14.1 Release Notes
for SciQuest Products

March 28, 2014 – Final Version
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Welcome

The 14.1 SciQuest Product Release will be available in the production environment starting March 30, 2014. The release includes features related to the following SciQuest products:

- **Spend Analysis Products:** Spend Radar
- **Supplier Management Products:** Total Supplier Manager
  - Features in this document are related to the Total Supplier Manager version launching with the 14.1 release. Features related to Legacy and SIMS SaaS versions of TSM are not covered.
  - Features related to supplier management tools available with Shopping, Accounts Payable and Inventory products are included in the appropriate section of the document.
- **Sourcing:** Advanced Sourcing Optimizer
- **Contract Products:** Contract Director
  - Contract management in Spend Director is included in the Shopping and Inventory Products section of this document.
  - Features in this document are related to the SaaS version of Contract Director. Features related to the deployed version of Contract Director are not covered.
- **Shopping Products:** Spend Director, Order Manager, and Requisition Manager
- **Inventory Products:** Supplies Manager
- **Accounts Payable Products:** Accounts Payable Director and Accounts Payable Express (formerly Settlement Manager)

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 14.1 release.

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

http://library.sciquest.com

This document will help you:

- Understand the impacts of new features on your requisitioners, approvers, administrators, and other individuals using the system.
- Understand any changes required on your part to enable a feature of the system.
- Provide a starting point of “where to go” to learn more about the features and functionality discussed in this document.
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 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>
14.1 Scheduling

To help prepare our customers for the upcoming 14.1 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 14.1 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 March 7, 2014 8am ET</td>
<td>The 14.1 release will be promoted to the Test (user test) environment from Friday, March 7, 2014 8am ET through Sunday, March 9, 2014 12pm ET. An email will be sent out when the promotion is complete.</td>
</tr>
<tr>
<td>Release Validation in Test environment</td>
<td>March 9, 2014 – March 27, 2014 (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 March 28, 2014, 9pm ET through Sun, March 30, 2014 12pm ET</td>
<td>The 14.1 release will be promoted to the Production environment from Friday, March 28, 2014 9pm ET through Sunday, March 30, 2014 12pm ET. An email will be sent out when the promotion is complete.</td>
</tr>
<tr>
<td>Release available on Production Sites</td>
<td>Sunday, March 30, 2014</td>
<td>This date indicates when the features and functionality associated with 14.1 will be available on customer Production sites. Final documentation provided at this time (Release Notes and Handbooks).</td>
</tr>
</tbody>
</table>

* Details:

- This schedule is applicable to the SaaS version of the following SciQuest products: Spend Director, Requisition Manager, Order Manager, Supplies Manager, Settlement Manager, Accounts Payable Director, AP Express, Total Supplier Manager, Sourcing Director, the SciQuest Supplier Network and SpendRadar.
- Advanced Sourcing Optimizer will release to production on the same schedule. Since this product does not offer a Test environment, the test dates are not applicable.
- A public release is not scheduled for Contract Director for the 14.1 release.
- Planned deviations to this schedule will be communicated to customers at least two weeks in advance. SciQuest is not liable for any system or data issues encountered during the recommended period of system unavailability listed above (release promotion period).
Training Opportunities
To help prepare you for the 14.1 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 Video</td>
<td>Available February 2014</td>
<td>The primary goal of this video is to introduce customers to planned functionality across all products for the upcoming release. Recommended Audience: System Administrators, key system users, and Trainers</td>
</tr>
<tr>
<td>Release Overview Webinar: eProcurement and AP</td>
<td>Wednesday, March 12, 2014 9 a.m. ET 2 p.m. ET</td>
<td>This webinar provides an overview of new features for the following product: Shopping, Accounts Payable and Inventory. Recommended Audience: System Administrators and Trainers</td>
</tr>
<tr>
<td>Introduction to Total Supplier Manager</td>
<td>Thursday, March 13, 2014 11 a.m. ET</td>
<td>This webinar provides an introduction to Total Supplier Manager - a supplier information-management solution launching with the 14.1 release. Recommended Audience: System Administrators and Trainers</td>
</tr>
</tbody>
</table>
The Feature Snapshot for 14.1

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 March 30, 2014, 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>On by default</td>
</tr>
<tr>
<td>Product Branding Changes</td>
<td>Advanced Sourcing Optimizer</td>
<td>End-users</td>
<td>☑</td>
</tr>
<tr>
<td>New Lookup Table for Sourcing Events</td>
<td>Advanced Sourcing Optimizer</td>
<td>End-users</td>
<td>☑</td>
</tr>
<tr>
<td>Increased Excel Template Size Limits</td>
<td>Advanced Sourcing Optimizer</td>
<td>End-users</td>
<td>☑</td>
</tr>
<tr>
<td>Full Transition to Phoenix Interface</td>
<td>All Shopping, Accounts Payable, Inventory and Supplier Management Products</td>
<td>Admins End-users</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>Email Management Tool</td>
<td>All Shopping, Accounts Payable, Inventory and Supplier Management Products</td>
<td>Admins</td>
<td></td>
</tr>
<tr>
<td>New Capabilities for Setting Color Themes</td>
<td>All Shopping, Accounts Payable, Inventory and Supplier Management Products</td>
<td>Admins</td>
<td></td>
</tr>
<tr>
<td>Ability to Update User Authentication Method in the User Profile</td>
<td>All Shopping, Accounts Payable, Inventory and Supplier Management Products</td>
<td>End-users Admins</td>
<td></td>
</tr>
<tr>
<td>Permission Change for Allowing Users to Edit Department in the User Profile</td>
<td>All Shopping, Accounts Payable, Inventory and Supplier Management Products</td>
<td>End-users Admins</td>
<td></td>
</tr>
<tr>
<td>Excel Export Documents Upgraded to Use Latest File Format</td>
<td>All Shopping, Accounts Payable, Inventory and Supplier Management Products</td>
<td>Admins</td>
<td></td>
</tr>
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<td></td>
</tr>
<tr>
<td>Ability to Inactivate Shared Cart Groups</td>
<td>Spend Director</td>
<td>End-users Admins</td>
<td></td>
</tr>
<tr>
<td>PR and PO Export Updates: Shared Cart Flag Added</td>
<td>Spend Director, Requisition Manager, Order Manager</td>
<td>Admins</td>
<td></td>
</tr>
<tr>
<td>Full PR Export Update: Prepared For User Added</td>
<td>Spend Director, Requisition 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>Banner Budget Authorization – Budget Exceeded Flag Management</td>
<td>Spend Director, Requisition Manager</td>
<td>Admins</td>
<td>✓</td>
</tr>
<tr>
<td>PO Unit Price in Document History Expanded to Four Decimal Places</td>
<td>Order Manager</td>
<td>Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Distribution of PO Fax Templates in Different Languages</td>
<td>Order Manager</td>
<td>End Users Admins</td>
<td>✓</td>
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<tr>
<td>Workflow for Minimum Quantity Purchases</td>
<td>Requisition Manager</td>
<td>End-users Admins</td>
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<td>New Supplier Search Options</td>
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<td>End-users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Supplier Search Export Update</td>
<td>All Shopping, Accounts Payable, Inventory and Supplier Management Products</td>
<td>Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Updated Supplier Profile User Interface and Navigation</td>
<td>All Shopping, Accounts Payable, Inventory and Supplier Management Products</td>
<td>End-users Admins</td>
<td>✓</td>
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<td>----------------------------------------------------------------------------------</td>
<td>----------------------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Additional Supplier Profile Enhancements</td>
<td>All Shopping, Accounts Payable, Inventory and Supplier Management Products</td>
<td>End-users Admins</td>
<td></td>
</tr>
<tr>
<td>New Top Items Purchased Report</td>
<td>All Shopping and Accounts Payable Products</td>
<td>End-users Admins</td>
<td></td>
</tr>
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<td>Organizational Spend Report Updates</td>
<td>All Shopping and Accounts Payable Products</td>
<td>End-users Admins</td>
<td></td>
</tr>
<tr>
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<td>All Shopping and Accounts Payable Products</td>
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<tr>
<td>New Invoice/PO Comparison Capabilities for Workflow Routing</td>
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<td>End Users Admins</td>
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</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>Ability to Determine if an Invoice Line Item is Under-Invoiced</td>
<td>AP Director</td>
<td>End Users Admins</td>
<td>Requires Setup</td>
</tr>
</tbody>
</table>

### Spend Analysis: Spend Radar Enhancements

This section of the document contains features related to the SpendRadar product. The 14.1 release is a minor release and only impacts those customers who use Data Manager.

