16.3 RELEASE NOTES

FOR ALL SELECTSITE PRODUCTS IN THE SOURCE-TO-SETTLE SUITE

OCTOBER 23, 2016 - INITIAL VERSION (Users)

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WELCOME

The **16.3 SciQuest Product Release** will be available in the production environment starting November 13, 2016. 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, Order Manager, Requisition Manager
  - Contract Lifecycle Management
  - Total Supplier Manager
  - Sourcing Director
  - Accounts Payable Products: Accounts Payable Director and AP Express
  - Supplies Manager
  - Data Manager/Spend Radar
  - Portfolio Savings Manager
- **Contract Director (SaaS Version)**: **Note**: Contract Director features are not included in this document. Information about Contract Director enhancements made between release 16.2 and release 16.3 can be found in the Maintenance Release Notes on the Product Release Library.
- **Advanced Sourcing Optimizer (ASO)**: **Note**: ASO features are not included in this document. Product Release Notes that are specific to ASO are available on the Product Release Library.

OBJECTIVES

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

- To provide a list of **key dates** associated with the upcoming release, including release availability in both the test and production environment.
- To provide an overview of **key features** that are planned and committed for delivery with the 16.3 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

THIS DOCUMENT WILL HELP YOU:

- Prepare for SciQuest products version 16.3 – available in your production environment on Sunday, November 13, 2016.
- Understand the impacts of new features on your end-users, approvers, administrators, and other individuals using the system.
- Understand any changes required on your part to enable a feature of the system.

- Provide a starting point of “where to go” to learn more about the features and functionality discussed in this document.

16.3 SCHEDULING

To help prepare our customers for the upcoming 16.3 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 16.3 Product Release*.

Event	Date and Time	Description and Details
Release Promotion: Test Sites Unavailable	Beginning October 21, 2016, 8am ET	The 16.3 release will be promoted to the Test (usertest) environment from Friday, October 21, 2016 8am ET through Sunday, October 23, 2016 12 pm ET. An email will be sent when the promotion is complete.
Release Validation in Test Environment	October 23, 2016 - November 10, 2016 (Three Weeks)	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, Online Searchable Help and Handbooks). **Recommendation**: It is recommended that clients perform testing of functionality critical to your business as soon as possible during this period - ideally during the first week. If any issues are encountered, this will allow time for application adjustments and re-testing.
Production Unavailable (Begin Release Upgrade)	Beginning November 11, 2016, 9pm ET through November 13, 2016, 12pm ET	The 16.3 release will be promoted to the Production environment from Friday, November 11, 2016 9pm ET through Sunday, November 13, 2016 12pm ET. An email will be sent out when the promotion is complete.
Release available on Production Sites	Sunday, November 13, 2016	This date indicates when the features and functionality associated with 16.3 will be available on customer Production sites. Final documentation provided at this time (Release Notes, Online Searchable Help and Handbooks).

* 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 16.3 release, various educational opportunities are provided by SciQuest. Each of these opportunities is detailed below.

Webinar Name	Date and Time	Description and Details
Preview Webinar (pre-recorded video)	Available September 26, 2016 on the Product Release Library	The pre-recorded video will present a preview of all features coming in release 16.3.
AP Director (pre-recorded video)	Available October 21, 2016 on the Product Release Library	This pre-recorded video will present details about AP Director features coming in release 16.3.
Contract Lifecycle Management (pre-recorded video)	Available October 21, 2016 on the Product Release Library	This pre-recorded video will present details about Contract Lifecycle Management features coming in release 16.3.
Sourcing Director(pre-recorded video)	Available October 21, 2016 on the Product Release Library	This pre-recorded video will present details about Sourcing Director features coming in release 16.3.
eProcurement (pre-recorded video)	Available October 21, 2016 on the Product Release Library	This pre-recorded video will present details about eProcurement features coming in release 16.3.

THE FEATURE SNAPSHOT FOR 16.3

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

SNAPSHOT KEY

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

- **Feature Name** –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 Users**– 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.
- **Integration Impact** - Indicates if the feature may have impact on integration between SelectSite and other third-party systems used by your organization. Examples would be changes to import or export files or features developed expressly for integration. We recommend that administrators review all of these features to determine if there is any integration impact.
- **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.
- **Requires 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** – Indicates that someone at SciQuest (Customer Support, Customer Success Manager, or Sales) must be involved in order to enable and 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 13, 2016.

