14.2

Release Notes
for SciQuest Products

July 20, 2014 – Production Version
# Table of Contents

**Welcome** .............................................................................................................................................. 1
  - Objectives .................................................................................................................................................. 1
  - Understanding the Format ......................................................................................................................... 2
    - Document Key ......................................................................................................................................... 2
  - Identification of Features ......................................................................................................................... 2

**14.2 Scheduling** ................................................................................................................................... 3
  - Key Dates .................................................................................................................................................. 3
  - Training Opportunities ............................................................................................................................... 4

**The Feature Snapshot for 14.2** ........................................................................................................... 5
  - Snapshot Key ........................................................................................................................................... 5
  - Feature Snapshot ...................................................................................................................................... 5

**General Enhancements for Products on the SelectSite Platform** ......................................................... 13
  - Redesigned Override Pattern for User Management .............................................................................. 13
  - Permission Details in the User Profile ...................................................................................................... 14
  - Updated User Profile Navigation ........................................................................................................... 14
  - Email Preferences Renamed to Notification Preferences ........................................................................ 15
  - Redesigned Roles Management ............................................................................................................ 15
  - Improved Ability to Log Out All Users ................................................................................................... 16
  - Updates to Online Searchable Help ......................................................................................................... 17

**Supplier Management** ....................................................................................................................... 19

**General Supplier Management Enhancements** .................................................................................. 19
  - Dedicated Supplier Management Navigation ......................................................................................... 19
  - Supplier Profile Supplier Actions Drop-down ......................................................................................... 19
  - Ability to Search for Suppliers by Taxpayer Identification Number (TIN) and NAICS ..................... 20
  - Ability to Search for Suppliers based on Registration Date and Date Profile Updated by Supplier ........ 20
  - Ability to Search for Suppliers by U.S. Postal Code Radius ................................................................... 21
  - Ability to Save Supplier Searches ........................................................................................................... 22
  - Ability to Create Supplier Email Templates ............................................................................................ 22
Ability to Send Emails to Selected Suppliers ..................................................................................................... 23
Ability to Control which Users can Bypass Potential Matches on Invite ........................................................... 23

**Total Supplier Manager Product Enhancements** ......................................................................................... 24

Introduction to 2nd Tier Reporting ..................................................................................................................... 24
General Enhancements ....................................................................................................................................... 24
Ability to search for suppliers by TIN Matching Status and TIN Status Last Updated ............................................... 24
In-Network Icon Visible in the Supplier Profile ....................................................................................................... 25
Registration Configuration Updates .................................................................................................................... 25
Ability to Manually Send a Supplier Through Registration Approval Workflow .................................................. 26
New Supplier Review Workflow Available for Ongoing Supplier Maintenance ........................................................... 27
New Supplier Workflow Objects .......................................................................................................................... 27
Manual Bulk TIN Validation ................................................................................................................................ 28
Pre-populated Tax Documents .................................................................................................................................. 29

**Sourcing** .......................................................................................................................................................... 30

**Sourcing Director** .............................................................................................................................................. 30

Introduction to Sourcing Director .......................................................................................................................... 30
General Enhancements for Early Adopters ........................................................................................................... 31
Supplier Management Enhancements for Early Adopters ....................................................................................... 31

**Advanced Sourcing Optimizer** ........................................................................................................................ 31

Conditionally Required Bid Fields .......................................................................................................................... 31
Gating Enhancements ............................................................................................................................................. 32
Internationalization ................................................................................................................................................. 32

**Contract Director Enhancements** .................................................................................................................. 34

**General Enhancements for 7.2 (13.2) Only** ..................................................................................................... 34

7.2 (13.2) Configurable Listings .......................................................................................................................... 34
7.2 (13.2) Browser Support for Internet Explorer 11 for Windows ......................................................................... 34
7.2 (13.2) Browser Support for Safari for Mac OS ................................................................................................. 35
7.2 (13.2) Salesforce.com Integration .................................................................................................................. 35

**General Enhancements for 7.5 (14.2)** .............................................................................................................. 36

Browser Support for Internet Explorer 11 for Windows .......................................................................................... 36
Browser Support for Safari for Mac OS ..................................................................................................................... 36
Organization Unit Hierarchy Access Groups .......................................................................................................... 36
Infinite Scrolling in Drop Down Fields and Many-to-Many Controls ...................................................................... 37

SciQuest University
Contract Emails .................................................................................................................................................. 37
Localization of Listing Labels ............................................................................................................................. 38
Optional Confirmation Popup View .................................................................................................................. 38
Re-use of Email Addresses and Username ........................................................................................................ 39

**List, Search, and Reporting Enhancements for 7.5 (14.2)** ........................................................... 40
Column Width Resizing on Simple Listing Screens ........................................................................................................ 40
Company Default Views for Configured Views .................................................................................................................. 40
Configured Search Dashboard Panel .................................................................................................................. 41
“Logged In User” Placeholder for Configured Views ......................................................................................................... 41
Document Text Filter for Configured Views .................................................................................................................. 42
New Legal Entity and Contracts Listing Filters and Grid Columns ......................................................................................................... 43
Search Contracts by Second Party Country .................................................................................................................. 43
Ability to Filter Contract Reports by Custom Field Values Found on Users ......................................................................................................... 44
New Global Search Results Page .................................................................................................................. 44

**Workflow Enhancements for 7.5 (14.2)** ..................................................................................... 45
Respond to Workflow Popup Window .................................................................................................................. 45
Improvements to Casual Approver User Interface .................................................................................................................. 45
Automatic Completion of Expired Contracts .................................................................................................................. 46

**Control List Enhancements for 7.5 (14.2)** ..................................................................................... 47
New Control Groups .......................................................................................................................................... 47
Adding Distribution Groups to Compliance and Performance Items ......................................................................................................... 47
Distribution Groups for Manual Tasks .................................................................................................................. 48
Display Name Search for Distribution and Workflow Group Members ......................................................................................................... 48

**Integration Enhancements for 7.5 (14.2)** ..................................................................................... 49
User Sync from Contract Director to SelectSite (for SSO) ......................................................................................................... 49
User Sync from SelectSite to Contract Director (for SSO) ......................................................................................................... 49
Single Sign-On between Contract Director and SelectSite ......................................................................................................... 50
External Contract Director Single Sign-On .................................................................................................................. 51
SelectSite Integration Time-out Prevention .................................................................................................................. 51

**Shopping Products** ..................................................................................................................... 52

**General Enhancements** ................................................................................................................... 52
General Enhancements ..................................................................................................................................... 52

**Spend Director/Order Manager/Requisition Manager Enhancements** ............................................ 52
Collapsible Product Showcases ........................................................................................................................... 52
Taxonomy Update .................................................................................................................................................. 53
Enhanced PunchOut Edit Capabilities .................................................................................................................. 53
New Fields Added to the Cart Assigned Email Notification .................................................................................. 54
Persona Business Unit and Department Considered when PunchOut Shopping .............................................. 54
New Term “PunchOut” added to Field Management Thesaurus .............................................................................. 55
Success Message Displayed when a Form is Saved ............................................................................................ 55
Updated Supplier Catalog Updates List Presentation ........................................................................................... 55

**Supplier Management Enhancements** ........................................................................................................... 56
General Supplier Management Enhancements .................................................................................................... 56

**Reporting Enhancements** .............................................................................................................................. 56
Customized Document Search Export .................................................................................................................. 56
Field Changes to Transaction and Full Document Exports .................................................................................... 57

**Inventory: Supplies Manager Enhancements** .................................................................................................. 58
General Enhancements ......................................................................................................................................... 58

**Accounts Payable Enhancements** .................................................................................................................. 59

**General AP Enhancements** ........................................................................................................................... 59
Invoice Approval Workflow Step added for Canceled Purchase Orders ............................................................... 59
Ability to Hide the PO Number Field for Non-PO Invoices ................................................................................ 59
Ability to Hide the View Simple Manual Entry link ............................................................................................ 60
New fields Added to the Full Document Export for Purchase Orders .................................................................. 60
Invoice Total Field Added to Invoices View in Purchase Order Documents ......................................................... 61
Payment Terms Limit increased ................................................................................................................................ 61
Personalization Change in AP Dashboard ............................................................................................................ 62
General Enhancements ......................................................................................................................................... 62
General Supplier Management Enhancements .................................................................................................... 62

**Accounts Payable Director Enhancements** .................................................................................................... 62
New Option to Dispute Invoices .......................................................................................................................... 62
Notification Message Displayed when Supplier Name on a Digital Mailroom Invoice cannot be Matched .......... 63
Ability for Suppliers to Associate Contracts to Non-PO invoices ...................................................................... 63
Ability to Create Messages on an Invoice and Send through the SQ Supplier Network ....................................... 64
Ability for Suppliers to Add Attachments to Invoices .......................................................................................... 65
Ability to Create Receipts from the AP Dashboard ................................................................. 65
Ability for Suppliers to Associate an Organization User with an Invoice ........................................... 65

**Reporting Enhancements** ........................................................................................................... 66
Customized Document Search Export ........................................................................................ 66
Field Changes to Transaction and Full Document Exports ................................................................. 66

**Supplier Management Enhancements** ......................................................................................... 66
General Supplier Management Enhancements .................................................................................. 66
Welcome

The **14.2 SciQuest Product Release** will be available in the production environment starting July 20, 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 on the SelectSite platform. 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, Sourcing Director
  - Features in this document are related to the Sourcing Director version on the SelectSite platform that is launching with 14.2. Features related to Legacy and SIMS SaaS versions of Sourcing Director are not covered.
- **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 14.2 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](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>Feature Request from Customer</td>
<td><img src="fr_icon.png" 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>
# 14.2 Scheduling

To help prepare our customers for the upcoming 14.2 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 14.2 Product Release*.

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Date</th>
<th>Description and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Promotion:</td>
<td></td>
<td>The 14.2 release will be promoted to the Test (usertest) environment from Friday, June 20, 2014 8am ET through Sunday, June 22, 2014 12pm ET. An email will be sent out when the promotion is complete.</td>
</tr>
<tr>
<td>Test Sites unavailable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Release Validation in</td>
<td></td>
<td>Four 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).</td>
</tr>
<tr>
<td>Test environment</td>
<td></td>
<td>Recommendation: 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>June 22, 2014 – July 17, 2014 (Four Weeks)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production Unavailable</td>
<td></td>
<td>The 14.2 release will be promoted to the Production environment from Friday, July 18, 2014 9pm ET through Sunday, July 20, 2014 12pm ET. An email will be sent out when the promotion is complete.</td>
</tr>
<tr>
<td>(Begin Release Upgrade)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Release available on</td>
<td></td>
<td>This date indicates when the features and functionality associated with 14.2 will be available on customer Production sites. Final documentation provided at this time (Release Notes and Handbooks).</td>
</tr>
<tr>
<td>Production Sites</td>
<td>Sunday, July 20, 2014</td>
<td></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, Accounts Payable Director, AP Express, Total Supplier Manager (SelectSite platform), Sourcing Director (SelectSite platform), Contract Director, Advanced Sourcing Optimizer and the SciQuest Supplier Network.
- 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 14.2 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 June 2014</td>
<td>The primary goal of this video is to introduce customers to planned functionality across all products for the upcoming release.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Recommended Audience: System Administrators, key system users, and Trainers</td>
</tr>
<tr>
<td>Contract Lifecycle Management, Sourcing Director and Total Supplier Manager Recorded Sessions</td>
<td>Available June 27, 2014</td>
<td>Videos available on the Product Release Library with information about functionality and updates to these products.</td>
</tr>
<tr>
<td>eProcurement/Accounts Payable Webinar</td>
<td>June 30, 2014 11:00 am Eastern</td>
<td>The primary goal of this webinar is to present the changes in the eProcurement and Accounts Payable products.</td>
</tr>
</tbody>
</table>
The Feature Snapshot for 14.2