### Data Manager

#### Data Load and Refresh Controls

New controls are available to better manage the data loading and refresh process. Controls include extra parameters to ensure that all lines from the data input file are fully loaded and received in the Data manager application. Troubleshooting is easier when issues are found.

#### Authorization Enhancements: Limiting External Access

The following areas of the Data Manager application are no longer accessible for Data Manager Users and require review with the SciQuest team:

- Project Setup
- Rule Auditing
- QlikView authoring and refreshes
- Start extra-large classification jobs
- Language translation changes

For questions or concerns, please contact the Spend Radar customer support team.
Supplier Management: Total Supplier Manager

Introduction to Total Supplier Manager

Total Supplier Manager (TSM) is a supplier information-management solution launching with the 14.1 release. Total Supplier Manager delivers a central entry point for suppliers and a data repository for internal users, and lays the foundation for a successful eProcurement strategy.

This supplier management solution helps organizations monitor supplier interactions, avoid duplication of effort, reduce errors and systematically reduce risk in the supply base while facilitating federal compliance and effectively managing diversity programs.

The following functionality is included in the base TSM solution:

• Branded supplier registration and profile management portal for suppliers
• Multiple, configurable supplier registration profiles for the supplier directory
• Supplier registration approval workflow
• Certification collection (insurance, diversity)
• Automated alerting and expiration management of key information and certifications
• Configurable approval process for ongoing updates to supplier profile information

Optional add-on modules are available for:

• Supplier on-boarding: automate the supplier setup process with W8/9 and payment method collection, OFAC risk check, AP approval workflow and data integration with ERP(s)
• 2nd Tier Reporting: manage 2nd Tier Diversity programs through Prime supplier reporting of 2nd tier spend against goals

For more information about Total Supplier Manager, including an overview, please visit this page of the Product Release Library: http://library.sciquest.com/docs/TSM/TSMModuleOverview.pdf

14.1 Enhancements for Early Adopters

Early adopters of Total Supplier Manager will see the following enhancements when version 14.1 is released.

General Enhancements

Full Transition to Phoenix Interface
For information about this feature, please see Full Transition to Phoenix Interface on page 15.

Email Management Tool
For information about this feature, please see Email Management Tool on page 16.

New Capabilities for Setting Color Themes
For information about this feature, please see New Capabilities for Setting Color Themes on page 17.
Ability to Update User Authentication Method in the User Profile
For information about this feature, please see Ability to Update User Authentication Method in the User Profile on page 17.

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For information about this feature, please see Permission Change for Allowing Users to Edit Department in the User Profile on page 18.

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Supplier Management Enhancements

New Supplier Search Options
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For information about this feature, please see Supplier Search Export Update on page 27.

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For information about this feature, please see Updated Supplier Profile User Interface and Navigation on page 28.

Ability to Remove Address/Contact Association
For information about this feature, please see Ability to Remove Address/Contact Association on page 29.

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For information about this feature, please Ability to Hide Inactive Supplier Addresses and Contacts on page 29.

Additional Supplier Profile Enhancements
For information about this feature, please see Additional Supplier Profile Enhancements on page 30.
Sourcing: Advanced Sourcing 
Optimizer Enhancements

The section of contains features related to Advanced Sourcing Optimizer (ASO). Beginning in 14.2, we will also be providing Sourcing Director updates in this section.

Product Branding Changes

As of 14.1, Advanced Sourcing Optimizer branding will be updated to be consistent with the standard look and feel of other SciQuest products and to reflect new naming conventions within the product. Important Note: While all end-user roles will see the logo and naming changes, no functionality will change due to the new branding.

The Branding Changes include:

• References to CombineNet will be changed to SciQuest.
• References to ASAP will be changed to ASO.
• CombineNet logos will be replaced with SciQuest logos.

Impact:

• Products Affected: Advanced Sourcing Optimizer
• End User Impact: Medium
• 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
• These changes are implemented by default across the complete ASO product offering.
• Changes include help files; CombineNet ASAP branding has been replaced with SciQuest ASO branding.

New Lookup Table for Sourcing Events

In order to enhance users’ ability to support more extensive modeling of various cost elements related to the items they are sourcing, ASO will provide the ability to create and reference a Lookup Table within an ASO event. Adding a Lookup Table to a sourcing event allows buyers to take into consideration additional costs based on unique combinations of Supplier, Item, and Bid information.

The NEW Lookup Table feature includes:

• Lookup Table Population – Users will have the ability to populate the Lookup Table within a formatted Excel template, and that template will be uploaded to add the values into the event.
• Lookup Table Values will be usable in cost model configuration- The values in a configured Lookup Table will be available for use when creating a cost model or cost component. Lookup Table values will appear on reports where appropriate.
• Table values available in Optimizations – With a configured and populated Lookup Table, the ability to create scenario rules using those values becomes available. Users will have the ability to build
business rules that reference the values in the lookup table, and analyze the results based on those rules.

**Impact:**
- Products Affected: Advanced Sourcing Optimizer
- End User Impact: Medium
- Admin User Impact: None
- Integration Impact: None

**Key points of Feature:**
- This feature is OFF (disabled) by default. Please contact SciQuest to enable.
- New Permissions related to this Feature: None
- Implementation:
  - Lookup Table configuration will be an available option for all new events, and all existing events on the 14.1 environment.
  - Legacy and Custom events created before the August 2013 release will not receive this feature.
  - To use a Lookup Table in a sourcing event, users must submit a request through ASO Buyer Support to configure and populate the Lookup Table. Once the Lookup Table has been configured and populated, the values in the table become available to be used within the Cost Model(s)/Cost Component(s), Expressive Feedback and Optimizations.

**Increased Excel Template Size Limits**
The existing size limits for downloading Excel files are being standardized for Excel 97-2003 (.xls) file types and increased for Excel 2007-2010 (.xlsx) file types. Examples of templates available in the product include supplier’s bid sheets and bid receipts, historics templates for buyers, etc.

**The increased limits include:**
- Increases for Excel 2007-2010 (XLSX) files - Column restrictions for .xlsx files will be removed entirely. The maximum number of rows per worksheet will be increased to 250,000 for all .xlsx downloads.
- Increases for Excel 97-2003 (XLS) files – There will be a maximum column limit of 256 for .xls downloads. The maximum number of rows per worksheet will be increased to 65,000 for all .xls downloads.

**Impact:**
- Products Affected: Advanced Sourcing Optimizer
- End User Impact: Medium
- Admin User Impact: None
- Integration Impact: None

**Key points of Feature:**
- This feature is ON by default.
- New Permissions related to this Feature: None
- Increase in size limit as specified above will apply to all Excel templates available in the product.
Contract Director Enhancements

A public release is not planned for Contract Director, as the focus continues to be on architecture improvements. Customers will not be impacted by this release, and the standard release dates do NOT apply to Contract Director for 14.1.

