of Feature

- This feature is ON (enabled) by default and can’t be turned off.
- New Permissions related to this Feature: None
- All automated steps within workflow will reflect these two new changes with 13.3. Nothing has to be done by anyone in order to turn these on or configure them.
- This change is to the interface only, no functionality with automated steps have been changed.
- This new change will help users better understand what is occurring with an automated or notification step.

### Updated Product Documentation and Training Videos

In a continued effort to provide clear and concise documentation for organization users and administrators, we have made several updates to product documentation and online help.

### Impact

- **Products Affected:** All Shopping and AP Products, Supplies Manager
- **End User Impact:** Medium
Admin User Impact: Medium
Integration Impact: None

Key points of Feature

- This feature is ON (enabled) by default and cannot be disabled.
- New Permissions related to this Feature: None

In 13.2, all product documentation was updated to reflect the Enhanced user interface. In 13.3, images are now included each time a navigation path is presented to help your users identify main menu items quickly. We hope this will help you to make an easier transition to the new interface as we approach Release 14.1. **Note:** Documents reflecting Classic Interface continue to be available in the Solutions Knowledgebase. However, those documents only contain features up to and including Release 13.1.

The SpendDirector Enterprise product contains the contract management feature. In an effort have documentation available in an area where it makes the most sense to a target user, the former **Contract Manager Handbook** has been absorbed into the **Shopping Handbook** and the **Administration Handbook: Shopping, Accounts Payable and Inventory**.

- Topics related to the management and administration of contracts can now be found in the **Managing Contract Purchasing** section of the **Administration Handbook: Shopping, Accounts Payable and Inventory**.
- Topics related to shopping from contracts can now be found in **Selecting Items for Purchase > Contract Items** section of the **Shopping Handbook**.

Application “Quick Guides” are being updated to reflect the Enhanced interface and features from previous releases. Guides that have been updated include:

- For customers who utilize the content management features in the Hosted Catalog Content Administration pages, the **Item Administration Import Guide** has been updated. This guide can be accessed by navigating to: **Site Configuration > Hosted Catalog and Ordering Configuration > Hosted Catalog Content Administration**, and select the **item buyer data import** tab.
- For customers who manage users via import, the **Detailed User Import Instructions** has been updated. Access this document by navigating to: **Site Administration > Manage Users > Import Users From a File**, and select the **Detailed User Import** tab.
- For customers and suppliers who import sales invoices, the **CSV Import Guide** has been updated. This guide is only available to customers who manage a catalog and process invoices against this catalog. This guide is primarily utilized by suppliers who participate in the SciQuest Supplier Network. For customers with this feature, this guide is found by navigating to: **Orders & Documents > Sales Invoices > Import Invoices**, on the **Sales Invoice Import** page.
- For customers who manage workflow rules related to Departments, the **CSV Workflow Rule Import/Export for Departments** has been updated. This guide can be accessed by navigating to: **Site Configuration > Organization Structure and Settings > Configure Departments and Positions > Departments/Positions Admin > CSV Workflow Rule Import/Export** tab.
- For customers managing workflow rules for custom fields, the **Dynamic Workflow Rules for Custom Fields Import/Export guide** has been updated. Access this guide by navigating to: **Site Configuration > Configure Documents > Manage Custom Fields > Import/Export > CSV Workflow Rule Import/Export** tab.
- For customers managing workflow rules for commodity codes, the **Dynamic Workflow Rules Import Guide for Commodity Code Values** has been updated. Navigate to this
For customers managing workflow rules based on form types, the CSV Workflow Rule Import/Export for Form Type has been updated. This document is accessed by navigating to Site Administration > Shopping Settings > Manage Form Types > CSV Workflow Rule Import/Export tab.

For customers utilizing custom fields, the Custom Fields Import/Export guide has been updated. Access this guide by navigating to Site Configuration > Configure Documents > Manage Custom Fields > Import/Export > CSV Values Import/Export tab.

For customers who utilize category mapping, the Category Mapping Import Guide has been updated. You may access this document by navigating to Site Configuration > Hosted Catalog and Ordering Configuration > Manage Commodity Codes and Mapping > Category Map Import/Export tab.

For customers utilizing Advanced Dynamic Workflow for Requisitions, Purchase Orders, Invoices or Sales Orders, the Dynamic Workflow Rules Import/Export for each document type has been updated. You may access the document by navigating to Site Configuration > (Document) Workflow Setup > Advanced Dynamic Workflow tab > Rules Import/Export tab.

Several Training Videos have been updated on the Product Release Library to reflect the enhanced interface. Training videos can be accessed at http://library.sciquest.com by clicking on the Training Videos link. The table below lists the training videos that have been updated:

<table>
<thead>
<tr>
<th>Category</th>
<th>Sub-Category</th>
<th>Updated Videos</th>
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</table>
| Basics and Shopping         | Navigation 101/Profile Setup        | • Navigation 101  
• Changing Password  
• Profile: Updating Basic Information  
• Profile: Updating Addresses  
• Profile: Custom Field Setup |
|                             | Finding Products and Services       | • Product Search  
• Purchasing Showcase  
• Product Comparison  
• Using Quick Order  
• Shopping from Punch-outs  
• Entering Non-catalog Items  
• Live Price Shopping  
• Level-2 Punchout Shopping |
| Common User Tasks           | Favorites and more...               | • Assigning a Cart  
• Document Search  
• Document Search: Dave and Export |
| Reporting                   |                                     | • Spend Dashboard Report – New for 13.3  
• Early Payment Analysis Reports – New for 13.3 |
| Approval                    |                                     | • Forward Documents for Approval  
• Assign a Substitute Approver  
• Reviewing Assigned Carts  
• Approvals  
• Returning and Rejections |
<table>
<thead>
<tr>
<th>Administrative</th>
<th>User Management</th>
<th>Viewing Previously Reviewed Documents</th>
</tr>
</thead>
<tbody>
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<td>Consortium</td>
<td>• Permissions</td>
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<td>• Role Maintenance</td>
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<td>• Consortium Management and Reporting</td>
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<td>• Associating Suppliers &amp; Publishing</td>
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<td>• Subscribing to Consortium Suppliers</td>
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<td>and Contracts</td>
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Supplier Management Enhancements

Streamlined Supplier Search

The Supplier Management Supplier Search provides a central entry point for administrators to access suppliers. Originally, the search criteria and search results displayed on the same page which forced the administrator to scroll down to view their search results. In 13.3, we streamlined the search experience by separating the supplier search criteria from the search results. The search results appear at the top of the page with the ability to quickly edit the search or start a new search. This functionality is consistent with our existing Document Search feature.

Impact

- Products Affected: All Shopping and AP Products
- End User Impact: None
- Admin User Impact: Low
- Integration Impact: None

Key points of Feature

- This feature is ON (enabled) by default and cannot be turned off.
- New Permissions related to this Feature: None.
- Administrators can easily access their supplier search results without having to scroll down past the search criteria.
- Users are able to modify their current search by clicking Edit Search. The original search criteria will be maintained for convenience. To conduct a new search administrators select Start New Search. The search will reset to the default settings.
- Users still have the ability to refine their search results using the Refine Supplier Search feature. With the 13.3 release, the refine search options display in alphabetical order (they were previously displayed in random order).
- Select All capabilities have been added to the Diversity Classification multi-select popup to provide the option to select all Federal and/or State Diversity Classifications.
- The individual Export Selected Suppliers and Export All Search Results buttons have been converted to a single Available Actions dropdown menu on the search results page.
- For AP Director customers, each supplier’s current Registration Status displays on the search results page.
- For additional information about supplier search please refer to the online help or the Administrator Handbook for Shopping, Accounts Payable and Inventory Products.