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 July 20, 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>Redesigned Override Pattern – User Management</td>
<td>All SelectSite Products</td>
<td>End Users Admins</td>
<td>On by default, Requires Setup</td>
</tr>
<tr>
<td>Permission Details in User Profile</td>
<td>All SelectSite Products</td>
<td>End Users Admins</td>
<td>On by default, Requires Setup</td>
</tr>
<tr>
<td>Updated User Profile Navigation</td>
<td>All SelectSite Products</td>
<td>End Users Admins</td>
<td>On by default, Requires Setup</td>
</tr>
<tr>
<td>Email Preferences renamed to Notification Preferences</td>
<td>All SelectSite Products</td>
<td>End Users Admins</td>
<td>On by default, Requires Setup</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>Redesigned Roles Management</td>
<td>All SelectSite Products</td>
<td>Admins</td>
<td></td>
</tr>
<tr>
<td>Improved Ability to Log Out All Users</td>
<td>All SelectSite Products</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Updates to Online Searchable Help</td>
<td>All SelectSite Products</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Dedicated Supplier Management Navigation</td>
<td>All Shopping and AP Products, Total Supplier Manager</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Supplier Profile Supplier Actions Drop-down</td>
<td>All Shopping and AP Products, Total Supplier Manager</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Ability to Search for Suppliers by TIN and NAICS</td>
<td>All Shopping and AP Products, Total Supplier Manager</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Ability to Search for Suppliers based on</td>
<td>Total Supplier Manager, AP Director, Sourcing Director</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Registration Date and Date Profile Updated by</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplier</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to Search for Suppliers by U.S. Postal</td>
<td>All products</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Code Radius</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to Search for Suppliers by TIN Matching</td>
<td>Total Supplier Manager with Onboarding</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Status and TIN Status Last Updated</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to Save Supplier Searches</td>
<td>All products</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Ability to Create Supplier Email Templates</td>
<td>Total Supplier Manager, AP Director, Sourcing Director</td>
<td>End Users 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>Ability to Send Emails to Selected Suppliers</td>
<td>Total Supplier Manager AP Director Sourcing Director</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>Bypass Potential Matches on Invite</td>
<td>Total Supplier Manager Sourcing Director</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>Ability to Search for Suppliers by TIN Matching Status and TIN Status Last Updated</td>
<td>Total Supplier Manager with Onboarding</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>In-Network Icon Visible in the Supplier Profile</td>
<td>Total Supplier Manager</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>Registration Configuration Updates</td>
<td>Total Supplier Manager</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>Ability to Manually Send a Supplier Through Registration Approval Workflow</td>
<td>Total Supplier Manager</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>New Supplier Review Workflow Available for Ongoing Supplier Maintenance</td>
<td>Total Supplier Manager</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>New Supplier Workflow Objects</td>
<td>Total Supplier Manager</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>Manual Bulk TIN Validation</td>
<td>Total Supplier Manager with Onboarding</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>Pre-populated Tax Documents</td>
<td>Total Supplier Manager with Onboarding</td>
<td>End Users Admins</td>
<td>☑️</td>
</tr>
<tr>
<td>Conditionally Required Bid Fields</td>
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<td>End Users</td>
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<td>Gating Enhancements</td>
<td>Advanced Sourcing Optimizer</td>
<td>End Users</td>
<td>☑️</td>
</tr>
<tr>
<td>Internationalization</td>
<td>Advanced Sourcing Optimizer</td>
<td>End Users</td>
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<td>--------------</td>
<td>------------------</td>
<td>----------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Configurable Listings</td>
<td>Contract Director (7.2 (13.2))</td>
<td>End Users</td>
<td>✓</td>
</tr>
<tr>
<td>Browser Support for Internet Explorer 11 for Windows</td>
<td>Contract Director</td>
<td>End Users</td>
<td>✓</td>
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<td>End Users</td>
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<td>Contract Director (7.5 (14.2))</td>
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<tr>
<td>Infinite Scrolling in Drop Down Fields and Many-to-Many Controls</td>
<td>Contract Director (7.5 (14.2))</td>
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<td>Contract Director (7.5 (14.2))</td>
<td>End Users</td>
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<td>Optional Confirmation Popup View</td>
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<td>Re-use of Email Addresses and Username</td>
<td>Contract Director (7.5 (14.2))</td>
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<td>End Users</td>
<td>✓</td>
</tr>
<tr>
<td>Configured Search Dashboard Panel</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users</td>
<td>✓</td>
</tr>
<tr>
<td>“Logged In User” Placeholder for Configured Views</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users</td>
<td>✓</td>
</tr>
<tr>
<td>Contract Document Text Filter for Configured Views</td>
<td>Contract Director (7.5 (14.2))</td>
<td>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>
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<td>--------------------</td>
</tr>
<tr>
<td>New Legal Entity and Contracts Listing Filters and Grid Columns</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Search Contracts by Second Party Country</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Filter Contract Reports by User Custom Field Values</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Configurable Date/Time Format on Contracts and Listing Pages</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>New Global Search Results Page</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Respond to Workflow Popup Window</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Improvements to Casual Approver User Interface</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Automatic Completion of Expired Contracts</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>New Control Groups</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Adding Distribution Groups to Compliance and Performance Items</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Distribution Groups for Manual Tasks</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Display Name Search for Distribution and Workflow Group Members</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>User Sync from Contract Director to SelectSite (for SSO)</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>User Sync from SelectSite to Contract Director (for SSO)</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users 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>Single Sign-On between Contract Director and SelectSite</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>External Contract Director Single Sign-On</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>SelectSite Integration Time-out Prevention</td>
<td>Contract Director (7.5 (14.2))</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Collapsible Product Showcases</td>
<td>Spend Director</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>Taxonomy Updates</td>
<td>Spend Director Order Manager Requisition Manager Accounts Payable</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>Enhanced PunchOut Edit Capabilities</td>
<td>Spend Director Requisition Manager Order Manager</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>New Fields Added to the Cart Assigned Email Notification</td>
<td>Spend Director Requisition Manager</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>Persona Business Unit and Department Considered when PunchOut Shopping</td>
<td>Spend Director</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>New Term “PunchOut” added to the Field Management Thesaurus</td>
<td>Spend Director Requisition Manager Order Manager</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Success Message Displayed when a Form is Saved</td>
<td>Spend Director Requisition Manager Order Manager</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>Updated Supplier Catalog Updates List Presentation</td>
<td>Spend Director</td>
<td>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>
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<td>--------------------</td>
</tr>
<tr>
<td>Customized Document Search Export</td>
<td>All Shopping and AP Products Supplies Manager</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Field Changes to Transaction and Full Document Exports</td>
<td>All Shopping and AP Products Supplies Manager</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Invoice Approval Workflow Step added for Canceled Purchase Orders</td>
<td>Spend Director Order Manager AP Products</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>Ability to Hide PO Number Field for Non-PO Invoices</td>
<td>AP Products</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Ability to Hide the View Simple Manual Entry Link</td>
<td>AP Products</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>New Fields Added to the Full Document Export for Purchase Orders</td>
<td>AP Products</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Invoice Total Field added to PO Document View</td>
<td>AP Products</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>Payment Terms Limit Increased</td>
<td>AP Products</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>Personalization Change in AP Dashboard</td>
<td>AP Products</td>
<td>End Users</td>
<td></td>
</tr>
<tr>
<td>New Option to Dispute Invoices</td>
<td>AP Director</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Notification Message Displayed when a Supplier Name on a Digital Mailroom Invoice cannot be Matched.</td>
<td>AP Director (with Digital Mailroom)</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Ability for Suppliers to Associate Contracts to Non-PO Invoices</td>
<td>AP Director (with Contract Manager)</td>
<td>End Users Admins</td>
<td></td>
</tr>
<tr>
<td>Ability to Create Messages on an Invoice and Send through the SQ Supplier Network</td>
<td>AP Director</td>
<td>End Users 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>
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<td>-------------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Ability for Suppliers to Add Attachments to Invoices</td>
<td>AP Director</td>
<td>End Users, Admins</td>
<td>On by default: ✔</td>
</tr>
<tr>
<td>Ability to Create Receipts from the AP Dashboard</td>
<td>AP Director</td>
<td>End Users, Admins</td>
<td>Requires Setup: ✔</td>
</tr>
<tr>
<td>Ability for Suppliers to Associate an Organization User with an Invoice</td>
<td>AP Director</td>
<td>End Users, Admins</td>
<td>Contact SQ: ✔</td>
</tr>
</tbody>
</table>
General Enhancements for Products on the SelectSite Platform

This section focuses on general enhancements that are applicable to all products on SciQuest’s SelectSite platform. These products include:

- **Shopping**: SpendDirector, Order Manager, Requisition Manager
- **Inventory**: Supplies Manager
- **Accounts Payable**: AP Director and AP Express
- **Supplier Management**: Total Supplier Manager
- **Sourcing**: Sourcing Director

**Redesigned Override Pattern for User Management**

Throughout the application, users with appropriate permissions are able to override existing settings with a new setting. For example, in the User Profile, when viewing a user’s permissions that are inherited from their roles, administrators are able to override the inherited permissions. Starting with the 14.2 release, a new pattern will be used on the Permissions page, as well as several other pages throughout User Management, which will make the settings much clearer and easier to understand.

**Impact**

- **Products Affected**: All SelectSite products
- **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
- All previously available override functionality is still available in the new design.
- When a user first arrives at a page using the new design, the page will be in Read Only mode. You will be able to view the current settings for the page.
- An **Edit Section** link will display. Click on the link to make any desired changes.
  - The first column will always show the inherited setting, whether that is “on” or “off”. If the inherited setting changes, the user or role will receive the new inherited setting.
  - The second and third columns are overrides. If these are selected, the user or role will no longer receive any changes to inherited settings, and the overridden setting will always be used.
- The new Override design is available on several pages throughout User Roles and the User Profile, including Permissions, Approval Limits, Punch-out Access and Notification Preferences.
Permission Details in the User Profile

By default, user permissions are inherited from the user’s assigned roles. As of 14.2, you will be able to view details about the roles from which the permissions are inherited directly in the user profile. In addition, the permission details will note if a permission has been overridden at the user level.

Impact

• Products Affected: All SelectSite products
• End User Impact: Low
• 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
• When viewing a permissions page, a new Show Details link is available for each section. Clicking this link will display any roles that granted this permission to the user, or if the permission has been overridden for that user.
• For additional information about managing user permissions, please see Viewing and Managing Assigned Permissions in the User Profile in the online help or the Basics Handbook.

Updated User Profile Navigation

To make it easier to locate items in the user profile, the navigation has been updated. Previously, the user profile was navigated through a series of hyperlinks. As of 14.2, the user profile will display a sidebar menu for navigation.

Impact

• Products Affected: All SelectSite 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 disabled.
• New Permissions related to this Feature: None
• In User Profile, the navigation hyperlinks have been replaced with a new navigation sidebar that is in use on several other pages (such as Supplier Profile and Roles Management). This means that, from any page within the profile, users can easily move to any other profile page without returning to any type of landing page.
• For additional information about working in the user profile, please see The User Profile in the online help or the Basics Handbook.
Email Preferences Renamed to Notification Preferences

Anywhere the application previously referred to Email Preferences, primarily in the user profile, the nomenclature has been changed to Notification Preferences. This name more accurately reflects the functionality as notifications can be received by email or within the application.

Impact

- Products Affected: All SelectSite 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 disabled.
- New Permissions related to this Feature: None
- In the User Profile, the Email Preferences section has been renamed Notification Preferences.
- Notification Preferences have been split into multiple pages (like Permissions) to make it easier to find and access the settings. For information about setting notification preferences for users, please see Setting Notification Preferences in the User Profile in the online help or the Basics Handbook.
- References to Email Preferences in the product documentation and online help have been updated to Notification Preferences.

Redesigned Roles Management

To make it easier to create new roles and update the settings of existing roles, administrators will be able to use a newly redesigned Manage User Roles page. The page will feature an updated “role tree” to select a role. Each page for each role will be redesigned to make it easier to update all settings for the role.

Impact

- Products Affected: All SelectSite products
- End User Impact: None
- 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
- All previously available functionality will still be available in the new design.
- Organizations will be able to add a short description to each role to document any notes about the primary purpose of the role.
- Once a role has been selected, the list of roles (the “role tree”) will be collapsed. It can be reopened at any time by clicking Show Roles in the top left of the screen.
- Since changes made to a parent role will also affect a child role, all child roles will be displayed just under the Role Name in the top left to allow users to stay aware of how their changes may affect other roles.
- An Actions menu is available from which you can create a new role or choose a new default role.
• **Create New Role** will create a new user role. From here, users will choose if the new role is a top level role, or a child role. If it is a child role, the user will indicate which role is the parent role.

• **Choose New Default Role** allows you to select a new role that will be used as the default.

• Most pages within Roles feature the new Override Pattern. This includes Approval Limits, Product Views, Punch-out Access, Currency Access, Checkout and Notification Preferences.

• For additional information about managing roles, please see **User Roles Setup** in the online help or the Configuration Handbook.

### Improved Ability to Log Out All Users

Periodically, organizations need to force out active sessions and block users from accessing the SciQuest site. For example, the site may need to be locked down during year-end or for ERP and SelectSite upgrades. In 14.2, organizations are able to work with the SciQuest support team to automatically force a site-wide lock out of the application. All users (excluding administrators) will be redirected to a maintenance page which can be customized to display pertinent information.

#### Impact

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

#### Key points of Feature

- This feature is OFF (disabled) by default. You must contact SciQuest support to enable this feature.
- New permissions related to this Feature: none
- When the site is unavailable a maintenance screen will display. Default text is configured but can be customized in Field Management.