The last major release of Contract Director occurred in July 2013 (13.2). Since then, bi-weekly maintenance updates have occurred and will continue as indicated in the Cloud Report. For details on the maintenance releases, please refer to the Product Release Library.
Shopping Products

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

- **General Enhancements** – This section focuses on general product enhancements.
- **Spend Director Enhancements** – This section focuses on enhancements related to Spend Director.
- **Order Manager Enhancements** – This section focuses on enhancements related to Order Manager.
- **Requisition Manager Enhancements** – This section focuses on enhancements related to Requisition 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**

**Full Transition to Phoenix Interface**

SciQuest’s 14.1 release brings our highly anticipated transition to our new user interface, the Phoenix UI. With the adoption of this enhanced UI, users will enjoy a more logically organized, task-driven series of menus. Breadcrumbs across the top of each page help users know where they are in the application, and provide an easy path to related areas of functionality. Some of the key benefits of the new UI include the vertically oriented, icon-based side menu that remains on the screen no matter where users are in the application. This task-oriented grouping of key functionality helps users easily identify the key areas where they do their day-to-day work. Users will also find great benefits to the new top banner, which houses the user profile, bookmarks, notifications and action items, and quick search menu. Finally, a well-organized and easy to access user profile and user management screen consolidates all of the key tasks users will need to access in order to configure the site in a way that is specific to their needs. As always, SciQuest strives to provide education and assistance to help our administrators and end-users learn our new functionality, so we encourage customers to take advantage of the additional information we have provided on the transition to the new user interface.

**Impact**

- Products Affected: All Shopping, Accounts Payable, Inventory and Supplier Management Products.
- End User Impact: **High**
- Admin User Impact: **High**
- Integration Impact: None

**Key points of Feature**

- This feature will be ON (enabled) by default.
- New Permissions Related to this Feature: None
- As of 14.1, Classic interface will no longer be available. All customer sites will automatically display Phoenix interface.
- All handbooks and online help have been updated to reflect the new interface.
- SciQuest is offering several opportunities for education and training related to the new interface. For additional information, please contact your Client Partner or Project Manager or go to [http://university.sciquest.com](http://university.sciquest.com).
Email Management Tool

System email configuration has historically been managed through Field Management. In 13.3, we introduced a new email management tool. In that release, the email management tool was available only to Accounts Payable Director customers and only a limited number of emails were included. In 14.1, the email management tool will be available for all organizations that use the Shopping, Accounts Payable, Inventory and Supplier Management products. For this release, 23 system emails will be configurable in the email management tool. It is important to note that SciQuest will continue to add emails to the email management tool over the next several releases. There are still many emails that require configuration through Field Management. Emails included in this release:

- Admin Import/Export Failure
- Admin Import/Export Success
- Approved Price File Effective
- Buyer Invoice PO Requires Receipt
- Buyer Invoice Review
- Cart/Requisition Returned Notice
- Consortium Price File Extract Complete Notice
- Content Audit Price File Extract Complete Notice
- Content Price File Extract Complete Notice
- Email Distribution Failure Notice
- Fax Distribution Failure Notice
- PO Requires Receipt Notice
- PO Status Request Notice
- Requisition Deleted
- Requisition Original Submitter
- Requisition Rejected
- Requisition Rejected Prepared By
- Requisition Rejected Shared Cart Participants
- Cart Shared Notice
- Supplier Portal Invitation Email from SQ
- Supplier Registration Complete
- Supplier Registration Complete With Auto Approval
- Supplier Content Has Updated

Impact

- Products Affected: All Shopping, Accounts Payable, Inventory and Supplier Management Products.
- End User Impact: None
- 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: Manage Emails. Note: This permission is currently available to Accounts Payable Director customers as of Release 13.3.

The email management tool is accessed through Site Administration > Email Management > System Emails.

The email management feature will provide the following capabilities:

- All text can be edited (Reply to, From, Subject, Body).
- Placeholder text can be easily inserted/moved/replaced within the email body.
- Default settings are easily restorable using the Restore System Defaults function.
- Email configuration and change history is captured.
- Emails in languages other than English can be created by selecting a language value in the Select Language field.
- Emails can be previewed
For additional information about the email management tool, please see the online help or the Configuration Handbook: Shopping, Accounts Payable and Inventory Products.

New Capabilities for Setting Color Themes
SciQuest is continuing to add options for personalizing your organization’s site to match your company’s color schemes. In 14.1, you will have the ability to configure the main top banner to a specific color. Currently, the color of the banner is dictated by the main color theme configured for your organization. In addition, Spend Director customers will have the ability to configure the background color of the Assign Cart and Place Order buttons.

Impact
- Products Affected: All Shopping, Accounts Payable, Inventory and Supplier Management Products
- End User Impact: None
- 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
- New configuration options are available when setting organization Color Themes including Primary Button color, Link Color, and the Banner Background color. Color themes are configured in Site Configuration > Site Appearance and Behavior > Manage Site Color Themes.
- The default color for Link Color has been changed from Dark Blue to Medium Blue to best support sight impaired and colorblind users. There are 4 possible colors available to customize the Link Color.
- For additional information, please see the online help or the Site Appearance and Behavior section in the Configuration Handbook: Shopping, Accounts Payable and Inventory Products.

Ability to Update User Authentication Method in the User Profile
Previously, a user’s authentication method could not be changed directly in the user profile. To change the setting, an Administrator would export the field value out of the system, modify the setting and reimport it. With the release of 14.1, the Authentication Method field assignment can be changed by an Administrator directly within a user’s profile.

Impact
- Products Affected: All Shopping, Inventory, Accounts Payable and Supplier Management products.
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

Key points of Feature
- This feature is ON (enabled) by default.
- New Permissions related to this Feature: None
- In order to perform this action, a user must have Edit All User Profiles/Roles/Permissions permission.
Permission Change for Allowing Users to Edit Department in the User Profile

The **Edit Personal Information** permission allows users to make updates to their own user profile. Previously, this permission also granted the ability to edit Department settings. By changing their department, users could potentially gain access to sensitive department level documents and information. With the release of 14.1, the ability to change department has been removed from the **Edit Personal Information** permission. A new, separate permission is now available to give users the ability to edit their departments.

**Impact**

- **Products Affected:** All Shopping, Inventory, Accounts Payable and Supplier Management products.
- **End User Impact:** Low
- **Admin User Impact:** Low
- **Integration Impact:** None

**Key points of Feature**

- This feature is **ON** (enabled) by default.
- A new permission, **Change My Dept/Position**, is now available. Users with this permission can edit department data.
  - **Permission location:** User Profile > Permission Settings > Administrator Permissions > User Administration section.
- The ability to edit departments is no longer associated with the permission **Edit Personal Information**.
- Any user previously assigned the **Edit Personal Information** permission is automatically granted the **Change My Dept/Position permission** with the 14.1 release,
- The new permission only displays for Organizations that use departments.
- For additional information about managing the user permissions, please see the online help or the **User Management** section of the **Basics Handbook: Shopping, Accounts Payable and Inventory Products**.

Excel Export Documents Upgraded to Use Latest File Format

In 14.1, Excel export documents are created using the Excel .xlsx format (Microsoft Office 2007 Excel format). This change not only ensures exported Excel documents are compliant with newer versions of Microsoft Excel programs, but also provides export performance improvements for the export of large documents.

**Impact**

- **Products Affected:** All Shopping, Accounts Payable, Inventory and Supplier Management Products.
- **End User Impact:** None
- **Admin User Impact:** Low
Key Points of the Feature
- This feature will be ON (enabled) by default.
- New Permissions Related to this Feature: None
- Excel exports affected by this change include:
  - Supplier Export
  - User Feedback Export
  - Customer Supplier Enablement Export
  - Supplier Portal Supplier Enablement Export
- Microsoft provides a compatibility patch for versions earlier than 2007. It is possible that this patch is already installed on user machines. If you are not using Excel 2007, please contact your IT Department to confirm that the patch is installed.

