14.3 Preview

Release Notes

for SciQuest Products

September 12, 2014 - Initial Version

# Table of Contents

## Welcome ........................................... .... 1

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

## 14.3 Scheduling ................................... ... 3

- Key Dates................................................................................................................ 3
- Training Opportunities.......................................................................................... 4

## The Feature Snapshot For 14.3 .................. 5

- Snapshot Key........................................................................................................ 5
- Feature Snapshot..................................................................................................... 5

## SelectSite General Enhancements ............ 11

### General Enhancements for All Products on the SelectSite Platform  11

- Updates to Help Text .......................................................................................... 11
- Ability to create a Custom Document Search Export in a Single File ................. 11
- Unique Approver for Workflows ......................................................................... 12

### General Enhancements for eProcurement and AP SelectSite Products 13

- Ability to Move Attachments on Forms and Purchasing Documents ................. 13
- Inactive Users Indicated when Creating a Comment on a Purchasing Document

## Supplier Management Enhancements ...... 15

### General Supplier Management Enhancements ............................................. 15

- Organizations can View and Edit Registration Profile from the Supplier Perspective
Country of Origin Added to Supplier Profile...................................................... 15
Ability to Schedule Supplier Emails ................................................................. 16
Welcome Email for New SciQuest Supplier Registrants .................................... 17
Advanced Supplier Search Enhancements ......................................................... 17

**Total Supplier Manager Product Updates** ........................................ 18

Introduction to Dynamic Qualification ........................................................... 18
Supplier Spend Profile for 2nd Tier Reporting ................................................. 18
New Metrics Available on 2nd Tier Supplier Dashboard .................................. 18
New Notification that a Supplier has Submitted 2nd Tier Data ....................... 19
Supplier 2nd Tier Information Available in the Supplier Profile ...................... 19
Changes to the Prime Credit Report Editing Feature ........................................ 20
IBAN (International Bank Account Number) Available in the Supplier Profile . 20
Tax Type W-8BEN-E Added to Supplier Profile Tax Information ...................... 21
Ability to Configure a Delay for Supplier Exports in TSM .............................. 21

**Sourcing** .................................................................................................. 23

**Sourcing Director** ....................................................................................... 23

General SelectSite Enhancements .................................................................... 23
Supplier Management Enhancements ............................................................... 23
General Sourcing Enhancements ..................................................................... 23
Updated UI For Questions and Items ............................................................... 24
Questions and Items Import/Export ................................................................. 24
Proxy Bids ........................................................................................................ 25
Custom Award Notifications ......................................................................... 26
Sourcing Email Templates ................................................................................ 26
Manually Invite Suppliers .............................................................................. 27
New Workflow Options for Sourcing Events ................................................... 27
Create Cart/Requisition From Sourcing Event ............................................... 28
Create Sourcing Event from Purchase Requisition ......................................... 29
Auto Score and Cost Analysis for Event Evaluations ..................................... 29
Evaluation Page Enhancements ..................................................................... 30
Evaluation Section on Events ....................................................................... 31
Panel Questionnaires for Events ................................................................... 31
Split Awards on Event .................................................................................. 32
Advanced Sourcing Optimizer ......................................................... 33
  Report Manager........................................................................................................ 33
  Award from the Tool Renamed to Communicate Results................................. 33
  Q&A Information Added to Event List Page ...................................................... 33
  Q&A Enhancements........................................................................................... 34
  Browser Support for Internet Explorer 11 ......................................................... 34
  Russian Language Support for Suppliers ........................................................... 35

Contract Director ......................................................... 36

Contract Director/SelectSite Integration ................................................... 36
  Contract Director-SelectSite Integration: Contract and Supplier Sync ........ 36
  Ability for End-Users to View a Contract in Contract Director from Contract Search Results in SelectSite ................................................................. 37
  Ability to Lock User-Defined Fields on Contracts in SelectSite that are Managed in Contract Director ................................................................. 38

General Contract Director Enhancements .............................................. 39
  E-Signature Integration...................................................................................... 39
  Salesforce Data Connector ................................................................................ 39
  Document As Attachment ................................................................................. 40
  Contract Emails .................................................................................................. 41
  Template Library Listing - Search Filter and Column Revision .............. 42
  User Listing - Filter and Column Revision ........................................................ 43
  Selective Merge ................................................................................................. 43

Shopping Products .......................................................... 44

General SelectSite Enhancements ........................................................ 44

Spend Director Enhancements .................................................................... 44
  Ability to Recalculate/Validate Custom Field Values in Express Checkout .... 44

Inventory: Supplies Manager Enhancements45

General SelectSite Enhancements ........................................................ 45

Accounts Payable Enhancements .............. 46
General SelectSite Enhancements ................................................................. 46
Supplier Management Enhancements .......................................................... 46

**AP Enhancements** ................................................................................... 46
  Ability to Add Shipping Address to Invoices and Credit Memos ................. 46
  Ability to Include Shipping Address on Invoice Import and Digital Mailroom Invoices 47
  Exact Supplier Name Matches when Importing Digital Mailroom or OCR Invoices 47

**Accounts Payable Director Enhancements** ........................................... 48
  Tax Engine Integration ............................................................................. 48

**AP Reporting Enhancements** ............................................................... 48
Welcome

The 14.3 SciQuest Product Release will be available in the production environment starting November 2, 2014. The release includes features related to the following SciQuest products:

- Supplier Management Products: Total Supplier Manager
- Sourcing: Advanced Sourcing Optimizer, Sourcing Director
  - Features in this document are related to the Sourcing Director version on the SelectSite platform that launched 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 Products section of this document.
  - Contract Director/SelectSite (Contract Manager) integration is covered in the Contract Director section.
  - 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.

Objectives

The purpose of the Preview 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 14.3 release.

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

http://library.sciquest.com

Understanding the Format

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

Document Key

Each documented feature contains three sections:

- A description and overview of the feature.
- Impact data – This section is used to indicate the following:
  - Products Affected: The products that are potentially affected by the change are listed. This is a helpful tool to determine whether or not the change applies to your organization.
• **Role-Based Impact:** This section indicates “who” in the organization the change affects, and how great the impact potentially is to that group of people.

• **Integration Impact:** This section indicates whether or not there is an impact to one or more integration points, and the level of impact. If the change affects an integration point, it is recommended that you discuss the potential changes with your IT staff.

• **Key Points of the Feature** – This section is used to indicate if there are any new permissions associated with the feature, whether the feature is enabled by default, where to go for more information, and any additional information that is key to understanding/implementing the feature.

### Identification of Features

In an effort to help you find the information you need quickly, you may notice that some of the feature descriptions contain icons to the left of the title. These icons are designed to help you identify 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>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>
# 14.3 Scheduling

To help prepare our customers for the upcoming 14.3 release, a list of KEY DATES is provided below. Please review the information and mark your calendars accordingly.

## Key Dates

The table below provides a list of key dates for the SciQuest 14.3 Product Release*.

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Date</th>
<th>Description and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Promotion: Test Sites unavailable</td>
<td>Beginning October 10, 2014 8am ET</td>
<td>The 14.3 release will be promoted to the Test (usertest) environment from Friday, October 10, 2014 8am ET through Sunday, October 12, 2014 12pm ET. An email will be sent out when the promotion is complete.</td>
</tr>
<tr>
<td>Release Validation in Test environment</td>
<td>October 12, 2014 – October 30, 2014 (Three Weeks)</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, handbooks and online searchable help). <strong>Recommendation:</strong> It is recommended that clients perform testing of functionality critical to your business as soon as possible during this period – ideally during the first week. If any issues are encountered, this will allow time for application adjustments and re-testing.</td>
</tr>
<tr>
<td>Production Unavailable(Begin Release Upgrade)</td>
<td>Beginning October 31, 2014, 9pm ET through November 2, 2014, 12pm ET</td>
<td>The 14.3 release will be promoted to the Production environment from Friday, October 31, 2014 9pm ET through Sunday, November 2, 2014 12pm ET. An email will be sent out when the promotion is complete.</td>
</tr>
<tr>
<td>Release available on Production Sites</td>
<td>Sunday, November 2, 2014</td>
<td>This date indicates when the features and functionality associated with 14.3 will be available on customer Production sites. Final documentation provided at this time (Release notes, handbooks and online searchable help).</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 14.3 release, various educational opportunities are provided by SciQuest. Each of these webinar sessions is detailed below.