Promotional Text Configuration Field Moved

In 13.2, we re-organized the supplier profile to make it easier for administrators to find the supplier data they need. We added the Configuration tab to store specific Shopping, Accounts Payable, and Product Search Configuration settings. In 13.3 release, the Promotional Text (text displayed in the product search results to promote the supplier) configuration field has been moved to the Configuration tab.

Impact

- Products Affected: All Shopping and AP Products, Supplies Manager
- End User Impact: None
• Admin User Impact: Low
• Integration Impact: None

Key points of Feature
• This feature is ON (enabled) by default and cannot be turned off.
• New Permissions related to this Feature: None.
• The **Promotional Text** field, which was originally on the General tab, has been moved to the Configuration tab. **Note:** The options available on the Configuration tab will depend on your organization's licenses.
• For additional information about the supplier profile please refer to the online help or the *Administrator Handbook for Shopping, Accounts Payable and Inventory Products*. 
Spend Director Enhancements

Internal and External Notes Available in Express Checkout

As part of the 13.2 release, Express Checkout was introduced as a streamlined checkout process that is intuitive and user friendly. With the 13.3 release, users who are using Express Checkout have the option to add Internal and External notes to a requisition through a new Notes screen.

Impact

- Products Affected: Spend Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

Key points of Feature

- This feature is ON (enabled) by default for organizations who have internal/external notes configured to show in the checkout process and cannot be disabled.
- New Permissions related to this Feature: None
- Users with permission to see and update internal and external notes see a new Notes page in Express Checkout to add and edit notes. The functionality for Internal and External Notes will not change:
  - Internal notes will be visible only to internal organization users.
  - External notes will be sent to suppliers.
- The notes will appear on the Order Review page as part of the order summary.
- Important Note: If an organization does not have Internal/External notes configured to show in the checkout process, Notes will not be available in Express Checkout.
- For additional information about Express Checkout and adding notes in the checkout process, please refer to the online help or the Shopping Handbook.

Enhanced Visibility Control for Item Attributes

With Release 13.3, SciQuest is providing greater control over where an organization’s item attributes are visible. Previously, a single setting determined whether an item attribute was displayed in both the search results and in the item detail view. In 13.3, two settings are available to provide this control, with one setting establishing visibility in the search results and the other establishing visibility within the item detail view.

Impact

- Products Affected: Spend Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

Key points of Feature

- This feature is ON (enabled) by default but must be configured for use.
- New Permissions related to this Feature: None
This feature applies to an organization’s custom item attributes, as well as to item attributes the organization may add to products in a self-managed catalog.

When configuring item attributes, the settings are available on the details tab in the Search/Display Configuration section.

The previous Show in shopper search results/product details view control setting is now replaced with two settings: Show in product details view and Show in shopper search results.

Any attribute, that had the previous integrated control setting ENABLED, automatically has both of the new control settings ENABLED with 13.3.

For additional information about configuring item attributes please refer to the online help or the Configuration Handbook for Shopping, Accounts Payable and Inventory Products.

Green Product Enhancements
Sustainability initiatives and the purchase of “green” products have become increasingly important to many organizations. The 13.3 release includes several enhancements related to the location and purchase of green compliant items. In addition to the existing Green attribute, a new attribute is now available for association with compliant product offerings. This new attribute is called LEED Compliance Details (Leadership in Energy and Environmental Design). Both the Green and LEED attributes are available as product search criteria. Additionally, “green” product information is now more readily accessible to users when reviewing and comparing items during the purchasing process.

Impact
• Products Affected: Spend Director
• End User Impact: Low
• Admin User Impact: None
• Integration Impact: None

Key points of Feature
• This feature is ON (enabled) by default.
• New Permissions related to this Feature: None
• Both the existing Green Product attribute and the new LEED Compliance Details attribute are available as product search criteria.
• The Green Product and LEED Product attributes are now included in purchase order and purchase requisition exports. (Important Note: The Purchase Order and Purchase Requisition export file layouts have changed with the addition of two new columns to accommodate the added attribute data. These changes must be accommodated if these export files are used in any post-processing activities.)
• When reviewing a product, the “Green Product” attribute text displays as hover text when the cursor is positioned over the Green product icon.
• If a catalog item is imported with the Green flag not set, the system automatically sets the flag in instances where the Green Product or the LEED Compliance attribute field is populated.
• SciQuest is providing a list of standard designations for use with the Green Product and LEED Compliance attribute fields. Supplier adoption of these designations will provide definition consistency that will serve to streamline product assessment and comparison tasks.
Enhanced Navigation for Punchout Shopping Windows

Organizations have the option of opening a punchout site in a separate window. Previously, when a punchout window was opened in this way, it would open without key navigational controls being available within the window. With 13.3, organizations now have the option to enable navigation controls for punchout sites that are opened in a separate window.

**Impact**
- Products Affected: Spend Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**
- This feature is OFF (disabled) by default and must be enabled by SciQuest.
- New Permissions related to this Feature: None
- If a user initiates a punch-out session to a supplier site with the new setting enabled, then the punchout will open in a window with browser navigation controls.
- Please contact Customer Support or your Client Partner to have this setting enabled.
- **Important Note:** This feature is not implemented for the Chrome browser.

Improved Purchase Requisition Approval Management

When the organization setting **Allow users to manually approve requisitions/POs they have submitted** is FALSE, a user cannot approve a Requisition or Purchase Order in workflow even if they are set as a workflow step approver. Previously however, users set as Financial Approvers were, in specific instances, allowed to approve a requisition they submitted. With 13.3, disabling this setting includes additional restrictions for approvers. Now when this setting is FALSE, the submitter cannot be added as an approver at any point in the requisition process. Also, the requisition cannot be forwarded to a Prepared for or Prepared by user for approval.

**Impact**
- Products Affected: Spend Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**
- This feature is ON (enabled) by default.
- New Permissions related to this Feature: None
- When the setting **Allow users to manually approve requisitions/POs they have submitted** is FALSE:
  - The Prepared by and Prepared for users on the requisition are not available to be selected as approvers when a user attempts to Add Approver to the document.
  - The Prepared by and Prepared for users are not available to be selected when an approver chooses to forward a PR to another user for approval.
• For additional information about configuring this setting please refer to online help or the Configuration Handbook for Shopping, Accounts Payable and Inventory Products.
**Order Manager Enhancements**

**Auto-populate Child Custom Field from Commodity Linked Parent**

Some “parent” custom fields have only one “child” custom field. Previously, if the parent custom field was linked to a commodity code, the single “child” field was not automatically populated in the cart. In 13.3, the child field is automatically populated. For example, if the commodity code is linked to a custom Account field, which only has a single Sub-Account child field, the Sub-Account field is included without the user having to manually select it.

**Impact**
- Products Affected: Requisition Manager, Order Manager
- End User Impact: Medium
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**
- This feature will be ON by default and cannot be turned off.
- New Permissions related to this Feature: None
- This feature applies only when there is a one-to-one parent-child relationship, and commodity-code mapped custom fields.
- Since this applies to commodity-linked fields, only line-level custom fields will be auto-populated.
- For additional information about adding commodity codes to a cart, please refer to the online help or the *Shopping Handbook*.