Spend Director Enhancements

Ability to Assign Cart from Each Step of Express Checkout
In the 13.2 release, SciQuest introduced Express Checkout, which gives organizations the ability to enable a simple checkout process for specified users. While users were previously able to assign a cart in Express Checkout, this task could only be performed from the Review Order step in the checkout process. In 14.1, Express Checkout has been enhanced by including the option to assign the cart in each step of the checkout 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 in Express Checkout
- New Permissions related to this Feature: None
- The Assign Cart button will display in every step of Express Checkout.

Efficient Assignment of Contracts to Cart/PR Line Items
It is common for shopping carts and purchase requisition line items to be associated with existing contracts after the cart or PR has been saved. Previously, in instances when a contract association was required for multiple purchased items, the user had to manually select and assign a contract to each of the requisition or cart line items, line item by line item. With the release of 14.1, a new Copy To Other Lines function is available which allows quick association of contracts across multiple line items.

Impact
- Products Affected: Spend Director, Requisition Manager
Key points of Feature
- This feature is ON by default.
- New Permissions related to this Feature: None
- Provides a much more efficient process for assigning contracts to Cart/PR line items
  - A user must be able to assign a contract to a line in order to copy the contract to a line.
  - Assigning and saving a contract to a line item, within a Cart or Requisition, establishes a baseline for multi-item Contract association.
    - A new copy to other lines... link is exposed within the line item to which the Contract has been associated.
    - When this link is selected, a new Contract Association pop-up screen is presented that lists all of the line items, within the Cart or Requisition, to which the associated Contract could possibly apply.
    - When the appropriate line items have been selected in the Contract Association pop-up and the Copy button selected, all of the new contract associations will be represented within the user’s Shopping Cart / PR.
    - Note that assigning a Contract to a line item could result in a change to the price of that item; as the contracted price –if different- will replace the price originally charged for the item.
    - The feature applies to both Simple and Advanced shopping carts.
- This enhancement does not apply to Express Checkout.
- For additional information about managing contracts, please see the Managing Contract Purchasing section of the Administration Handbook: Shopping, Accounts Payable and Inventory Products.

Ability to Remove Preferred Status from Cart Assignees and Financial Approvers
In a user’s profile settings, one or more users can be assigned as Financial Approvers and/or Cart Assignees. From these assignments, one of the Financial Approvers can be designated as the preferred approver, and one of the Cart Assignees can be designated as the preferred assignee. Previously, there was no simple way to remove the Preferred status from a user. One had to delete and then re-assign the user. In 14.1, a user can remove the Preferred status by simply clicking a button.

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

Key points of Feature
- This feature is ON (enabled) by default.
New Form Check for Copied Shopping Carts

Previously, when a shopping cart that included an old version of a form was copied as a new cart, the old version of the form was not detected when the new cart was created. This resulted in possible missing form data in the new cart. In 14.1, as the requisition is being processed through Purchase Requisition approval workflow, the system is now able to recognize that a newer version of a form is available. Purchase Requisition approval workflows can now be constructed to detect carts containing older form versions and route the approval accordingly for review.

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

Key points of Feature
- This feature is OFF by default.
- New Permissions related to this Feature: None.
- A new workflow object is available with the 14.1 release that, when integrated into an organization’s requisition workflow, detects that a newer version of the form is available and will use that form instead of the outdated form.
- For additional information about workflow setup, please see the online help or the Workflow Setup section of the Configuration Handbook: Shopping, Accounts Payable and Inventory Products. Note: It is recommended that you consult with SciQuest when workflow changes are necessary.

Ability to Inactivate Shared Cart Groups

Organizations create Shared Cart user groups to allow multiple users to purchase from a single cart. Previously, there was no way to inactivate Shared Cart Groups that were no longer needed or useful. With the release of 14.1, organizations now have the ability to inactivate Shared Cart User groups.

Impact
- Products Affected: Spend Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None
Key points of Feature

- This feature is ON by default.
- New Permissions related to this Feature: None
- Shared cart user groups are accessed through Shop > Admin > Manage Groups for Shared Carts and selecting a user group to edit.
- A new **Active** checkbox is located in the Shared Cart User Group. This checkbox allows the user group to be made active and inactive. **Note:** Users with the **Manage shared cart user groups** permission can make this edit only to groups that they created. Users with the **Administer shared cart user groups** can make this edit to any group.
- Shared cart user groups can now be filtered by **All**, **Active** or **Inactive** by selecting the appropriate action from the drop-down menu.
- By default newly created groups are always **Active**.
- Upon release all existing user groups will remain active.
- This feature is applicable to both Simple and Advanced carts.
- For additional information about managing shared carts, please see the online help or the **Shopping Carts and Checkout** section of the **Shopping Handbook**.

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PR and PO Export Updates – Shared Cart Flag Added

With the release of 14.1, a **Shared Cart** flag is added to Purchase Requisition and Purchase Order export documents for both the Full and Transaction PR and PO exports. In the export files, the new column name is titled **Shared Cart**.

**Impact**

- Products Affected: Spend Director, Requisition Manager, Order Manager
- End User Impact: None
- Admin User Impact: Low
- Integration Impact: Low

Key points of Feature

- This feature is ON (enabled) by default for organizations using Shared Carts.
- New Permissions related to this Feature: None
- The Shared Cart flag value is T (True) if the order came from a shared cart, and is F (False) if the order is not from a shared cart.
- Organizations using PR and/or PO exports in other internal systems should review the new export file layout to be sure that the additional column does not affect integration with those systems (the new column is positioned at the end of the columns contained in the previous version of the export file).

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Full PR Export Update - “Prepared For” User Added

Previously, the Full PR Export did not contain information about the **Prepared For** user. In release 14.1, this information is available within the export file.

**Impact**

- Products Affected: Spend Director, Requisition Manager
- End User Impact: None
Key points of Feature
• This feature is ON by default.
• New Permissions related to this Feature: None
• Four new columns are now incorporated into the PR Full Export file layout. The column titles are:
  • Owner: Username
  • Owner: First Name
  • Owner: Last Name
  • Owner: Email
• Organizations using PR exports in other internal systems should review the new export file layout to be sure that the additional columns do not affect integration with those systems (the new columns are positioned at the end of the columns contained in the previous version of the export file).

Banner Budget Authorization – Budget Exceeded Flag Management
Previously, any requisition, purchase order or invoice that was marked as exceeding a set budget level was never properly refreshed if budget levels were subsequently increased in the integrated Allucian Banner ERP. With the 14.1 release, the Budget Exceeded flag on a requisition, purchase order, or invoice will now be properly updated to reflect the true budget status every time a Budget Authorization is run. Refreshing the Budget Exceeded flag on requisitions, purchase orders, and invoices will ensure that unnecessary workflow review is avoided if proper funds exist.

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

Key points of Feature
• This feature is OFF (disabled) by default.
• New Permissions related to this Feature: None
• Please contact SciQuest to enable this feature.

Order Manager Enhancements

PO Unit Price in Document History Expanded to Four Decimal Places
Previously, Document History displayed Purchase Order unit prices out to the second decimal place. If a user made price adjustments beyond two decimal places, the change was not reflected within the document’s history tab. This resulted in user price changes not being accurately recorded. With the 14.1 release, the number of decimal places stored is now expanded to four. Note that this same detail is also provided in the export file when the Document History information is exported.
Impact

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

Key points of Feature

- This feature is ON by default.
- New Permissions related to this Feature: None
- Organizations using PO document history exports in other internal systems should ensure that the additional decimal places can be accommodated by those systems.

