15.1

Release Preview
for SciQuest's SelectSite Products

January 30, 2015 - Initial Version
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WELCOME

The 15.1 SciQuest Product Release will be available in the production environment starting March 29, 2015. The release includes features related to the following SciQuest products:

- **All SelectSite Products**: This document focuses on the features for SelectSite products including:
  - eProcurement Products: Spend Director (including Contract Management), Order Manager, Requisition Manager
  - Total Supplier Manager
  - Sourcing Director
  - Accounts Payable Products: Accounts Payable Director and AP Express
- **Contract Director (Saas Version): Note**: Contract Director features (other than those related to integration with the Spend Director Contract Manager module) are not included in this document. A Release Preview document that is specific to Contract Director is available on the Product Release Library.
- **Advanced Sourcing Optimizer (ASO): Note**: ASO features are not included in this document. A Release Preview document that is specific to ASO is available on the Product Release Library.

Objectives

The purpose of the Release Preview 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 information about major release themes and general information about features related to those themes. **Note**: This document is not intended to provide an exhaustive list of features included in the release. Often, features are added and/or modified between the release preview and the release in the Test environment. Product Release Notes that include detailed information about all 15.1 features will be available prior to the release in the Test environment.

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

http://library.scquest.com
### 15.1 Scheduling

To help prepare our customers for the upcoming 15.1 release, a list of KEY DATES is provided below. Please review the information and mark your calendars accordingly.

## Key Dates

The table below provides a list of key dates for the SciQuest 15.1 Product Release*.

<table>
<thead>
<tr>
<th>Webinar Name</th>
<th>Date and Time</th>
<th>Description and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Promotion: Test Sites Unavailable</td>
<td>Beginning March 6, 2015 8am ET</td>
<td>The 15.1 release will be promoted to the Test (usertest) environment from Friday, March 6, 2015 8am ET through Sunday, March 8, 2015 12 pm ET. An email will be sent when the promotion is complete.</td>
</tr>
<tr>
<td>Release Validation in Test Environment</td>
<td>March 8, 2015 - March 27, 2015 (Three Weeks)</td>
<td>Three weeks prior to General Availability, release enhancements can be viewed and tested in the Test environment. Draft documentation is provided at this time (Release Notes, WebHelp and Handbooks). <strong>Recommendation:</strong> It is recommended that clients perform testing of functionality critical to your business as soon as possible during this period - ideally during the first week. If any issues are encountered, this will allow time for application adjustments and re-testing.</td>
</tr>
<tr>
<td>Production Unavailable (Begin Release Upgrade)</td>
<td>Beginning March 27, 2015 9pm ET through March 29, 2015 12pm ET</td>
<td>The 15.1 release will be promoted to the Production environment from Friday, March 27, 2015 9pm ET through Sunday, March 29, 2015 12pm ET. An email will be sent out when the promotion is complete.</td>
</tr>
<tr>
<td>Release available on Production Sites</td>
<td>Sunday, March 27, 2015</td>
<td>This date indicates when the features and functionality associated with 15.1 will be available on customer Production sites. Final documentation provided at this time (Release Notes, WebHelp and Handbooks).</td>
</tr>
</tbody>
</table>

* Details:

- 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 15.1 release, the following training videos will be available:

<table>
<thead>
<tr>
<th>Video Name</th>
<th>Date Available</th>
<th>Description and Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>eProcurement and AP Director</td>
<td>Available on the Product Release Library March 11, 2015</td>
<td>This recorded webinar will present details about features in 15.1 related to the eProcurement and Accounts Payable products.</td>
</tr>
<tr>
<td>Sourcing Director</td>
<td>Available on the Product Release Library March 11, 2015</td>
<td>This recorded webinar will present details about features in 15.1 related to the Sourcing Director product.</td>
</tr>
<tr>
<td>Total Supplier Manager</td>
<td>Available on the Product Release Library March 11, 2015</td>
<td>This recorded webinar will present details about features in 15.1 related to the Total Supplier Manager product.</td>
</tr>
</tbody>
</table>
SUPPLIER MANAGEMENT ENHANCEMENTS

This section focuses on supplier management in SelectSite (including features related to the Total Supplier Manager product).

Updates to the Supplier Profile

New Field Management Options for the Supplier Profile

Field management helps organizations to customize SelectSite to meet their specific needs. You can choose to show or hide fields based on the specific information your users need to view and/or configure. In 15.1, we will be adding the following field management options for the supplier profile:

- Ability to hide the Sales Territories field that is located in the General supplier profile screen.
- Ability to hide Third-party Reference Number field that is located in the Company Information section of the General supplier profile screen.