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

<table>
<thead>
<tr>
<th>Webinar Name</th>
<th>Date and Time</th>
<th>Description and Details</th>
</tr>
</thead>
</table>
| eProcurement and AP Director | October 15, 2014  
  Session 1: 10:00 am ET - 11:00 am ET,  
  Session 2: 3:00 pm ET - 4:00 pm ET | This live webinar will present details about the features coming in 14.3 related to the eProcurement and AP Director products.                         |
| Sourcing Director          | October 16, 2014  
  Session 1: 10:00 am ET - 11:00 am ET,  
  Session 2: 3:00 pm ET - 4:00 pm ET | This live webinar will present details about the features coming in 14.3 related to the Sourcing Director product.                                     |
| Total Supplier Manager     | October 17, 2014  
  Session 1: 10:00 am ET - 11:00 am ET,  
  Session 2: 3:00 pm ET - 4:00 pm ET | This live webinar will present details about the features coming in 14.3 related to the Total Supplier Manager product.                            |
| Contract Director          | October 22, 2014  
  Session 1: For Customers on 7.2 or below (SaaS version 13.2)  
  10:00 am ET - 11:00 am ET,  
  Session 2: For customers on 7.3 and above (SaaS version 14.2 and above)  
  3:00 pm ET - 4:00 pm ET | This live webinar will present details about the features coming in 14.3 related to the Sourcing Director product.                                 |
| Advanced Sourcing Optimizer | Available on the Product Release Library October 17, 2014 |                                                                                                                                                         |
THE FEATURE SNAPSHOT FOR 14.3

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

Snapshot Key

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

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

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

- **Impacted roles** – The user role or roles PRIMARILY affected by the enhancement. For example, if a change is made to the way that a shopper selects a supplier, end user would be listed in this column. For more details, such as level of impact (low, medium, or high), please refer to the feature description.

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

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

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

Feature Snapshot

The following table provides a summary of features available starting November 2, 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>Updates to Help Text</td>
<td>All SelectSite Products</td>
<td>End Users Admins</td>
<td>✅</td>
</tr>
<tr>
<td>Ability to create a Custom Document Search Export in a Single File</td>
<td>All SelectSite Products</td>
<td>End Users</td>
<td>✅</td>
</tr>
<tr>
<td>Unique Approver for Workflows</td>
<td>Requisition Manager, Order Manager, AP Director, Invoice Manager, Total</td>
<td>Admins</td>
<td>✅</td>
</tr>
<tr>
<td>Feature Name</td>
<td>Related Products</td>
<td>Impacted Users</td>
<td>Setup/Visibility</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------</td>
<td>------------------------------------------------------</td>
<td>--------------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td><strong>Ability to Move Attachments on Forms and Purchasing Documents</strong></td>
<td>All Shopping and AP Products</td>
<td>End Users</td>
<td>✅</td>
</tr>
<tr>
<td><strong>Inactive Users Indicated when Creating a Comment on a Purchasing Document</strong></td>
<td>All Shopping and AP Products</td>
<td>End Users</td>
<td>✅</td>
</tr>
<tr>
<td><strong>Organizations can View and Edit Registration Profile from the Supplier Perspective</strong></td>
<td>AP Director, Total Supplier Manager, Sourcing Director</td>
<td>End Users</td>
<td>✅</td>
</tr>
<tr>
<td><strong>Country of Origin Added to Supplier Profile</strong></td>
<td>AP Director, Total Supplier Manager, Sourcing Director</td>
<td>End Users</td>
<td>✅</td>
</tr>
<tr>
<td><strong>Ability to Schedule Supplier Emails</strong></td>
<td>AP Director, Total Supplier Manager, Sourcing Director</td>
<td>End Users</td>
<td>✅</td>
</tr>
<tr>
<td><strong>Welcome Email for New SciQuest Supplier Registrants</strong></td>
<td>AP Director, Total Supplier Manager, Sourcing Director</td>
<td>Admins</td>
<td>✅</td>
</tr>
<tr>
<td><strong>Advanced Supplier Search Enhancements</strong></td>
<td>AP Director, Total Supplier Manager, Sourcing Director</td>
<td>End Users</td>
<td>✅</td>
</tr>
<tr>
<td><strong>Introduction to Dynamic Qualification</strong></td>
<td>Total Supplier Manager with Dynamic Qualification Add-On</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Supplier Spend Profile for 2nd Tier Reporting</strong></td>
<td>Total Supplier Manager with 2nd Tier Reporting Add-On</td>
<td>End Users</td>
<td>✅</td>
</tr>
<tr>
<td><strong>New Metrics Available on 2nd Tier Supplier Dashboard</strong></td>
<td>Total Supplier Manager with 2nd Tier Reporting Add-On</td>
<td>End Users</td>
<td>✅</td>
</tr>
<tr>
<td><strong>New Notification that a Supplier has Submitted 2nd Tier Data</strong></td>
<td>Total Supplier Manager with 2nd Tier Reporting Add-On</td>
<td>End Users</td>
<td>✅</td>
</tr>
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</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>----------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Supplier 2nd Tier Information Available in the Supplier Profile</td>
<td>Total Supplier Manager with 2nd Tier Reporting Add-on</td>
<td>End users</td>
<td>✓</td>
</tr>
<tr>
<td>Changes to the Prime Credit Report Editing Feature</td>
<td>Total Supplier Manager with 2nd Tier Reporting Add-on</td>
<td>End users</td>
<td>✓</td>
</tr>
<tr>
<td>IBAN (International Bank Account Number) Available in the Supplier Profile</td>
<td>Total Supplier Manager with Onboarding Add-on</td>
<td>End Users</td>
<td>✓</td>
</tr>
<tr>
<td>Tax Type W-8BEN-E Added to Supplier Profile Tax Information</td>
<td>Total Supplier Manager with Onboarding Add-on</td>
<td>End Users/Admins</td>
<td></td>
</tr>
<tr>
<td>Ability to Configure a Delay for Supplier Exports in TSM</td>
<td>Total Supplier Manager</td>
<td>Admins</td>
<td>✓</td>
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<tr>
<td>General Sourcing Enhancements</td>
<td>Sourcing Director</td>
<td>End Users/Admins</td>
<td></td>
</tr>
<tr>
<td>Updated UI For Questions and Items</td>
<td>Sourcing Director</td>
<td>End Users/Admins</td>
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<td>Manually Invite Suppliers</td>
<td>Sourcing Director</td>
<td>End Users/Admins</td>
<td></td>
</tr>
<tr>
<td>New Workflow Options for Sourcing Events</td>
<td>Sourcing Director</td>
<td>Admins</td>
<td>✓</td>
</tr>
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<td>Feature Name</td>
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</tr>
<tr>
<td>Create Cart/Requisition From Sourcing Event</td>
<td>Sourcing Director</td>
<td>End Users Admins</td>
<td>✓</td>
</tr>
<tr>
<td>Create Sourcing Event from Purchase Requisition</td>
<td>Sourcing Director</td>
<td>End Users Admins</td>
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<td>Auto Score and Cost Analysis for Event Evaluations</td>
<td>Sourcing Director</td>
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<td>✓</td>
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<td>✓</td>
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<td>Contract Director-SelectSite Integration: Contract and Supplier Sync</td>
<td>Contract Director with SelectSite Integration (Contract Manager)</td>
<td>End Users Admins</td>
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<td>Template Library Listing - Search Filter and Column Revision</td>
<td>Contract Director</td>
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<td>User Listing - Filter and Column Revision</td>
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<td>Exact Supplier Name Matches when Importing Digital Mailroom or OCR</td>
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</tr>
</tbody>
</table>
**SELECTSITE GENERAL ENHANCEMENTS**

This section focuses on general enhancements that are applicable to multiple 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

**General Enhancements for All Products on the SelectSite Platform**

**Updates to Help Text**

Page-level help text is available on most pages and page sections in the application. Currently, when the help text is accessed, all of the help information for that page or section displays in a single window. Although the window is opened to the appropriate section, it is then necessary to scroll to any additional help topics within the window. In 14.3, we will be updating the help text look and feel, making it easier and more efficient for users to utilize the help text. In addition, the help text will be searchable.

**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
- Page-level help text will continue to display in a pop-up window. However, the topics will be organized in a tree format. Users will be able to browse the topics without having to scroll through the window.
- Users will be able to search the help text in the open window.
- When a user has appropriate permissions, an **Edit in Field Management** link will display. Users will be able to click on the link to edit the help fields.
- Users editing the help fields in Field Management will be able to preview the help text.

**Ability to create a Custom Document Search Export in a Single File**

In 14.2, we added the ability to create a custom document search export. Currently, when a custom export is run, the data is exported in separate files. In 14.3, we will include the option to export all data in to a single file.
Impact

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

Key points of Feature

- This feature is **ON** (enabled) by default.
- New Permissions related to this Feature: None
- An additional configuration option will be added to the Customize Export feature that allows organizations to choose between exporting data in one single file or in separate files.
- If your organization is currently integrating a document search export with any internal systems and elects to change an export to a single file, your integration may need to be adjusted.

Unique Approver for Workflows

Some customers have a business process in which the same person is not allowed to take an approval action more than once for the same document, supplier or event. As an example, if your requisition workflow has four steps in it, a user would only be allowed to approve the event in one of those four steps, even if the user was an approver on all of the steps. This allows customers to satisfy an auditing requirement that forces unique individuals to take approval actions during the workflow process.

With the 14.3 release, administrators may enforce unique approvers for any workflow they have enabled via the general workflow configuration settings. When the option is enabled, an approver may not take action on a document more than once.