  • **Site Configuration > Field Management > Manage Field Names and Help Text.**
  • Select: Home/Login > home/login > Login Errors.
  • Navigate to:
    - “Temporarily Offline for Maintenance”
    - “We apologize for any inconvenience”
    - Administrator Contact

- The email address and phone number which populate the Administrator Contact field are derived from the organizational default settings under:

  • **Site Configuration > Site Appearance and Behavior > Organization Message and Site Logos > Message Board > Message and Resource Settings.**

- The image which populates the Administrator Contact field is derived from the organizational default settings under:

  • **Site Configuration > Site Appearance and Behavior > Organization Message and Site Logos > Message Board > Login Page Image.**

- To review the Maintenance screen customizations, navigate to: [https://solutions.sciequest.com/apps/Router/ScheduledMaint](https://solutions.sciequest.com/apps/Router/ScheduledMaint)

- When the lockout is released, all users will be able to access the application as normal.

- You will need to contact SciQuest customer support to perform this action.
Updates to Online Searchable Help

Our goal is to provide comprehensive product documentation and help to enable customers to work as efficiently as possible in the application. In addition to the context-sensitive help (accessed by clicking ? on the appropriate screen), SciQuest provides printed handbooks and an online searchable help that provide concepts and step-by-step instructions for using features in the site. In 14.2, we have made updates to the online searchable help to promote more efficiency when using it and to make new and prominently-used feature topics easier to locate.

What You May not Know about the Online Searchable Help!

- Online searchable help can be accessed two ways; from the Admin Dashboard (Site Administration > Dashboard > Admin Dashboard) or from the user menu (click on your name in the top-right banner and select Search Help for a Solution).
- By default, users who do not have the Administration permission do not have access to online searchable help or printed handbooks. However, you can enable this functionality for users or roles by enabling the Access Self-Help Tools permission. The permission is located in Administration > System Administration.
- Topics can be saved as favorites: To save a topic as a favorite, click the button above the active topic. To access the favorites list, click the button.
- Topics can be printed: Many users like to have printed information to reference but do not want to reference the larger printed handbooks. You can print individual topics by clicking the button above the active topic.
- Search strings can be saved: You can save a search string for future use. After entering a search term and executing the search, click the button. To access the saved searches, click the button.
- We want your feedback! As we continue to make updates and improvements to the online searchable help and printed handbooks, feedback from our customers will be a key factor. If you have any suggestions for improvement, please email them to documentation@sciquest.com.

Updates

Product Release Notes Linked to Topics in the Online Searchable Help

For the last several releases, the product release notes have been included in the online searchable help. As of 14.2, we have included links from the release notes directly to the help topics where applicable. The linked topic or topics explain how to enable, manage and/or use the feature.

Select Features More Prominent in the Table of Contents

The online searchable help includes a table of contents. In general, the information is organized in the same way as the printed handbooks, making it necessary to browse to find the topics when using the TOC. In 14.2, we have put several topics in the main TOC for easier access. The features include: Navigating the Site, Managing Site Users, Document Search and Export and Supplier Management. To access the TOC, click Browse the Table of Contents below the search field.

Streamlining of Select Help Topics

In an effort to require less clicking and browsing, we have streamlined several of the help topics. Topics related to a specific feature can be accessed from a single page; often from drop-down text that does not require you to leave the page. In addition, the language on these pages focuses more on what you, as the user, are trying to achieve, than the actual “name” of the feature. For example, a link that previously read “Reviewing Supplier Registration Workflow History” may now read “I want to see
where a supplier is in the registration process.” **Note:** We are taking a phased-approach to streamlining the data. These updates are primarily featured in the topics noted above. In the coming releases, more updates will be made.
Supplier Management

This section focuses on changes and updates made to supplier management features in the application. Information includes:

- **General Supplier Management Enhancements** – These enhancements affect the Total Supplier Manager (TSM) product, AP Director product, Sourcing Director product and/or the supplier management features used by eProcurement organizations who do not use TSM.
- **Total Supplier Manager Product Enhancements** – These enhancements affect only organizations that use the TSM product.

General Supplier Management Enhancements

**Dedicated Supplier Management Navigation**

Previously, Supplier Management was located within the Site Administration menu. With 14.2, a new icon designated for Supplier Management functions will be located in the left-hand navigation pane. When the Supplier Management menu is accessed, users will find supplier-specific tasks such as searching for suppliers, managing registration invitations, and creating new suppliers under the new navigation icon.

**Impact**
- Products Affected: All SelectSite 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 disabled.
- New Permissions related to this Feature: None
- The permissions needed for each menu item have not changed and the same features are available in the new menu location as were in the old location.
- If a user had a supplier management page bookmarked or set as their home page, they will need to reset it to the new locations after the 14.2 release.

**Supplier Profile Supplier Actions Drop-down**

A new Supplier Actions menu is available in the supplier profile. This menu allows organizations to perform specific actions from the supplier profile that were previously only executable from the supplier search results. Using this new menu, users will no longer need to return to the search results in order to perform these actions for a specific supplier, such as activating or deactivating.

**Impact**
- Products Affected: All SelectSite 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 disabled.
- New Permissions related to this Feature: None
- The new Supplier Actions drop-down list displays at the top of each screen in the supplier profile.
- Features available in the Supplier Actions menu vary depending on your individual permissions.

Ability to Search for Suppliers by Taxpayer Identification Number (TIN) and NAICS
Customer users will have the ability to search for suppliers by Tax Identification Number (TIN) and NAICS Code(s) via the supplier advanced search.

Impact
- Products Affected: All SelectSite 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 be disabled by an administrator.
- New Permissions related to this Feature: None
- Users will be able to search for suppliers based on their NAICS Codes and TIN via Supplier Advanced Search.
- Customer users will need to have the "View Supplier TIN/SSN" permission to see search results for supplier profiles that have SSN selected as the Tax ID Type.
  - If the customer user has the "View Supplier TIN/SSN" permission enabled, the TIN search will capture supplier records with Federal IDs and SSNs.
  - If the customer user does not have the "View Supplier TIN/SSN" permission enabled, the TIN search will only capture supplier records with Federal IDs only.
- The search fields can be hidden via Field Management. To hide the TIN field, go to Site Configuration > Field Management > Manage Field Names and Help Text. Browse to General > navigation > supplier management > Advanced Search > Tax Identification Number and mark the field as not visible. To hide the NAICS field, browse the same path, but expand the Products/Services fields and mark the NAICS field as not visible. For additional information about Field Management, please see About Field Management in the online help or the Configuration Handbook.

Ability to Search for Suppliers based on Registration Date and Date Profile Updated by Supplier
Customer users will have the ability to search for suppliers by Registration Date and Profile Updated by Supplier Data via the supplier management advanced search. These features will allow users to find suppliers that registered within a particular timeframe or have not updated their profile within a timeframe.

Impact
- Products Affected: Total Supplier Manager, AP Director, Sourcing Director
- 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
• Suppliers will be searchable based on their Registration Date and Profile Updated by Supplier date via Supplier Advanced Search.
• Registration Date will allow customer users to search for suppliers who have registered within a specific date range, Before or After X Date, Last X Days or Before the Last X Days.
• Profile Updated by Supplier will allow customer users to search for suppliers who have updated their supplier profile within a specific date range, Before or After X Date, Last X Days or Before the Last X Days. Note: The Profile Updated by Supplier date gets updated only when the supplier updates their profile via the branded supplier profile. Customer updates to the supplier profile will continue to be logged with Last Updated date.
• The search fields can be hidden via Field Management. To hide the field, go to Site Configuration > Field Management > Manage Field Names and Help Text. Browse to General > navigation > supplier management > Advanced Search > Registration Information and mark the field or fields as not visible. For additional information about Field Management, please see About Field Management in the online help or the Configuration Handbook.

Ability to Search for Suppliers by U.S. Postal Code Radius
To help customer users locate vendors with a physical location within a certain area, the ability to search for suppliers by U.S. Postal Code Radius has been introduced with the 14.2 release.

Impact
• Products Affected: All SelectSite 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 be disabled by an administrator.
• New Permissions related to this Feature: None
• Users are able to search for suppliers based on their proximity to a specified U.S. postal zip code via Supplier Advanced Search.
  • When searching for In Network supplier, the search query will return only Active Physical or Fulfillment Addresses whose postal codes are within the specified radius of the search parameter.
  • When searching for Out of Network Suppliers, the search will return any suppliers that have either Active or Inactive Physical or Fulfillment Addresses whose postal codes are within the specified radius of the search parameter.
• The U.S. Postal Code Radius search field can be hidden via Field Management. To hide the field, go to Site Configuration > Field Management > Manage Field Names and Help Text. Browse to General > navigation > supplier management > Advanced Search > U.S. Postal Code and mark the field as not visible. For additional information about Field Management, please see About Field Management in the online help or the Configuration Handbook.
Ability to Save Supplier Searches
Customer users have the ability to save supplier searches via the supplier management advanced search. Like Document Search, this feature enables users to save popular personal or shared searches to be used in the future. Saved searches may be added as shortcuts on the supplier search page.

Impact
- Products Affected: All SelectSite Products
- 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
- Organizations are able to save and modify saved supplier searches to be run at a later date. Saved searches are created directly from the search results page where a Save Search button displays.
- Saved supplier searches can be organized in folders. Customer users with the proper access permissions are able to view, use, and manage saved shared folders:
  - The Create Shared Favorites Folders permission must be enabled in order for customer users to create shared search folders. This permission is located in Permissions > Administration > System Administration.
  - The Administer Shared Favorites permission must be enabled in order for customer users to manage shared supplier search folders created by other users. This permission is located in Permissions > Administration > System Administration.
- For additional information about saving supplier searches, please see Saving Supplier Searches in the online help or the Administration Handbook.

Ability to Create Supplier Email Templates
Your organization may send email messages to suppliers frequently or on a reoccurring basis. As of 14.2, you are able to create supplier email templates. The templates allow you to create and manage reusable email content in order to promote and deliver a consistent message when communicating with suppliers.

Impact
- Products Affected: Total Supplier Manager, AP Director, Sourcing 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: Manage Supplier Email Templates. The permission is located in Permissions > Administration > Supplier Administration.
- Customer users with the proper access permission are able to create and manage supplier email templates.
Email template set up is performed in Supplier Management > Supplier Communication > Email Templates. For information about setting up email templates, please see Managing Supplier Email Templates in the online help or the Administration Handbook.

Supplier emails can include attachments.

Changes to supplier email templates will be logged in Email History.

**Ability to Send Emails to Selected Suppliers**

In 14.2, organizations will be able to quickly send emails to specific suppliers via the Send Email supplier action. This action can be executed for an email template or “on-the-fly” to single or multiple suppliers.

**Impact**

- Products Affected: Total Supplier Manager, AP Director, Sourcing 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: Email Suppliers. This permission is located in Permissions > Administration > Supplier Administration.
- Customer users with the proper permission will be able to send ad-hoc email messages to the Active, Primary contacts and Supplier Support Contacts for selected suppliers via supplier search results or from the supplier profile.
- Emails can be sent to a single supplier or to multiple suppliers from the supplier search results. For information about emailing suppliers through Supplier Management, please see Emailing Suppliers from Supplier Management in the online help or the Administration Handbook.
- Attachments can be uploaded to supplier emails.
- Email logs will capture information such as date sent, sent by, recipient list, and full message.
- Supplier-specific email logs will also be captured.

**Ability to Control which Users can Bypass Potential Matches on Invite**

Prior to 14.2, all customer users with permissions to invite a supplier also had the ability to bypass potential vendor matches when inviting a new supplier. This meant the user could select to invite a new supplier even though there were potential matches to the information submitted for the supplier. In 14.2, organizations can control which users can bypass potential matches on invite by enabling/disabling the new Bypass Potential Matches on Invite Supplier Administration permission. This will allow administrators to limit the potential for duplicate vendors to be added the database.

**Impact**

- Products Affected: Total Supplier Manager and Sourcing Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**

- This feature is ON by default.
Total Supplier Manager Product Enhancements

Introduction to 2nd Tier Reporting
As of 14.2, 2nd Tier Spend Reporting will be available for purchase by customers who have purchased Total Supplier Manager. The 2nd Tier Spend Reporting module helps organizations manage and track 2nd Tier Supplier spend. Through the supplier portal, prime vendors can enter information on 2nd Tier suppliers as well as direct and indirect spend. Organizations can then generate 2nd Tier spend reports and track against 2nd Tier spend goals.

Please contact your Client Partner or Account Manager for further information about 2nd Tier Spend Reporting.

For instructions on 2nd Tier setup and use, please see 2nd Tier Reporting in the online help or Total Supplier Manager Handbook.