Distribution of PO Fax Templates in Different Languages

Previously, multi-national organizations were limited in their ability to deliver PO Fax templates in the various languages that their suppliers were best equipped to consume. With 14.1, the PO Fax configuration template allows organizations to configure the template in multiple languages. By using a single PO Fax document template with the new PO language enhancements, purchase orders can now be created and delivered in different languages.

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.
- New Permissions related to this Feature: None
- This feature is available if an organization has more than one supported language defined.
- PO Fax document is configured by navigating to Site Configuration > Configure Documents > Configure Purchase Order Document > Fax then selecting a fax configuration and selecting the Layout Details tab.
- In each group, a Show Languages hyperlink is available that, when clicked, allows you to view the available languages and override options. You can choose to override an elements language with a different language.
- All PO Fax element changes are logged in the audit history.
- A PO template is previewed in the language of the user.
- Element language overrides are honored when a PO Fax configuration is exported.
- When a PO Fax configuration is copied, element language overrides are copied as well.
- With the introduction of multi-language support for the PO Fax Document, a language selection hierarchy has been established as follows (in descending order):
  - Fulfillment Center language
  - Business Unit (BU) language
  - Default Organization language
• ‘English’ – Set as default language if no other organization settings are configured.

• Suggested Best Practice: Users will segment their international markets into different Business Units. The language of each Business Unit will be used in the construction of POs created and submitted from that BU. If supplier language exceptions exist within the supplier community serving a particular BU, then Fulfillment Center language overrides can be established for those suppliers that require PO submissions in a language different than the default language of the BU.

• For additional information about document setup, please see the Document Design section in the Configuration Handbook: Shopping, Accounts Payable and Inventory Products.

Ability to Send PO Requested Delivery Date in ISO Format

Previously, customers could only submit cXML purchase orders to suppliers with the Requested Delivery Date field in the format of MM-DD-YYYY. But some suppliers require the Requested Delivery Date field in purchase orders to be in the format of YYYY-MM-DDth:mm:ss.sTZD (ISO 8601 format). With the 14.1 release, when creating a purchase order template, purchase orders can now include a Requested Delivery Date field with format ISO 1806 in accordance with supplier requirements.

Impact

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

Key points of Feature

• This feature is OFF by default.
• New Permissions related to this Feature: None
• Please contact SciQuest to enable this feature.
• For additional information about workflow setup, please see the online help or the Workflow Setup section of the Configuration Handbook: Shopping, Accounts Payable and Inventory Products. Note: It is recommended that you consult with SciQuest when workflow changes are necessary.

Requisition Manager Enhancements

Workflow for Minimum Quantity Purchases

A Minimum Quantity value which details the minimum purchase levels for specific items can be managed by the supplier using the Content Management Tool (CMT). With the 14.1 release, a new workflow property is provided to allow custom workflow routing depending on if that minimum quantity is reached. Whenever a designated minimum quantity is not met on a new purchase requisition, the requisition can now be routed for approval.

Impact

• Products Affected: Requisition Manager
• End User Impact: Low
• Admin User Impact: Low
• Integration Impact: None

Key points of Feature
• This feature is OFF (disabled) by default.
• New Permissions related to this Feature: None
• A new workflow object is available with the 14.1 release that will detect if an established item minimum quantity purchase level has not been met.
• Suppliers will be responsible for ensuring that a product’s minimum quantity setting is a proper numeric value.
• The CMT is accessed in the supplier portal through Manage Catalogs > Hosted Catalog Items and Price > Submit Hosted Content and Price Data.
• For additional information about workflow setup, please see the online help or the Workflow Setup section of the Configuration Handbook: Shopping, Accounts Payable and Inventory Products. Note: It is recommended that you consult with SciQuest when workflow changes are necessary.

Banner Budget Authorization – Enhanced Requisition Routing
Previously, requisitions were only marked as exceeding budget authorization if the integrated Banner ERP was set to return a Budget Exceeded Warning when the condition occurred. The Banner ERP could also be configured to return a Budget Exceeded Error response if a non-sufficient funds (NSF) check exposed an issue, but the requisition was not flagged as budget exceeded when this error message was received. Therefore, some requisitions with NSF issues could not be routed for proper disposition. With the 14.1 release, requisitions can be marked as exceeding budget authorization if the integrated Banner ERP is set to return either a Budget Exceeded Warning or a Budget Exceeded Error.

Impact
• Products Affected: Requisition Manager
• End User Impact: Low
• Admin User Impact: Low
• Integration Impact: None

Key points of Feature
• This feature is OFF (disabled) by default.
• New Permissions related to this Feature: None
• A new Organization setting is available, that when enabled, allows a requisition with an NSF Error response to be routed just like it would be if an NSF warning response had been received. If required, please contact SciQuest Support to have this setting enabled.

Supplier Management Enhancements

New Supplier Search Options
As part of a continued effort to make searching for and locating suppliers as efficient as possible, SciQuest made several enhancements to Supplier Search in 14.1. Below is a list of new supplier search options:
• There are two new Advanced Search filters: Commodity Code and Geographic Service Area.
• Diversity Classifications display with the full classification name, followed by the classification abbreviation (in 13.3, only the full name displayed). In addition, users are able to search for suppliers based on the abbreviation and search on suppliers with no diversity classification.

• Search results may be filtered by supplier class.

Impact

• Products Affected: All Shopping, Accounts Payable, Inventory and Supplier Management products.
• 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 Permissions related to this Feature: None
• Suppliers are searchable based on their Commodity Code and Geographic Service Areas via Advanced Search. **Note:** If no Commodity Codes are configured for the organization, the Commodity Code search option is not available.
• Supplier Class has been added to Filter By and Refine Supplier Search.
• Suppliers are searchable based on Diversity Classification abbreviations alongside the full name via Advanced Search.
• Suppliers are searchable based on having or not having any diversity classifications. **Note:** The None option applies to suppliers who have not entered, or who have partially entered, a diversity classification. This search option will not find suppliers who have answered the question as Does Not Qualify, Decline to Answer, etc.
• The full name of the “8(a)” Federal Diversity Classification has been corrected to “8(a) Business Development Program”.
• For additional information about supplier search, please see the online help or the Supplier Management section of the Administration Handbook: Shopping, Accounts Payable and Inventory Products.

Supplier Search Export Update

Organizations have the ability to export supplier search results for use outside of the SciQuest application. In 14.1, we enhanced the supplier search results export to allow for an easier, more efficient supplier data management experience.

Impact

• Products Affected: All Shopping, Accounts Payable, Inventory and Supplier Management products.
• End User Impact: None
• Admin User Impact: Low
• Integration Impact: Low

Key points of Feature

• This feature is ON (enabled) by default and cannot be turned off.
• New Permissions related to this Feature: None
• **Supplier Remittance Address** has been removed as an export option; it was replaced with a **Supplier Addresses** option which extracts all Address data, regardless of Address Type, as well as 3rd Party ID, Address ID, Primary status and Type.

• The **Supplier General Profile** export option has been enhanced to include the previous three year’s Annual Revenue/Receipts, Status and Type.

• For AP Director customers, the **Supplier General Profile** export option has been enhanced to include Date Registered, Last Updated, Registration Method, Registration Status, Registration Type and Are you exempt from backup withholding?

• A default description, **Supplier Export**, is populated in the description field. You can edit the description.

**Updated Supplier Profile User Interface and Navigation**

As functionality within the supplier profile expands, it is important that the interface remains intuitive and user-friendly. In 13.3, supplier profile information was viewed from a series of tabs with general information as header text above the tabs. As the ability to store additional supplier data has increased, the number of tabs has increased requiring the user to scroll horizontally to access all information. In 14.1, we updated the supplier profile interface to a branch-style, collapsible menu in order to make navigating easier. The header text has been moved to a new location, above the menu, to save additional space.