Impact

- Products Affected: Requisition Manager, Order Manager, AP Director, Invoice Manager, Total Supplier Manager, Sourcing Director
- End User Impact: None
- Admin User Impact: Medium
- Integration Impact: None

Key points of Feature

- This feature is **OFF** (disabled) by default but can be enabled by an administrator.
- New Permissions related to this Feature: None
- A general workflow configuration setting will be available for each type of workflow applicable to the organization:
  - Enforce unique approvers in Registration Workflow
  - Enforce unique approvers in PO Workflow
  - Enforce unique approvers in Invoice Workflow
  - Enforce unique approvers in Supplier Registration Workflow
  - Enforce unique approvers in Supplier Review Workflow
  - Enforce unique approvers in Sourcing Event Approval Workflow
  - Enforce unique approvers in Sourcing Event Evaluation Workflow
• With a setting enabled, an approver will receive an error message when attempting to take action on a document in the configured workflow more than once.

General Enhancements for eProcurement and AP SelectSite Products

Ability to Move Attachments on Forms and Purchasing Documents

Organizations are able to include attachments on forms and purchasing documents such as purchase orders and invoices. Attachments can be external, meaning suppliers can view, or internal, meaning only organizations users can view. Currently, in order to change the type, the attachment must be deleted and re-attached as the appropriate type. In 14.3, organizations will have the ability change the attachment type, eliminating the need to perform those extra steps.

Impact
• Products Affected: All Shopping and AP 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
• This action can be performed on both header level and line level attachments in purchasing documents.
• Users must have permissions to manage both internal and external attachments for header level in order to switch the attachment type at the header level. Users must have permissions to manage both internal and external attachments for line level in order to switch the attachment type at the line level.
• When the type is changed, the attachment will move to display in the appropriate area of the document or form.
• If the supplier does not accept attachments, the move option will not be available.
• The move option will not be available for Supplies Manager Sales Orders.

Inactive Users Indicated when Creating a Comment on a Purchasing Document

When comments are added to a purchasing documents, you have to option of notifying specific users associated with the document (prepared for user, prepared by user, etc.). A list of appropriate users displays and the user creating the comment can select one or more of them for notification. Currently, there is no indication that a displayed user has a status of Inactive. In 14.3, users who are not active will be marked as Inactive.

Impact
• Products Affected: All Shopping and AP 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
- The feature is an indicator only. You will still be able to select the user for notification.
- Inactive users will not be able to be added through the **Add Email Recipient** feature.
SUPPLIER MANAGEMENT ENHANCEMENTS

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

**Organizations can View and Edit Registration Profile from the Supplier Perspective**

Currently, if organizations want to view how the registration looks to a supplier, it would be necessary to log in to that portal. In 14.3, we will be adding the ability for customers to link to a view of the registration profile as it is displayed in the supplier portal. This gives the buying organization the ability to preview how the registration profile displays to a supplier. Users with appropriate permissions will be able to make edits to the profile from this view.

**Impact**

- Products Affected: AP Director, Total Supplier Manager, Sourcing Director.
- End User Impact: Medium
- Admin User Impact: None
- Integration Impact: None

**Key points of Feature**

- This feature is **ON** (enabled) by default.
- New Permissions related to this Feature: None
- The view of the registration profile will be accessible from a link in the supplier profile.
- Customers will see the profile as it is displayed in the supplier portal. The site will not link to the actual portal.
- The view will reflect the Registration Type applied to the supplier. Registration Type must be indicated for the supplier in order for this functionality to be active.
- Users who have permission to manage supplier profiles will be able to make edits from this view. Users who have permission only to view supplier profiles will not be able to make edits.

Country of Origin Added to Supplier Profile

In some cases, supplier organizations are headquartered in one country, but may have one or more additional locations in other countries. It may be important to a buying organization to know from where the supplier originates. As of 14.3, supplier profile information will include **Country of Origin**. This field allows organizations to capture information about the country from which the supplier originated.
Impact

- Products Affected: All Shopping and AP Products
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

Key points of Feature

- This feature is ON (enabled) by default.
- New Permissions related to this Feature: None
- Organizations will be able to configure which profile registrations types should include Country of Origin for both Individual and Entity registration. Country of Origin will also be able to be configured as a required field.
- Organizations using Total Supplier Manager can require a review for edits made to the field.
- Organization users with appropriate permissions will be able to manage the field in the supplier profile.
- Country of Origin will be searchable in advanced supplier search.
- The **Country of Origin** field will be included in supplier exports. If your organization integrates supplier exports with other internal or third-party systems, the integration may need to be reviewed and adjusted.

Ability to Schedule Supplier Emails

Beginning in 14.3, organizations will have the ability to schedule emails to be sent to suppliers. Customers will be able to configure scheduled emails for saved supplier searches and emails can be sent to supplier contacts based on selected contact type. Customers will be able to schedule the emails to send at different time intervals (daily, weekly, etc.) and within a specific time period (start date and end date).

Impact

- Products Affected: AP Director, 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.
- New Permissions related to this Feature: None
- When configuring a scheduled email, you will choose a saved supplier search as the distribution list. It is mandatory to use a saved supplier search for scheduled emails.
- You will choose one or more supplier Contact Types when configuring the scheduled email. Supplier users assigned the contact type(s) will be sent the email.
- Scheduled emails will require an email template. Templates must be set up prior to configuring the scheduled email.
- Adding a new email template will now show the Status selections with Draft first and Published second. The system will not default new templates with Draft status template.
Welcome Email for New SciQuest Supplier Registrants

In 14.3, we will be adding functionality that automatically sends a "Welcome" email to a supplier that completes registration for a supplier profile. The email contains welcome text, hints and tips for using the supplier portal and encourages the supplier to complete the Network profile.

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

**Key points of Feature**
- This feature is **ON** (enabled) by default.
- New Permissions related to this Feature: None
- A Welcome email will be sent to suppliers within 24 hours of the supplier certifying and submitting their registration.
- The email will be sent to the primary contact email address.
- The email will be sent to a supplier only once.
- The Welcome email will be sent only to suppliers who have completed the Entity registration.

Advanced Supplier Search Enhancements

SciQuest strives to continuously improve and enhance the user experience. In 14.3, we will be making some minor enhancements to the supplier search. Currently, on the Advanced Search page, the Registration Status, Registration Method, and TIN Status fields display all possible options with checkboxes to select the appropriate options. In 14.3, these fields will be changed to text input fields with the ability to search for the appropriate option. This update will provide a cleaner and more organized advanced search layout.

**Impact**
- Products Affected: AP Director, Total Supplier Manager, Sourcing 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
- The search function will work similarly to other searchable fields in the application.
Total Supplier Manager Product Updates

**Introduction to Dynamic Qualification**

As of 14.3, Dynamic Qualification will be available for purchase by customers who have purchased Total Supplier Manager. Organizations wanting to identify, assess and track potential risk within their supplier community may benefit from this add-on module. Dynamic Qualification allows for supplier vetting processes to be dynamically created, tracked, and managed, taking the vendor due diligence process out of a manual, paper-based system. Please contact your Client Partner or Account Manager for additional information.

**Supplier Spend Profile for 2nd Tier Reporting**

Currently, organizations using the 2nd Tier module do not have the ability to manage the type of diversity spend that their suppliers can report. All suppliers are able to report both Direct and Indirect spend. However, in some cases, you may want greater control over the type of spend being reported. In 14.3, organizations will have the ability to assign a spend profile to prime suppliers. A spend profile determines how suppliers can report diversity spend; Direct and Indirect, Direct Only or Indirect Only. The spend profile is set at the organization level and can be overridden at the supplier level.

**Impact**

- **Products Affected:** Total Supplier Manager with 2nd Tier Reporting add-on.
- **End User Impact:** Low
- **Admin User Impact:** Low
- **Integration Impact:** None

**Key points of Feature**

- This feature is **ON** (enabled) by default but requires setup.
- **New Permissions related to this Feature:** None
- Organizations will be able to determine what type of diversity spend suppliers should report; direct, indirect or both.
- Organizations will be able to set a default spend profile for all suppliers through Supplier Management in 2nd Tier Configuration.
- Organizations will be able to override the spend profile at the supplier level through the supplier profile.
- The spend profile configured for a supplier will determine what will display for that supplier in the portal. For example, if a supplier is configured to report direct spend only, the indirect spend page will not display.