General Enhancements
14.2 will include a few general enhancements that affect Total Supplier Manager. For information about these features please see General Enhancements for Products on the SelectSite Platform starting on page 13.

Ability to search for suppliers by TIN Matching Status and TIN Status Last Updated
Customer users have the ability to search for suppliers by TIN Matching Status and TIN Status Last Updated via the supplier management advanced search. These features allow users to find suppliers that with specific Tax Identification Number Matching status or have had their TIN Status updated in their profile within a specified timeframe. For more information about TIN Matching Status, please see Manual Bulk TIN Validation on page 28.

Impact
- Products Affected: Total Supplier Manager with Onboarding add-on
- 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: Manage TIN Information. The permission is located in Permissions > Administration > Supplier Administration.
- Suppliers are searchable based on their TIN Matching Status and TIN Status Last Updated date via Supplier Advanced Search.
• TIN Matching Status allows customer users to search for suppliers who have a specific TIN Matching Status saved in their profile.

• TIN Status Last Updated allows customer users to search for suppliers whose TIN Matching Status has been updated within a specific date range, Before or After X Date, Last X Days or Before the Last X Days.

• The search fields can be hidden via Field Management. To hide the fields, go to Site Configuration > Field Management > Manage Field Names and Help Text. Browse to General > navigation > supplier management > Advanced Search > Compliance and mark the field or fields as not visible. For additional information about Field Management, please see About Field Management in the online help or in the Configuration Handbook.

**In-Network Icon Visible in the Supplier Profile**

Previously, the In-network icon only displayed in supplier search results. Users were forced to return to the search results to verify if the selected supplier is an in-network supplier. With this enhancement, customer users can easily see the In-network icon next to the supplier’s name in the supplier profile.

**Impact**

• Products Affected: Total Supplier Manager, Sourcing Director

• 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.

• New Permissions related to this Feature: None

• The In-Network icon displays in the supplier sticker next to the supplier’s name on the supplier profile.

• For additional information about the supplier profile, please see the Supplier Profile Management topics in the online help or in the Site Administration Handbook.

**Registration Configuration Updates**

The Profile Update Review screen, which is used to configure the Accept/Decline Supplier Profile Edits, will be moved and renamed to “Registration Setting”. In 14.1, this screen only housed the Profile Update Review Setting; however, with 14.2 it will begin to store organization-wide registration settings such as the new U.S. Postal Format Setting. The U.S. Postal Format Setting will enable organizations to restrict the postal code format for United States vendor addresses.

TSM customer organizations that also have Onboarding will have the ability to configure which purchase order distribution methods are available on the Locations screen via the Registration Configuration.

**Impact**

• Products Affected: Total Supplier 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
- The [Profile Update Review Settings](#) screen will be moved and renamed to [Registration Settings](#).
- The [U.S. Postal Format Setting](#) will enable organizations to enforce the U.S. postal code format for all addresses and account payable direct deposit (ACH) entries. The available options will 5 digits only, 9 digits only, 5 or 9 digits only, or No format restriction. **Note:** Customer and supplier users will be required to use the configured U.S. Postal Format Setting in the supplier profile.
- In 14.1, Email, Fax and Mail were the default purchase order distribution method selections for Onboarding customer Locations. With 14.2 customer administrators will be able to configure which default purchase order distribution methods are visible in their supplier registration. **Not Applicable** will also be a valid purchase order distribution methods.
- The new **E-signature** feature enables Onboarding customers to enable/disable the ability for supplier users to electronically sign their uploaded tax documents.
- For additional information about supplier registration configuration, please see [Entity Registration](#) or [Individual Registration Configuration](#) in the online help or the Total Supplier Manager Handbook.

Ability to Manually Send a Supplier Through Registration Approval Workflow

To support instances when a supplier profile needs to go through the registration approval process before the supplier itself submits their registration, the ability for a customer user to manually send a supplier through registration workflow will be added with the 14.2 release. This may happen when the customer is managing the profile information on behalf of the supplier or when there is a time-sensitive need to get the profile approved. The ability to kick off the registration approval process manually will give greater flexibility in routing suppliers for approval.

Impact

- Products Affected: Total Supplier 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: Submit for Registration Approval
- When viewing the profile of a supplier that has not yet been through Registration Approval Workflow, the action to Submit for Registration Approval will be available in the Supplier Actions drop down for users with the appropriate permissions. For information about performing this action, please see [Sending a Supplier through the Registration Process Manually](#) in the online help or the [Total Supplier Manager Handbook](#).
- The supplier profile will then enter the first step in the active Registration Approval Workflow just as if the supplier itself had submitted the registration.
- Should a supplier be manually sent through Registration Approval Workflow and later the supplier themselves submits their registration, the supplier profile will again enter Registration Approval Workflow.
For additional information about supplier registration approval, please see the Supplier Registration Approval topics in the Using Total Supplier Manager online help or the Total Supplier Manager User Handbook.

New Supplier Review Workflow Available for Ongoing Supplier Maintenance

Ongoing supplier maintenance activities often require the routing and review of supplier profile information by internal users. To accommodate the ongoing maintenance process for supplier information, an additional supplier workflow type is available with the 14.2 release. When this workflow is enabled, and the user has the appropriate permissions, a supplier can be entered into the workflow for review of the information.

Impact

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

Key points of Feature

- This feature is OFF (disabled) by default and can be enabled by SciQuest. Please reach out to your SciQuest contact if you will like to enable this new workflow.
- New Permissions related to this Feature: Submit for Supplier Review Approval. The permission is located in Permissions > Administration > Supplier Administration.
- Once enabled by SciQuest, customer users with the appropriate permission will be able to manually send a supplier into the new workflow for approval. For information about sending a supplier through this workflow, please see Sending a Supplier Through Review Workflow in the online help or the Total Supplier Manager Handbook.
- The same workflow objects available for Supplier Registration Approval are available for Supplier Review Approval.
- The approvals interface now includes Supplier Review Workflow.
- Users can search for suppliers and filter search results by Supplier Review Workflow step.
- Users can opt into Supplier Review Workflow Notification Preferences to receive notifications on this workflow activity.

New Supplier Workflow Objects

With the 14.2 release, new workflow objects will be available to help route suppliers through Registration and Review Approval workflows according to customer processes. These workflow objects evaluate if a supplier has registered and if the supplier has profile information that is currently pending.

Impact

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

Key points of Feature

- This feature is OFF (disabled) by default. Contact SciQuest to configure new workflow options.
• New Permissions related to this Feature: None

• "SupplierHasRegistered" is a workflow object that will allow workflow rules to evaluate if a supplier has registered and thus have a workflow step trigger based on this information. For example, the following rule will be available with 14.2: SupplierHasRegistered = false, the supplier only stops in that step if they have not submitted a registration.

• "HasPendingData" is a workflow object that will allow workflow rules to evaluate if a supplier has profile information that is currently pending customer review via the Accept/Decline feature. For example, the following rule will be available with 14.2: HasPendingData = true, the supplier only stops in that step if they have profile data that is currently pending review by an internal user.

### Manual Bulk TIN Validation

The new Manual Bulk TIN Validation feature will enable Onboarding customers to export a text file of selected suppliers that can be sent to the Internal Revenue Service’s web-based TIN matching service. The IRS will send back a response file that can be imported into the customer site that will update the TIN matching status for appropriate supplier records in Supplier Management.

### Impact

- Products Affected: Total Supplier Manager with Onboarding add-on
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

### Key points of Feature

- This feature is ON (enabled) by default.
- Import/Export
  - New Permissions related to this Feature: Import/Export Bulk TIN Matching. The permission is located in Permissions > Administration > Supplier Administration.
  - The customer users with the proper access permission are able to export a list of suppliers for Bulk TIN matching via the supplier search results page.
  - Once the customer user has a response file from the IRS, they can update the supplier records via an import into Supplier Management.
  - When an error such as missing Tax ID Number, duplicate Tax ID Number, or Tax ID Number not 9 digits is encountered, the supplier is removed from the Bulk TIN Matching export file, and an export error file is generated. This feature decreases the likelihood that the IRS TIN matching service will reject the Bulk TIN Matching export file.

- TIN Matching Status
  - New Permissions related to this Feature: Manage TIN Information. The permission is located in Permissions > Administration > Supplier Administration.
  - The new TIN Matching Status is available in the Supplier Profile. Customer users with the proper permissions are able to view and edit the TIN Matching Status via the Supplier Profile.
  - Users are also able to search for suppliers based on their TIN Matching Status via the Supplier Advanced Search.

- For information about performing a bulk export and TIN validation, please see Bulk TIN Validation in the online help or the Total Supplier Manager Handbook.
Pre-populated Tax Documents

Prior to 14.2, Onboarding customers were able to upload tax documents on a supplier’s behalf via the Supplier Profile. In 14.2, we have added a Pre-populated Tax Documents feature. Onboarding customers can easily generate tax documents pre-populated with profile data such as Supplier Name, Business Name, Federal Tax Classification, Address, etc. Customer users will need to download the pre-populated tax document to their local machine and upload to the supplier’s profile. This feature minimizes data mismatches between the supplier profile and the uploaded tax document.

Impact

- Products Affected: Total Supplier Manager with Onboarding add-on
- 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
- The customer users with the proper access permission to see the Tax Information tab are able to generate and upload pre-populated tax documents on a supplier’s behalf via the Supplier Profile.
- The application will pre-populate the selected tax document with the appropriate data such as Supplier Name, Business Name, Federal Tax Classification, Address, etc.
- Customer users will need to download the pre-populated tax document to their local machine and upload to the supplier’s profile.
- If the supplier’s TIN is SSN, the customer user must have the View TIN/SSN permission in order to see the SSN on the pre-populated tax document for the selected tax document type.
- For information about managing a supplier’s tax information, please see Managing Supplier Tax Information in the Supplier Profile in the online help or the Basics Handbook.
Sourcing

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

- **Sourcing Director** – This section provides an introduction to Sourcing Director, which is being launched with the 14.2 release. In addition, this section will present any updates associated with the 14.2 release that may affect early adopters of the product.

- **Advanced Sourcing Optimizer (ASO) Enhancements** – This section focuses on enhancements related to ASO.

## Sourcing Director

### Introduction to Sourcing Director

Sourcing Director is a purchasing-driven eSourcing solution launching with the 14.2 release. Sourcing Director delivers a fully functional event management repository for internal users and a central entry point for suppliers to manage their response to opportunities, laying the foundation for a successful eSourcing strategy.

This solution helps organizations centralize sourcing events, manage public postings of opportunities, ensure compliant bid responses from Suppliers to evaluate, and organize RFx content across multiple departments or geographies.

**Note:** Sourcing Director online help is available in the application for the release in the test environment. A printed manual is available but is not yet in the application (it will be in the application at or before the production release). Please contact your client partner or project manager to request a copy of the printed manual.

**The following functionality for Buyers is included in the Sourcing solution:**

- Intuitive event creation wizard
- Event approval and award workflow, including support for Sealed Bids
- Public site enablement and public events for exposure beyond invitation by Supplier only
- Foundational evaluation of bids using side-by-side comparison and export
- Automated alerting of key event dates and supplier activity
- Libraries & Templates for streamlining content preparation
- Q&A Board for direct communication with Suppliers during bidding phase
- Amendments, Addendum and Event Management support

**The following functionality for Suppliers is included in the Sourcing solution:**

- Branded supplier registration and profile management portal for suppliers
- A simple supplier registration profile for the supplier directory
- Supplier user management
- Intuitive supplier bid response wizard
- Public site access and combined management of both public and private events
- Automated alerting of key event dates and buyer activity

**The following functionality for Administrators is included in the Sourcing solution:**

- User Role and Permissions Management
• Supplier Management including basic registrations
• Number Wheel Management for automated numbering
• Event Type Management to control complexity of content
• Project Setup and configuration
• Customizable Email Templates
• Control and enforcement of functionality at Project and Event levels.

General Enhancements for Early Adopters
Early adopters may notice some changes in 14.2. This release will include a few general enhancements that affect Sourcing Director. For information about these features please see General Enhancements for Products on the SelectSite Platform starting on page 13.

Supplier Management Enhancements for Early Adopters
In addition to the general enhancements referenced above, the release will also include enhancements to supplier management. For information about these features please see General Supplier Management Enhancements on page 19.

Advanced Sourcing Optimizer
Conditionally Required Bid Fields
Previously, when creating a sourcing event, bid fields could be configured as either ‘Required’, or ‘Not Required’ for bid collection. ASO has a new option available: “Conditionally Required”, which expands configurability to include cases where a bid field is required only if other criteria are met.
This makes it easier for suppliers to know what information is required for each bid, and also ensures that bid data is clean and ready to be analyzed when bidding closes.
Example: In transportation events, suppliers are often required to specify the mode of transportation for each of their bids. Different sets of data points need to be collected depending on whether the mode of transportation is truckload or rail. Information essential for one would not be applicable for the other. Users are now able to configure such an event so that a bidder that selects ‘Rail’ for that field is also required to specify the origin ramp, destination ramp, and railroad, but a bidder who chooses ‘Truckload’ can leave that information blank.
This new feature is available to be configured in all current ASO sealed bid events with the 14.2 product release.