**Increased Limit for PO Clause Text**

The limit for PO Clause text has been increased from 2500 characters to 3000 characters.

**Impact**
- Products Affected: Order Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**
- This feature is ON (enabled) by default, and cannot be turned off.
- New Permission Related to this Feature: None
- No action is required to increase the text limit.
- For additional information about configuring commodity codes, please refer to the online help or the *Configuration Handbook for Shopping, Accounts Payable and Inventory Products*.

**Improved Banner Change Order Processing**

Organizations that utilize the Banner change order process will now see budget authorization failures for change orders stop in workflow. Previously change orders would always complete workflow, even if budget authorization failed.
Impact

- Products Affected: Order Manager (Banner change order customers only)
- End User Impact: Medium
- Admin User Impact: Low
- Integration Impact: Medium

Key points of Feature

- This feature is ON (enabled) by default and cannot be disabled.
- New Permissions related to this Feature: None
- When the change order fails budget authorization the PO will stop in workflow and require that the step be restarted (after appropriate changes have been made) or expedited (to move past the failed authorization).
Reporting Enhancements

Spend Dashboard- Organizational Spend

In 13.3, a new report called **Organizational Spend** which resides on the Spend Dashboard is available to help organizations gain further transparency into their spending. The **Organizational Spend Report** allows you to view a rolling 6 months (current month plus 5 previous months) of spend and document counts, compare it to the same time last year all within a graph format which allows you to then “drill down” for additional spend details.

For example, you can see your Catalog, Non Catalog PO spend and the count of PO’s over a rolling 6 month period and compare it to the same time for the previous year. In addition, you can then select a particular month and spend type, and drill down to see the supplier and order details associated with that spend.

**Impact**

- Products Affected: All Shopping and AP Products
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: None

**Key Points of Feature**

- This feature is **ON** (enabled) by default
- New Permissions related to this Feature: None
- The Spend Dashboard is available from **Reporting > Purchases and Spending Reports**.
- The Organizational Spend can be filtered for Purchase Orders, Requisitions, or Invoices (*with the appropriate products*) using the Document Type filter.
- If your Organization has the Multi Business Unit license, this report allows you to filter your results by a particular Business Unit.
- A rolling six (6) months of spend is included for both present year and previous year.
- The graph display can be changed by simply clicking on the legend to turn on and off that measure
- This is a dual axis graph whereby the Spend measure is on the left axis and the Document Count is on the right axis.
- You can click the “?” for additional help about this report or at the top right of your report there is a “New to this page?” icon and link which will take you directly to a short training video on how to use this new report.
- For additional information about this report, please refer to the online help or the **Administration Handbook for Shopping, Accounts Payable and Inventory Products**.

**Organizational Spend by Supplier**

The **Organizational Spend by Supplier** report provides you with a view in to your Organizations Spend by Supplier. This report allows you to see the aggregated Supplier spend totals, number of orders and average spend at both the order level and line level for all your Suppliers. Using the Supplier Type and Spend Type filters allows for further analyzing of your spend. For example you can:

- Determine where all your Catalog spend is coming from for your selected date range.
• Within your Catalog Suppliers determine where your Non-Catalog spend is coming from within the date range you selected.

Impact
• Products Affected: All Shopping and AP Products
• End User Impact: Low
• Admin User Impact: Medium
• Integration Impact: None

Key points of Feature
• This feature is **ON** (enabled) by default
• New Permissions related to this Feature: None
• The Organizational Spend by Supplier is available from **Reporting > Purchases and Spending Reports**.
• The Organizational spend can be filtered for Purchase Orders, Requisitions, or Invoices using the Document Type filter.
• Spend can be filtered by Supplier Type and/or Spend Type for further analyzing
• The Organizational Spend by Supplier report can be accessed from either:
  • Reporting menu under the Purchases And Spending Reports sub menu
  • From the Spend Dashboard- Organizational Spend Report- by “drilling down” (clicking on a bar in the chart)
• If your Organization has the Multi Business Unit license, this report allows you to filter your results by a particular Business Unit.
• Click on the question mark (“?”) for additional help on this report.
• For additional information about this report, please refer to the online help or the Administration Handbook for Shopping, Accounts Payable and Inventory Products.

Early Payment Discount Analysis Report
The Early Payment Discount Analysis Report allows organizations to visualize their potential opportunities for early payment discounts, drill down in to the details as well as apply “what if” scenarios.

This report reviews all Early Payment Discount eligible invoices which have completed workflow (and payment status of payable or paid) within your selected Date Range. It then compares your Invoice Workflow Complete Date and your Target Date and puts the early discount in one of two buckets.

  • “Potential” – If your Workflow Complete Date is on or before your Target Date
  • “Unrealized” – If your Workflow Complete Date is after your Target Date

Impact
• Products Affected: **All AP Products**
• End User Impact: Low
• Admin User Impact: Medium
• Integration Impact: None
Key points of Feature

- This feature will be **ON** (enabled) by default.
- New Permissions related to this Feature: None
- The Early Payment Discount Analysis Report is available from **Accounts Payable > Reports**.
- Using the Target Date filter, you can perform “what if” scenarios to see what happens to your early payment discount amount if you shorten or lengthen the lead time between your Workflow Complete Date and the Target Date.
- This report allows you to drill down in to the Invoice details (**Early Payment Details Discount Report**) by clicking in the chart on a Potential/Unrealized bar in a particular month. From there, you see the Invoice Number, Supplier, Purchase Order(s), Workflow Complete Date and Discount date, among other valuable information.
- The graph display can be changed by simply clicking on the legend to turn on and off that variable.
- Invoices appear on this report if they have completed workflow, and are marked as payable or paid, and a valid Terms Discount exists on the invoice (i.e. 10% 15, Net 30)
- You can click the “?” for additional help about this report or at the top right of your report there is a “New to this page?” icon and link which will take you directly to a short training video on how to use this new report.
- For additional information about this report, please refer to the online help or the **Accounts Payable Handbook**.

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**Early Payment Discount - Details Report**

The Early Payment Discount Details Report allows organizations to see the details associated with their early payment eligible invoices and apply “what if” scenarios.

This report reviews all Early Payment Discount eligible invoices which have completed workflow (and payment status of payable or paid) within your selected Date Range. It then compares your Invoice Workflow Complete Date and your Target Date and calculates the difference and displays it in the Target Missed Days.

**Impact**

- Products Affected: **All AP Products**
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: None

**Key points of Feature**

- This feature will be **ON** (enabled) by default.
- New Permissions related to this Feature: None
- The Early Payment Discount Analysis Report is available from **Accounts Payable > Reports**.
- Using the Target Date filter, you can perform “what if” scenarios to see the impact to your early payment discount opportunities if you shorten or lengthen the lead time between your Workflow Complete Date and the Target Date.
- Using the Discount Status filter allows you to view Potential, Unrealized or Both of your discount buckets.
• All columns on this report are sortable. The default sort is on the Target Missed Days from the highest number of Late Days to the highest number of Early days.

• The Early Payment Discount Details report can be accessed from either:
  • Accounts Payable under the Reports menu
  • From the Early Payment Analysis Report by “drilling down” (clicking on a bar in the chart).