**New Metrics Available on 2nd Tier Supplier Dashboard**

The 2nd Tier supplier dashboard provides information about and access to suppliers based on their 2nd Tier status. Currently, these metrics include Prime Supplier status, suppliers that have reported and suppliers that are overdue. In 14.3, we are including additional metrics to provide enhanced summary information on the dashboard and the ability to analyze based on percentage of suppliers who have reported and total direct and indirect spend reported.
Impact

- Products Affected: Total Supplier Manager with 2nd Tier Reporting add-on.
- 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
- New metrics will include:
  - Percentage of Suppliers Reported - indicates the percentage of prime suppliers that have reported spend.
  - Percentage of Suppliers Not Reported - indicates the percentage of prime suppliers that have not reported spend.
  - Total Direct Spend Reported - indicates the total direct spend reported in the most recently opened reporting period.
  - Total Indirect Spend Reported - indicates the total indirect spend reported in the most recently opened reporting period.
  - In addition, the current metric Total Prime Suppliers Overdue will be re-labeled Total Prime Suppliers Needing to Report.

New Notification that a Supplier has Submitted 2nd Tier Data

Currently, when a supplier certifies and submits spend data to an organization, the only way to know that the data is completed is by viewing the 2nd-tier dashboard and/or reports. In 14.3, a new 2nd Tier Supplier Data Submitted notification will be available. Users configured to receive this notification will be alerted by email and/or within the application when 2nd tier data is submitted.

Impact

- Products Affected: Total Supplier Manager with 2nd Tier Reporting 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 notification can be set at the role level and overridden in the user profile.
- By default, the email will contain the supplier name and the reporting period or contract for which the supplier is reporting.

Supplier 2nd Tier Information Available in the Supplier Profile

Currently, all of a prime supplier’s 2nd Tier information is stored in the Diversity section of the supplier profile, requiring the user to browse to that section to get basic 2nd Tier details. Beginning in 14.3, organizations will
be able to view a snapshot of a prime supplier’s 2nd Tier information on the Summary page of the profile for quick reference. This information will include the reporting period, spend profile and reporting status for the supplier.

**Impact**

- Products Affected: Total Supplier Manager with 2nd Tier Reporting add-on.
- 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
- Information included in the snapshot will include:
  - The designated Spend Profile for the supplier; direct spend, indirect spend or both
  - Reporting period
  - Status
  - Dates such as reporting due date and submitted date
- The information will include the status of the spend reporting (in progress, submitted, etc.) and date information such as due date and date submitted.

**Changes to the Prime Credit Report Editing Feature**

In some cases, organizations may need to make updates to a supplier’s reported spend information. This functionality is currently available however, in 14.3, the editing process will be updated to align with the editing process of other features in SelectSite.

**Impact**

- Products Affected: Total Supplier Manager with 2nd Tier Reporting add-on.
- 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
- in 14.3, the Prime Credit Report will be edited by using the Edit Selection functionality found in other areas of the application.

**IBAN (International Bank Account Number) Available in the Supplier Profile**

In 14.3, suppliers for organizations with the Onboarding module will be able to enter an IBAN for Direct Deposit (ACH) payment type. As a result, this field will be available in the supplier profile in the organization site.
Impact

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

Key points of Feature

- This feature is ON (enabled) by default.
- New Permissions related to this Feature: None
- IBAN will display on the Payment Information page.
- Important Note: This field will be available to suppliers only if the supplier has selected a European country that has implemented IBAN standards.

Tax Type W-8BEN-E Added to Supplier Profile Tax Information

In 14.3, the tax type W-8BEN-E will be available in the tax information for Total Supplier Manager organizations with the Onboarding module. The form will be available for selection in supplier registration/portal as well as the supplier profile in the organization site.

Impact

- Products Affected: Total Supplier Manager with Onboarding Module.
- 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
- As with other tax types, organizations will be able to retrieve and use the latest tax form from the IRS website.
- Customers will be able to configure W-8BEN-E as the tax type when configuring the registration.
- Organizations will be able to hide the tax type through Field Management.

Ability to Configure a Delay for Supplier Exports in TSM

Your organization may have integrated TSM with an internal ERP system, resulting in the export of supplier information from TSM to the ERP. When integrated, specific time intervals for export (for example every 1 minute) was configured. When the interval is set to such a quick time period, a user can be making changes to multiple parts of a supplier record and that record could be exported before the changes are complete. In 14.3, we are adding the ability to delay export to the ERP based on the last update to the supplier record. In addition, you will be able to delay export of a supplier record with changes pending review.

Impact

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

**Key points of Feature**

- This feature is **OFF** (disabled) by default and you must contact SciQuest to enable.
- New Permissions related to this Feature: None
- When a delay interval is configured, the application will check the last updated time on the supplier record before exporting. If the last updated time is not within the configured delay period (based on the time of export) the record will not be exported. For example, if the delay is set to 10 minutes, and the export runs within 9 minutes of the last update, the record will not export.
- When the application is configured to delay the export of a supplier record with changes pending review, the record will not be exported if there are changes waiting for to be accepted or declined in the Profile Update Review.
- Delay settings can be overwritten for a specific supplier through the Supplier Actions menu in the supplier profile.
- These settings can be configured by SciQuest only. Please contact your Client Partner, Project Manager or Customer Support.
SOURCING

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

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

**Sourcing Director**

This section provides information on enhancements to Sourcing Director, which was launched with the 14.2 release.

**General SelectSite Enhancements**

14.3 contains several features that are general to products on the SelectSite platform including Sourcing Director. For information about general SelectSite enhancements, please see [SelectSite General Enhancements](#) on page 11.

**Supplier Management Enhancements**

14.3 contains supplier management enhancements that are applicable to Sourcing Director. For information about these features, please see [Supplier Management Enhancements](#) on page 15.

**General Sourcing Enhancements**

Several event enhancements will be released with 14.3, based on customer feedback. These enhancements include requiring an estimated delivery date for items on a sourcing event and hiding fields on event setup that may not apply to your organization.

**Impact**

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

**Key points of Feature**

- These features are available by default. See details below regarding additional configuration that may be required.
- New Permissions related to this Feature: None

**Items configuration:** When configuring items for a Sourcing Event, customers can currently require that Unit Price be provided by the supplier in their response. With the 14.3 release, customers may require that an Estimated Delivery Date be required in order to submit the response. When adding or editing a Product Line Item in a sourcing event, the customer may select a new option, **Estimated Delivery Date is Required**.

  - With this option enabled, the customer and supplier user will see an indication that Estimated Delivery Date is required for the item on the Items page.
• **Sourcing Configuration permission**: The Sourcing Configuration permission will be moved to the Sourcing > Administration permissions section of the user profile. No changes will be made to the permission or to users/roles with the permission enabled or disabled.

• **Quick Search Update**: The quick search for sourcing events in the upper right banner will display the sourcing event name in addition to the number.

• **Sourcing Event Search Results**: When viewing sourcing event search results, the Status indication will show with the same color scheme as event status on the Sourcing Dashboard. Also, the Event Details are listed in a single section that includes key dates and bid response information.

**Updated UI For Questions and Items**

To support enhancements related to importing and exporting questions and items, some general changes will be made to the actions available on the **Questions** and **Items** pages for an event. The **Add New** hyperlink that is currently available to manage pages and groups on the **Questions** and **Items** pages for an event will be changed to an **Add or Import** button with drop-down actions.

**Impact**

- Products Affected: 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: None
- On the **Questions** page and the **Items** page of the Event, the **Add New** hyperlink will be changed to a button **Add or Import**.
  - Actions include **Add a Page** or **Add a Group** for the section, **Add from Library**, or **Import From File**.

**Questions and Items Import/Export**

Customers may need to add a large number of questions or items to an event, library or template. With the 14.3 release, users will have the ability to bulk load questions and items into the event via an import. Also, the questions and items may be exported for review or modification by others in the organization. A template will be available to populate questions, or you may use the export format to make changes and re-import. A validation process will warn the user of any errors prior to importing data. The import/export feature will available for events, libraries and templates.

**Impact**

- Products Affected: Sourcing Director
- 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
• A new page will be available on Events under the Tools section of the Event navigation - Exports and Imports. Users will have the ability to access export files and import file results on this page.
• Users may export questions and items on an Event that is in any status. As long as the user has the ability to access the Event (Owner, Stakeholder or Approver), the export feature is available.
  • On the Questions page of the Event, a new button is available to Export Questions. On the Items page of the Event, a new button is available to Export Items.
  • The export files will be available for download on the Exports and Imports page of the Event, located in the Tools section.
  • The file will be generated in .xlsx format, and can be opened in Microsoft Excel.
• The Import feature will be available for Questions and Items if the Event is in Draft status only. A user must be an Event Owner in order to import questions or items.
  • On the Questions page and the Items page of the Event, users will select the Import From File option from the Add or Import button. A template will be available for questions and items to be populated.
  • Upon import, the changes will be effective for the questions and items. Any data in the import file will override all data previously present for the questions and items.
  • The user may choose to Export the Questions or Items, make modifications to the file, and re-import the export file with the updates.
• The export and import features will also be available for questions and items in Libraries and Templates that are in Draft status only. The user must have access to the library or template for the project.

Proxy Bids
To allow customers more flexibility in the bidding process, the 14.3 release will feature the ability for an organization to receive proxy bids from suppliers for Sourcing Events. The proxy bid will allow for the supplier to mail, email or phone in a bid to the buyer. The buyer will see the sourcing event as a supplier would see it in their portal, thereby making it easier to complete the bid information online on the supplier’s behalf.