The NEW Feature includes:
• A new Configuration section. When users choose to enable Conditionally Required Bid Fields in their event, the configuration section becomes available.
• Conditionally Required Bid Field Rule Creation – Users are able to select a trigger, triggering condition, and impacted fields. Multiple rules may be created as needed.
• Placing Bids – When a bidder enters the event, they are now required to populate values based on the rules created.
• Cost Model Impact – Cost models can be built with different calculations based on values in the bid. The ability to configure fields as conditionally required helps ensure that all of the required data is populated for each cost model configuration.

Impact:
• Products Affected: Advanced Sourcing Optimizer
• End User Impact: **High**
• Admin User Impact: None
• Integration Impact: **High**

**Key points of Feature:**
• This feature is OFF (disabled) by default.
• Conditionally Required Bid Field configuration is available on existing standard ASO events, and in new event configuration. Users are able to activate the feature in events as desired.
• Implementation in Auctions is slated for a future release.
• For additional information about bid fields, please see the online help or the Event Creation Process: Values section of the Advanced Sourcing Optimizer Buyer Guide.

**Gating Enhancements**
As an expansion of our existing gating functionality, ASO now offers two new gating options, in addition to Statement Gating, Document Gating and RFI Gating.

**The NEW Features include:**
• Intent to Bid – When configured, suppliers have the ability to let the buyer know that they do not wish to bid on a particular event. This prevents buyers from having to follow up with suppliers to see if they wish to bid or not.
• Event Document Gating – Permit suppliers to upload a document which can be reviewed prior to being granted access to the bidding portion of the event.
  • Suppliers are required to upload specified documents for approval.
  • Buyers have the ability to approve the suppliers’ documents before granting those suppliers access into the event to submit bid information.

**Impact**
• Products Affected: Advanced Sourcing Optimizer
• End User Impact: Low
• Admin User Impact: None
• Integration Impact: Low

**Key points of Feature:**
• This feature is OFF (disabled) by default.
• The new Gating options are available on existing standard ASO events, and in new event configuration. Users will be able to activate the feature in events as desired.
• For additional information about gating, please see the online help or the Gating section of the Advanced Sourcing Optimizer Buyer Guide.

**Internationalization**
Expanding our customers’ ability to conduct global sourcing events, ASO now supports Brazilian Portuguese for suppliers/bidders. The ASO user interface for suppliers automatically translates into the following languages, based on the supplier’s browser settings:

- English
- Spanish
- Chinese
- French
Impact

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

Key points of Feature:

- This feature is ON (enabled) by default.
- Language support is controlled by the suppliers browser.
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 14.2.

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.

General Enhancements for 7.2 (13.2) Only

7.2 (13.2) Configurable Listings

New search fields and filters have been added to several configurable listing screens in Contract Director, providing additional search options and the ability to view some data directly from the listing screen without requiring the user to drill down into the record.

Impact

- Products Affected: Contract 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
- These search fields have been added to the following listing screens:
  - The Find Template Library screen allows for searching and filtering of contract types and organization units
  - The Compliance/Performance screen allows for searching and filtering of compliance item codes
  - The Manual Tasks screen allows for searching and filtering of due dates.
- These fields can be printed along with any other fields added to the grid.

7.2 (13.2) Browser Support for Internet Explorer 11 for Windows

Contract Director 7.2 (13.2) is fully compatible with Internet Explorer 11.

Impact

- Products Affected: Contract Director
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None
7.2 (13.2) Browser Support for Safari for Mac OS

Contract Director 7.2 (13.2) is fully compatible with Safari on the Mac OS.

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

7.2 (13.2) Salesforce.com Integration

The Salesforce.com (SFDC) Integration to Contract Director allows for an organization’s users to initiate a contract creation from an Opportunity within SFDC. A basic form containing the standard fields required to create a contract in Contract Director is completed within SFDC. All contract status updates are passed from Contract Director, back into SFDC, and shown on the Opportunity. This reduces the cycle time for requesting a contract to be created and gives the power of initiating the contract to the user. This feature is currently only available for customers on 7.2 (13.2).

Impact
- Products Affected: Contract Director
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: High (if configured)

Key points of Feature
- This feature is OFF (disabled) by default
- New Permissions related to this Feature: None
- Initiates a contract creation from an Opportunity within SFDC. Provides a “Create Contract” link in the Opportunity, which then presents a basic form with the standard fields required to create a contract in Contract Director. This form is flexible enough to add custom fields as necessary.
- Upon “Submit” all relevant information is passed into Contract Director, and a contract is created.
- All contract status updates are passed from Contract Director, back into SFDC, and shown on the Opportunity
General Enhancements for 7.5 (14.2)

Browser Support for Internet Explorer 11 for Windows
Contract Director 14.2 and above is now fully compatible with Internet Explorer 11.

Impact
- Areas Impacted: All
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

Browser Support for Safari for Mac OS
Contract Director 14.2 and above is now fully compatible with Safari.

Impact
- Areas Impacted: All
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

Organization Unit Hierarchy Access Groups
Organization unit hierarchy access groups are automatically generated by the system when an organization unit is created, providing access to an organization unit and any child organization units within the hierarchy.

If a child organization unit is added to the hierarchy, the organization unit hierarchy access group automatically updates to grant access to the new organization unit.

As a result, when administrators add a child organization unit to the hierarchy, they do not have to manually assign access to the users in the parent organization unit.

For example, if an administrator creates an organization unit called “North America”; two access groups are automatically generated by the system:
- An Organization Unit Access Group (called “North America”)
- An Organization Unit Hierarchy Access Group (called “North America and children”)

If the administrator adds a child organization unit beneath North America called “United States”, the “North America and children” organization unit hierarchy access group updates automatically to include access to the United States organization unit. As a result, users who already have view access to the North America organization unit automatically gain view access to the United States organization unit.

Organization unit hierarchy access groups are system-generated and cannot be modified through the user interface.
Impact
- Areas Impacted: Organization Units, Access Groups
- 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
- This new type of access group automatically updates organization unit access whenever a new organization unit is added or changed.
- Organization unit hierarchy access groups are system-generated and not editable.

Infinite Scrolling in Drop Down Fields and Many-to-Many Controls
An infinite scrolling feature has been added to drop down fields and many-to-many controls. In fields that contain a large volume of records, only the first 20 records are loaded, and are sorted in alphabetical order. Scrolling down with the scroll bar or mouse wheel loads additional records in groups of 20. Records can still be searched with search boxes or type-ahead, regardless of whether the target records are already loaded in the field.
This enhancement improves general application performance and response time when dealing with large data sets that need to be presented to the end user.

Impact
- Areas Impacted: All drop down fields and many-to-many controls containing more than 20 records, except in configured view listing filters.
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

Key points of Feature
- This feature is ON (enabled) by default
- Drop down and many-to-many fields load records in groups of 20 continuously.
- Scrolling down loads additional records in increments of 20.
- Searching and type-ahead controls are unaffected.
- Drop down fields in configured view listing filters are not included in this enhancement.

Contract Emails
The Contract Email feature allows users to send and receive email messages about a particular contract directly from Contract Director.

Clicking the Send An Email option in the left menu launches a contract email popup window. A custom message can then be sent to one or more recipients. Any replies to the email are automatically received and stored by Contract Director. For auditing purposes, a history of all sent and received messages is kept in the Outbound Emails and Inbound Emails areas, respectively. This allows the capture of correspondences between parties around contract negotiation in a single place.
Additional contract email features will be available in future releases.
Impact
- Areas Impacted: Contracts
- End User Impact: Medium
- Admin User Impact: Low
- Integration Impact: None

Key points of Feature
- This feature is OFF (disabled) by default.
- New Permissions related to this Feature:
  - Contract Email:
    - Contracts > Custom Actions > Contract Email
  - Inbound Email area
    - Common > Email Inbound > Contract Inbound Email
  - Outbound Email area:
    - Common > Email Outbound > Contract Outbound Email
    - Common > Email Outbound Delivery Attempt > Contract Email Outbound Delivery Attempt
    - Common > Email Outbound Instance > Contract Email Outbound Instance
- Emails about a contract can be sent directly from Contract Director.

Localization of Listing Labels
In 14.2, labels on listing pages can be localized. This enhancement allows administrators to rename the labels, or to translate them into a different language. Localization is available through metadata configuration.

Impact
- Areas Impacted: Listing screens
- End User Impact: Low
- Admin User Impact: High
- Integration Impact: None

Key points of Feature
- This feature is ON (enabled) by default.
- New Permissions related to this Feature: None
- Listing page labels can be renamed or translated into a different language through the metadata page.

Optional Confirmation Popup View
In previous versions of Contract Director, a confirmation window appeared when creating or deleting a record (for example, when creating a new contract or deleting a dashboard panel). Generally, this popup window did not provide any new information and resulted in an extra click when performing an action. In 14.2, the confirmation popup window has been removed, thereby streamlining the action process and reducing the number of clicks required by an end user.
Impact
• Areas Impacted: All
• End User Impact: Medium
• 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
• The confirmation popup window that appeared when creating or deleting a record has been removed.

Re-use of Email Addresses and Username
This feature allows email addresses and user names to be re-used if the original user has been deactivated. This is controlled by the date in which the user is deactivated. Administrators will be able to create a new user and re-use the existing email address and username. This allows organizations that have a similar IT policy to enable it within Contract Director as well.

Impact
• Products Affected: User Management
• End User Impact: Low
• Admin User Impact: Low
• Integration Impact: High if SSO is enabled

Key points of Feature
• This feature is ON (enabled) by default
• New Permissions related to this Feature: None
• The existing user in Contract Director must be deactivated and the date in which this is set must be in the past.
• If the Administrator reuses the email address or user name of a user who is not deactivated, they will receive a validation message indicating:
  • The email address is currently in use and must be unique
  • The user name is currently in use and must be unique.
• If you use single sign-on, this feature is enabled and allows you to re-use the email addresses and user names.
List, Search, and Reporting Enhancements for 7.5 (14.2)

Column Width Resizing on Simple Listing Screens
This feature extends the column width resize capabilities that are already available on most configured views to any simple listing pages.

The column resizing is saved when a user navigates away from the listing, logs out of Contract Director, or closes the browser window. Column widths revert to the default setting only if the browser cache is cleared.

Column width configurations can also be saved to a configured view. When the configured view is saved the column width will persist whenever the view is selected in the future.

Impact
- Areas Impacted: Simple listing pages
- End User Impact: Low
- Admin User Impact: None
- Integration Impact: None

Key points of Feature
- This feature is ON (enabled) by default
- Columns can be dragged to edit or resize their width.
- Column width resizing persists after navigating away from the listing, logging out of Contract Director, or if the browser is closed.
- Column width configuration can be saved for each custom configured view.
- Last selected record and last viewed listing page number will also persist after navigating away from the listing or logging out of Contract Director.

Company Default Views for Configured Views
With this enhancement the View drop down field for configured views are grouped and sorted in priority sequence by the following criteria:
1. Personal Default
2. Personal Favorites
3. Shared Favorites
4. Personal
5. Shared
6. Default

If there are multiple types of each view, they are sorted within each category alphanumerically. The generic “Default” view appears at the bottom of the list. This sorting provides two main advantages:

- Administrators can create a custom default view for end users, who will only see the generic “Default” view if no other views have been shared to them
- Advanced users now have quicker access to the personal favorite views they have created, as they are grouped together at the top of the View drop down list.
Additionally, the last-selected view (including the selected page and record) persists when a user navigates away from the page, or logs out of Contract Director.

**Impact**
- Areas Impacted: Configured Views, Listing Screens
- End User Impact: **High**
- Admin User Impact: **High**
- Integration Impact: None

**Key points of Feature**
- This feature is ON (enabled) by default
- Configured views are sorted into four categories, with “Default” at the bottom of the list.
- Sorting allows consistency in the display order of available views.
- Improved sorting also puts favorite views close at hand for experienced users.
- The last-selected view, page and record is saved when a user navigates away from the page or logs out of Contract Director.

**Configured Search Dashboard Panel**

The new Configured Search dashboard panel allows users to search records directly from their home page. When creating the panel, the user can select any configured view they have access to view. The pinned filters from this view then appear in the dashboard panel.

Entering search criteria and clicking the Search button on the panel redirects the user to the listing page, where the results of the search are displayed. For more experienced users, clicking the Advanced Search button redirects the user to the Add/Edit view tab of the listing page, where they can modify the search settings.