• Click on the question mark (“?”) for additional help on this report.

• For additional information about this report, please refer to the online help or the Accounts Payable Handbook.
Accounts Payable Enhancements

The features in this section are organized by the following enhancements:

- **General Enhancements** – This section focuses on enhancements applicable to both AP Director and AP Express (formerly Settlement Manager).
- **AP Director Enhancements** – This section focuses on enhancements that apply only to AP Director.

General Enhancements

**Workflow Setting to Allow Users to Approve Invoices/Credit Memos they Create**

Previously, users could not manually approve invoices and/or credit memos that they created themselves. In 13.3, a new setting has been added to the General Workflow Settings page called **Allow users to approve invoices and credit memos they create**. When this setting is on, approvers have the ability to manually approve invoices and credits that they submit.

**Impact**

- Products Affected: All AP Products
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: None

**Key points of Feature**

- This feature will be OFF (disabled) by default and can be enabled at the organization level.
- New Permissions related to this Feature: None
- The setting is located in **Site Configuration > Workflow Setup > General Workflow Settings**.
- This setting can be used with or without the **Allow users to approve invoices and credit memos they own** setting, which is based on the invoice owner rather than the submitter.
- For additional information about workflow setup, please refer to the online help or to the **Configuration Handbook: Shopping, Accounts Payable and Inventory Products**.

**New AP Dashboard Section for Past Due Invoices**

The AP Dashboard “rolls up” many of the important invoicing tasks performed by AP employees so that staff can quickly see a snapshot of the things that require attention. In 13.3, a new section has been added to the AP Dashboard listing past due invoices.

**Impact**

- Products Affected: All AP Products
- End User Impact: Medium
- Admin User Impact: Low
- Integration Impact: None
Key points of Feature

- This feature is ON (enabled) by default and cannot be turned off.
- New Permissions related to this Feature: None
- Invoices displayed in the Past Due section have a due date that is before the current date.
- Users also have the ability to configure the date range using the “show invoices” dropdown to view invoices that are coming due today or during the next week.
- For additional information about the AP Dashboard, please refer to the online help or the Accounts Payable Handbook.

Organization-level Invoice Payment Terms List

In 13.3 organizations now have the ability to configure a list of payment terms. These terms are then available on invoices for selection by the user. When enabled, this list will appear on invoices in place of the current manual entry fields for payment terms. Organizations have the ability to allow or restrict manual entry of payment terms in addition to selecting from the org-managed list.

Impact

- Products Affected: All AP Products
- End User Impact: High
- Admin User Impact: High
- Integration Impact: None

Additional Users Available on Invoice Comment Creation Screen

Users adding comments to invoices or credit memos can view and quickly select additional users to be added to the conversation - including Invoice Owner, PR prepared for/by, and users who have received against the corresponding PO. This eliminates the need to go back to the requisition or receipt and search for the user you’d like to receive a copy of the comment.

Impact

- Products Affected: All AP Products
• End User Impact: Low
• Admin User Impact: Low
• Integration Impact: None

**Key points of Feature**
• This feature is ON by default, and cannot be turned off.
• New Permissions Related to this Feature: None
• Eligible users will display with a checkbox next to the user name. Click the checkbox to select a user.
• Users who share multiple roles on the document – for example an Invoice Owner who is also a Receipt Creator – are only listed once on the **Add Comment** screen. All applicable roles for this user are comma separated to the right of their name for reference.
• For additional information about selecting users for the invoice comments, please refer to the online help or the **Accounts Payable Handbook**.

### Display Matching Issues on Invoice Approvals Page
Unmatched invoices now display mismatch reason(s) on the invoice **Approvals** page. Matching issues will also be available as a filter on the left side of the approvals page, so approvers can quickly see all invoices with a certain matching problem.

**Impact**
• Products Affected: All AP Products
• End User Impact: Medium
• Admin User Impact: Low
• Integration Impact: None

**Key points of Feature**
• This feature will be ON by default, and cannot be turned off.
• New Permissions Related to this Feature: None
• Possible matching issues include: **Over/Below Quantity**, **Over/Below Price**, **Over/Below TSH**, **No Receipt**, and **PO Line Cancelled**.
• If more than three matching problems are present on a document, a link to the matching tab will appear allowing the user to see the full details.
• For additional information about this feature, please refer to the online help or the **Accounts Payable Handbook**.

### Split Approve and Reject Permission for Invoices/Credit Memos
Currently, users with the **Approve/Reject Invoices** permission are able to approve, forward and reject invoices. In 13.3, this permission is being split into two permissions, allowing administrators to prevent certain users from rejecting invoices while still allowing them to approve or forward.

**Impact**
• Products Affected: All AP Products
• End User Impact: Medium
• Admin User Impact: Medium
Key points of Feature

- This feature will be available by default, and cannot be turned off.
- The existing Approve/Reject Invoices permission is being renamed to Approve Invoices. Users/roles with this permission will be able to approve and/or forward invoices.
- A new permission called Reject Invoices will be available. Users/roles with this permission will be able to reject invoices.
- Important: Any user/role with Approve/Reject Invoices enabled when 13.3 is promoted will have both Approve Invoices and Reject Invoices turned on automatically.

New Permission to Allow Editing of Invoice Accounting Fields Only

Previously, users with the Edit Invoices permission could edit all information on an invoice (both accounting and non-accounting). In 13.3, a new permission is available that allows organizations to give limited ability to edit invoices to users who only need to update accounting custom field groups.

Impact

- Products Affected: All AP Products
- End User Impact: High
- Admin User Impact: High
- Integration Impact: None

Key points of Feature

- This feature will be OFF (DISABLED) by default, and can be controlled by the permission detailed below.
- A new permission called Edit Pending Invoices (My Invoice Approvals) – Account Codes Only is now available. This permission allows users to edit the accounting fields on any invoice they have permission to approve, but not any other information.
- No user automatically has this permission upon release. It will need to be added to specific users or roles to take advantage of the functionality.
- For additional information about setting user permissions for AP products, please refer to the online help or the Accounts Payable Handbook.

Banner Customers – Export Non-PO Invoices

The ability to export non-PO invoices to Banner has been added in 13.3. Customers will need to work with Client Partners/Support to update their workflow and Invoice export format in order to take advantage of this feature. This functionality will also require a Banner version upgrade.

Impact

- Products Affected: All AP Products
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: High
**Key points of Feature**

- This feature will be OFF (DISABLED) by default and requires configuration.
- Banner support for this functionality is expected in late 2013/early 2014, and a Banner upgrade will be required before this feature can be used.
- As part of this feature, customers have the ability to execute a Budget Authorization in Invoice Workflow.
- Check with SciQuest support or your Client Partner for more information.

**Additional Fields on Full Invoice Export from Document Search**

**Invoice Owner** and **Invoice Remit-to Address** are now part of the full invoice export from document search.

**Impact**

- Products Affected: All AP Products
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**

- This feature will be ON by default, and cannot be turned off.
- The new fields are only available on the full export. The export will contain two new columns for Invoice Owner and Remit-to Address.
- The screen and transaction export remain unchanged.

**Supplier Account Number Now Available for Supplier Portal Invoices**

The existing **supplier account number** field is now available for entry by supplier through the supplier portal. This field will automatically populate on the buyer invoice or credit memo when entered by the supplier.