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

Key points of Feature
• This feature is ON (enabled) as Optional for the organization by default but may be configured to be always ON or always OFF at the project or event level by users with appropriate permissions.
• New Permissions related to this Feature: Create Proxy Bid
• Organizations will have the ability to enable Proxy Bid access at the organization, project or event level.
• In order to submit a proxy bid on behalf of the supplier, the user must be an Event Owner with either the Create/Own Events permission or Manage Project Events permission, as well as the new Create Proxy Bid permission.
• With the setting enabled, customers will have the ability to access the sourcing event from the supplier's perspective, and complete the information as directed by the supplier via email, mail or phone.
**Custom Award Notifications**

Standard and system email notifications are available for use in communicating with suppliers through the application. With the 14.3 release, customers will have the ability to configure and send custom award notification emails to event suppliers.

**Impact**

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

**Key points of Feature**

- This feature is **OFF** (disabled) by default but may be enabled by an administrator.
- New Permissions related to this Feature: None
- The customer may enable notifications that may be sent on events in the organization's General Sourcing Settings.
- Custom award notifications may configured for and be sent to:
  - Suppliers who are awarded all or some portion of the event.
  - Suppliers who submit a bid on the event.
  - Suppliers who are invited or opt in via the public site but do not bid on the event.
- When notifications are selected for the event, a new **Award Notifications** page will display in the **Tools** section of the Event navigation. From this page, the user can select to send the default system email notification, select an award email template, and also customize the email or template before sending.

**Sourcing Email Templates**

To allow Sourcing Director customers flexibility with the award notifications that they choose to send to suppliers for sourcing events, the 14.3 release will feature a new **Sourcing Email Templates** page where customers can add and edit email templates.

**Impact**

- Products Affected: Sourcing 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: **Manage Sourcing Email Templates**
- A user with the appropriate permission will have access to the new **Award Email Templates** page under the Sourcing menu.
- Users can classify templates as being appropriate for:
  - Awarded suppliers - those suppliers who have been awarded all or a portion of an event.
• Participating suppliers - suppliers who responded to the event but did not receive an award.
• Non-participating suppliers - Suppliers who were invited to the event but did not respond.
• See the Custom Awards feature for more information on how the templates may be utilized for specific events.

Manually Invite Suppliers
Many times, customers would like to invite suppliers who are not currently in the supplier master database to participate in a sourcing event. Currently, the supplier must exist in the supplier master database in order to be invited to participate in a sourcing event. With this release, buyers may invite new suppliers to a sourcing event without creating a record for that supplier until they respond to the invitation. If the supplier never responds, the supplier master database will not be polluted with the new supplier information. Customers may add suppliers to the event through the UI, or via an import process.

Impact
• Products Affected: Sourcing Director
• End User Impact: Medium
• Admin User Impact: Medium
• Integration Impact: None

Key points of Feature
• This feature is ON (enabled) as Optional for all projects by default, but may be enabled or disabled by project.
• New Permissions related to this Feature: None
• To allow for manually inviting suppliers, a new setting will be available - Manually Invited Suppliers Setting. Organizations will have the ability to allow or disallow Manually Inviting Suppliers at the organization and project level.
• When allowed for a project, all events for that project will show a Manually Invite Suppliers button on the Add Suppliers to Event page.
  • You will have the ability to Import a file with multiple suppliers, or add one or more suppliers to the event through the UI. The Supplier Name and Email will be required, and a sales or corporate contact name is optional.
  • If importing, you will have access to an Import template with instructions on the format and process for uploading the file.
  • Manually added suppliers will not show with hyperlinks on the supplier name, since a supplier record will not be created for them unless they respond to your invitation by registering for a portal.

New Workflow Options for Sourcing Events
Based on customer feedback, the 14.3 release features several new options for sourcing event approval workflow and evaluation workflow. Contact SciQuest support to update your workflow configuration to support any of these options.

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

Key points of Feature
• This feature is **OFF** (disabled) by default and must be enabled by SciQuest.
• New Permissions related to this Feature: None
• With the 14.3 release, you may request that SciQuest update your organization’s Sourcing Approval or Sourcing Evaluation workflow based on the following criteria:
  • If a supplier was manually invited to the event.
  • The number of diverse suppliers invited to an event compared to a desired number.
  • If registration workflow is complete for the supplier.
• In addition, you may request that SciQuest enable an Amendment check into your Sourcing Approval workflow. This option is not available for Sourcing Evaluation workflow.

Create Cart/Requisition From Sourcing Event
Customers with Sourcing Director and Requisition Manager will have the ability to create a shopping cart or purchase requisition from an awarded event within Sourcing Director. The options available will be dependent on whether the event originated from a requisition line item in eProcurement, or from within Sourcing Director.

Impact
• Products Affected: Sourcing Director customers with Requisition 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
• When a Sourcing Event has been awarded to one or more suppliers, a user may select to create a shopping cart or purchase requisition from the event.
  • If the Sourcing Event originated from flagged line items in eProcurement, the user will have the option to create a Purchase Requisition or a shopping cart from the awarded event.
  • If the Sourcing Event originated from the Sourcing Director application, the user will have the option to create a shopping cart.
• Upon selection of Purchase Requisition or Shopping Cart, the appropriate document will be created in eProcurement with details from the sourcing event such as item information, awarded supplier, and delivery dates.
• The requisition will indicate that items originated from a sourcing event.
• The advanced search for Requisitions will include options to search for documents from which a sourcing event was initiated, documents that were created from a sourcing event, or documents with sourced line items that have attained a specific sourcing status.
• The advanced search for Sourcing events will include the ability to search for Events based on where the Events originated (i.e. from within Sourcing Director, and/or within eProcurement).
**Create Sourcing Event from Purchase Requisition**

With the 14.3 release, significant order fulfillment process efficiencies will be realized through eProcurement and Sourcing Director products working together. One of these efficiencies allows for sourcing events to be initiated from within eProcurement workflow for administration within Sourcing Director. When the event has been awarded, the results will be directed back into the eProcurement Requisition workflow for order fulfillment.

**Impact**

- Products Affected: Sourcing Director customers with Requisition Manager
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

**Key points of Feature**

- This feature is **OFF** (disabled) by default and you must contact SciQuest to enable the appropriate workflow.
- New Permissions related to this Feature: None
- From a requisition in workflow, users will have the option to indicate a line item **Requires Sourcing**.
- With the appropriate workflow in place, a user will have the ability to initiate an event in Sourcing Director for requisition line items flagged as **Requires Sourcing**.
- After the Sourcing event has been awarded, the results can then be directed back to the requisition workflow for order fulfillment.

**Auto Score and Cost Analysis for Event Evaluations**

With the 14.3 release, Sourcing Director customers will have additional tools to streamline the evaluation process. The Auto Score option may be enabled at the project and event level, allowing customers to assign an ‘automatic score’ to different supplier responses to questions. Also, customers may also configure a Cost Analysis option for projects and events that will allow for a cost adjustment based on a supplier’s specific answers to questions.

**Impact**

- Products Affected: Sourcing Director
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: None

**Key points of Feature**

- This feature is **ON** (enabled) as **Optional** for projects and events by default but may be configured to be always ON or always OFF for the project or event.
- New Permissions related to this Feature: None
- New configuration settings are available at the project and event level to enable auto scoring and cost analysis for supplier responses to an event during the evaluation process.
  - In a project’s configuration settings, new sections for **Auto Score Settings** and **Cost Analysis Settings** will be available where you can choose:
• Optional - you may choose to enable for specific events in the project.
• All - always enabled for all events in the project.
• Off - Never enabled for any event in the project.

When creating or editing a draft event, new settings will be available depending on the project settings for Auto Score and Cost Analysis:
• If the project for the event is configured for the feature to be optional, you may select to enable one or both for the specific event.
• If the event’s project is configured to disable one or both features for all events, you will not see the option to configure the disabled feature.
• If the event’s project is configured to always enable one or both features, you will see the enabled option as read-only.

When Auto Score or Cost Analysis is enabled for an event, you will have the options to set criteria for include questions from the event in the Auto Score and/or Cost Analysis portion of the evaluation. Question types that may be configured for Auto Score and Cost Analysis include:
• Numeric Text Box
• Yes/No
• Dropdown list (pick one)
• Multiple Choice (pick one)
• Multiple Select (pick many)
• Date

When selecting to enable Auto Score or Cost Analysis for a specific question on an event, you will see options to set the score and/or cost adjustment based on specific responses.

Auto Score and Cost Analysis results are presented when Evaluating Supplier Responses for the event.

Evaluation Page Enhancements

Several enhancements will be effective on the Sourcing Event Evaluations page with the 14.3 release. Evaluators will have the ability to run common evaluation scenarios, and see the effect of an awarded scenario on a specific line item.