Feature Name	Related Products	Impacted Users
Main Navigation Menu Item Updates	All	End Users, Admins
New Advanced Search Setting for Document Search and Contract Search	All	End Users, Admins
Navigation and Save Buttons Display without Scrolling	All	End Users, Admins
New Savings Initiative Home Page	Not Applicable	End Users, Admins
Static AP Dashboard Replaced with a Default Configurable Dashboard and Renamed to AP Home	Not Applicable	End Users, Admins
Static Sourcing Events Dashboard Replaced with a Default Configurable Dashboard and Renamed to Sourcing Event Home Page	Sourcing Director	End Users, Admins
Contract Dashboard Renamed to Contract Home	All CLM Products	End Users
Admin Dashboard Renamed to Admin Home	All	Admins
Usability Evaluation	All	End Users, Admins
Perfect Forward Secrecy Security Property	Not Applicable	End Users,

Feature Name	Related Products	Impacted Users
		Admins
Updated SciQuest Taxonomy	Not Applicable	Admins
Allow all Custom Field Value Approvers to View Documents in Document Search	Not Applicable	End Users, Admins
New Organization Dashboard Types Available	All	End Users, Admins
Ability to Auto Size Widgets on Configurable Dashboards	All	End Users, Admins
Ability to Restrict Dashboard Accessibility by Department	All	End Users, Admins
New Supplier Search Widget	All	End Users, Admins
Update to Approvals Widget	All	End Users
New Create Invoice Widget	Not Applicable	End Users, Admins
New Expiring Discounts Widget	Not Applicable	End Users, Admins
New Past Due Invoices Widget	Not Applicable	End Users, Admins
Update to the Invoice Summary Widget	Not Applicable	End Users
New Key Event Date Widgets	Sourcing Director	End Users, Admins

Feature Name	Related Products	Impacted Users
New Sourcing Event Summary Widget	Sourcing Director	End Users, Admins
All Form Attachments Included in Invoice Exports	Not Applicable	Admins, End Users
Updates to Invoice Shipping and Handling Allocations	Not Applicable	Admins, End Users
Ability to Automatically Reject Portal Invoices for Price and Tax Discrepancies	Not Applicable	Admins
Trustweaver Validation for Invoices	Not Applicable	Admins
ERP Budget Validation Workflow Step Available for Non-PO Invoices	Not Applicable	Admins
Update to Custom Field Configuration Based on Invoice Owner	Not Applicable	Admins, End Users
Contracts Menu Name Changes	Contract Compliance Tracker, Total Contract Manager	Admins, End Users
Contract Navigation and Save Buttons Display without Scrolling	Contract Compliance Tracker, Total Contract Manager	End Users
Updates to Contract Advanced Search	Contract Compliance Tracker, Total Contract Manager	Admins, End Users
Contract Users and Contacts Page Updated	Contract Compliance Tracker, Total Contract Manager	End Users
Ability to Add Default Account Codes to Contracts	Not Applicable	Admins, End Users

Feature Name	Related Products	Impacted Users
Contract Invoice Approvers	Not Applicable	Admins, End Users
Invoice Workflow Routing Based on Contracts or Contract Invoice Approvers	Not Applicable	Admins, End Users
Updates to Line Selection on Invoices and Line Items Associated with a Contract	Not Applicable	End Users
New Contract Setting to Allow Suppliers to Adjust Contract Non-Catalog Item Information on Portal Invoices and Credit Memos	Not Applicable	End Users
Supplier Ability to Generate Portal Invoice Based on a Contract, and Add and Modify Contract Line Items	Not Applicable	Admins, End Users
New Contract Validation Checks on Supplier Portal Invoices and Credit Memos	Not Applicable	Admins, End Users
Ability to Set Contract to Start When Executed	Total Contract Manager	Admins, End Users
New Visibility Settings for Contract Stakeholders	Total Contract Manager	Admins, End Users

Feature Name	Related Products	Impacted Users
Supplier Notifications for Public Q&A Board Responses	Sourcing Director	End Users

GENERAL ENHANCEMENTS

This section details general SelectSite enhancements that will be available in the 16.3 release.