**Impact**

- Products Affected: All AP Products
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**

- This feature will be ON by default, and cannot be turned off. However, the field must be configured to show on your invoice/credit memo document configuration in order for it to be visible on the buyer invoice or credit memo.
- The supplier account number field will be available to all suppliers through the portal.
- For additional information about document configuration, please refer to the online help or the [Configuration Handbook for Shopping, Accounts Payable and Inventory Products](#).
Allow Receipts to be Entered Against Soft-closed POs

Some organizations utilize receiving without making it a requirement for invoice matching. These organizations may be interested in allowing users to continue to enter receipts while a purchase order is in soft-close status. Organizations that choose not to set a soft-close delay are not affected by this change.

Impact
- Products Affected: All AP Products
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

Key points of Feature
- This feature is OFF by default and must be turned on using the new organization setting mentioned below.
- A new setting called Allow receipts against soft-closed POs has been added. This setting can be accessed from Accounts Payable > AP Administration > Configure AP Settings under the PO Auto Close section.
- When this setting is turned on, any user with permission to create receipts is able to enter receipts against POs in Soft Close status. Receipts can be created directly from the PO document or from document search.
- Once the PO has been set to Closed receipt creation will no longer be available.
- For additional information about configuring AP settings, please refer to the online help or the Accounts Payable Handbook.

Organization Message Configurations
Please see the feature description on page 9 in the Shopping Products section.

Ability to Override User Interface Settings
Please see the feature description on page 10 in the Shopping Products section.

Visual Enhancements in the Phoenix Interface
Please see the feature description on page 11 in the Shopping Products section.

Remove Comments from Documents
Please see the feature description on page 11 in the Shopping Products section.

Streamlined Supplier Search
Please see the feature description on page 12 in the Shopping Products section.

Supplier Profile History Enhanced
Please see the feature description on page 37 in the Shopping Products section.
Accounts Payable Director Enhancements

AP Enabled Supplier Network Portal
As of release 13.2, AP Director customers can allow suppliers to self-register for a customer-branded portal in the SciQuest Supplier Network. From the portal, suppliers can manage their business information, see customer purchase orders, send invoices to customers, and view a customer’s invoice status.

AP Director customers configure the supplier portal feature for all active suppliers by enabling the Receive Portal Invoices and/or Enable Supplier Portal settings in the AP Configuration settings for their organization. Or, a customer may enable these settings for a specific supplier. With 13.2, enabling these settings would set the supplier’s registration status to Invited. Disabling these settings would set the supplier’s Registration Status to None.

With 13.3, Registration Statuses have been simplified to reflect the supplier self-registration process available to AP Director customers. The two AP Configuration settings indicated above will no longer affect the supplier Registration Status. Supplier registration for AP Director is only available through a self-registration portal URL and the supplier is not invited through the SciQuest system. The supplier’s actions upon starting and completing the registration will determine the Registration Status.

Impact
- Products Affected: AP Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

Key points of Feature
- This feature is OFF (disabled) by default and must be turned on to enable supplier portal access.
- New Permissions related to this feature: None
- Suppliers with an Invited status are updated to None as of 13.3. Suppliers with a status of In Progress or Profile Complete will not change with 13.3.
• Suppliers will not see a change to their Registration Status for each customer within the SciQuest Supplier Network Portal.

• Suppliers enabled for self-registration by the AP customer will have the ability to login to a customer-branded portal.

• The Registration Status will progress as it has before. It will change to In Progress after the supplier selects Get Started and begins to complete their registration. It will then change from In Progress to Profile Complete once the supplier is done with their registration and selects Certify and Submit.

• Since the Invited status is no longer applicable, it has been removed as an option in the Supplier Advanced Search filters.

• The Enable Supplier Access to Branded Portal checkbox, which allows suppliers to self-register, has been renamed to Enable Unsolicited Supplier Portal Access with Invoice Verification to provide clarification.

• The section for Form Types in the Registration Configuration section for each field has been renamed to Registration Types.

• For additional information about configuring AP-Enabled Supplier Network Portal, please refer to the online help or the Accounts Payable Handbook.

Supplier Registration Enhanced

In a continued effort to improve the supplier registration process available to AP Director customers, we have made some enhancements to the supplier registration process, detailed below.

Impact

• Products Affected: AP Director

• End User Impact: None

• Admin User Impact: Low

• Integration Impact: None

Key points of Feature

• This feature is ON (enabled) by default and cannot be turned off.

• New Permissions related to this Feature: None

• During supplier registration for an AP Director customer, suppliers need to provide a recent Invoice Number and Invoice Amount. The Amount was previously labeled as a US Dollar amount. This description for the field has been removed since only the numeric value was used as verification without any additional currency calculations.

• When a supplier user tries to register with an AP Director customer, they receive an error message if the supplier portal already existed for the customer, but the user was not an active supplier portal user. The error message now includes the supplier portal administrator’s contact information so they can be contacted by the requesting supplier user and added as an active supplier portal user.
**Notify Suppliers of Rejected/Cancelled Portal Invoices**

When a supplier submits an invoice to an AP Director customer through the portal that is subsequently Rejected or marked Cancelled, a comment will be added in the **Supplier Messages** section of the invoice in the customer’s AP Director application as well as in the supplier portal.

**Impact**
- Products Affected: AP Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**
- This feature will be ON by default, and cannot be turned off.
- New Permission related to this Feature: None
- This feature only applies to invoices that were created through the Supplier Network portal. Other invoice source types will not be affected.
- Approvers continue to have the option of adding the reject/cancellation reason to the message. A new checkbox is present on the rejection reason popup called “Send to supplier” that allows this message to be sent to the supplier as well. Suppliers will automatically receive an email for each rejection regardless of whether or not a message is added.
- For additional information about configuring AP-Enabled Supplier Network Portal, please refer to the online help or the **Accounts Payable Handbook**.

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**New Email Management Feature**

Previously, all system emails were managed through Field Management. In 13.3, we are introducing a new email management feature. For this release, only the following emails will be managed from this new feature.

- **Supplier Registration Attempt Failed**
- **Supplier Registration Complete**
- **Supplier Registration Confirmation**
- **Password Reset Request**

**Impact**
- Products Affected: AP Director
- End User Impact: None
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**
- This feature will be ON (enabled) by default. However, no users will have the new permission initially, so new users must be configured to have access to the email management pages.
- New Permissions Related to this Feature: **Manage Emails**
- A new System Email screen is available to users with the **Manage Emails** permission. The new email editor provides the following capabilities:
• All text can be edited (Reply to, From, Subject, Body).
• Easily move/replace placeholder text.
• Easily restore default settings.
• Ability to preview email in HTML or plain text formats.
• Placeholders appear as a popup screen from the Email Editor. They are customized for every email.
• An Email configuration screen allows user to customize the following values for the system emails
  • “From Name”
  • “From Email Address”
  • “Reply-to Email”
  • “Preferred Email Format”
  • Insurance & Diversity Certification Expiration period
• Audit history is captured for changes to the system emails page and the email configuration page.
• Emails sent out are logged and available in the Email Logs screen. The log captures the following values for each email sent.
  • Email Display Name
  • From
  • Recipient
  • Date

  Note: The log is maintained for only those emails that are in the System Emails page.

• Only the emails noted above will be managed on the System Emails screen. All other emails will still be managed through Field Management. Eventually, all system emails will be managed using this functionality.