**Impact**
- Areas Impacted: Dashboard
- End User Impact: **High**
- Admin User Impact: **High**
- Integration Impact: None

**Key points of Feature**
- This feature is ON (enabled) by default
- New Permissions related to this Feature: None
- With the Configured Search dashboard panel, users can now perform searches directly from the dashboard.
- Entering search criteria and clicking Search redirects the user to the listing page, where the results of the search are displayed.
- Experienced users can use Advanced Search to quickly access the Add/Edit View tab of the listing page.

**“Logged In User” Placeholder for Configured Views**

Search filters for user fields and user collections now contain a placeholder option called “Logged In User” on configured views. With this placeholder, an administrator can create a view that retrieves records specific to the currently logged in user, eliminating the need for each user to create their own customized views. The name of this placeholder is editable through the Localization screen.
Impact
- Areas Impacted: Configured Views; all search filters that contain a drop down list of users
- End User Impact: High
- Admin User Impact: High
- Integration Impact: None

Key points of Feature
- This feature is ON (enabled) by default
- New Permissions related to this Feature: None
- Eliminates the need to create views for individual users.
- Available on any ‘user’ field on configured views.
- Appears as the first option in the drop down field.
- Can be renamed through the Localization screen.

Document Text Filter for Configured Views
With this release, new search filters are available for configured views in the Contracts and Template Library listing screens that allow users to filter and search text in main documents and attachments of records. The filter performs a ‘contains’ search of all the main documents and attachments that the user has access to view, allowing users to search contract text for a specific word or phrase.

Impact
- Areas Impacted: Contracts
- End User Impact: Medium
- 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
- The Search filters allow users to search main document and attachment text through configured views. The following new search filters are available:
  - For Contract Configured Views:
    - Text in All Documents – searches text in both the main document and attachments of a contract
    - Text in Attachments – searches text in contract attachments only
    - Text in Main Document – searches text in the main document of a contract only.
  - For Template Configured Views:
    - Text in Main Document – searches text in the main document of a template or library group
New Legal Entity and Contracts Listing Filters and Grid Columns

A number of new filters and grid columns are now available on the Contracts and Legal Entities listing pages. These additions represent legal entity or contract standard fields that were not previously searchable, or could not be added as a column to the listing grid.

In addition, all “Legacy” search filters have been removed from the list of available filters on the Legal Entities listing page.

Impact

- Areas Impacted: Contracts and Legal Entities listing pages
- End User Impact: Medium
- 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 search filters are available on the Contracts and Legal Entities listing page.
- New grid columns are available on the Contracts and Legal Entities listing page.
- Legacy filters are removed from the list of available filters on the Legal Entities listing page.

Search Contracts by Second Party Country

Users can now search for contracts based on the country of the second party selected on a contract. A new search filter called “Second Party Country” is available for searching, as well as a listing grid column with the same name. This filter searches through the second party addresses on the contract.

For example, if a contract manager would like to quickly find all the contracts she has with vendors in Germany, she can enter “Germany” in the Second Party Country filter and click Search to generate a list.

Impact

- Areas Impacted: Contracts Listing page
- End User Impact: Medium
- 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
- Second Party Country search filter and grid column are available.
- Searches through the country in the second party address on contracts.
Ability to Filter Contract Reports by Custom Field Values Found on Users

The Contract Reports area has been enhanced to allow contract reports to be filtered by custom fields added to a user record, where the user has been selected as a Contract or Invoice Manager on a contract.

For instance, imagine that an organization has a custom field on the Users screen called “Reports To”. When a user is created, their direct supervisor’s name is entered in this field. Anne Black is a supervisor who would like to see all contracts that are managed by users who report to her. To see this information, she can add the “Contract Manager – Reports To” filter to a contract report, select ‘Equal to Anne Black’ as the filter criteria, and run the report.

Impact
- Areas Impacted: Contract Reports
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: None

Key points of Feature
- This feature is ON (enabled) by default in 14.2+; Web Reports Administration configuration is required in older versions of Contract Director.
- New Permissions related to this Feature: None
- Contract reports can be filtered by custom fields added to a user record, where the user has been selected as a Contract or Invoice Manager on a contract.

New Global Search Results Page

The Global Search Results page has been enhanced to improve user experience and boost overall performance. Whether searching all records or specific areas of the system, the results page now displays key information pertinent to records retrieved in the search.

The Global Search Results page now features a preview of the text match on document searches (Contracts and Contract Attachment Search), and the text fragment matches are highlighted within the new preview window for each result match. Key record information and links to additional pages associated with the results are also displayed. Additionally, the system retains the last selected search area (Users, Template Libraries, Contracts, Contract Attachments, Legal Entities), so that users can continue to refine their search requirement or limit the search in a specific area without having to re-select each time.

Links to additional pages have also been introduced. The links that are displayed on the Global Search Results page, such as “Notes” or “Download Attachment”, can be configured through Metadata.

Impact
- Areas Impacted: Global Search
- End User Impact: High (improved user experience)
- 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
• The last selected search in the Global Search Area is retained.
• The updated Global Search Results screen improves user experience.
• Preview text appears for contract and template text search.
• Text fragment matches are highlighted in the Results page.
• Links are provided to the main record and related pages.
• Incremental indexing has been enhanced for improved performance.

Workflow Enhancements for 7.5 (14.2)

Respond to Workflow Pop up Window
In previous versions of Contract Director, responding to workflow or checking a contract in or out required navigating away from a contract to a different screen. In 14.2, workflow, operations, and check in/check out responses are presented in a popup window on top of the screen the user is working in. When the user confirms the action, the popup window closes and the page will automatically refresh to reflect any changes in state or status. This enhancement reduces the total number of clicks required to approve a contract, and allows for workflow approval without navigating away from the record.

Impact
• Areas Impacted: Workflow Response, Operations, and Check in/out actions (on entities)
• End User Impact: Medium
• 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
• Workflow, Operations and Check in/Check out actions appear in a popup window.
• Automatic page refresh when confirmation popup window is closed.

Improvements to Casual Approver User Interface
In order to facilitate contract approval among users who rarely access the system, Contract Director 14.2 includes a number of enhancements designed to simplify the contract approval experience:

• New Respond to Workflow buttons at the top of the contract header – For casual users, these buttons are more conspicuous than the “Respond to Workflow” fly out on the left menu. More experienced users can still approve contracts through the fly out menu. The buttons do not appear if the user does not have the appropriate workflow permissions. In cases where there are parallel workflows, each workflow will have a separate group of buttons.

• New Print to PDF and Attachment buttons at the top of the contract header – These buttons allow quick access to the contract’s main document and all attachments. To streamline the user interface, the Attachments button does not appear unless the selected contract contains at least one attachment.

• A simplified ‘Executive View’ of the contract header – When the contract header is accessed by a special link in a workflow approval email, it launches in Executive View mode. The Executive View hides the left menu, and can also be configured to hide sections of the header so that only the most relevant information for the approver is displayed. Hidden sections can be configured using the
Metadata UI page. The standard contract header view can be accessed by clicking the “View” button on the top of the contract header; customers who do not use workflow approval emails can toggle between standard and executive contract header views in the same way.

Impact

- Areas Impacted: Contract Header, Workflow Response
- End User Impact: High
- Admin User Impact: Low
- Integration Impact: None

Key points of Feature

- Workflow Response buttons are ON (enabled) by default
- Executive View is ON by default, but standard view is still the default setting. Executive View can be accessed by clicking the “Executive View” button at the top of the contract header. Customers who use workflow approval emails must configure their approval emails to contain the Executive View email placeholder.
- New Permissions related to this Feature: Contracts > Contract > Custom Actions > Executive View
- User interface improvements to benefit casual approvers.
- Workflow, Attachment, and Print to PDF buttons are available at the top of the contract header.
- Executive View provides a streamlined view of the contract header. It can be accessed through a special email placeholder link, or by clicking the Executive View button at the top of the contract header.

Automatic Completion of Expired Contracts

New configuration settings now allow the contract completion process to be automated, so that a contract document state will automatically change to “Complete” once the contract’s end date is reached. This setting is configurable through the Configuration > Events area. In previous versions of Contract Director, approved contracts that reach their end date stayed in an active/document state until they were manually completed.

Impact

- Areas Impacted: Contracts
- End User Impact: Medium
- Admin User Impact: Low
- Integration Impact: None

Key points of Feature

- This feature is OFF by default
- New Permissions related to this Feature: None, but configurable through settings in the Events area.
- Approved contracts will automatically complete when the end date is reached.
- This setting will be configurable.
Control List Enhancements for 7.5 (14.2)

New Control Groups
Distribution and Workflow Control List functionality has been enhanced and renamed as Distribution Groups and Workflow Groups. The update improves the look and feel of the user interface to match other areas of Contract Director, improves user experience, and boosts overall system performance.

Impact
- Areas Impacted: Security, Contracts, Templates
- End User Impact: Low
- Admin User Impact: High
- Integration Impact: None

Key points of Feature
- This feature is ON (enabled) by default
- New Permissions related to this Feature:
  - Configuration > Predefined Distribution Group
  - Configuration > Predefined Workflow Group
  - Configuration > Predefined Distribution Group Identifier
  - Configuration > Predefined Workflow Group Identifier
  - Contracts > Document Distribution Group
  - Contracts > Document Distribution Group External Member
  - Contracts > Document Distribution Group User Member
  - Contracts > Document Workflow Group
  - Contracts > Document Workflow Group Member
  - Contracts > Reference Distribution Group Member (refers to predefined groups)
  - Contracts > Reference Workflow Group Member (refers to predefined groups)
- The Distribution and Workflow Group screens have been updated to match other areas of Contract Director.
- Improved system performance.
- Infinite scrolling for the selection panels.
- List identifiers for control groups are created and updated using the fly out menu on the List Identifier field in any Distribution or Workflow Group screen.

Adding Distribution Groups to Compliance and Performance Items
This enhancement allows distribution groups to be added to compliance or performance items. When the compliance or performance item is added or updated on a template or contract, users can select a distribution group for each item. Members of the distribution group are notified when the compliance or performance criteria are due for verification or updating.
The distribution group must first be added to the contract or template before it can be selected on a compliance or performance item. These can be created ‘on-the-fly’ from the Distribution List field on the Compliance / Performance Item.

Impact
- Areas Impacted: Compliance/Performance (Contracts and Templates)
• End User Impact: Medium
• Admin User Impact: Low
• Integration Impact: None

**Key points of Feature**
• This feature is ON (enabled) by default
• Users can select a distribution group to attach to a compliance or performance item.
• A new distribution group can be created by clicking the Add icon beside the drop down field or by selecting Distribution Group from the left menu of the listing screen of a template or contract.

**Distribution Groups for Manual Tasks**
This enhancement allows distribution groups to be added to manual tasks. Members of the distribution group will receive email reminders about the manual task at the specified notification lead time.

The distribution group must first be added to the contract before it can be selected on a manual task. These can be created ‘on-the-fly’ from the Distribution List field on the Compliance / Performance Item.

**Impact**
• Areas Impacted: Manual Tasks (Contracts)
• End User Impact: Medium
• Admin User Impact: Low
• Integration Impact: None

**Key points of Feature**
• This feature is ON (enabled) by default

**Display Name Search for Distribution and Workflow Group Members**
In 14.2, the user display names are searchable from the Distribution and Workflow Group Members page. Display names are system-generated names that incorporate the first and last name of the user (out of the box). For organizations with very large user bases, searching for users by first and last name may be insufficient. Now additional fields can be added to the display name, making display names configurable. In addition, any part of the display name is now searchable, making it easier to find the user you are looking for.

For example, a contract manager would like to add John Smith to a distribution group, but there are 10 John Smiths in the organization. A first name or last name is insufficient in this case, but if the organization captures additional information during the user creation process (for example, middle names, user names or aliases), the contract manager can find the correct John Smith by typing that information in the Display Name search field.

**Impact**
• Areas Impacted: Control List Members page
• End User Impact: Medium
• 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
• Designed to help large organizations where many users may share the same first and last names.
• Any part of a user's display name is searchable.
• Modifying the display name configuration will not update the display name for existing users; therefore display name configuration should be set before users are entered in the system.
• The display name is stored in the database.

Integration Enhancements for 7.5 (14.2)

User Sync from Contract Director to SelectSite (for SSO)
A new user synchronization feature can be turned on so that users created in Contract Director are automatically sent to SelectSite and used for Single Sign On capabilities. The User screen in Contract Director has not been changed and users can still be added in the same fashion. User records can be managed by an administrator in Contract Director.