Main Navigation Menu Item Updates

In release 16.3, updates have been made to the way the main menu items (located along the left side of the interface) are displayed. Previously, the menu options were displayed only as icons. As of the 16.3 release, the name of the menu option displays along with the icon for users with browser resolutions set to 1440 pixels or wider. The titles of several menu options have also be changed. These changes include the following:

- The **Orders & Documents** menu option has been renamed to **Documents**.
- The **Catalogs and Contracts** menu option has been renamed to **Contracts**.
- The **Supplier Management** menu option has been renamed to **Suppliers**.
- The **Site Administration** menu option has been renamed to **Administer**.
- The **Site Configuration** menu option has been renamed to **Setup**.

Important Note: Organizations can still rename main menu items in field management. If an organization previously made changes to any of the main menu options, those updates have not been overwritten by the updated menu option names

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** by default.
- New Permissions related to this Feature: None
- The main menu option text displays only when a user's browser resolution is set to 1440 pixels wide or higher. If the browser resolution is smaller that 1440 pixels, only the icon displays.
- The main menu item name changes are reflected in the text that displays with the icons on the left navigation menu. In addition, they are reflected anywhere the navigation path displays in the application, such as the top of each screen.
- Main menu options can still be renamed in field management. If an organization previously made changes to any of the main menu options, those updates have not been overwritten by the updated menu option names.
- There is an icon  on the bottom of the menu that allows users to hide the labels.

- Please note that product documentation provided by SciQuest has been updated to reflect changes to the main menu items.

New Advanced Search Setting for Document Search and Contract Search

Advanced search functionality allows you to search for items based on related users. For document search, this includes "participants" or anyone who touched a document and is in the audit trail for that document. For contract search, this includes specifying one or more contract managers. Previously, participants or contract managers had to be manually selected for the search. In 16.3, we have added a setting that will indicate that the items returned should be those for which the user searching is the participant (document search) or contract manager (contract search). The primary purpose of this feature update is to allow a search to be saved with this criteria. The saved search can be used on a dashboard in a saved search widget. When the saved search is run from the widget, the results always display documents or contracts related to the user who is searching from the dashboard.

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** by default.
- New Permissions related to this Feature: None
- The updated search option allows advanced document and contract searches to search for documents or contracts for the current user. The ability to pick users for both searches is still available.
- The **Participant** search field is available on advanced document search for requisitions, purchase orders, invoices, receipts, sales orders and sourcing events. In addition, the option is available when searching all documents. Previously, this was simply a text entry field in which the user names could be searched for or entered. In 16.3, there are three options to choose from.
  - **Any** - This option returns documents for all participants.
  - **Me** - This option returns documents on which the current user is a participant.
  - **Pick** - This option allows the user to select participants for the search. When this option is selected a field displays below in which the users can be searched for or entered.
- The Contract Manager search field is available in advanced contract search. Previously, this was simply a text entry field in which the user names could be searched for or entered. In 16.3, there are three options to choose from.
  - **Any** - This option returns contracts for all contract managers.

- **Me** - This option returns contracts for which the current user is a contract manager.
- **Pick** - This option allows the user to select contract managers for the search. When this option is selected a field displays below in which the users can be searched for or entered.

Navigation and Save Buttons Display without Scrolling

Several features in the application use wizard-like interfaces for setup and configuration. Some examples include form request template setup, submitting form requests, contract setup and more. Users can navigate through the wizard and save their progress using buttons on each configuration screen. Previously, if the configuration screen was longer than the available screen size, the user was required to scroll down to access the buttons. As of 16.3, the buttons display, or "stick" in the available screen space. This eliminates the need to scroll all the way down the screen to access the buttons.

IMPACT

- Products Affected: All SelectSite products that contain features configured in a wizard interface.
- 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
- This feature does not affect any functionality of the configuration wizards.
- Buttons display at the bottom of the active screen. If the buttons are displayed within a rectangular background this indicates that the page is scrollable. If the page is not scrollable, or if you have reached the end of the page, the buttons simply display on the screen in the same way they were previously displayed.

PRODUCT HOME PAGE UPDATES

The application contains various home pages that provide access to tasks for specific features or products. For example, organization administrators have access to an Admin home page, organizations who license Sourcing Director have access to a Sourcing Events home page, etc. In 16.3, we have made several updates and additions to the functionality of the product homepages.