Validation of Routing Number Field in Accounts Payable Records

Note: This update is applicable only to organizations using Total Supplier Manager with the On Boarding module.

Currently, the application does not do any validation on the bank routing number when it's entered into an AP record in the supplier profile. In 15.1, the system will validate that a 9-digit number was entered. Note: The data will not be validated as an actual routing number; only that it is 9 digits and all characters are numerals.

New Permissions available when the Enable Supplier Access Permissions Setting is Active

Note: This update is applicable only to organizations using Total Supplier Manager who have the Enable Supplier Access Permissions setting enabled.

The Enable Supplier Access Permissions setting allows you to split up access to specific information in the supplier profile that is normally bundled together in the basic supplier profile management permissions. Currently, when the setting is enabled, you can control access to sensitive business information. In 15.1, we will be breaking out access to the information as described below. Important Note: If the Enable Supplier Access Permissions setting is active when 15.1 goes live, users with the Manage Supplier Profile Settings permission will NO LONGER have the access to the areas mentioned below in the supplier profile. An administrator will need to enable the new permissions for users and/or roles.

- **Access Sensitive Company Information**: This permission allows users to view data such as legal structure, Tax ID type, Tax ID number, VAT registration number and DUNS number. Users without this permission will not be able to see those fields in the supplier profile. Note: Users who do not have this permission will also not be able to search on Tax ID number in Advanced supplier search.

- **Access Custom Company Information**: Allows the user to view custom fields in the Company Information section of the supplier profile. Users without this new permission will not be able to see those fields in the supplier profile.

- **Access Custom Business Information**: Allows the user to view custom fields in the Business Information section of the supplier profile. Users without this new permission will not be able to see those fields in the supplier profile.

Note: A user that does not have access to fields in the supplier profile will not be able to search by those fields in the Supplier Advanced Search or post-search filtering, nor will they be viewable to the user from the supplier export.
Ability to Assign a Default Bill-To Address in the Supplier Profile

In some cases, you may wish for an individual supplier to send bills to a specific Bill-To address within your organization, regardless of the shopping user’s Bill To address. In 15.1, we will be adding a new field to the supplier profile that allows you to assign an address that will always be used by that supplier. When an address is selected in this field, that address will override the user default Bill To address for requisitions and invoices.

Ability to Manually Select SBE Diversity Classifications in the Supplier Profile

The system currently calculates a supplier as SBE qualified based on the NAICS Code and number of employees or Annual Revenue/Receipts. In 15.1, customers and supplier users will be able to manually select or deselect the SBE classification. When there is a discrepancy where the system qualifies the supplier as SBE, but the supplier has not selected at least one SBE classification or vice versa, a warning message will display to indicate the discrepancy. The SBE classification can be added via the TSM import as well.

Updates to Functionality for Managing and/or Preventing Duplicate Suppliers

When an organization has many suppliers, it is important that the inclusion of duplicate suppliers be carefully managed and, in many cases, prevented. SciQuest provides functionality that helps you identify duplicate suppliers and how to handle the duplicates. In 15.1, we will be making the following updates and enhancements:

Ability to Link Suppliers in a Parent/Child Relationship

In 15.1, we will be adding functionality that allows organizations to link suppliers in a parent/child relationship. The primary goal of this functionality is to allow you to link two or more suppliers that have the same Tax ID Number (TIN) for the TSM Supplier Export/Import. In the supplier profile, you will be able to select a parent for that supplier. The parent supplier can only be a supplier that has a supplier number assigned in their own supplier profile (to help distinguish suppliers with the same TIN). The parent supplier field will be added to the Total Supplier Manager XML supplier export. Important Note: This feature is intended only to link the suppliers. There will be no additional business logic or functionality associated with the parent/child relationship.

Potential Matches Presented when Attempting to Add a Duplicate Supplier

Note: This update applies to organizations who have licensed Total Supplier Manager and/or Sourcing Director.

Currently, when you INVITE a supplier, the application searches for potential supplier matches based on the information you include in the invitation (email address, for example). These matches are presented to the user and specific actions can be taken based on the supplier's status and the user's permissions. In 15.1, we will be providing that same functionality when a user attempts to ADD an organization-managed supplier. The application will display a Potential Matches page when suppliers are matched on supplier name/DBA, TIN or DUNS. From that page, you will be able to click access and view the supplier profile of each potential match. The matching process considers all existing suppliers, both in and out of network. Note: Users with the appropriate permissions will be able to bypass the matches and add the supplier. Users without the permission will only be able to view the potential matches.