**Impact**

- Products Affected: All Shopping, Accounts Payable, Inventory and Supplier Management products.
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

**Key points of Feature**

- This feature is ON (enabled) by default and cannot be turned off.
- New Permissions related to this Feature: None
- Users are able to view the supplier profile via a more user-friendly, collapsible menu.
- Previous “sub-tabs” within the “parent” tab are now listed as collapsible links within the parent menu group (e.g., Showcase/Punchout and Supplier Classes “sub-tabs” within the “parent” Showcase/Classes tab).
- The **History** tab has been converted to an easy-to-access link directly below the collapsible menu.
- The header text of the supplier profile has been moved to a section above the menu to further reduce the amount of white space on the page. Additional changes to the header text content include:
  - Replacing Supplier ID with Supplier Number.
  - Relocating Registration Type to the new Supplier Registration Info section of the Summary page (for TSM and AP Director customers).
- For additional information about the supplier profile, please see the online help or the **Supplier Management** section of the **Administration Handbook: Shopping, Accounts Payable and Inventory Products**.
Ability to Remove Address/Contact Association

In 13.2, SciQuest added the capability to associate supplier addresses with supplier contacts. In 13.3, once an address was associated with a contact, that association could not be removed. In 14.1, organizations have the ability to disassociate an address from a contact.

This new enhancement improves overall address management for supplier contacts.

Impact

- Products Affected: All Shopping, Accounts Payable, Inventory and Supplier Management 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 remove an Associated Address from a supplier Contact in the Contacts screen when editing a Supplier profile.
- For additional information about supplier addresses, please see the online help or the Supplier Management section of the Administration Handbook: Shopping, Accounts Payable and Inventory Products.

Ability to Hide Inactive Supplier Addresses and Contacts

In 13.3, inactive supplier addresses and contacts were displayed below active addresses in the supplier profile, by default. In 14.1, we have provided the ability to hide inactive addresses and contacts, allowing only the active ones to display. Important Note: As of the 14.1 release, suppliers have the ability to mark addresses and contacts as active or inactive; this should be taken into consideration if you choose to hide inactive items.

Impact

- Products Affected: All Shopping, Accounts Payable, Inventory and Supplier Management 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
- In the Addresses screen of the Supplier profiles, Addresses and Contacts that are not marked as active can be hidden from view in the supplier profile via the Hide Inactive Addresses hyperlink.
- Important: Upon release, the supplier profile defaults to display only active addresses and contacts. Inactive addresses and contacts ARE NOT visible until you select to make them display.
- New additions to Addresses and Contacts will automatically have the Active checkbox selected at the time of creation. The checkbox can be deselected prior to saving the entry to create an Inactive address or contact.
For additional information about supplier addresses, please see the online help or the Supplier Management section of the Administration Handbook: Shopping, Accounts Payable and Inventory Products.

**Additional Supplier Profile Enhancements**

14.1 introduced a number of additional minor enhancements to the supplier profile including:

- Additional Legal Structures were added to allow management of global suppliers.
- The Annual Sales, Date Established, and Supplier ID fields were re-labeled.
- The Short Form registration type for AP Director customers was renamed to Entity Profile 1. This change prevents user confusion with other SelectSite forms.
- For AP Director customers, a Supplier Registration Information section has been added to the Summary page.
- An Edit pop-up window has been added to all ERP ID/Number and Third Party ID/Number fields to prevent accidental updates.

**Impact**

- Products Affected: All Shopping, Accounts Payable, Inventory and Supplier Management products.
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**

- These features are ON (enabled) by default and cannot be turned off.
- New Permissions related to this Feature: None
- Non-US Based Entity and Foreign Individual were added as options for Legal Structure.
- Annual Sales was re-labeled to Annual Revenue/Receipts.
- Date Established was re-labeled to Year Established.
- Supplier ID was re-labeled to SciQuest Supplier ID.
- The Short Form registration type was renamed to Entity Profile 1 for AP Director customers.
- For AP Director customers, a Supplier Registration Information section has been added to the Summary page. The section includes the following information, when available:
  - Date Registered
  - Last Updated
  - Registration Method
  - Registration Status
  - Registration Type
  - Supplier Support Contact
- An Edit pop-up window has been added to all ERP ID/Number and Third Party ID/Number fields to prevent accidental updates. This includes:
  - The Third Party Reference Number and Supplier Number on the General page.
  - The 3rd Party ID and Address ID on the Addresses page.
  - The 3rd Party ID and Contact ID on the Contacts page.
  - The 3rd Party Address ID and Address ID on the Fulfillment Centers page.
Reporting Enhancements

New Top Items Purchased Report
In Release 13.3, SciQuest introduced the Spend Dashboard, which will be the central location for your organization’s key spend metrics. In Release 14.1, we expanded the Spend Dashboard with the addition of the Top Items Purchased report. Presented as an interactive graphical chart, this report quickly gives organizations a look at their top items purchased. In addition, it provides the ability to drill down into the item level details to see total spend, quantity, supplier data and other item related details. For example, you are able to report on your top 10 items purchased with non-catalog suppliers within a specified date range broken down by item type (catalog, punch out, form, etc.)

Impact
- Products Affected: All Shopping and Accounts Payable 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
- Depending on the SciQuest products licensed and in-use within your organization, the Top Items Purchased can be filtered for purchase orders, requisitions, or invoices using the Document Type filter.
- Once “Maximized”, a variety of filters are available for further analysis of your top items purchased data, including Date Range, Spend By, # of items, Supplier Name, Spend Type, and Supplier Type.
- If your organization has the multi business unit license, this report allows you to filter your results by a particular business unit.
- You can toggle between viewing your data in graphical formats (Chart) and the detailed data (Details) contained within these charts with a simply click of either the Chart or Details button.
- Returning to the Spend Dashboard is as easy as a single click using the Return to Dashboard link
- You can export, to Excel, both your data and chart along with the filters you used in your data selection.
- Print functionality is available on both the Chart and Detail pages allowing you to quickly print either the Chart or Details pages when needed.

Organizational Spend Report Updates
The Organizational Spend report was introduced in 13.3 and was the first report included in the Spend Dashboard. In 14.1, the Organizational Spend Report is enhanced to allow for more date ranges, supplier specific spend and further breakdown of spend by item types. Further enhancements have been made to allow for easier navigation between the data view (graphics vs. data details) and returning back to the spend dashboard from the report.
Impact
- Products Affected: All Shopping and Accounts Payable 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 report can be accessed via Reporting > Purchases and Spending Reports > Spend Dashboard
  - Once “Maximized”, a variety of filters are added to aid in the further analysis of your spend data, including date range, supplier name, spend type and supplier type.
- If your organization has the multi business unit license, this report allows you to filter your results by a particular business unit
- The graph display can be changed by simply clicking on the legend to turn off and on that measure
- You can toggle between viewing your data in graphical formats (Chart) and the detailed data (Details) contained within these charts with a simply click of either the Chart or Details button.
- Returning to the Spend Dashboard is as easy as a single click using the Return to Dashboard link
- You can export, to Excel, both your data and chart along with the filters you used in your data selection.
- Print functionality is available on both the Chart and Detail pages allowing you to quickly print either the Chart or Details pages when needed.
- For additional information about reports, please see the online help or the Reporting section of the Administration Handbook: Shopping, Accounts Payable and Inventory Products.