New Savings Initiative Home Page

In 16.3, a new Savings Initiative Home page is available for Portfolio Savings Manager customers. The new Home page gives customers access to functionality and information related to their savings initiatives. By default, information displayed on the Home page includes:

- Savings by Fiscal Year Report
- Savings Summary Report
- Savings Initiative Search
- PSM-related Quick Links

Rather than a static page, the Savings Initiative Home page is a dashboard that can be updated to meet each customer's specifications. The default dashboard can be copied, new widgets added and republished by a dashboard administrator. Or, a new Savings Initiative dashboard can be created to replace the default Savings Initiative dashboard completely.

IMPACT

- Products Affected: Portfolio Savings Manager
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: None

KEY POINTS OF FEATURE

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None
- On the Savings Initiative Home page, a link will display to users with the *Manage Organization Dashboard* or *Portfolio Savings Configuration* permission. The link, **Configure this Dashboard**, allows the user to manage the dashboard being displayed on the Home page.
  - If the dashboard being displayed is the system default dashboard, clicking on this link will open an overlay for copying the dashboard. Once the copy is configured and made active, it will replace the system default dashboard on the Home page.
  - If the dashboard being displayed is not the system default, clicking on this link will open the dashboard for editing. Once changes are made and published the dashboard will be updated on the .Home page.
- On the **Manage Organization Dashboards** page, the system default page is indicated by System Default.
- When a new dashboard is created, it replaces the system default. If multiple dashboards are active and assigned the Savings Initiative dashboard type, users with access to more than one of the dashboards will be able to toggle between them. Users who do not have access to any of the replacement dashboards will see the system default.
- For additional information about managing dashboards, please see Creating and Managing Organization Dashboardsin the online searchable help or **Site Basics Handbook**.

Static AP Dashboard Replaced with a Default Configurable Dashboard and Renamed to AP Home

Using the AP Dashboard has been a quick and easy way to access functionality and information related to the AP Director and AP Express products. Previously, the AP Dashboard was a static page not easily configured for changes. In 16.3, we have replaced that page with a default Accounts Payable configurable dashboard. The benefit of this is that organizations are now able to make changes more easily using configurable dashboard functionality. The default dashboard can be copied, new widgets added and republished by a dashboard administrator. Or, a new AP dashboard can be created to replace the default AP dashboard completely.

The **AP Dashboard** has been renamed **AP Home** (**Accounts Payable > Invoices and Receipts > AP Home**).

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None
- The static AP Dashboard has been replaced by a system default configurable dashboard. The information available on the system dashboard is similar to the content available on the previous dashboard.
- The AP Dashboard has been renamed to **AP Home**. On the AP Home page, a link will display to users with the *Manage Organization Dashboard* or *AP Configuration* permission. The link, **Configure this Dashboard**, allows the user to manage the dashboard being displayed on the Home page.
  - If the dashboard being displayed is the system default dashboard, clicking on this link will open an overlay for copying the dashboard. Once the copy is configured and made active, it will replace the system default dashboard on the Home page.
  - If the dashboard being displayed is not the system default, clicking on this link will open the dashboard for editing. Once changes are made and published the dashboard will be updated on the .Home page.
- On the **Manage Organization Dashboards** page, the system default page is indicated by System Default.
- When a new dashboard is created, it replaces the system default. If multiple dashboards are active and assigned the AP dashboard type, users with access to more than one of the dashboards will be able to toggle between them. Users who do not have access to any of the replacement dashboards will see the system default.
- The organization message is now included on the AP system default dashboard by default.

- Because the org message is included by default, the **AP Dashboard** option has been removed from the **Show Message in the Following Locations** field on the **Organization Message and Site Logo** page.
- The organization message cannot be removed from the AP system default. However, a copy of the dashboard can be made and the message removed from the copy.

- For additional information about managing dashboards, please see Creating and Managing Organization Dashboardsin the online searchable help or **Site Basics Handbook**.

Static Sourcing Events Dashboard Replaced with a Default Configurable Dashboard and Renamed to Sourcing Event Home Page

Using the Sourcing Events Dashboard has been a quick and easy way to access functionality and information related to the Sourcing Director product. Previously, the Sourcing Event Dashboard was a static page not easily configured for changes. In 16.3, we have replaced that page with a default Sourcing Event configurable dashboard. The benefit of this is that organizations are now able to make changes more easily using configurable dashboard functionality. The default dashboard can be copied, new widgets added and republished by a dashboard administrator. Or, a new Sourcing Event dashboard can be created to replace the default Sourcing Event dashboard completely.