Enhancements to the Potential Matches Page for Invited Suppliers

Note: This update applies to organizations who have licensed Total Supplier Manager and/or Sourcing Director.
In 15.1, the potential matches page for invited suppliers will be enhanced to include a field that provides all
information about the data on which the supplier matched. Currently, some of the matching information is
available, however this information is contained in separate fields and is often not highly informative about
what is actually matching. In 15.1, a single field called Matched On will contain all items that are considered
matching and/or duplicate. The items will be clearly labeled with the matching field name (Legal Company
Name, DUNS, Tax ID Number, etc.) and the actual matching data. Note: The Tax ID Number will not display to
users without the appropriate permission to view it.

New Workflow Object for Detecting Duplicate TIN/SSN in the Supplier Registration and Review Workflows

Note: This functionality applies to organizations who have licensed Total Supplier Manager. You will need to
contact SciQuest to set up the workflow when it is available.

In 15.1, a new workflow object will be available that allows the application to detect a duplicate Tax ID Number
(TIN) or Social Security Number (SSN) for a supplier in either Supplier Review or Registration Workflow This
can be used for notification type steps or manual approvals. Please note that the workflow object will only
search for matches with In-Network suppliers.

Supplier Invitation Enhancements

Additional Supplier Invitation Email Templates

Note: This enhancement applies only to organizations using Total Supplier Manager.

Currently, there are two templates for supplier invitation emails; one for individual registration and one for
entity registration that applies to all entity registration types (Profile 1, Profile 2 and Profile 3). In 15.1, each
type registration type will have its own email template, for a total of four invitation emails. You will be able to
make customizations to the email templates.

Last Invitation Date Included in Supplier Profile

Note: This update is applicable to organizations using Total Supplier Manager or Sourcing Director.

In 15.1, the most recent date/time that a supplier was invited will display in the summary information in the
supplier’s profile. The date/time stored is the last time an invitation was sent to the supplier and respects the
user’s country and timezone setting (or organization setting if it is not overridden by the user profile). This
information will be searchable in the Advanced search. Additionally, the last invitation date/time will be
available in the supplier exports. Note: If you use the supplier export to integrate with other third-party
systems, you may need to take steps to ensure that the new field will not cause any issues with the integration.

Updates to Functionality for Capturing Supplier Diversity Information in Total Supplier Manager

Note: These updates apply only to organizations who have licensed Total Supplier Manager.

An important part of supplier management is to have a good understanding of the diversity information and
classifications of your organization’s suppliers. In 15.1, we will include updated functionality that allows your
organization additional options for collecting and storing diversity information. These updates include:

Updates to the Add Diversity Classification Functionality in the Supplier Profile

In order to accommodate the MBE changes, and in an effort to continue improving the intuitiveness of the
product, we will be making a small update to the functionality for adding diversity classifications. When you
choose to add a diversity classification, a sub-menu will display. From this sub-menu, you will be able to select to add a Federal Diversity Classification, State Diversity Classification or No Classification.

**New Regional Affiliate Options for NMSDC-certified Suppliers**

When a supplier is marked as a Minority Business Enterprise (MBE), the supplier or buying organization may also want to indicate in the supplier profile that the supplier is certified by a certifying agency. If a supplier is identified as National Minority Supplier Development Council (NMSDC) certified, a regional affiliate can be selected. In 15.1, we will be adding several regional affiliates for selection.

**Updated NAICS Codes**

The Small Business Administration (SBA) releases new guidelines on small business sizing for inflation. In 15.1, our SBE calculations will honor the updated SBA standards.

*Note*: Please see the feature **Ability to Manually Select SBE Diversity Classification in the Supplier Profile** for information on an additional SBE enhancement.

**Additional Supplier Management Enhancements**

### Supplier Request Templates

*Note*: This update is available only to organizations using the Total Supplier Manager product.

Only users with specific permissions are able to create new suppliers. Currently, there is no functionality in the application that allows users without that permission to request that a supplier be added or created. These requests have to be made manually, outside of the system. In 15.1, we will be adding functionality that allows those requests to be made, and completely managed, through the application.

Users with the permission to request suppliers will be able to create a supplier request. When users request that a supplier be added, they will be required to provide information about the supplier based on the template used to make the request. To gather that information, organizations will be able to create one or more supplier request templates. Users with permission to manage supplier request templates will be able to create templates and configure them to require specific supplier information. Templates will be set up similarly to Dynamic Qualification questionnaires; you will be able to provide general instructions for the template, configure questions, mark questions as required, etc.