Impact
• Products Affected: Sourcing Director
• End User Impact: Medium
• Admin User Impact: None
• Integration Impact: None

Key points of Feature
• This feature is ON (enabled) by default.
• New Permissions related to this Feature: None
• When evaluating supplier responses on the Evaluations page, a new Evaluation Scenario drop-down will be available that will allow users to select common award scenario’s such as awarding to a single supplier with the overall lowest bid price, or awarding to several suppliers based on the lowest bid for individual items.
• When a scenario is run or saved, an Awarded Scenario column will show the supplier selected for the award for each line item.
• The Actions dropdown for each supplier will continue to be available, with actions related to awarding the event, pinning the supplier, and removing the supplier response from the evaluation.

Evaluation Section on Events
Once suppliers begin to submit responses for an event, customers can see the results of those responses on the Supplier Responses page for the event. With the 14.3 release, the Supplier Responses page will be under a new Evaluations section.

Impact
• Products Affected: Sourcing 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
• Event navigation will include an Evaluations section that can be expanded to view the following pages:
  • Supplier Responses - available once the Event has been released.
  • Panel Questionnaire - available if configured for the Event. See Panel Questionnaires for Events on page 31 for more details.
  • Auto Score - available if configured for the Event. See Auto Score and Cost Analysis for Event Evaluations on page 29 for more details about this configuration.
  • Cost Analysis - available if configured for the Event. See Auto Score and Cost Analysis for Event Evaluations on page 29 for more details about this configuration.

Panel Questionnaires for Events
Sourcing Director customers will have the ability to include Panel Questionnaires for projects and events. Panel Questionnaires may be used in the evaluation process for an event. When enabling a panel questionnaire for an event, the event owner will be indicating what criteria is most important, supplier responses that are most important, and evaluators to complete the questionnaire.

Impact
• Products Affected: Sourcing Director
• End User Impact: Medium
• Admin User Impact: Medium
• Integration Impact: None

Key points of Feature
• This feature is ON (enabled) as Optional for projects and events by default but may be configured to be always ON or always OFF for the project or event.
• New Permissions related to this Feature: None
• New configuration settings will be available at the project and event level to allow panel questionnaires.
• In a project’s configuration settings, a new **Questionnaire Settings** section will show where you can choose that Panel Questionnaires are optional for all events, always required for events, or disabled for all events.

• When the event is configured to include a panel questionnaire, a new page is available under the **Evaluations** section of the event. Here, you will configure scoring and weighting, panelists to add to the event, and actual questions.
  
  • Panelists may be selected from any user who can view an event.
  
  • Suppliers are selected from the list of suppliers that have responded to the event.
  
  • Questions are selected from the event questions. You may configure specific scoring options for each question.
  
  • You may add questions from a library, if available.

• Once the event is closed and the questionnaire has been configured and published, panelists will receive an email indicating they have a questionnaire to complete. Panelists will navigate to the event from the email or within the application, and begin completing the requested information.

**Split Awards on Event**

Currently, Sourcing Director customers can award an event to a single supplier. With the 14.3 release, awards can be split by products or items among several different suppliers.

**Impact**

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

**Key points of Feature**

• This feature is **ON** (enabled) by default
• New Permissions related to this Feature: None

• When an event is under evaluation and a user is viewing supplier responses, a new action will be available to **Award to [Supplier Name]**, with an option available for each supplier being evaluated.
  
  • The evaluator will have the ability to select product line items and service line items for the award option. For example, Product Line Item 1 may be selected to be awarded to Supplier ABC, while Product Line Item 2 may be selected to be awarded to Supplier FGH.
  
  • **No Award** may be selected for one or more items.

• Line items that are not selected for an award will be shown with a status of **Unawarded**. The evaluator must select No Award or a supplier for each item in order to complete the event evaluation process.

• When the award is split among different suppliers, each line item will show the supplier who has been awarded the event in the **Awarded Scenario** column on the Evaluations page.
Advanced Sourcing Optimizer

Report Manager
The Report Manager will be a new reporting module for ASO. With the Report Manager we will include two new reports:

- **Bid Comparison Report** – The Bid Comparison report will provide users with a report of the bids in their sourcing event grouped by item and sorted by price in ascending order, allowing easier comparison and evaluation of bids across suppliers. Users will be provided with the minimum, maximum, and average bid price on each item.

- **Historic Comparison Report** – The Historic Comparison report will allow users to more easily compare an incumbent supplier’s bid to their historic price on each item by showing all of the incumbent’s bids, compared to their own historic price on the item.

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

Key points of Feature
- This feature is ON (enabled) by default.

Award from the Tool Renamed to Communicate Results
The Award from the Tool feature allows buyers to set an existing scenario as Awarded, which then allows them to communicate the results of that scenario with the winning suppliers.

The Award terminology will be renamed Communicate Results throughout the application. This will better represent the feature’s use as a negotiation and communication tool rather than imply any use as a bid awarding mechanism.

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.

Q&A Information Added to Event List Page
Currently, clicking the Show Details link under an event on the Event List page lists information regarding the suppliers, dates, and bids for that event. With this enhancement, Q&A information, including how many questions exist, how many have been answered, and how many still need to be answered, will be displayed with the other event details.
**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.
- Event Details enhancements will be available on existing standard ASO events, and in new event configuration.

**Q&A Enhancements**
Advanced Sourcing Optimizer’s Q&A feature is used by buyers to answer business questions from suppliers during sourcing events. The Q&A feature is being enhanced to improve usability and communication.

Buyers will now have the option to publish question responses privately to only the supplier who asked the question, or publicly to all suppliers. This will allow buyers the flexibility to keep some information private and to inform suppliers more broadly when appropriate.

Currently, only suppliers are notified when a question has been answered. With this enhancement, users will have the option to notify buyers as well. This will improve communication in events managed by multiple buyers.

**Enhancements include:**
- **Questions listed by supplier name** – Users will be able to view the name of the supplier asking the question on the Q&A page.
- **Ability to privately or publicly publish responses** – Users will have the ability to publish their Q&A answers to only the supplier that asked the question, or to all suppliers. Users will also have the option to notify those suppliers that a question has been answered.
- **Ability to notify selected buyers** - Users will have the ability to notify buyers when a question has been answered.

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

**Key points of Feature**
- This feature is **ON** (enabled) by default.
- Q&A enhancements will be available on existing standard ASO events, and in new event configuration.

**Browser Support for Internet Explorer 11**
Advanced Sourcing Optimizer 14.3 and above will be fully compatible with Internet Explorer 11.
• End User Impact: Low
• Admin User Impact: None
• Integration Impact: None

**Russian Language Support for Suppliers**

Expanding our customers’ ability to conduct global sourcing events, ASO will support Russian for suppliers. The ASO user interface for suppliers will automatically translate into the following languages, based on the supplier’s browser settings:

- English
- Spanish
- Chinese
- French
- German
- Brazilian Portuguese
- Russian

**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 supplier’s browser.
**Contract Director**

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

- **Contract Director/SelectSite Integration** – This section focuses on the integration between Contract Director and SelectSite and the related features.
- **General Contract Director Enhancements** – This section focuses on general enhancements to the Contract Director product.

### Contract Director/SelectSite Integration

**Contract Director-SelectSite Integration: Contract and Supplier Sync**

Two new integration features will connect SelectSite and Contract Director. **Supplier Import sync** will import suppliers created in SelectSite into Contract Director as legal entities, where they will be used to create contracts. **Contract Export sync** will export contracts created in Contract Director to SelectSite, where they can be viewed in SelectSite, or accessed through a link to Contract Director. For supplier sync, SelectSite will be the system of record. For contract sync, Contract Director will be the system of record.

Customers with an existing supplier integration with SelectSite will have the benefit of automatically creating legal entities within Contract Director with this new feature. This will drive contract creation, and when contracts are sent to SelectSite, will provide a mechanism to easily track spend against a contract.

**Impact**

- Products Affected: Contract Director, Contract Manager, Supplier Management
- End User Impact: Medium
- 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 feature:
  - Configuration by Client Delivery is required. Contact your client partner or service representative to have this feature enabled.
  - Supplier sync must be set up before contract sync will work.
  - Prerequisite: User sync must be enabled if user fields are being mapped.

**Supplier Sync:**

- An initial export will send data for all active suppliers in SelectSite to Contract Director, where they are created as legal entities, and can be selected as contract parties. SelectSite is the system of record – changes to the record made in Contract Director will not be written back to SelectSite.
- Legal entities created via the supplier sync are created with a vendor business relationship by default. This default can be changed if required during implementation. Additional business relationships can be added to the legal entity in Contract Director.
• When a preferred Fulfillment Center is specified in SelectSite, the address will be created as the primary address for the legal entity in Contract Director, with a sequence number of 0 (zero). All other addresses will follow the conventional sequence numbering pattern.