The **Sourcing Event Dashboard** has been renamed **Sourcing Event Home**(located in **Sourcing > Sourcing Events > Sourcing Events Home**).

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None
- The static Sourcing Event Dashboard has been replaced by a system default configurable dashboard. The information available on the system dashboard is similar to the content available on the previous dashboard.
- The Sourcing Events Dashboard has been renamed to **Sourcing Events Home**. On the Sourcing Events Home page, a link will display to users with the *Manage Organization Dashboard* or *Sourcing Configuration* permission. The link, **Configure this Dashboard**, allows the user to manage the dashboard being displayed on the Home page.

  - If the dashboard being displayed is the system default dashboard, clicking on this link will open an overlay for copying the dashboard. Once the copy is configured and made active, it will replace the system default dashboard on the Home page.
  - If the dashboard being displayed is not the system default, clicking on this link will open the dashboard for editing. Once changes are made and published the dashboard will be updated on the .Home page.
- On the **Manage Organization Dashboards** page, the system default page is indicated by System Default.
- When a new dashboard is created, it replaces the system default. If multiple dashboards are active and assigned the Sourcing Events dashboard type, users with access to more than one of the dashboards will be able to toggle between them. Users who do not have access to any of the replacement dashboards will see the sytem default.

Contract Dashboard Renamed to Contract Home

The Contract Dashboard has been a way to quickly and easily access functionality and information related to the Contract Lifecycle Management products. In 16.3, the Contract Dashboard has been renamed to **Contract Home**. The page is in the same location; **Contracts > Contract > Contract Home**.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default.
- New Permissions related to this Feature: None
- The page has been renamed to Contract Home. No functionality on the page has been changed.

Admin Dashboard Renamed to Admin Home

The Admin Dashboard has been a way to quickly and easily access tasks and information related to site administration. In 16.3, the Admin Dashboard has been renamed to **Admin Home**. The page is in the same location; **Administer > Administration > Admin Home**.

IMPACT

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

- Integration Impact: None

KEY POINTS OF FEATURE

- This feature is **ON** by default.
- New Permissions related to this Feature: None
- The page has been renamed to Admin Home. No functionality on the page has been changed.

Usability Evaluation

Because SciQuest is a software-as-a-service company, we are always measuring product usage to inform future improvements. Starting in 16.3, we are honing our focus on measuring usability. The approach is lightweight and unobtrusive. No more than once per month, a user may be invited to answer a few simple questions about a task they just completed. Participation is anonymous, fast, and optional. It takes less than 1 minute to complete, and when dismissed will not appear again for at least a month. We piloted the approach with several hundred end-users and received an impressive 60% response rate. The insights gleaned will improve SciQuest's product and future development. An example question is, "I find the checkout process easy to use," which a user might be asked immediately after checking out.

Perfect Forward Secrecy Security Property

Perfect Forward Secrecy (PFS) is a security property. PFS provides a session key derived of long-term public and private keys that make it very difficult to compromise, even if the (long-key) private key is compromised. PFS generates a unique session key for each session, so even if a session is comprised, then it is contained only to that session. We have added PFS in 16.3. **Note**: This security property has been implemented to ensure security with modern applications, including iOS.

EPROCUREMENT ENHANCEMENTS

This section details eProcurement enhancements that will be available in the 16.3 release.

Updated SciQuest Taxonomy

The SelectSite Taxonomy utilizes UNSPSC codes from a single reference version. Previously, the taxonomy used UNSPSC (UNDP) version 16.0901. From time to time, SciQuest synchronizes the taxonomy with the latest UNSPSC version. With the 16.3 release, the taxonomy is updated to synchronize with the latest UNSPSC (UNDP) version, 19.0501. This update includes category additions, deletions, and name changes.

While most of the changes are not anticipated to affect current hosted products, you may be affected by the update if your organization utilizes any of the following at a granular level:

- Category mapping
- UNSPSC codes (or UNSPSC codes set as your Commodity Codes) or Category names in workflow steps
- Category classes
- UNSPSC codes (or UNSPSC codes set as your Commodity Codes) or Category names in your internal/ERP processes

Further details are available in the Product Release Library.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default
- New Permissions related to this Feature: None
- With the 16.3 release, SelectSite will begin using UNSPSC (UNDP) version 19.0501. This upgrade includes:
    - Approximately **25,000 new categories**. About 85% of these new categories are for products such as food material, pharmaceuticals, services, etc. and are not expected to apply to many hosted catalog products. Suppliers will not necessarily have products in any of the new categories upon 16.3 go-live.