### Supplier Search Enhancements

The following enhancements will be made to supplier search for TSM customers:

- Advanced supplier search will remember your most recent selection in the **Network** field (In Network or Out of Network) and that selection will be displayed. *Note*: This information is cached in the user’s browser.
- As previously noted, users who do not have permission to access sensitive company information will not be able to search for suppliers by TIN in Advanced supplier search or export Tax ID numbers in supplier export.
- As previously noted, users who do not have permission to access sensitive company or business information will not be able to search by custom company or business profile fields.

### TSM Organization Users Prevented from Saving Data in the Customer View of the Supplier Registration if there is Pending Data from the Supplier

*Note*: This feature only applies to TSM organizations with the **Require Review of Subsequent Edits to Supplier Profile Registration Setting** enabled.

To help ensure that supplier data is as fresh and up-to-date as possible, we provide functionality that allows both organization users and supplier users to make updates to the same data in the Customer View of the
Supplier Registration. In some cases, both an organization user and supplier user can be making changes at the same time. In 15.1, we will be adding functionality so that if the supplier user submits a change, the organization user will not be able to save any updates in the Customer View of the Supplier Registration. If an organization user attempts to save a change while supplier changes are pending, the application will display a message indicating that a pending change has been submitted. That change will need to be reviewed and accepted/declined before any additional edits can be saved on the organization side in the Customer View of the Supplier Registration.
SHOPPING ENHANCEMENTS

This section focuses on enhancements related to SciQuest’s eProcurement products (Spend Director, Requisition Manager and Order Manager).

Introduction of Shopping Dashboards

In 15.1, SciQuest will be introducing the ability to create configurable Shopping Dashboards. Shopping Dashboards will allow you to customize and combine the content that your shoppers can view. By using the new configurable dashboards, users can reduce the amount of time it takes to search for features in the menus. Everyday functions such as Product Search, Document Search and Product Showcases (showcased suppliers, forms and favorites that are configured on the shopping home page) can be included on a dashboard, allowing the user to access all of these from one location. In addition, you can include the Organization Message or other free-from text, allowing the dashboard to be a true customized page for your users. Additionally, users with the Set My Home Page permission will be able to set a dashboard as their home page. Administrators can make the dashboard specific to a role or business unit.

Organization Dashboards

Users with appropriate permissions can set up dashboards on the organization level. Organization dashboards are then accessible by the end-users. You can restrict end-user view of a dashboard by role or business unit, allowing you to create customized dashboards based on this criteria. Additionally, functions displayed to the user on the dashboard will vary based on the individual user’s permissions. For example, if the user does not have permission to perform a document search, the Document Search function will not display to that user even if it has been added to the dashboard.

Personal Dashboards

In addition to having access to organization dashboards, end-users with appropriate permissions will be able to create personal dashboards. A personal dashboard can be seen and accessed only by the user who created it. As with organization dashboards, the available functions will vary based on licensed products. In addition, the functions available to the end-user to include on the dashboard will vary based on the user’s permissions.

Updates to Shopping Favorites

Shopping Favorites allow your organization’s users to store frequently shopped items, eliminating the need to search for the items each time. In 15.1, SciQuest will be making significant updates to the Shopping Favorites user interface as well as adding new key features. All existing functionality will remain, but additional functionality will be available; all in a more streamlined, intuitive interface.

Shopping Favorites User Interface Updates

In 15.1, the current interface for Favorites management will be updated. In the current interface, most actions are accessed through a series of buttons or links. The updated interface will roll those actions in to more intuitive drop-down menus. For example, currently the Edit, Move, Copy and Delete actions are separate links. In 15.1, those actions will all be accessible from an Available Actions drop-down menu, similar to other areas in the application. The Available Actions drop-down menu will allow you perform an action on multiple favorites. In addition, required fields will be marked with an asterisk (*) instead of simply displaying in bold, as they do currently.

Ability to Search Shopping Favorites in Favorites Management

In 15.1, users will have the ability to search Favorites and Favorites folders. This is useful when there are a large amount of Favorites/folders saved. Users with permission to view and use personal favorites will be able to search personal folders. Users with permissions to view shared folders or who have access to specific
shared folder, will be able to search on those folders. Clicking on an item in the search results will take the user directly to the favorite or folder.