Impact
• Products Affected: Contract Director
• End User Impact: Low
• Admin User Impact: Medium
• Integration Impact: High

Key points of Feature
• This feature is OFF (disabled) by default
• New Permissions related to this Feature: None
• Implementation of this functionality:
  • A change to the tenant configuration is required to enable this setting
  • Contact your client partner or service representative to have this feature enabled.
• When a user is added to Contract Director the following fields are sent to SelectSite and stored: First Name, Last Name, Email, Is Active, and Federation Login Credential.
• When Contract Director is the housing entity, users cannot be added directly to SelectSite.
• The Authentication Mode in SelectSite is set to Local by default.
• Any existing users in Contract Director will be able to be imported into SelectSite through the use of an external tool.

User Sync from SelectSite to Contract Director (for SSO)
A new user synchronization feature can be turned on so that users created in SelectSite are automatically sent to Contract Director and used for Single Sign On capabilities. User records can be managed by an Administrator in SelectSite. The Manage User area in SelectSite has not been changed and users can still be added in the same fashion.

Impact
• Products Affected: Contract Director
• End User Impact: Low
• Admin User Impact: Medium
• Integration Impact: High
**Key points of Feature**

- This feature is OFF (disabled) by default
- New Permissions related to this Feature: Contract Director Access *(Note: this permission is only enabled if the Contract Director SSO Model is on)*, New Contract Director SSO Model in SelectSite

**Implementation of this functionality:**

  - A change to the configuration file is required to enable this setting
  - Contact your client partner or service representative to have this feature enabled.

- When a user is added to SelectSite the following fields are sent to Contract Director and stored: Username, Email, Is Active, First Name, Middle Name, Last Name, Phone Number.
  - Upon adding the user to SelectSite they must be granted Contract Director access in the Administrator permissions area of SelectSite.
  - When users are synced from SelectSite to Contract Director they will acquire minimal permissions within Contract Director. This is handled by the configuration file and will require setup to be enabled appropriately.

- When SelectSite is the housing entity users cannot be added directly to Contract Director.
- The Authentication Mode in SelectSite is set to Local by default.
- Any existing users in SelectSite will be able to be imported into Contract Director through the use of an external tool.
- There are three ways to link to Contract Director from SelectSite:
  
  - “Go to Contract Director” is a link on the contracts dashboard page that will open in the same window
  - “View in Contract Director” is a link on the contract detail page that will open in a popup window
  - Attachment links on the contract detail page. This will open the attachments in Contract Director in a popup; however, the user has to have Contract Director access.

**Single Sign-On between Contract Director and SelectSite**

The Single Sign On feature enables users to log into Contract Director through SelectSite. The login is seamless to the user and the re-direct happens without notice. When Single Sign-On is turned on, SelectSite becomes the end point, meaning users must exist in both systems and the password must be the same in each. This feature works with the user sync features listed previously in this document.

**Impact**

- Products Affected: Contract Director
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: High

**Key points of Feature**

- This feature is OFF (enabled) by default
- New Permissions related to this Feature: None

**Implementation of this functionality:**

  - A change to the configuration file is required to enable this setting
  - Contact your client partner or service representative to have this feature enabled.
• The page in which a user is directed to for login is configurable. This will be configured during implementation of your project.
• When a user tries to log into Contract Director they are redirected to a SelectSite login seamlessly
• Upon a successful login the user is redirected back to Contract Director and they will be logged in.
• If this feature is in use, the users created must exist in both systems. This is enabled as part of the User Sync features listed above.
• When a user is deactivated in the system of record, the user record will also be deactivated in the corresponding system.
• The password for each user will be managed by SelectSite.

**External Contract Director Single Sign-On**

With this release, Single Sign On is available to external customer providers. The SSO protocols that Contract Director can integrate with will be SAML, Shibboleth, ADFS, and LDAP.

**Impact**

- Products Affected: Contract Director
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: **High**

**Key points of Feature**

- This feature is OFF by default
- New Permissions related to this Feature: None

**SelectSite Integration Time-out Prevention**

In 14.2, Contract Director/SelectSite integration contains a ‘keep-alive’ feature. Working in Contract Director for an extended period of time causes it to ‘ping’ an integrated instance of SelectSite to ensure the session does not time out due to inactivity.

If the current integrated session of Contract Director is left idle, a warning message appears two minutes before the session expires. Clicking OK on this message ‘pings’ both Contract Director and SelectSite to keep the sessions alive. If there is no user response during this two-minute time frame, the user will be logged out of Contract Director and SelectSite automatically.

Session length for time-out prevention is configured in SelectSite.

**Impact**

- Areas Impacted: Security
- End User Impact: Medium
- Admin User Impact: Low
- Integration Impact: **High**

**Key points of Feature**

- This feature is ON (enabled) by default (if Contract Director is integrated with SelectSite)
- New Permissions related to this Feature: None
- Contract Director/SelectSite integration prevents session timeout due to inactivity.
Shopping Products

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

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

**General Enhancements**

14.2 will include a few general enhancements that affect Shopping products. For information about these features please see **General Enhancements for Products on the SelectSite Platform** starting on page 13.

Spend Director/Order Manager/Requisition Manager Enhancements

Collapsible Product Showcases

On the Shopping Home page, administrators are able to configure Showcases which feature different types of suppliers and forms available to their users. Beginning with the 14.2 release, users will be able to collapse individual showcases to hide their contents from view if the showcase contains items which are not pertinent to that user. Users can then more easily locate the showcases that they use more often.

**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
- Users will be able to collapse individual showcases on the Shopping Home page if the information contained in them is not valuable to the user.
- After the user logs out and logs back in, the system will remember any showcases that have been collapsed and will keep them collapsed.
Taxonomy Update

With the 14.2 release, SciQuest will include the latest version of the UNSPSC code set (version 16.0901). Changes and updates to UNSPSC codes may affect current functionality related to category mappings, workflow routing, and reports. Details are available in the Product Release Library that describe the code changes, potential impact, and steps to adjust customer mappings. If you have any questions about this Taxonomy upgrade, please reach out to your Client Partner.

Impact

- Products Affected: Spend Director, Order Manager, Requisition Manager, Accounts Payable
- 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

Enhanced PunchOut Edit Capabilities

Organizations that use the eProcurement products can allow their users to edit quantities and delete line items for orders created in PunchOut sessions. Previously, a single setting allowed users to make these edits in both Carts/Requisitions and Purchase Orders; if the setting was turned off, users could do neither. In 14.2, this setting is updated to allow organizations more control over which area users can make changes to PunchOut orders.

Impact

- Products Affected: Spend Director, Requisition Manager, Order 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
- Organizations are able to configure users to be able to edit PunchOut sessions for Cart/Requisitions, Purchase Orders, both or neither.
- This functionality is controlled by the Allow users to edit PunchOut sessions in the application setting in the supplier profile. This setting can be accessed from the navigation menu Integrations > PunchOut Setup.
- Four options are available from the setting dropdown; Off, Cart/Requisition Only, PO Only and All Documents.
- Existing supplier settings will be respected so that current functionality does not change.
  - If the field was previously set to No, then the new setting is defaulted to Off.
  - If the field was previously set to Yes then the new setting is defaulted to All Documents.
- For additional information about configuring a supplier’s PunchOut integration settings, please see Managing Supplier Integration Settings in the Supplier Profile in the online help or the Administration Handbook.
New Fields Added to the Cart Assigned Email Notification

When a shopper assigned a cart to a requestor for processing, the email that was generated needed to contain a variety of information such as the shopper’s name, Business Unit and Department, cart number, cart name, and the name of the person the cart was prepared for. Three new fields are added to the Assign Cart Email Notification: Cart number, Business Unit and Department.

Impact
- Products Affected: Spend Director, Requisition Manager
- 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
- Organizations are able to control visibility of the cart number on the email notification through Document Configuration.
- If users do not want to see the cart number on their notifications, this feature can be turned on and off at the Organization level by going to:
  - Site Configuration > Configure Documents > General Document Configurations Settings
  - The Show cart number to user option (under Cart Configuration) can be selected or deselected, depending on the business need.

Persona Business Unit and Department Considered when PunchOut Shopping

Organizations using Departments and/or Multi-Business Units can configure users to shop for more than one department or business unit. The Shopping Persona feature allows users to shop for more than one department or business unit without having to change the field in their profile. Currently, if a user punches out while using a shopping persona, the punch-out site does not recognize the persona business unit. This can potentially lead to incorrect items and prices being displayed. In 14.2, persona business unit can be added to the PunchOut request, allowing organizations to pass that information. In addition, persona department is included.

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

Key points of Feature
- This feature is OFF (disabled) by default. Contact SciQuest Support or your Client Partner to update the supplier’s PunchOut configuration in order to enable this feature.
- New permissions related to this Feature: none
- For personas where Business Unit or Department is not captured, the user’s current Business Unit / Department will be passed.
New Term “PunchOut” added to Field Management Thesaurus

The intent of the Field Management Thesaurus is to customize SciQuest terminology to reflect organization terminology. For example, the term “Supplier” is used to refer to an entity that sells goods and services. Many customers refer to such entities as “Vendors”. SciQuest continues to add terms to the Field Management Thesaurus. In 14.2 the term PunchOut is included.

Impact

- Products Affected: Spend Director, Requisition Manager, 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 terminology can be modified by navigating to: Site Configuration > Field Management > Configure Field Thesaurus.
- For additional information about configuring thesaurus terms, please see Updating a Field Term in the Field Management Thesaurus in the online help or the Configuration Handbook.

Success Message Displayed when a Form is Saved

Previously, when saving a form or form updates, there was no acknowledgement that the information had actually been saved. Starting with the 14.2 release, a message is now displayed indicating that the form was saved successfully.

Impact

- Products Affected: Spend Director, Requisition Manager, Order Manager
- 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

Updated Supplier Catalog Updates List Presentation

At a maximum, the Supplier Catalog Updates screen shows 5000 records. In the case a Supplier has updated catalog information for more than 5000 records across various dates, users may not see the most recent changes. With the 14.2 release, the most recent 5000 records will be retrieved and presented in the Supplier Catalog Updates screen sorted by the most recent date at the top of the list. This change will ensure the most recent changes will always be available for review.

Impact

- Products Affected: Spend Director
- End User Impact: Low
- Admin User Impact: None
Supplier Management Enhancements

General Supplier Management Enhancements

14.2 includes a few general supplier management enhancements. For information about these features, please see General Supplier Management Enhancements starting on page 19.

Reporting Enhancements

Customized Document Search Export

Starting with the 14.2 release, organizations will have the ability to customize Document Search Exports for requisitions, purchase orders, buyer invoices and receipts. In addition to the existing default export types (Screen, Transaction and Full export types), custom document search exports can be built through an easy to use wizard by selecting which fields and files to include for export. These customized exports can be saved as templates for later use in document searches and with the appropriate permissions, the exports can be shared or kept for personal use only. Available from Document Search, the Export Search functionality will allow selection from either personal or shared templates. Existing templates can be copied, modified and saved for future exports.

Impact

- Products Affected: All Shopping and AP 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.
- New Permissions related to this Feature: Three (3) new permissions (in addition to the existing Export Search Results permission) are related to this functionality.
  - Create/Manage My Custom Export Templates - Allows users to create, edit, delete a customized template and copy from shared (public) templates.
  - Share My Custom Export Templates – Allows user to share their customized template.
  - Administer all Custom Export Templates – Users with this permission can remove sharing for others shared customized templates.
- With the appropriate permissions, users are able to create (as well as edit, copy and delete), Customized Export Templates and define the specific fields and files to be included in the Document Search Export File. In addition, users are able to decide whether or not to save the Customized Template for use at a later time.
- A new Create and Manage Exports and Configuration page is available from the Orders and Documents menu which allows users to view existing templates. Shared templates can be copied, edited, and saved as new templates.
• Users are able to save Customized Export Templates as either personal use or share them for others to use.
• From Document Search, users with the existing Export Search Results permission are now able to export their search by choosing from either the default existing Export Types (Screen, Transaction or Full) or Others Shared Customized Export Templates.
• Recurring exports are available to the existing default Export Templates (Screen, Transaction and Full) only.
• For additional information about exporting document searches, please see the Document Search and Export topics in the online help or the Site Basics Handbook.

Field Changes to Transaction and Full Document Exports
With the 14.2 release, the list of available fields to include in Transaction and Full Document exports has been updated. The changes include removing duplicate columns and clarifying fields to have more meaningful column names.