• All Effective As Of date fields for a legal entity (e.g., on addresses, phone numbers, and emails), will be set to the date the legal entity is created from the supplier sync. Obsolete dates can be added in Contract Director after the suppliers have been imported. If suppliers previously imported into Contract Director have their fulfillment and/or contact information removed in SelectSite, the next export will set the corresponding Obsolete As Of fields to the date of the export, provided the Obsolete Date field is blank in Contract Director. Any existing values will remain.

• When creating a SelectSite contract, the second party type will default to vendor, as all suppliers imported from SelectSite will have vendor business relationships by default. This default can be changed if required during implementation.

**Contract Sync:**

• For systems with the feature configured, contracts created in Contract Director will be exported to SelectSite upon contract approval. Contracts will be re-synced when the following operations are performed in Contract Director: Terminate, Create Amendment, Limited Edit, Create Renew, Contract Update Attachment.

• Contracts can be viewed in SelectSite, or a link will provide access to the record in Contract Director for users with the appropriate permissions. For contract sync, Contract Director is the system of record.

• Before a contract can be exported to SelectSite, the contract type must be enabled in Contract Director by selecting the Integrated with SelectSite checkbox in the Properties panel of the contract type, which can be accessed through the Contract Types or Manage Metadata (Advanced) screens.

• There is a maximum of eight custom fields that will be migrated to SelectSite, for all contract types. The custom fields that will appear on contracts in SelectSite must also be enabled by selecting the Integrated with SelectSite checkbox on the Properties screen for the custom field, in the Contract Types or Manage Metadata (Advanced) screens.

• On contracts with the feature enabled:
  • Only legal entities that are imported as part of the Supplier Sync will be available for selection as first or second parties on a contract
  • On the contract header, the second party type will default to Vendor (or the business relationship designated as the default business relationship for supplier sync)
  • The Description field will be a required field
  • Contract end dates must be fixed (a specific date) or set by time period (e.g., 1 year). The Is Ongoing option will be hidden for SelectSite contract types
  • Only the custom fields that have been designated for integration with SelectSite will appear in SelectSite.

**Ability for End-Users to View a Contract in Contract Director from Contract Search Results in SelectSite**

Currently, contract owners and administrators for organizations that have integrated Contract Manager in SelectSite with Contract Director have the ability to view a contract in Contract Director directly from SelectSite. In 14.3, end-users with the appropriate permissions in both SelectSite and Contract Director will also have this ability. Users will be able to link to the contract in Contract Director directly from the contract search results in SelectSite.

**Impact**

• Products Affected: SelectSite with Contract Manager; Contract Director 7.2 and 7.4+
• 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 Contract Director Access permission in SelectSite will give users the ability to link to a contract in Contract Director directly from SelectSite.
• When 14.3 is live, users with the Contract Owner or Contract Administrator permissions will automatically get the Contract Director Access permission.
• The link will display to end-users with the permission in SelectSite. However, the SelectSite users must also be users with appropriate permissions in Contract Director. prior to the link. If a SelectSite user who is not a Contract Director user clicks on the link, an error message will be displayed.

**Ability to Lock User-Defined Fields on Contracts in SelectSite that are Managed in Contract Director**

In SelectSite, contracts originating from Contract Director may contain user-defined "flex" fields as well as contract fields. Organizations with both Contract Director and Contract Manager can currently edit these fields when the contract is available in SelectSite. If Contract Director is the system of record, it is important that these user-defined fields and key Contract Fields not be updated to the contract in SelectSite. In 14.3, organizations will be able to lock these fields for editing in SelectSite.

**Impact**

• Products Affected: SelectSite with Contract Manager; Contract Director 7.2 and 7.4+
• End User Impact: Low
• Admin User Impact: None
• Integration Impact: None

**Key points of Feature**

• This feature is OFF (disabled) by default.
• New Permissions related to this Feature: None
• Organizations will be able to lock one or more of the flex fields and contract fields. When a field is locked, no edits can be made to the field in SelectSite.
• This feature applies only to contracts originating from Contract Director.
• When updates are made to a contract in Contract Director, locked fields in SelectSite will continue to be updated.
• This feature must be enabled by SciQuest. Please contact your Client Partner, Project Manager or Customer Support for more information.
General Contract Director Enhancements

E-Signature Integration

E-Signature will be enhanced with a standardized configuration to provide more efficient handling of electronically signed contracts.

The e-signature feature provides the ability to sign contracts electronically. For systems with this feature, users creating a contract will be able to indicate e-signatories for the contract on the contract header. When the e-signature workflow step is selected, the individuals indicated as signatories will receive an email notification that allows them to open the document from their email and sign it electronically. When they have finished signing the document, the contract returns to the regular workflow in Contract Director.

Impact

- Products Affected: Contract Director
- End User Impact: Medium
- 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 feature:
  - Configuration by Client Delivery is required. Contact your client partner or service representative to have this feature enabled.
  - A client agreement with an e-signature provider is required for integrator keys and licensing. DocuSign and EchoSign providers will be supported for this release. Support for additional e-signature providers will be added in future releases.
  - When creating a contract, fields within an e-signature panel will be used to specify the individuals who are signatories, along with their email address and the sequence in which they sign. Multiple signatories can be added.
  - A step in the workflow will be used to send the contract to the signatories. Once selected, the signatories receive an email notification indicating that the contract is ready for signing. They will be able to open the document from their email and sign and/or initial the contract electronically.
  - Once the contract is signed, two workflow options will be set up to:
    - Check for signatures – Will confirm that all the parties have signed the contract, in which case the contract moves to the next step in the workflow.
    - Recall – Will reject the signatures on the contract and the contract is returned to the owner.

Salesforce Data Connector

A new Salesforce data connector will allow information gathered as an opportunity in Salesforce to generate a contract in Contract Director. As the contract is processed through workflow with different document statuses in Contract Director, the status of the opportunity will be changed in Salesforce, notifying stakeholders where the contract is in the lifecycle. This will streamline the contract creation process and reduce cycle time for finalizing a contract.
Impact
- Products Affected: Contract Director
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: High

Key points of Feature
- This feature is OFF (disabled) by default.
- New Permissions related to this Feature:
  - Access Role > Sales Force > Data Connector
- Implementation of this feature:
  - Configuration by Client Delivery is required. Contact your client partner or service representative to have this feature enabled.
- Data connector default settings will be configured using the Sales Force option under the Configuration menu to supply the information needed by Contract Director to create a Salesforce contract, such as the contract type and template.
- When creating Salesforce contracts:
  - A Salesforce data connector contract type must be selected from the Contracts menu. The default settings will populate the contract header fields.
  - The first party legal entity must have a legal entity code and an Owner business relationship and code.
  - A “Sales Force Opportunity” field appears on the contract header, and will be populated if the contract is attached to Salesforce, otherwise it will be blank.
- As the contract is processed through workflow with different document statuses in Contract Director, the status of the opportunity will be changed in Salesforce, notifying stakeholders where the contract is in the lifecycle.

Document As Attachment
The Document As Attachment feature will allow documents created externally to be used as contract text. When creating a contract, selecting the Main Document as Attachment checkbox on the contract header will indicate that the primary attachment is the contract document.

When the checkbox is selected, the Main Document (document editor), Word IO and Template Used By screens will be hidden. Templates will be optional, and the way the contract document is attached to the contract will depend on whether a template is selected or not:
- If a template is not selected – An attachment will need to be uploaded and designated as the primary attachment.
- If a template is selected – A contract document will be generated from the template text, and attached to the contract as the primary attachment when the contract is saved.

Document As Attachment will allow a Microsoft Word document to be the main contract document. Users can then take advantage of Word features to complete the contract lifecycle.

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

**Key points of Feature**

- This feature is **ON** (enabled) by default.
- New Permissions related to this Feature: None
- When creating a contract, the *Main Document As Attachment* checkbox on the contract header will indicate that the primary attachment is the contract document.
- If the checkbox is selected, templates are optional and the contract document is generated as follows:
  - *If a template is not selected* – An attachment will need to uploaded and designated as the primary attachment before the contract can be released.
  - *If a template is selected* – A contract document will be generated from the template text, and attached to the contract as the primary attachment when the contract is saved. You will be able to choose a file format for the generated document.
- The *Main Document* (document editor), *Word IO* and *Template Used By* screens will be hidden.

**Contract Emails**

Emailing and attachment capabilities will be enhanced to include the handling of attachments for inbound and outbound emails within Contract Director. When sending an email regarding a contract, new checkboxes will allow the contract document to be sent with the email.

Users will also have the option to initiate a Word IO export directly from the Send an Email screen. Recipients will be able to reply to the email with an attached copy of their marked-up changes, initiating an automatic Word IO import.

The email and attachment capabilities will extend to the *Send An Email, Outbound Emails, Inbound Emails* and *Word IO* screens.

Users employing this feature will experience a much more fluid contract negotiation process as there will be less manual intervention with the system. Automatic importing of contract email replies will reduce the cycle time of contract negotiation.