- Approximately **1,000 deleted categories**. Less than 0.2% of hosted products across all suppliers are affected by the deletions. About 65% resulted in moving the category under a different path, and not deleting it altogether.
- Approximately **1,100 name edits** to existing categories.

- This update is not expected to result in drastic impact for clients since organizations do not have products available in each of the Categories being affected by the update.
- Details are provided in the Product Release Library, including specific changes and an Excel-based tool to evaluate the impact on Category Mapping being used by your organization.
- You may need to contact SciQuest to make necessary adjustments in workflow if any of the deleted or changed codes were included in your workflow processes.

Allow all Custom Field Value Approvers to View Documents in Document Search

The custom field feature allows you to create fields specific to your organization. You are able to configure specific values for a custom field. For example, an organization may create an Account Code custom field and configure the codes as values. These values can be used as a workflow trigger for requisition, purchase order, fulfillment and invoice dynamic workflow. Within each workflow set up for a custom field value, you can configure ranges and assign specific users as approvers for that range. For example, you may set up ranges of $0-$100 and $100 and above for a specific account code and then assign users to each range. Previously, in document search, approvers only had visibility of documents that contain the value RANGE to which they are assigned. In 16.3, organizations have the option to make documents visible in document search for all approvers of a specific custom field value, regardless of range. A new (optional) organization setting is available to enable this capability.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **OFF** by default but can be enabled by an administrator.
- New Permissions related to this Feature: None
- A new organization setting is available. The Dynamic Workflow Custom Field Visibility setting is located in **Setup > Workflow Setup > General Workflow Settings > Workflow Options**.
- When this setting is enabled, applicable documents are visible in document search for all users who are assigned as approvers for a custom field values, regardless of range.

DASHBOARD ENHANCEMENTS

This section details enhancements to configurable dashboards that will be available in the 16.3 release.

New Organization Dashboard Types Available

The application contains various home pages that provide access to tasks for specific features or products. For example, organization administrators have access to an Admin home page, organizations who license Sourcing Director have access to a Sourcing Events home page, etc. In the past several releases, SciQuest has been adding the ability to replace these home pages with configurable dashboards, allowing organizations to provide information more specific to their needs. In 16.3, we have added new dashboard types for organization dashboards that can be used to replace home pages. These include:

- **Accounts Payable Home Page** - Dashboards configured as this type can replace the dashboard displayed on the AP Home page located in **Accounts Payable > Invoices and Receipts > AP Home**.
- **Admin Home Page** - Dashboards configured as this type can replace the Admin Dashboard located in **Administer > Administration > Admin Home**.
- **Sourcing Events Home Page** - Dashboards configured as this type can replace the dashboard displayed on the Sourcing Events Home page located in **Sourcing > Sourcing Events > Sourcing Events Home**.
- **Supplier Management Home Page** - Dashboards configured as this type can replace the dashboard on the Supplier Management Home page located in **Suppliers > Manage Suppliers > Supplier Management Home**.
- **Savings Initiative Home Page** - Dashboards configured as this type can replace the dashboard displayed on the Savings Initiative Home page located in **Portfolio Savings > Savings Initiative > Savings Initiative Home**.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default.
- New Permissions related to this Feature: None
- Organization dashboards are created by accessing **Administer > Administration > Manage Organization Dashboards**. When creating a new dashboard, the **Where should this dashboard be**

displayed? field must be configured. The new home page locations have been added as options for this field.

- When a specific home page is made active and assigned to a dashboard, one of the following will apply:
  - If the Home page is currently configured to display the system default dashboard, a new dashboard replaces the system default.
  - If the Home page is currently configured to display one or more dashboards other than the system default, users with access to multiple dashboards can toggle between them.
- For additional information about dashboard types, please see Creating and Managing Organization Dashboards in the online help or the **Site Basics Handbook**.