New and Enhanced Cycle Time Reports
Cycle Time reports analyze the time it takes for a purchasing document to go through workflow. These reports are useful in helping organizations to determine areas for process improvements by identifying where delays are happening in the workflow process. For Release 14.1, we added one Cycle Time report and are providing enhancements to two existing Cycle Time reports. All three of these reports now have the ability to view the Cycle Time data in both graphical format as well as the detailed data on screen.
- A new report, Invoice Create to Invoice Export, measures the length of time from invoice creation to invoice export. This allows organizations to measure the time that invoices are in draft mode.
- Cycle Time Reports; Time from PR Submission to PR Completion and Time from Invoice Submission to Invoice Export now have enhancements allowing organizations to easily identify areas of concern along with the capability to drill down to the associated documents and their key details.
- Menu change - the Reporting menu now has both the Cycle Time Reports and the Invoice Reports on their own lines giving specific navigation to either set of reports.

Impact
- Products Affected: All Shopping and Accounts Payable Products
- End User Impact: Low
- Admin User Impact: Medium
Key points of Feature

- This feature is ON (enabled) by default
- New Permissions related to this Feature: None
- The Cycle Time reports can be accessed via Reporting > Operational and Site Usage Reports > Cycle Time Reports

Cycle time report enhancements include graphs that provide the following functionality:

- Ability to group documents (Requisitions or Invoices) according to the number of distribution days it took for that cycle, and for invoice documents it will also further categorize by invoice source type.
- Ability to show total percentage of invoices by invoice source type (for Invoice related Cycle Time reports)
- Ability to provide an overall quick glance summary of data including total count and percentage of documents within each distribution bucket, average cycle time, as well as document lines (count and percentages).

- You can drill down from the graph to key document data such as document number, dates (submit or create) Owner (or Requisitioner), document total, and Supplier data.
- A variety of filters are added to aid in the further analysis of your cycle time data, including date range, supplier name, source type, etc.
- The Cycle Time filter allows you to filter on either a specific distribution bucket (i.e. 30 + days) or by selecting “Custom”, you can span distribution buckets by entering a from and to number of distribution days. Leaving the to field blank acts as a “and higher” range.
  - For example, if you want to see all documents that are between 20 and 25 days, you will enter between 20 – 25 days. If you want to see all documents that are 20 days or greater, you will enter 20 (leaving the next field blank, which means “and higher”).
- The Owner (for Invoice Cycle Time reports) and Requisitioner (for Requisition Cycle Time reports), filters allow you to filter for documents with specific Owners or Requisitioners.
- If your organization has the multi business unit license, all Cycle Time reports allow you to filter your results by a particular business unit.
- You can toggle between viewing your data in graphical formats (Chart) and the detailed data (Details) contained within these charts with a simple click of either the Chart or Details button.
- You can export, to Excel, both your data and chart along with the filters you used in your data selection.
- Print functionality is available on both the Chart and Detail pages allowing you to quickly print either the Chart or Details pages when needed.
- With the appropriate licenses and permissions, the two Invoice Cycle Time Reports (Invoice Create to Invoice Export and Invoice Submit to Invoice Export) can be accessed via the Accounts Payable flyout menu under Reports.
- For additional information about reports, please see the online help or the Reporting section of the Administration Handbook: Shopping, Accounts Payable and Inventory Products.
Inventory: Supplies Manager Enhancements

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

- **General Enhancements** – This section focuses on general enhancements that affect Supplies Manager.
- **Supplier Management Enhancements** – This section focuses on reporting enhancements that affect Supplies Manager.

## General Enhancements

**Full Transition to Phoenix Interface**
For information about this feature, please see [Full Transition to Phoenix Interface](#) on page 15.

**Email Management Tool**
For information about this feature, please see [Email Management Tool](#) on page 16.

**New Capabilities for Setting Color Themes**
For information about this feature, please see [New Capabilities for Setting Color Themes](#) on page 17.

**Ability to Update User Authentication Method in the User Profile**
For information about this feature, please see [Ability to Update User Authentication Method in the User Profile](#) on page 17.

**Permission Change for Allowing Users to Edit Department in the User Profile**
For information about this feature, please see [Permission Change for Allowing Users to Edit Department in the User Profile](#) on page 18.

**Excel Export Documents Upgraded to Use Latest File Format**
For information about this feature, please see [Excel Export Documents Upgraded to Use Latest File Format](#) on page 18.

## Supplier Management Enhancements

**New Supplier Search Options**
For information about this feature, please see [New Supplier Search Options](#) on page 26.

**Supplier Search Export Update**
For information about this feature, please see [Error! Reference source not found.](#) on page 27.
Updated Supplier Profile User Interface and Navigation
For information about this feature, please see Updated Supplier Profile User Interface and Navigation on page 28.

Ability to Remove Address/Contact Association
For information about this feature, please see Ability to Remove Address/Contact Association on page 29.

Ability to Hide Inactive Addresses and Contacts
For information about this feature, please see Ability to Hide Inactive Supplier Addresses and Contacts on page 29.

Additional Supplier Profile Enhancements
For information about this feature, please see Additional Supplier Profile Enhancements on page 30.
Accounts Payable Enhancements

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

- **General Enhancements** – This section focuses on general enhancements that affect AP products.
- **Reporting Enhancements** – This section focuses on reporting enhancements that affect AP products.
- **Supplier Management Enhancements** – This section focuses on reporting enhancements that affect AP products.
- **AP Director Enhancements** – This section focuses on enhancements that apply only to AP Director.

### General Enhancements

#### Ability to Identify Inactive Invoice Owners and Provide Notification

Previously, when an Invoice Owner had been inactivated in the system, or if they no longer had invoice approval permission, the system would continue to route invoices requiring approval to that user. This resulted in needless delays in the processing of invoices. With 14.1, the application can now identify when an invoice owner has been inactivated or no longer has invoice approval permission; thus eliminating the inefficiencies of improper routing. Leveraging the existing Administrator email setting *Invoice Workflow Step Error Notice*, the system can also be set to provide immediate notification of this workflow error condition to the appropriate Administrator.

**Impact**

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

**Key points of Feature**

- This feature is ON by default, when the Invoice Owner folder selection rule is integrated into an Organization’s invoice workflow.
- New Permissions related to this Feature: None
- Email notifications of invalid invoice owner values can be configured using the existing Administrator email setting *Invoice Workflow Step Error Notice*.
  - Setting location: User Profile > User Information and Settings > Email Preferences > see Settlement section.
- A new workflow message has been created for use in an Audit History log, whenever this Invoice Owner condition is realized.
- For additional information about invoice workflow, please see the online help or the Invoice Workflow and Approval section of the Accounts Payable Handbook.

### Invoice Import Update - Ability to Detect Inactive Custom Field Values

Previously, when performing an invoice import, an invoice with an inactive custom field value could be imported without error. The presence of an inactive value can result in incorrect approval routing and invoice failures during the export process. With 14.1, the system is able to scan custom fields to
confirm that the custom field values are active. If a value is found to be inactive, workflow can route the invoice appropriately.

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

**Key points of Feature**
- This feature is OFF by default.
- New Permissions related to this Feature: None
- A new workflow object is available with the 14.1 release that, when integrated into an Organization’s invoice workflow, will detect the existence of inactive custom field values.
- For additional information about workflow setup, please see the online help or the Workflow Setup section of the Configuration Handbook: Shopping, Accounts Payable and Inventory Products. **Note:** It is recommended that you consult with SciQuest when workflow changes are necessary.

**Receipt Transaction Export: “Return for Reason” Text Display Added**

When a return receipt is created, a Return for Reason is populated. In addition to the text display, the return for reason is assigned an associated Value ID (an internal ID referenced by the system). Previously, when a receipt transaction export was performed, only the Value ID was included in the exported file, requiring organizations to cross-reference the Value ID with the text display to understand the reason for the return. In 14.1, the actual **Return for Reason** text is incorporated into the receipt transaction export, providing a clear description of why an item was returned.