**Impact**

- Products Affected: Contract Director
- 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
- Implementation of this feature:
  - Configuration by Client Delivery is required. Contact your client partner or service representative to have this feature enabled.
  - Prerequisite: Enabling this feature will require access to an IMAP server that must be supplied by the customer.
- Changes affect the following screens:
  - **Send An Email**
    - An *Attach Main Document as PDF* checkbox will allow the primary contract document to be sent with the email as a file in .pdf document.
• An *Initiate Word IO Export* checkbox will initiate a Word IO export, and the exported document will be attached to the email. The Word IO screen will also be updated with the export information. Selecting this checkbox will also reveal additional fields that can be used to customize the Word IO export.

• An *Attachments* panel will allow contract attachments to be included with the email, including attachments uploaded from a user's computer.

*Outbound Emails*

• The Outbound Emails screen will be updated to handle attachments sent with outbound emails. Attachments will be viewable from the Outbound Emails screen by selecting the email record in the grid, then selecting View. Email attachments will be listed in a panel on the bottom of the email window and can be opened for viewing or downloaded to a computer.

*Inbound Emails*

• The Inbound Emails screen will be updated to handle attachments received with an incoming email. Attachments will be viewable from the Inbound Emails screen by selecting the email record in the grid, then selecting View. Email attachments will be listed in a panel on the bottom of the email window and can be opened for viewing or downloaded to a computer.

• Email attachments will not be listed in the Attachments screen.

*Word IO*

• The Word IO screen will be updated to handle exports initiated from the Send An Email screen using the *Initiate Word IO Export* checkbox, and imports from replies to the email.

**Template Library Listing - Search Filter and Column Revision**

Filters and columns will be modified to improve the search and configured view options available in the Add/Edit View and Configure Grid tabs on Template Library listing screens.

**Impact**

• Products Affected: Contract 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
• On the *Add/Edit View* tab:
  • *Version Number, Obsolete As Of,* and *Stylesheet* will be added as search filter fields.
  • *Legacy Display Version, Legacy Id, Legacy Number Selection Id, Legacy Stylesheet Id* and *Legacy Stylesheet Version No* will be removed.
• On the *Configure Grid* tab, the *Document Creation Failed, Obsolete As Of,* and *Stylesheet* fields will be added as options in the Add A Column field.
• Some filter and column names have been edited for consistency and clarity.
User Listing - Filter and Column Revision

Filters and columns will be modified to improve the search and configured view options available in the Add/Edit View and Configure Grid tabs on the User List screen.

Impact

• Products Affected: Contract 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
• On the Add/Edit View tab, Login Credential and Access Assignment will be added as search filter fields. Access Group will be removed.
• Some filter and column names have been edited for consistency and clarity.

Selective Merge

A new selective merge option will be added to the Legal Entity Merge screen. It will allow users to move records (contracts, templates or library groups) from one legal entity to another. This can be done to move partial sets of the related records, to split records to another entity, or to perform a merge but exclude records which are not eligible to be reassigned.

Impact

• Products Affected: Contract 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
• All previously available override functionality is still available in the new design.
• A Selective Merge option will be available when creating a legal entity merge.
• After selecting the source and target legal entity for the merge, a list of documents that can be merged appears. Users can select the documents to merge, then execute the merge immediately, or save the merge and execute it at a later date.
SHOPPING PRODUCTS

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

- **General Enhancements** – This section focuses on general product enhancements for all Shopping products.
- **Spend Director Enhancements** – This section focuses on enhancements related to Spend Director.

General SelectSite Enhancements

14.3 contains several features that are general to products on the SelectSite platform including Shopping products. For information about general SelectSite enhancements, please see **SelectSite General Enhancements** on page 11.

Spend Director Enhancements

**Ability to Recalculate/Validate Custom Field Values in Express Checkout**

When custom fields are applied to items in a cart, and there are changes during checkout, it is often necessary to re-calculate the custom fields to reflect the changes and get the child values. Currently, Express Checkout does not allow users to validate/re-calculate custom field values; functionality that is available in Advanced Checkout. As of 14.3, this functionality will be available in Express Checkout.

**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 and cannot be disabled.
- New Permissions related to this Feature: None
- The functionality in Express Checkout will work identically to the functionality in Advanced Checkout. If a user manually enters a value into a parent custom field input which has associated child values, when the recalculate button is clicked the child input field will recalculate accordingly to show associated values.
INVENTORY: SUPPLIES MANAGER ENHANCEMENTS

General SelectSite Enhancements

14.3 contains several features that are general to products on the SelectSite platform including Supplies Manager. For information about general SelectSite enhancements, please see SelectSite General Enhancements on page 11.
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.

General SelectSite Enhancements

14.3 contains several features that are general to products on the SelectSite platform including Accounts Payable Products. For information about general SelectSite enhancements, please see **SelectSite General Enhancements** on page 11.

Supplier Management Enhancements

14.3 contains supplier management enhancements that are applicable to Accounts Payable products. For information about these features, please see **Supplier Management Enhancements** on page 15.

AP Enhancements

**Ability to Add Shipping Address to Invoices and Credit Memos**

Currently, there is no functionality that allows shipping locations to be specified on invoices and credit memos. Starting with release 14.3, organizations will be able to add the Ship-to address on these documents, allowing this information to be displayed. The ship-to address can be added to the both the buyer invoices and supplier sales invoices through document setup.

**Impact**

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

**Key points of Feature**

- This feature is **OFF** by default but can be enabled by an Administrator with appropriate permissions
- New Permissions related to this Feature: None
- The ship-to field will need to be added to the buyer invoice and sales invoice documents via document setup.
- The ship-to field is header-level only.
- When the ship-to field is configured on buyer invoice documents, the ship-to field can be populated manually or be copied over from a purchase order. Users with appropriate permissions will be able to enter or edit the ship-to information on the invoice.
When the ship-to field is configured on supplier sales invoices, suppliers will be able to enter shipping information on manual invoices and view the current ship-to information when an invoice is created by flipping a sales order.

**Ability to Include Shipping Address on Invoice Import and Digital Mailroom Invoices**

Starting with release 14.3, the Invoice Import/Digital Mailroom Import will include the shipping address fields. The address will be able to be added to imported invoices at the time they are created.

**Impact**

- **Products Affected:** All AP Products with Digital Mailroom (AP Director) or OCR Invoice Import
- **End User Impact:** Low
- **Admin User Impact:** None
- **Integration Impact:** None

**Key points of Feature**

- This feature is **ON (enabled)** by default for organizations using the most current Invoice Export DTD.
- New Permissions related to this Feature: None
- The ship-to fields are not required. There will be no impact if the fields are not included in the import.
- Please contact SciQuest if you are unsure if you are using the most current Invoice Export DTD.

**Exact Supplier Name Matches when Importing Digital Mailroom or OCR Invoices**

In 14.3, the application will first search for an exact match on supplier name before searching for all possible matches when importing a Digital Mailroom or OCR invoice. Currently, the system searches for all possible matches on import. Consequently, if the exact supplier name exists AND the exact supplier name is contained in another supplier name, the system will not recognize and exact match automatically.

**Impact**

- **Products Affected:** All AP Products with Digital Mailroom or OCR Invoice Import
- **End User Impact:** Low
- **Admin User Impact:** Low
- **Integration Impact:** None

**Key points of Feature**

- This feature is **ON** by default.
- New Permissions related to this Feature: None
- An exact match in supplier name will be matched automatically in the system.
- If no exact match is found, the system will then search for all possible matches.
- In order to make a match, the imported supplier must be registered and active in the organization.
Accounts Payable Director Enhancements

Tax Engine Integration

In 14.3, functionality will be added that allows AP Director customers to integrate with a third-party tax engine. When integrated, organizations will be able to include tax calculated in the third-party system on buyer invoices within the application. Additionally, buyers will be able to compare tax amounts on supplier invoices with calculated tax amounts from the tax engine integration. If the two tax amounts differ, invoices can be specifically routed for approvals. Important Note: For release 14.3, the application will be able to integrate to the tax engine One Source only.

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

Key points of Feature
- This feature is OFF by default.
- New Permissions related to this Feature: None
- When the tax integration is enabled, users will have an option to calculate taxes directly on the invoice. A Calculate Tax button will display. When this button is selected, the tax will be calculated by the One Source system and returned to the invoice.
- The integration must be configured by SciQuest. Please contact your Client Partner, Project Manager or Customer Support for additional information.

AP Reporting Enhancements


In 14.3, SciQuest will add a new report for AP customers. The Invoice Aging Report will provide information about invoices and credit memos based on the invoice due date. The report groups will evaluate the due date vs. the current date and groups them accordingly. For example, if the due date is in the future, the invoice will be in the Current group. If the due date was 30 prior to the current date, it will be in the 1-30 group, etc.

Impact
- Products Affected: All AP Products
- 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 report will be an MS Excel report.
- The report will contain a summary by supplier, showing the number of invoices and credit memos, total and grand total for each group (Current, 1-30 days, etc.)
• The report will also contain details, showing each invoice or credit memo with due date and total by group (Current, 1 - 30 days, etc.).