• For additional information about working in the new email management feature, please refer to the online help or the Accounts Payable Handbook.

Supplier Profile History Enhanced
The Supplier Profile History is a log of all customer-initiated and supplier-initiated profile changes. Accounts Payable Director customers have the ability to configure a registration process for suppliers, whereby suppliers are required to certify the information they provide is accurate. The certification includes information on who is submitting the registration. In 13.3, History now captures the Preparer’s Email Address, Title, Name, and Initials for future reference after a supplier submits their registration.

Impact
• Products Affected: Accounts Payable Director
• End User Impact: None
• Admin User Impact: Low
• Integration Impact: None

Key points of Feature
• This feature is ON (enabled) by default and cannot be turned off.
• New Permissions related to this Feature: None
• For additional information about the supplier profile please refer to the online help or the Administrator Handbook for Shopping, Accounts Payable and Inventory Products.
Contract Director Enhancements

There are no enhancements to Contract Director for the 13.3 release. A list of maintenance changes made since the 13.2 release can be viewed below by module or by date of change on the SciQuest Product Release Library by following this link http://library.sciquest.com/docs/MaintenanceChanges.pdf. Future maintenance release changes will also be listed here.

Maintenance Release Changes 13.2 through 13.3

Home

View My Tasks Screen Updated
Users can view tasks assigned to them in the View My Tasks screen. Previously, the Task Type field did not stay selected when a user navigated away from the screen to view a task, then returned to the View My Tasks screen. As of this release, the task type remains selected when a user views a task, then returns to the View My Tasks screen.

Contracts Configured View Corrected
Panels of data can be added to a dashboard view to display system information or link to frequently used areas in the application. Previously, users could see contracts they did not have access to listed on the Contracts Configured View dashboard panel; although they were denied access if they attempted to open them. As of this release, users will only be able to see contracts they have permission to view on the Contracts Configured View dashboard panel.

Corporate Dashboard View Corrected
You can configure your Home page so that it displays information from the different areas in application at a glance. Previously, users with permission to create a corporate dashboard view could overwrite the corporate default dashboard by selecting it as default for themselves. As of this release, users will not be able to override the corporate default dashboard without saving it as the corporate default.

First Party and Second Party Included in Global Search
The Global Search function allows you to search legal entities, contracts, contract requests, and templates for records that match entered search criteria. Previously, the First Party and Second Party fields of contracts were not searched when performing a global search. As of this release, the First Party and Second Party fields are searched when performing a global search.

Administration

Legal Entity Email Address and Phone Number Types Corrected
Legal entity email addresses and phone numbers are assigned types that describe what they are, such as the location they are associated with. Previously, multiple email addresses and phone numbers of the same type could be added to a legal entity. As of this release, users cannot enter multiple email addresses and phone numbers of the same type and a reminder message is displayed.
Updating Legal Entity Information Corrected
One or more business relationship, address, email or phone number records can be added to a legal entity. Previously, secondary business relationships, addresses, email addresses and phone numbers could not be deleted from a legal entity. As of this release, secondary business relationships, addresses, emails and phone numbers can be deleted from a legal entity (a legal entity must have at least one business relationship, address, email address and phone number).

Corporate Legal Entity Merge Corrected
Legal entity merges combine records from two entities into one. Previously, deactivated legal entities appeared in both the Source and Target fields on a new legal entity merge, users linked to a legal entity that had been deactivated in a merge remained active, and a legal entity merge could be completed without assignable documents. As of this release, deactivated legal entities do not appear in the Source and Target merge fields, source legal entities and their associated users are deactivated in a merge, and if there are no assignable documents, a new validation "There are no assignable documents associated with this merge. Nothing can be merged" appears.

Distribution Control Lists Updated
Pre-defined distribution control lists allow users (internal or external) to receive email notifications. Previously, external users could not be selected as members on a pre-defined distribution list created in the Administration area. As of this release, external users can be selected as members of a pre-defined distribution list.

Administration Standard Reports Corrected
Administration standard reports can be filtered or updated to create a report specific to the needs of your organization. Previously, entering filter criteria for operators in the Filter By panel caused an error. As of this release, filter criteria can be selected.

Reference Codes Corrected
The Reference Codes screen in the Administration area is used to create select lists. Previously, deleting a reference code in the Codes screen caused an error. As of this release, the Delete option has been removed from the left menu, and reference code items can be deleted by clicking the Delete icon next to the item in the grid.

Legal Entity Merge Rollback Columns Display Correct Data
The Merge Legal Entities area allows records from two legal entities to be combined into one. A rollback can be performed to undo a merge. Previously, the Rollback By Username and Rollback Date columns on the Merge Legal Entities listing screen remained blank if a merge was rolled back. As of this release, the column data displays correctly.

Login Tracking Screen Updated
The Login Tracking screen provides users with appropriate security access to view login information for Contract Director. Previously, the screen was showing duplicate records for each log in. As of this release, there is one record per login.

Legal Entity is Deactivated if it has no Business Relationship
Business Relationships attached to a legal entity define one or more roles a legal entity may have within Contract Director. A legal entity must have at least one business relationship. Previously, a legal entity remained active after all business relationships were deleted from it. As of this release, the legal entity is deactivated when the last business relationship is deleted from it.
Legal Entity Deletion Corrected
Previously, users received an error message when attempting to delete a legal entity. As of this release, legal entities can be deleted as expected.

Organization Units Corrected
Assigning an organization unit to a user gives them access to the records in that organization unit. Previously, attempting to add users to an organization unit or modifying an organization unit’s permissions would result in an error. As of this release, users can be added to organization units, and organization unit permissions can be modified.

Remove Duplicate Legal Entity Merge Corrected
The Merge Legal Entities feature allows you to merge details of one legal entity with another. The Remove Duplicate option is used when you want to consolidate records from duplicate legal entities. Previously, merging legal entities did not result in the removal of duplicate entities from the legal entities listing. As of this release, merging legal entities will result in the removal of duplicate entities.

Configure Option Removed
Previously, clicking Configure on pages throughout the application would open a blank pop-up. As of this release, the Configure option has been removed where it is not needed.

Contracts

Contract Detail Types Updated
Contract details are added to a contract to record various sales arrangements agreed upon in contracts. There are both sales and purchase types of details. Previously, all detail types could be added to either purchase or sales contracts. As of this release, payable detail types can only be added to contracts created with a purchase template, and sales detail types can only be added to contract created with a sales template.

Contract Request Add On
A contract request feature is now available that allows users to request a contract. Configuration is required for setup. This includes workflow changes, reference data, templates, default values, screens and data connector setup. This feature is off by default. Contact your client partner or project team for more information about this add-on service tool.

Confidential Contract Security Corrected
Selecting the Confidential checkbox on a contract allows only the contract manager, contract creator, and any additional users added through an access user list, to view the contract record. Previously, changing the contract manager of a confidential contract allowed the previous contract manager to still view the contract. As of this release, only contract managers with the correct security access can view a contract.

Days Notice Required For Renew Field Corrected
The Days Notice Required For Renew field on the contract header sets the number of days prior to contract renewal that an email notification is generated by the system. Previously, the Days Notice Required For Renew field was being automatically populated without user input. As of this release, the Days Notice Required For Renew field is not automatically populated.
Manual Task Email Distribution Corrected
The Manual Tasks screen tracks key dates associated with a contract. You can use the Manual Tasks feature to send email notifications to members of a distribution list, informing them of an upcoming task or deadline. Previously, emails were not being sent to members of manual task distribution lists. As of this release, emails are being sent as expected.