Ability to Auto Size Widgets on Configurable Dashboards

In 16.3, we have added a feature that allows organizations to configure specific widgets's heights to be auto-sized. Previously, there was no option to size the widget to the available content. Widgets had to be manually sized, which could often result in the user having to scroll (if there was too much content for the widget size) or seeing unnecessary white space (if there was too little content for the widget size). As of 16.3, an auto-size setting is available for several widgets. **Note**: This setting is optional. Upon go live widgets created prior to 16.3 do NOT have the setting enabled.

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** by default but requires setup.
- New Permissions related to this Feature: None
- The auto-size setting is available for several, but not all, of the available widgets. If a widget can be auto-sized, a configuration option is available when adding the widget to a dashboard.
- When the auto-size setting is enabled for a widget, the width of the widget can still be manually expanded but not the height.
- For additional information about creating and managing widgets, please see Configuring and Using Dashboard Widgets in the online searchable help or the **Site Basics Handbook**.

Ability to Restrict Dashboard Accessibility by Department

In 16.3, we have added the ability to restrict organization dashboard accessibility based on a user's department. When a specific department or departments are assigned to a dashboard, only department users are able to access it.

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** by default but requires setup.
- New Permissions related to this Feature: None
- A new **Departments** configuration setting is available when creating a dashboard.
  - **All** - Select this option to allow users from all departments to access the dashboard.
  - **Select Departments** - Select this option to choose one or more departments who will have access to the dashboard. When option is selected the **Departments with access to this dashboard** field displays. Search for and select the appropriate department(s).
- If multiple departments are selected, users from any of the departments have access to the dashboard.
- A column has been added on the **Manage Organization Dashboards** page that displays the Department restrictions.
- For additional information about using this feature, please see Creating and Managing Organization Dashboards in the online help or **Site Basics Handbook**.

GENERAL WIDGET UPDATES

There are widget updates and additions that are applicable to most organizations regardless of licensed products.

New Supplier Search Widget

In 16.3, the **Supplier Search** widget is available for configurable dashboards. This widget allows users to perform a **simple** supplier search directly from the dashboard. A link to access the Advanced Supplier Search is also available. The Supplier Search widget is available for both organization and personal dashboards.

IMPACT

- Products Affected: Spend Director, Total Supplier Manager, Sourcing Director, Accounts Payable Director, or Contract Manager Repository
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

KEY POINTS OF FEATURE

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None
- One of the following permissions is required: *Approve All Supplier Price Files*, *Approve Assigned Supplier Price Files*, *Supplier Profile View Only*, *Manage Supplier Profiles*.
  - Users who do not have at least one of the above permissions can not add the widget to a personal dashboard. In addition, they will not be able to view the widget on an organization dashboard.
  - Dashboard administrators who do not have at least one of the above permissions can add the widget to an organization dashboard but cannot view/test the content.
- Adding the widget to a dashboard:
  - The widget can be added from the **All** or **Supplier Management** widget categories.
- Using the widget on a dashboard:
  - A simple search can be performed from the widget by entering search criteria in the text field and clicking the search icon.
  - Advanced supplier search can be accessed by clicking the **Advanced Search** link.
- Detailed instructions for configuring and using the Supplier Search widget can be found in Supplier Management Widgets in the online help or **Site Basics Handbook**.

Update to the Approvals Widget

The **My Approvals** widget displays pending approvals that are located in approval folders to which the user viewing the dashboard is assigned. In 16.3, the widget has been updated to allow users to group approvals by approval folder.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default.
- New Permissions related to this Feature: None
- A new **Group By Folder** field is available on the widget. Selecting *Yes* groups the approvals by folder. Selecting *No* means the approval will display in a list format.
- When grouped by folder, the following information is displayed for each folder:
  - **Folder** - The name of the approval folder. Clicking on the folder name opens the folder with all approvals displaying.
  - **Total** - The total number of approvals in the approval folder. Clicking on the total opens the folder with all approvals displaying.
  - **Assigned to Me** - The total number of approvals in the approval folder assigned to the user who is viewing the dashboard. Clicking on the number opens the approval folder with only those approvals displaying.
  - **Other** - The total number of approvals in the approval folder assigned to users other than the user who is viewing the dashboard. Clicking on the number opens the approval folder with only those approvals displaying.
  - **None** - The total number of approvals in the approval folder that are not assigned to any user. Clicking on the number opens the approval folder with only those approvals displaying.
- For additional information about this widget, please see General Widgets in the online help or **Site Basics Handbook**.