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

**Key points of Feature**
- This feature is ON (enabled) by default.
- New Permissions related to this Feature: None
- Organizations using receipt transaction exports in other internal systems should review the new export file layout to be sure that the additional column does not affect integration with those systems (the new column is positioned as the last column in the export).

**Full Invoice Export Update: Time and Date Columns Added**

Previously in the **Full Invoice** export file, a single Export Date column existed that contained both the date and time of the invoice export. With the release of 14.1, two new columns are included in the export file. These two new columns separate the export date and time, allowing for more granular reporting and sorting of the invoice export data.
Impact
• Products Affected: AP Director, AP Express
• End User Impact: Low
• Admin User Impact: Low
• Integration Impact: Low

Key points of Feature
• This feature is ON by default.
• New Permissions related to this Feature: None
• The new columns, labeled Date of Export and Time of Export, are positioned within the Full Export file to the immediate right of the existing Export Date column. This introduces a change to the layout of the Full Invoice export file. Clients currently performing post-processing analyses of this export file content must make appropriate accommodations for the change in file layout.

Full Transition to Phoenix Interface
For information about this feature, please see Full Transition to Phoenix Interface on page 15.

Email Management Tool
For information about this feature, please see Email Management Tool on page 16.

New Capabilities for Setting Color Themes
For information about this feature, please see New Capabilities for Setting Color Themes on page 17.

Ability to Update User Authentication Method in the User Profile
For information about this feature, please see Ability to Update User Authentication Method in the User Profile on page 17.

Permission Change for Allowing Users to Edit Department in the User Profile
For information about this feature, please see Permission Change for Allowing Users to Edit Department in the User Profile on page 18.

Excel Export Documents Upgraded to Use Latest File Format
For information about this feature, please see Excel Export Documents Upgraded to Use Latest File Format on page 18.

Reporting Enhancements

New and Enhanced Cycle Time Reports
For additional information, please see New and Enhanced Cycle Time Reports on page 32.
Supplier Management Enhancements

**New Supplier Search Options**
For information about this feature, please see New Supplier Search Options on page 26.

**Supplier Search Export Update**
For information about this feature, please see Supplier Search Export Update on page 27.

**Updated Supplier Profile User Interface and Navigation**
For information about this feature, please see Updated Supplier Profile User Interface and Navigation on page 28.

**Ability to Remove Address/Contact Association**
For information about this feature, please see Ability to Remove Address/Contact Association on page 29.

**Ability to Hide Inactive Addresses and Contacts**
For information about this feature, please see Ability to Hide Inactive Supplier Addresses and Contacts on page 29.

**Additional Supplier Profile Enhancements**
For information about this feature, please see Additional Supplier Profile Enhancements on page 30.

Accounts Payable Director Enhancements

**Ability to Import a Header Level Invoice Discount Amount**
Previously, users who had implemented OCR (Optical Character Recognition) invoice import did not have the ability to specify a discount amount at the invoice header level. In the cases where discounts were only at the header level (and not at the line level), those discount amounts would not properly import. This would possibly result in failed invoice matching situations and require user interaction for invoice approval. With 14.1, users are now able to integrate header level discount amounts into imported invoices.

**Impact**
- Products Affected: AP Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

**Key points of Feature**
- This feature is ON by default.
- New Permissions related to this Feature: None
- An optional field to accommodate the header discount amount has been added to the invoice import DTD (document type definition). The introduction of an optional field for the header
discount amount ensures no impact to existing integrations. The DiscountAmount field is now available to be used at the header and line level.

### New Line Item Description Option for Digital Mailroom Invoices

When importing a multiple line item Digital Mailroom (DMR) invoice that is associated with a single-line cost-matched PO, the invoice lines are merged into a single line. An organization can elect to have the system roll all of the individual invoice line descriptions up into a single line description. This merging of the line item descriptions can be confusing, and does not lend itself to providing an effective match to the Purchase Order description. With the 14.1 release, organizations now have the option of applying the line item description from the PO to the cost PO invoice.

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

### Key points of Feature
- This feature is OFF by default.
- **New Permissions related to this Feature:** None
- A new organization setting is available that, when enabled, applies the PO line description against the merged invoice line item, instead of applying a concatenation of the imported invoice line item descriptions to the invoice line item.
  - **New Setting:** Copy PO Line Description to Invoice
  - **Setting location:** Accounts Payable > AP Administration > Configure AP Settings > AP Configuration tab > Invoice Import/PO Total Tolerance panel
  - The new setting displays if the setting for Merge multiple invoice lines against a single line cost matched PO is enabled
  - If the Merge multiple invoice lines against a single line cost matched PO setting is disabled, then the new setting will be disabled as well.
- For additional information about please see the online help or the Accounts Payable Handbook.

### Option to Use Remit To Address from Imported Digital Mailroom Invoices

Previously, the remit to address that is included on a Digital Mailroom (DMR) invoice was used only if it contained an unknown PO AND an unknown supplier. With the release of 14.1, a new Organization setting is available that allows organizations to choose to use either the Supplier’s remit to address stored within the system, or to use the remit to address included on the imported invoice.

### 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.
- New Permissions related to this Feature: None
- A new setting is available that, when ON, ensures that the supplier Remit To address configured by an organization is used. When it is OFF, the remit to address on the invoice is used.
  - New Setting label: Use Organization Remit To Address for Invoice/DMR Imports
  - This setting can be managed at either of the following locations.
    - Organization level: Accounts Payable > AP Administration > Configure AP Settings, > AP Configuration tab > Supplier Configuration Parameters section
    - Supplier-level: Site Administration > Supplier Management > (Find and open a Supplier of interest) > Integrations > Integration Configuration > Supplier Invoice Item Matching panel.
- For additional information about please see the online help or the Accounts Payable Handbook.

New Invoice/PO Comparison Capabilities for Workflow Routing

With the 14.1 release, seven new invoice workflow functions are available for returning values from either the Invoice or PO document. Matching rules incorporating these function values can now be used in ensuring the proper workflow management of an invoice or purchase order.

Impact

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

Key points of Feature

- This feature is OFF by default. When integrated into an Organization’s Invoice workflow, these objects will return the noted document values.
- New Permissions related to this Feature: None
- The new Invoice Workflow objects are as follows:
  - Document line level workflow objects are:
    - Tax1 = Returns the line item tax1 value from an Invoice
    - Tax2 = Returns the line item tax2 value from an Invoice
    - POTax1 = Returns the line item tax1 value from a PO
    - POTax2 = Returns the line item tax2 value from a PO
    - POQuantity = Returns the line item purchased quantity from a PO
  - Document Header level workflow objects:
    - POTax1 = Returns the Header level tax1 value from a PO
    - POTax2 = Returns the Header level tax2 value from a PO
- For additional information about workflow setup, please see the online help or the Workflow Setup section of the Configuration Handbook: Shopping, Accounts Payable and Inventory Products. Note: It is recommended that you consult with SciQuest when workflow changes are necessary.
Ability to determine if an Invoice Line Item is Under-Invoiced

As part of invoice matching, an invoice workflow function exists to check if an invoice includes an invoice line amount that exceeds the similar line item amount found on the corresponding PO. With 14.1, a new invoice workflow function is available that determines if an invoice line item amount is less than that found in the associated PO line. This provides another specific matching condition that can be used in the management of invoice approvals.

Impact

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

Key points of Feature

- This feature is OFF by default.
- New Permissions related to this Feature: None
- A new Decline Invoice Workflow object is available that, when integrated into an Organization’s Invoice workflow, will indicate True if an invoice amount is less than the corresponding amount within the PO.
- For additional information about workflow setup, please see the online help or the Workflow Setup section of the Configuration Handbook: Shopping, Accounts Payable and Inventory Products. Note: It is recommended that you consult with SciQuest when workflow changes are necessary.