Organize Folders Corrected
Folders are used to manage outgoing and incoming emails and document attachments. Previously, folders could not be updated by users. As of this release, users with the correct security access can update folders in the Organize Folders area.

Contract Reassignment Updated
Respond to Workflow allows you to make changes to a contract and then take the next step in the workflow. The Reassign option allows you to reassign the contract task from one user to another. Previously, contract tasks could be assigned to inactive users. As of this release, contract tasks cannot be reassigned to inactive users.

Document Editor Table Resizing Updated
Tables of information can be built or inserted in contracts or templates using the document editor. Previously, attempting to resize the width of a table column would result in an error. As of this release, table column widths can be resized without error.

Paste From Word Tool Corrected
The Paste From Word tool is used to paste copied text from a Microsoft Word document into the document editor. Previously, pasting multiple blocks of text using Paste From Word in the document editor would result in an error. As of this release, Paste From Word functions as expected.

Contract Type 'Allow On Dashboard' Feature Corrected
When creating a contract type, selecting the ‘Allow On Dashboard’ checkbox indicates that the contract type can be selected in the Shortcuts/Actions dashboard panel. Previously, if the ‘Allow On Dashboard’ checkbox was left blank, the contract type could still be selected on the Shortcuts/Actions dashboard panel. As of this release, if the ‘Allow On Dashboard’ checkbox is not selected on the contract type, the contract type cannot be selected in the Shortcuts/Action dashboard panel.

Configured Views Updated
The default configured view is the view that appears when a user navigates to the page. Previously, saving updates to the default view caused an error message. As of this release, the Save and Delete buttons have been disabled so the default view cannot be modified or deleted. Copy and New buttons remain enabled so that the default view can be copied, or a new one created.

New Contract Folder Validation
The Organize Folders screen is used to manage folders for emails and attachment. Previously, when assigning a folder to a contract type or contract, choosing the same folder in the Folder and Parent Folder fields caused the folder to disappear. As of this release, a validation message indicates that a folder cannot be selected as a parent to itself.
Custom Contract Folders Corrected
Folders specific to a contract can be created to organize emails and attachments. Previously, changing the folder name on a copied contract also changed the folder name on the original contract. As of this release, changing the folder name on a copied contract does not affect the folder name on the original contract.

Folder Structure on Copied Contracts Corrected
When copying a contract, users can choose to have custom folders copied to the new contract. Previously, the custom folder hierarchy was not copied to the new contract when the Custom folders checkbox was selected. As of this release, the folder hierarchy is copied into the new contract.

Attachments on Copied Contracts Corrected
When copying a contract, users can choose to have attachments copied to the new contract. Previously, attachments were not copied to the new contract when the Attachments checkbox was selected. As of this release, attachments are copied to the new contract when the Attachments checkbox is selected.

First Party Field Can Be Added to New Contract Reports
In the Contract Reports area, a report can be created that is specific to the needs of your organization. Previously, the First Party field was not available for selection when creating a contract report. As of this release, the First Party field can be added to contract reports.

Contract Template Usage Report Corrected
Contract standard reports can be filtered or updated to create a report specific to the needs of your organization. Previously, the total number of contracts displayed on the Template Usage Report was not accurate. As of this release, the total number of contracts on the Template Usage report displays correctly.

Contract Listing Summary Report Updated
Contract standard reports can be filtered or updated to create a report specific to the needs of your organization. Previously, the Invoice Manager field was not available for selection as a filter on the Contract Listing Summary Report. As of this release, the Invoice Manager field can be selected as a filter on the Contract Listing Summary Report.

Contract Listing Summary Report Formatting Updated
Contract standard reports can be filtered or updated to create a report specific to the needs of your organization. Previously, the formatting was not consistent when the Contract Summary List Report was executed. As of this release, formatting is consistent when executing the Contract Listing Summary Report.

Contract Compliance/Performance 'Allow Deletion' Column Corrected
When adding a compliance item to a template, selecting the 'Allow Deletion' checkbox allows the compliance item to be deleted from contracts created from the template. Previously, the ‘Allow Deletion’ column on the Contract Compliance/Performance screen showed a value of ‘True’ (allowing deletion), even if the checkbox was not selected on the template. As of this release, values in the ‘Allow Deletion’ column on a contract’s Compliance/Performance screen are correct.
Contract Compliance/Performance List Screen Corrected

Compliance/performance items are conditions that can be added to a contract and must be met during the contract life cycle. Previously, the Compliance/Performance listing screen in the Contracts area displayed server errors when a compliance item was added. As of this release, compliance/performance items on the page display correctly when a compliance item is added.

New Validation for Child Contracts of Parent Contracts

Child contracts of parent contracts must have start and end dates within those of the parent contract. Previously, child contracts in limited edit mode did not validate against the latest amendment of the parent, allowing child contract dates to be saved beyond that of the parent if the parent contract had been amended. As of this release, a new validation indicates that the end date of the child contract must be less than or equal to that of the parent contract.

Folder User Role Security Corrected

Security can be applied to a contract folder so that access is limited to specific users or user roles. Previously, assigning user role security to a folder did not allow access to all users with the user role. As of this release, security has been corrected so that users with the user role have appropriate access to the folder, as long as they have a task for that contract assigned to them.

Contract Listing Screen - Default View Permissions Updated

Configured views can be created in the Add/Edit View tab to limit the records shown on the listing screen. Previously, multiple configured views could be selected as the default view in the Find Contract screen. As of this release, there can only be one configured view selected as the default view in the Find Contract screen.

"Ends On" Search Operators in Contract Listing Screen Corrected

Search filters can be applied to fields in the contract listing screen to narrow the search for contract records. Previously, some search operators for Ends On field were not displayed correctly and could not be selected. As of this release, the search operators for the Ends On field function as expected.

New Distribution List Field for Compliance/Performance Items

When adding a compliance or performance item to a contract, a distribution list can be added to allow notifications to be sent to additional individuals. The distribution lists available for selection in the Create New Contract Compliance or Create New Contract Performance windows are now listed in two fields:

- Pre-defined distribution lists created in the Administration area are listed in the Distribution List drop down field.
- Distribution lists created specifically for the contract are listed in the Contract Distribution List drop down field.

A distribution list can be selected from either field. No more than one distribution list can be selected.

Visual Workflow Removed

The Work Process tab in the navigation pane shows a visual representation of workflow for a record. Previously, the workflow was not displayed accurately. As of this release, the Workflow tab has been removed. Workflow information is available in the Workflow History screen.
First Party Primary Address Corrected for Contract Header
The first party on a contract is the owner company for the contract. The first party Address field on a contract populates with the address of the first party. Previously, changing the primary address of a legal entity should automatically update contracts which use that entity as their first party to include the new address on the header. As of this release, the first party address on a contract is automatically updated when the legal entity’s primary address is changed.

New Validation - End Date for Renewable Contracts Required
For renewable contracts, an email notification is sent prior to the contract end date, when the contract is due to be renewed. Previously, a renewable contract could be saved with an ongoing end date, and a renewal notification would not be sent. As of this release, saving a renewable contract with an ongoing end date causes a validation to appear, indicating that the Ends On checkbox should be selected and an end date should be specified.