**Ability to Make Favorites or Favorites Folders a Showcase**

Showcases allow organizations to highlight specific suppliers and forms on the Shopping page. Showcases are generally organized by suppliers and forms that provide similar functions (Office Supplies, Furniture, etc.). They contain "stickers" that link the user from the showcase to the supplier catalog or punchout site or to the appropriate form. In 15.1, you will have the ability to create stickers from shopping favorites. This will allow favorites and favorite folders to be displayed on the Shopping page, making them even more easily accessible to your shoppers.

**Ability to Import and Export Shopping Favorites**

In 15.1, you will have the ability to import and export shopping favorites. Favorites import/export functions will work similarly to import/export functionality elsewhere in the system. Records will export to an MS Excel file. A template is available for favorite import (or updates can be made to an exported file and re-imported). Users will have the ability to import/export both shared and personal favorites, depending on their individual permissions. **Note:** Only folders, hosted catalog items and Item Master items can be imported or exported.

**Additional Shopping Enhancements**

Our goal for each release is to make updates and enhancements to SelectSite based on feedback from our customers. The following miscellaneous enhancements will be included in the 15.1 release based on customer feedback.

**Supplier Legal Structure Added to Requisition Advanced Dynamic Workflow**

In 15.1, organizations that use Advanced Dynamic Workflow (ADW) will have the option to use supplier legal structure as a document level rule for requisitions. You will be able to choose legal structure as the rule and then select which legal structure values can be used in the rule. For example, you may wish to create a special approval step for suppliers that are S Corporations. You will be able to select Legal Structure as the document-level rule and then select S Corporation as the element.

**Ability to View Draft Cart History**

Currently, a user who has permission to view another user’s draft carts does not have access to the cart history. Often, it is necessary to view the history for troubleshooting purposes. In 15.1, users with permission to view other user’s draft carts will be able to view the draft cart history. A **view cart history** link will be available for each draft cart. Clicking the link will display the cart history.
CONTRACT MANAGEMENT ENHANCEMENTS

This section focuses on features related to the Contract Manager module in SelectSite.

Contract Management Updates

The Contract Manager feature in SelectSite allows your organization to organize and manage contracts in the application. In 15.1, we will be introducing several usability updates to contract management. The primary goal of the updates is to provide your organization’s users a more streamlined experience when using the feature. **Note:** The changes to contract management may have a significant impact on your organizations day-to-day use of the feature. A **Before and After** guide, along with a training video, will be available on the Product Release Library (http://library.sciquest.com) in late February 2015 prior to the release in the Test environment. It is highly recommended that you review this document as soon as it's available.

Below are some of the changes you can expect with the 15.1 release:

**Updated Contract Management User Experience**

In 15.1, we will be making significant changes to the user experience when managing contracts. Some of these changes include:

- The look and feel of the contract management interface will be updated to match the user interface in other areas of the application. The current tab navigation will be replaced with a left navigation menu. Some page names will be updated for consistency.
- A new, separate, page for adding and managing contract attachments will be available.
- Many of the contract fields will be re-grouped within the new navigation to make common features accessible from the same area. Some contract sections will be re-named to make them more meaningful to the fields in that section. For example, date and renewal information, which are currently separate sections on the **General** tab will be combined into a single section on the **Contract Header** page.
- What is currently called the document soft copy will be referred to as the **Main Document**. A link to the main document will be displayed on the left navigation menu making it accessible from wherever you are in the contract navigation. A new page for adding and managing attachments will be available. **Note:** As of 15.1, the application will only allow you to designate one main soft-copy of the document. Upon release, the document attached in the Contract Soft Copy field will be designated as the Main Document and all other attachments will display on the new **Attachments** page. If you have multiple documents in the Soft Copy field, they will all be labeled as attachments and you will be able to indicate which document is the **Main Document**.
- When defining the Visibility controls for the contract, there will be a new preview button making it easier to see what the contract summary will look like. Users with limited visibility on a contract will be able to preview the information they can view.
- The **Contracts Home** page, which contains information redundant to the **Contract Administrator’s Dashboard**, will be removed.
- The **Contract Search** page will be updated. Advanced Search fields will be grouped by common function and available in expandable menus, making the search page cleaner and easier to use.
- The **Contract Create** process will be updated so it is available via the SelectSite left-navigation menu from anywhere in the application.
- The **Effective Date** and **Expiration Date** will allow an optional time stamp during manual contract creation or via an import. The system currently defaults all times to midnight.
New Contract Number Wheel Available

In 15.1, we will be adding the ability to use a number wheel for contract management. Number wheels allow organizations to create a numbering format that can then be used for assigning contract numbers. This feature will help your organization to standardize contract numbering.