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.
• New permissions related to this Feature: none
• The specific fields that were previously duplicated in the Invoice Full export file and now the duplicate column is removed are:
  • Supplier Name
  • Supplier Number
• The specific fields that appeared multiple times with the same name (but are actually different fields) have been renamed to remove the ambiguity. These fields are:

<table>
<thead>
<tr>
<th>Original Name</th>
<th>New Name</th>
<th>Located in File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit Price</td>
<td>Invoice Line Unit Price</td>
<td>Transaction &amp; Full</td>
</tr>
<tr>
<td>Unit Price</td>
<td>PO Line Unit Price</td>
<td>Full</td>
</tr>
<tr>
<td>Currency</td>
<td>Invoice Line Currency</td>
<td>Transaction, Full &amp; CustomField Summary</td>
</tr>
<tr>
<td>Currency</td>
<td>PO Line Currency</td>
<td>Full</td>
</tr>
<tr>
<td>Extended Price</td>
<td>Invoice Line Extended Price</td>
<td>Transaction, Full &amp; CustomField Summary</td>
</tr>
<tr>
<td>Extended Price</td>
<td>PO Line Extended Price</td>
<td>Full</td>
</tr>
</tbody>
</table>

*only appears if multi-currency Organization
Inventory: Supplies Manager Enhancements

General Enhancements

14.2 will include a few general enhancements that affect Supplies Manager. For information about these features please see General Enhancements for Products on the SelectSite Platform starting on page 13.
Accounts Payable Enhancements

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

- **AP Enhancements** – This section focuses on general enhancements that affect both AP Director and AP Express.
- **AP Director Enhancements** – This section focuses on enhancements that apply only to AP Director.
- **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.

General AP Enhancements

**Invoice Approval Workflow Step added for Canceled Purchase Orders**

When an invoice is received against a canceled Purchase Order, the invoice owners should be made aware and the Invoice Approval workflow should be halted. Previously, there was no workflow step that alerts approvers that the invoice was against a canceled PO. Starting with the 14.2 release, a new step is included in the workflow titled “Contains Any Canceled PO” which automatically triggers whenever an invoice is received against a canceled Purchase Order. In addition, an error notification is sent to the invoice owner.

**Impact**

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

**Key points of Feature**

- This feature is OFF (disabled) by default. Contact SciQuest to configure this feature.
- New permissions related to this Feature: none
- A workflow step is added and the PO will successfully stop at this step.
- Please contact your Client Partner or Project Manager to have this step added to workflow.

**Ability to Hide the PO Number Field for Non-PO Invoices**

Previously, when adding a non-PO line item to an invoice, a PO Number field was displayed despite the fact that is may not be needed. With the 14.2 release customers have the option to hide that field through field management.

**Impact**

- Products Affected: Accounts Payable Director, AP Express
- 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
- To hide the field when adding a non-catalog line item go to Site Configuration > Field Management > Manage Field Names and Help Text. Browse to Reports > Non-Catalog Item > Add/Edit Non-Catalog Item > PO Number. For information about updating fields please see About Field Management in the online help or the Configuration Handbook.

Ability to Hide the View Simple Manual Entry link

With the 14.2 release, when creating a new invoice, customers can hide the View Simple Manual Entry hyperlink through configuration.

Impact

- Products Affected: Accounts Payable Director, AP Express
- 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
- The View Simple Manual Entry link is located in the following location: Site Configuration> Field Management. Browse to Accounts Payable > Buyer Invoice > Tabs > Simple Manual Entry > View Simple Manual Entry. For information about updating fields in Field Management please see About Field Management in the online help or the Configuration Handbook.
- The application automatically remembers which view a user was in last. If users are already in simple view they will remain in simple view even when the link is removed.

New fields Added to the Full Document Export for Purchase Orders

With the 14.2 release, additional fields have been added to the Full Document Export for Purchase Orders. The addition of these fields provides information related to quantity and cost receipts.

Impact

- Products Affected: Accounts Payable Director, AP Express
- 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
- The following fields have been added to the Full Document Export for POs. These fields are contained in the POData file in the export:
  - Qty Net Received
  - Qty Net Invoiced
  - Qty Variance
- Cost Net Invoiced
- Cost Variance
- Receive Status
- Invoice status

- **Important:** If your organization uses the Full Document Export files to integrate with any other internal system, you may need to make adjustments to the integration to accommodate the new fields or remove the fields before import into the internal system. These fields are situated as the last seven columns of the POData file.

### Invoice Total Field Added to Invoices View in Purchase Order Documents

Within a purchase order document, you are able to view invoices against the purchase order. Previously, if there were multiple invoices, you could view the total for each invoice, but there was no grand total for all invoices. In 14.2, a Total field has been added that displays this information.

**Impact**

- Products Affected: Accounts Payable Director, AP Express
- 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
- You view PO-related invoices on the **Invoices** tab in the document. The invoice grand total displays in the **Total** field located on the far right below the **Invoice Summary** section.

### Payment Terms Limit increased

Previously, organizations could configure up to 25 payment terms to be selected by users on the invoice. With the 14.2 release, the number of allowable payment terms has been increased to 150.

**Impact**

- Products Affected: Accounts Payable Director, AP Express
- 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
- For information about configuring payment terms, please see [Configuring Invoice Payment Terms](#) in the online help or the [Accounts Payable Handbook](#).
Personalization Change in AP Dashboard

As of 14.2, when you create an invoice or credit memo from the AP Dashboard, the dashboard will remember the last From value you selected. That value will be populated by default the next time you access the dashboard.

Impact

- Products Affected: Accounts Payable Director, AP Express
- 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

General Enhancements

14.2 will include a few general enhancements that affect Accounts Payable products. For information about these features please see General Enhancements for Products on the SelectSite Platform starting on page 13.

General Supplier Management Enhancements

14.2 will include some supplier management enhancements that affect Accounts Payable products. For information about these features, please see General Supplier Management Enhancements on page 19.

Accounts Payable Director Enhancements

New Option to Dispute Invoices

With the 14.2 release, the invoice Dispute feature gives organizations the ability to notify suppliers when there is a dispute with part or all of an invoice. A new Dispute action is available within the invoice. When this action is taken the invoice's pay status is changed to Dispute and the invoice supplier is automatically notified through the SciQuest Supplier Network. Once the dispute is settled, customers can resolve the dispute in the invoice.

Impact

- Products Affected: Accounts Payable Director
- 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: Set Invoice as Dispute. When the permission is turned ON, a user can dispute an invoice. This permission is located in the Accounts Payable permissions menu under the Accounts Payable permissions.
• In order to use this feature with a supplier, that supplier must meet the following criteria (if one or more of these criteria are not set an error message will display that tells the user why the invoice cannot be disputed):
  • The supplier must exist as a supplier within the customer organization.
  • The supplier must have a registered portal with the customer organization
  • The supplier must have the Enable Supplier Portal option enabled in the supplier profile (located in Configuration > AP Configuration).
  • The supplier must have at least one user set to receive notifications for disputed invoices.

• The Available Actions menu contains the option Mark as Dispute. When this option is selected you can configure a message to that will be sent to the supplier notifying it of the dispute.

• Once an invoice has been marked as dispute, the Available Actions menu will contain the option Resolve Dispute. Selecting this option will change the pay status from Dispute to the pay status when the invoice was disputed.

• Disputed invoices can be routed through workflow. However, when a disputed invoice completes workflow, the Resolve Dispute option is no longer available.

• Disputed invoices are searchable in Advanced document search by searching on Message Type: Dispute.

• For additional information about disputing invoices, please see Disputing an Invoice in the online help or the Accounts Payable Handbook.

**Notification Message Displayed when Supplier Name on a Digital Mailroom Invoice cannot be Matched**

Previously, when an invoice was imported through the Digital Mailroom (DMR) feature and the supplier name was not recognized or had multiple matches, the invoice owner had no way of knowing that there was an issue. This scenario often happens when processing non-PO invoices where the supplier name is new to the system. In 14.2, a message is added to the invoice noting that the supplier name is unknown to the system.

**Impact**

• Products Affected: Accounts Payable Director (with Digital Mailroom)
• 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
• The invoice owner will see a notification message at the top of the Invoice view. The message will instruct the user to locate the correct supplier name in the database and update the invoice.
• For additional information about the Digital Mailroom feature, please see Digital Mailroom in the online help or the Accounts Payable Handbook.

**Ability for Suppliers to Associate Contracts to Non-PO invoices**

With the 14.2 release, suppliers have the ability to create non-PO invoice lines on an invoice and associate a contract number to each line. Once the invoice is issued by the supplier, the corresponding
invoice amount will be included in the total spend amount of the contract. Contract spend can be reported on by customers.

Impact
- Modules Affected: Accounts Payable Director, Contract Manager
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: None

Key points of Feature
- This feature is OFF (disabled) by default
- New permissions related to this feature: None
- When this feature is enabled, the supplier will be able to select a contract to associate with an invoice line. Note: In addition to being associated with the supplier, the contract must be active and within the effective date to be selectable.
- A new organizational setting is related to this feature: Show Contract Number on Sales Invoice. When this setting is enabled, the functionality is available for all AP suppliers with a portal. The setting is located in Accounts Payable > AP Administration > Configure AP Settings. For additional information about enabling this functionality for the organization please see General AP Configuration Options in the online help or the Accounts Payable Handbook.
- The setting can be overridden at the supplier level within the supplier profile. This can be accessed from Integrations > Integration Configuration in the Supplier Invoice Item Matching section. For additional information about overriding the setting for a specific supplier, please see Managing Supplier Integration Settings in the Supplier Profile in the online help or the Accounts Payable Handbook.
- Customer can configure workflow to check invoice against contract budget.

Ability to Create Messages on an Invoice and Send through the SQ Supplier Network
Suppliers have always had the ability to create and send new messages to customers through the supplier portal. With the 14.2 release, invoice owners also have the ability to create and send new messages to suppliers through the SciQuest Supplier Network. From an invoice document, an invoice owner has the ability to add a message to an invoice document automatically notifies the supplier through the SciQuest Supplier Network.

Impact
- Products Affected: Accounts Payable 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
- Messages are created and managed from the Supplier Messages tab located within the invoice document.
You designate a "message type" for each supplier message. **Message Type** is included as search criteria for advanced document search. Users can search on this criterion to locate invoices with a particular message type.

For additional information about creating a message to a supplier on an invoice, please see **Communicating with Suppliers via Supplier Invoice Messages** in the online help or in the **Accounts Payable Handbook**.

### Ability for Suppliers to Add Attachments to Invoices

As of the 14.2 release, suppliers have the ability to add attachments to an invoice through the SciQuest Supplier Network. This eliminates the need for suppliers to mail paper copies or send separate emails with attachments to customers.

**Impact**
- Products Affected: Accounts Payable 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
- Customers can view the attachments on the invoice within the application. You can identify invoices (and other documents) that have attachments by the paperclip icon in the search results.

### Ability to Create Receipts from the AP Dashboard

In the 13.3 release, SciQuest introduced new document create capabilities through the AP dashboard allowing for the creation of invoices and credit memos. With the 14.2 release, customers can also create receipts from the AP dashboard.

**Impact**
- Products Affected: AP Express, Accounts Payable Director
- 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
- Receipts can be created from purchase orders using the AP Dashboard (**Accounts Payable > Invoices & Receipts > AP Dashboard**) in the **Create** section.
- For additional information about creating receipts, please see **Creating a Receipt from the AP Dashboard** in the online help or the **Accounts Payable Handbook**.

### Ability for Suppliers to Associate an Organization User with an Invoice

With the 14.2 release, suppliers have the ability to associate a specific organization user as the invoice owner to a newly created invoice through the SciQuest Supplier Network. This allows the invoice to route to the appropriate approver when it is submitted. Suppliers have the ability to view a list of
customer employees and select a name as the invoice owner. This feature facilitates faster invoice approvals for customers. In order for suppliers to be able to perform this function, it must be enabled by the organization.

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

Key points of Feature
- This feature is OFF (disabled) by default
- New permissions related to this feature: None
- When this feature is enabled, suppliers are able to search for and select an invoice owner.
- A new organizational setting is related to this feature: Show Invoice Owner On Sales Invoice. When this setting is enabled, the functionality is available for all AP suppliers with a portal. The setting is located in Accounts Payable > AP Administration > Configure AP Settings. For additional information about enabling this functionality for the organization please see General AP Configuration Options in the online help or in the Accounts Payable Handbook.
- The setting can be overridden at the supplier level within the supplier profile. This can be accessed from Integrations > Integration Configuration in the Supplier Invoice Item Matching section. For additional information about overriding the setting for a specific supplier, please see Managing Supplier Integration Settings in the Supplier Profile in the online help or the Accounts Payable Handbook.

Reporting Enhancements

Customized Document Search Export
For information about this report, please see Customized Document Search Export on page 56.
Field Changes to Transaction and Full Document Exports

Field Changes to Transaction and Full Document Exports
For information about this report, please see Field Changes to Transaction and Full Document Exports on page 57.

Supplier Management Enhancements

General Supplier Management Enhancements
14.2 includes a few general supplier management enhancements. For information about these features, please see General Supplier Management Enhancements starting on page 19.