Folder Assignment Security Corrected
Folders are used to manage attachments within the Document Management area. You can define who has access to the contents of a folder by applying security settings to it. Security settings can be set for users or user roles. Previously, contract folders were viewable to all users. As of this release, only users or user roles with permission to access a folder can view it.

Folder Naming Rules Corrected
Folders are used to manage contract attachments within the Document Management area. Previously, folders for different contracts could not be created with the same name. As of this release, it is now possible to create folders with the same name for different contracts.

Adding Compliance/Performance Items to Contracts Corrected
Compliance/performance items are conditions that must be met during the contract life cycle. They are available to be added to contracts on the Compliance/Performance screen. Previously, attempting to add a compliance/performance item to a contract would result in an error. As of this release, compliance/performance Items can be added to contracts.

Administrator Rights for Contract Check-In Corrected
The Check In/Check Out features help ensure document security. Before you can edit a contract, it must be checked out to you, and you cannot make changes to documents that are checked out to other users. Previously, Administrators were unable to check-in other users’ contracts. As of this release, they can check-in other users’ contracts.

Additional First Party Searchable on Find Contract Listing Screen
The Additional First Party field is used to enter an additional first party for contracts involving multiple parties. Previously, the Additional First Party field could not be searched from the Find Contract listing screen. As of this release, the Additional First Party field can be added as part of a Find Contract configured view and searched.

Contract Email Notes Corrected
The Contract Emails page can be used to send custom emails for contracts through the application. Previously, notes added to contracts with the document editor were not included when the contracts were emailed out with Word IO and Include Clause notes. As of this release, emails sent with Word IO and Include Clause notes will contain notes added with the document editor.
Amendment and Parent Contract Numbers Searchable
Previously, the Amendment number and Parent Contract number fields could not be searched from the Find Contract listing screen. As of this release, the Amendment and Parent Contract Number fields can be added as part of a Find Contract configured view and searched.

Contract Emails Corrected to Allow Multiple Recipients
The Contract Emails page is used to create custom emails for contracts. Previously, users could not select more than one user in each of the To:, CC:, and BCC: fields. As of this release, users are able to send contract emails to multiple recipients in each field.

Audit Tracking Report Corrected
The Audit Tracking Report is used to view which fields on a contract have been modified. Previously, running the Audit Tracking Report would result in a timeout error. As of this release, the report runs as expected.

First and Second Party Addresses Corrected in Contract Header
The contract header captures basic information required to create a contract. Previously, the Postal Code and Address Line 2 fields were not displayed for the first and second parties on a contract header. As of this release, the Postal Code and Address Line 2 fields are displayed the first and second parties on a contract.

Word IO Third Party Import Corrected
Third Party Import on the Word IO screen allows users to import text into the main document. The Template dropdown on the Word IO screen defines how an external document is applied to an existing contract when importing a third party document. Previously, only the option to append when importing a third party document was available. As of this release, both the options to append and overwrite the existing template are available on the Word IO screen.

Contract Copying Corrected
Previously, users received an error message when attempting to copy a contract. As of this release, contracts can be copied as expected.

Update Entities from Contract Header Corrected
Entities required to create a contract can be updated from the contract header using the Update icon that appears beside the relevant field. Previously, First Party, Additional First Party, Second Party, and Stakeholders could not be updated from the contract header. As of this release, these entities can be updated from the contract header.

Amending Contracts with Referenced Documents Corrected
Amendments allow users to modify the terms and conditions of an approved contract; they create a link between the original contract and the amendment. Previously, attempting to amend a contract with a referenced document resulted in an error. As of this release, contracts with referenced documents can be amended.

Word Order Amendments Corrected
Work order amendments are used to create a sub-contract for an existing contract. Previously, attempting to save a work order amendment resulted in an error. As of this release, work order amendments can be saved.
Word IO Import Corrected
Word IO is used to send contracts back and forth during contract negotiations. Previously, exporting a contract and importing it through Word IO would result in an error. As of this release, exported documents can be imported without error.

First Party Field on Contracts Corrected
The First Party field is used to select the owner company for the contract. Previously, attempting to change the first party would result in the user being logged out of the application. As of this release, the first party field can be changed without error.

Reassign Tasks Corrected
The Reassign Tasks function in the Contracts area allows users to change the contract owner. Previously, clicking the Reassign Tasks link would result in an error message to display and the user to be logged out. As of this release, the Reassign Tasks window opens as expected.

Custom Fields on Child Contracts Corrected
Custom fields are used to capture information specific to an organization. Previously, creating a child contract of another contract would cause the settings of the parent contract's custom fields to be reset. As of this release, custom field settings are not reset when a child contract is created.

Contract Hierarchy Report Corrected
The Contract Hierarchy report is used to view all contracts related to a contract. Previously, the Contract Hierarchy report displayed all contracts. As of this release, only contracts with amendments and/or parent/child contracts are displayed on the Contract Hierarchy report.

Custom Reports Corrected
Web reports are used to view pre-defined reports, or create new reports based on information from the application. Previously, attempting to run the custom reports resulted in an error message. As of this release, custom reports can be run without error.

Document Library

Template Stylesheets Corrected
Template stylesheets establish formatting for templates and contract documents. Previously, the Org Unit field would not allow users to reset the Org Unit field to blank once an organization unit had been saved in the field. As of this release, the Org Unit field can be reset to a blank value.

Compliance Items Added To Template Text Corrected
Compliance items added to template text in the document editor are automatically added to contracts created from the template. Previously, compliance items added to template text did not appear in contracts created from the template. As of this release, compliance items added to template text appear in contracts created from the template.

Forwarding a Template Corrected
After a template has been created and saved, it can be forwarded to another user for review. Previously, forwarding a template caused an error message. As of this release, forwarding a template functions as expected.
Inventory Products: Supplies Manager Enhancements

The features in this section are organized by the following enhancements:

- **General Enhancements** – This section focuses on enhancements applicable to the Supplies Manager product.

## General Enhancements

**Organization Message Configurations**
Please see the feature description on page 9 in the *Shopping Products* section.

**Ability to Override User Interface Settings**
Please see the feature description on page 10 in the *Shopping Products* section.

**Visual Enhancements in the Phoenix Interface**
Please see the feature description on page 11 in the *Shopping Products* section.

**Remove Comments from Documents**
Please see the feature description on page 11 in the *Shopping Products* section.

**Streamlined Supplier Search**
Please see the feature description on page 12 in the *Shopping Products* section.

**Supplier Profile History Enhanced**
Please see the feature description on page 37 in the *Shopping Products* section.

**Promotional Text Moved**
Please see the feature description on page 16 in the *Shopping Products* section.

**Updated Product Documentation**
Please see the feature description on page 12 in the *Shopping Products* section.
Spend Analysis Products: Spend Radar Enhancements

The Spend Radar product follows a monthly maintenance release schedule. Feature updates and defect corrections are delivered during those maintenance releases.

Below is a list of features/defect corrections delivered to-date (since the 13.2 release of the other SciQuest products)

Production Reports

Ability to Maximize Report Space

Some organizations have requested additional space in which to review their reports. As of this maintenance release, users will have the ability to maximize the report space. When the icon in the top-right corner is clicked, the left navigation bar and the toolbar are minimized and the report screen size is increased. Clicking the icon on the enlarged screen will minimize the screen.