Contract Management Permission Updates

In 15.1, changes and updates will be made to permissions related to contract management. All contract management-related permissions will reside in a new Contracts section of Permission Settings. A new permission, Contract Configuration, will be available that allows a user to manage all contract settings and all contracts. Several permissions will be revised and renamed. The primary goal is to provide you greater flexibility as to the areas of the contract that users can access and configure.
Accounts Payable Enhancements

This section focuses on features related to the Accounts Payable products (AP Director and AP Express).

New and Updated Invoice Features

SciQuest strives to continuously make updates to our Accounts Payable products to provide customers with the functionality they need to successfully manage the AP process. In 15.1, we are focusing on new features related to invoicing.

Ability to Approve Invoices via Email

Note: This feature is applicable to organizations that use Accounts Payable Director or AP Express.

In 15.1, organizations will be able to allow invoices to be approved by email. When this feature is enabled, approvers with appropriate permissions will be able to take action on an invoice directly from an email, without having to go in to the application. The email will contain the invoice details. A button will be on the email that, when clicked, opens a separate window with the available approval actions. The approver will be able to take the appropriate approval action. Note: Available approval actions will depend on the user’s individual permissions.

Ability to Schedule Recurring Invoices

Note: This feature is applicable only to organizations that use Accounts Payable Director.

Your organization may have the need for specific invoices to be generated on a regular basis. In 15.1, SciQuest will be adding the ability to schedule recurring invoices. Users with appropriate permissions will be able to schedule recurring invoices based on date-range (start and end-date) and recurrence patterns (weekly, monthly). Recurring invoices are created directly from an existing invoice. A new View Recurring Invoice Schedules page will be available for managing (view, edit cancel) the invoices. From this page, you will also be able to view the occurrences of the recurring invoices.

Ability to Automatically Return Invoices

Note: This feature is applicable to organizations that use Accounts Payable Director or AP Express.

In some cases, approvers may want to send an invoice back to the creator or owner for edits or additional information before taking an approval action. In 15.1, we will be providing the ability for invoices to be returned to the invoice owner or creator by an approver. When an invoice is assigned to an approver, the Return Invoice option will be displayed as an available action. When this action is selected, the approver will be able to choose to return the invoice to the creator or to the owner (depending how the invoice was created) and include a message.

When an approver returns an invoice, the creator or owner will receive notification of return. The user will be able to access the returned invoice from the Draft invoices page. From there, returned invoices can be edited just as draft invoices would be. Once edits are made the returned invoice can be submitted in to workflow.

Tax Engine Integration Updates

In Release 14.3, SciQuest introduced functionality that allows organizations using Accounts Payable Director to integrate with third-party tax systems. Currently, the application can integrate with the OneSource product. In 15.1, we will be making the following enhancements related to integration between AP Director and third-party tax engines:
Ability Search Invoices by Tax Engine Errors

The tax integration may sometimes error because of issues with the invoice, system errors or the third-party engine being unavailable when the tax is being calculated. Currently, users must go back to each invoice to be sure tax calculation is successful. In 15.1, a new Advanced document search field will be available that allows you to search for invoices with tax engine errors. In addition, tax engine errors will be available as a post-search filter for invoice documents.

Ability to Retry Tax Calculation in Bulk from Invoice Search Results

Currently, when a tax calculation fails, a user must manually retry the calculation from the invoice. With the addition of tax engine errors as a search feature in 15.1, we will also be adding the ability to retry the tax calculation on multiple invoices directly from the search results. The available actions in the search results will include an option to Retry Tax Calculation. Multiple invoices can be selected and when the new option is chosen the application will retry the tax calculation on the selected invoices.

Updated Invoice Export DTD Available

An updated invoice Export DTD will be available that includes line-level tax information for invoice documents that have had a successful tax engine callout. New fields include TaxAuthorityName, Tax Description, TaxableBasis, TaxRate and ERPTaxCode.
SOURCING DIRECTOR ENHANCEMENTS

This section focuses on enhancements to the Sourcing Director product on the SelectSite platform.

Event Enhancements

General Sourcing Event Updates

Several Sourcing Director general event enhancements will be released with 15.1, based on customer feedback. These enhancements include:

- Sourcing administrators will have the ability to configure the organization’s Fiscal Year as part of an Event Number Wheel.
- The Sourcing Event Advanced Search will be organized into different sections to allow for new features and overall better usability. Users will have the ability to search Events by Awarded Date using the Date field criteria in Advanced Search.
- On the Sourcing Event document search results page, event dates and times will display according to the user’s profile settings for country and time zone. This applies to internal customer users as well as suppliers viewing the event through the customer portal.

Product and Service Item Updates

Several new features will be available for event product and service item configuration and responses. These include:

- The Description field for product and service line items will be expanded for all areas of events. Users will have the ability to enter up to 2500 characters.
- Updated Requested Delivery Date options for product and service items, allowing the buyer to enter an actual date or a number of days after the award.
- Buyers will have the option of entering a Target Price for an item for use in analyzing bid responses. Suppliers will not have visibility into the target price.
- Items may be configured to allow for alternate item submissions. See the Alternate Item feature for details.
- Commodity codes may be added at the item level. See the Commodity Codes feature for details.

Alternate Items Allowed for Events

With the 15.1 release, customers may allow alternate items to be submitted by suppliers when responding to sourcing events. Alternate Items may be configured at the organization, project, event and item level. If enabled for the event, each item is configured to allow or not allow alternates. The side-by-side evaluations page will support the display and analysis of alternate items. The event export PDF will include an indication if alternate items are allowed on the event. The item export will include alternate item responses, and the item import functionality will support the import of alternates for the configured items.

When alternate items are chosen to be awarded, those items are available to include on requisitions or contracts created from the Sourcing Event.

Multi-Stage Events

The multi-stage event functionality is being introduced to allow customers more options in the supplier selection process. Customers will have the ability to configure multiple stages for events at the project and event levels. When configured, the buyers can initiate a new stage for an event before it is awarded. Event content is carried to the next stage, and buyers can choose which suppliers are included for subsequent stages. The buyer will have the ability to choose analysis options (questionnaire, auto score, and cost analysis)
from the different event stages that they want to use in the evaluation using the Evaluation Calculation Options in Event Navigation.

The Event navigation will contain links to view the different stages of an event. When selecting to export an event as a PDF, the buyer will have additional options for selecting one or more stages and stage information to include in the export.

Suppliers will have visibility into the multiple event stages if they are invited to participate in those stages. On a customer public site, previous stages of events will show as Closed, but the initial event stage PDF will continue to be available. Suppliers will have the ability to respond only to the current stage of an event if they are selected to advance and bid on it.

**Commodity Codes for Sourcing Events**

Previously, a commodity code could be associated with a Sourcing Event at the event level. With the 15.1 release, customers can indicate a commodity code for each product and service line item on the event. The item export will include associated commodity codes, and the item import will allow for the import of a commodity code for each item.

Also, the Event Settings and Content page will include a new Commodity Codes section where Reporting and additional Commodity Codes may be selected. This section will also display any item level commodity codes that are configured for the event. The Advanced Search for sourcing events will include the ability to search for events by reporting, additional or item commodity code(s).

**Invite Suppliers by Commodity Code**

With the 15.1 release, suppliers can be invited on an event based on the commodity code(s) configured for the event. A new setting is available at the organization, project and event levels to Force Supplier Invitation by Commodity Code. When configured for the event, suppliers are added to the invited list based on the reporting, additional or item level commodity code(s).

For events where suppliers are invited based on commodity code, a new tab will display on the Suppliers page in Event Settings and Content. The Suppliers Invited by Commodity Code tab will show suppliers in the customer's network that have a commodity code associated with the supplier profile matching any of the event commodity codes. Buyers may add new contacts for the listed suppliers if appropriate.

**Supplier Response Information**

With the 15.1 release, customers will have additional information about the progress of supplier responses for a sourcing event.

- The Supplier Responses page will include an additional column displaying the completeness of a supplier's response. Once a supplier has viewed the event, the Response % Complete column shows a percentage of the required items completed by the supplier. The buyer can select the percentage value to see more information about what the supplier has or has not completed. Note that a percentage will not show for sealed events until the sealed bid open date.

- The Supplier Responses page will also include two separate columns for the total bid information if both required and optional items exist for the event. A Required Items Total Bid column will show the value of the supplier response for required items, while the Optional Items Total Bid column will display the value of the supplier response to optional items. If only required or optional items exist for the event, a single Total Bid column displays.

- Event history will show a Supplier History tab, logging the major milestones of the bid status, including Intent to Bid, Prerequisites accepted and Response Submitted. Buyers will have the ability to filter the history by date range and supplier. The supplier history results can be exported to CSV file. Event history will not display for sealed events until the sealed open date occurs.
Event Evaluation and Award Enhancements

Evaluations Updates

With the 15.1 release, several new options will be available on the side-by-side Evaluations page for use in evaluating supplier responses:

- **The sorting options** will be streamlined to select the sort choice and order (ascending or descending) separately.

- **Add notes to supplier responses in a scenario**: When creating scenarios on the side-by-side evaluation page, users will have the option to add notes to each of the supplier’s responses. These notes are on a per-scenario basis and will be available for review during the finalization process.

- **Add a response rank on scenarios**: This option will allow users on the side-by-side evaluation to give any response marked “Pending Award” a rank in the given scenario. This allows users to add a preferred supplier, which is especially helpful in situations where more than one supplier has been marked for awarding.

Panel Questionnaire Updates

Several enhancements will be made to panel questionnaires with the 15.1 release. The questionnaire may be configured so that suppliers are viewed individually instead of viewing multiple suppliers on the same page.

Also, a panelist may choose to export the questionnaire and responses for completion outside of the system, and import the file with responses back into the application. An event administrator may also choose to export the questionnaire for a panelist and import a completed file on the panelist’s behalf. A new section for Panel Exports and Imports will be available in the event navigation, where files associated with questionnaire exports and imports can be downloaded. Event administrators may also choose to assign panelists to specific groups of questions via a Panel Questionnaire Group Assignment.

Another new option will allow the user to enter the Weights using points instead of percentages. This will allow the user to distribute their total points available to pages, groups, or questions instead of using a percentage to determine the weight.

Additional Award Options

With the 15.1 release, customers will have additional flexibility during the award scenario process:

- **Split an award among multiple suppliers**: The configuration to allow split awards will be available at the project and event levels. For events that allow split awards, the side-by-side evaluation page will include the option to Split Between Suppliers under Actions for Selected Items. An overlay then allows the user to indicate the quantity of the selected item(s) to award to each supplier being evaluated.

- **Award a single item to multiple suppliers**: This option will be available on the side-by-side evaluation page for all events. Once an item has been awarded to a supplier and the item is selected to be awarded to a different supplier, the user will have the option of confirming the item award to an additional supplier or changing the award to the newly selected supplier. For events without items, the user will have the ability to award more than one supplier on the event.

General Sourcing Enhancements

Projects UI Enhancements

The Projects pages will be updated for enhanced usability. Previously, project settings were contained on a single page. With this release, the project information will be managed on three tabs:

- **About**: Includes the project Name, Code, Description and Project Administrators
• **Event Users** - The section where event users for the project are set, such as event creators, managers, stakeholders and library/template managers are managed.

• **Event Setup** - This tab contains all the basic configurations for events for the project.

### Sourcing Director Exports and Reports

With the 15.1 release, customers will have the ability to export from Sourcing Event document search results. A new Export Search button will display for event search results. When selected, the user may choose to export:

• **Summary** - A summary of information about the events in search result, including event title, type, dates, items, and other basic configuration settings.

• **Supplier Participation** - Information about the supplier responses for the events in search results, including basic event information, progress in responding to each event, and supplier contact information. Note that all events will not be included in this report; only those events to which suppliers have the ability to respond will be included. For example, draft events would not be included in this report, even if it was displayed in the event search results.

### Supplier Class - Exclude from Sourcing Events

With the 15.1 release, a new supplier class will be available for Exclude from Sourcing Events. When enabled for the organization, this class may be used to flag suppliers that a buyer may want to exclude from future sourcing events. Flagged suppliers will display an icon for easy identification.

The class is for informational purposes only. If a supplier with this classification is added to a sourcing event, new ADW workflow objects will be available to configure an approval step for any suppliers who should be excluded from inviting to the event or before an event is awarded.

### Sourcing Director and Contracts

#### Initiate a Contract Director Contract from a Sourcing Event

With the 15.1 release, significant process efficiencies will be realized through integrating Contract Director and Sourcing Director. Sourcing Director users with the appropriate permission will have the ability to initiate a contract from a sourcing event, and see the contract details from within the sourcing event as it moves through Contract Director workflow.

A new permission, **Initiate Contract Process**, will allow users to select to initiate a contract within the Contract Director application for one or more suppliers on an event. Once the event has reached either an Under Evaluation or Awarded status, and a finalized Award Scenario exists, users with the permission will see a link to Initiate Contract Process for each supplier awarded in the scenario. Upon selecting the link, the user can enter basic contract information, choose the type of contract to be created, and select the event items to be included in the contract. From within Sourcing Director, the user can see the status of the contract as it moves through the Contract Director workflow.