ACCOUNTS PAYABLE WIDGET UPDATES

There are widget updates and additions that are applicable to organizations that use the Accounts Payable products.

New Create Invoice Widget

In 16.3, a new **Create Invoice** widget is available for configurable dashboards. This widget allows users with appropriate permissions to create invoices, credit memos, quantity receipts and cost receipts directly from a dashboard. Invoices, credit memos and receipts can be created against purchase orders. In addition, non-po invoices and credit memos can be created from the widget. This feature allows users to create invoices directly from a dashboard or the AP Home page without having to navigate to a separate area of the application.

IMPACT

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

KEY POINTS OF THE FEATURE

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None
- One of the following AP permissions is necessary to perform each function from the widget. **Note**: AP permissions are located in **Permission Settings > Accounts Payable**.
  - **Create PO Invoice/Credit Memo** - to create POs or credit memos from a PO.
  - **Create Non-PO Invoice/Credit Memo** - to create non-PO invoices or credit memos.
  - **Create Receipt** - to create quantity or cost receipts.
  - Users who do not have any of the above permissions cannot add the widget to a personal dashboard. In addition, they are not able to view the widget on an organization dashboard. Users who have one or two of the permissions are able to view the widget on an organization dashboard and add it to a personal dashboard. However, they are only able to perform the functions for which they have permission.
  - Dashboard administrators who do not have any of the above permissions can add the widget to an organization dashboard but cannot view test the content. If they have one or two of the permissions, they are able to view the content for which they have permission.
- The **Create Invoices** widget is included by default on the AP Home page. It can be added to both organization and personal dashboards.
- Adding a widget to the dashboard:
  - The widget can be selected from the **All** or **AP** widget categories.
  - The widget can be auto-sized.
- Using the widget on the dashboard:
  - Invoices, credit memos, quantity receipts and cost receipts can be created against purchase orders. Non-PO invoices and credit memos can also be created.
  - **Type Field** - Users select an option in this field to indicate the type of document to be created.
  - **From Field** - Users select an option in this field to indicate if the document will be created from a PO or be a non-PO document. **Note**: If cost receipt or quantity receipt were selected in the Type field, only the PO option is available.
  - **PO Numbers Field** - Users enter the PO number or numbers from which to create the document. A document can be created from multiple POs but each PO must be for the same supplier.
  - **Supplier Name Field** - This field displays only if **Non PO** is selected in the From field. Users can search for and select the supplier against which to create the non-po document.
- Detailed instructions for configuring and using the Create Invoice widget can be found in Accounts Payable Widgets in the online help or **Site Basics Handbook**.

New Expiring Discounts Widget

In 16.3, a new **Expiring Discounts** widget is available for configurable dashboards. This widget displays a list of invoices that have discounts expiring within a specified time-frame (1 - 10 days). Users can view the invoices and expire date and access the invoice directly from the dashboard.

IMPACT

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

KEY POINTS OF THE FEATURE

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None
- The **Expiring Discounts** widget is included by default on the AP Home page. It can be included on both organization and personal dashboards.
- All of the following AP permissions are required in order to view/use the widget: *View My Invoices*, *View Organization Invoices*, *Approve/Reject Invoices*.
  - Users who do not have all of the above permissions cannot add the widget to a personal dashboard. In addition, they are not able to view the widget on an organization dashboard.
  - Dashboard administrators who do not have at least one of the above permissions can add the widget to an organization dashboard but cannot view/test the content.
- Adding the widget to a dashboard:
  - The widget can be selected from the **All** or **AP** widget categories.
  - A default time-frame for the widget can be selected in the **Discounts Expiring in the Next** field.
  - The widget can be auto-sized.
- Using the widget on a dashboard:
  - A default time-frame is set when the widget is added to a dashboard. Users can change the timeframe in the **Discounts Expiring in the Next** field. The widget displays the changed view the next time the user accesses the dashboard.
  - Invoice Number, Supplier Invoice Number, Supplier Name, Discount Date and Discount Amount are displayed for each invoice in the list.
  - Discount Date indicates the expiration date for the discount.
  - Invoice Number is a link that opens the invoice.
- Detailed instructions for configuring and using the Expiring Discounts widget can be found in Accounts Payable Widgets in the online help or **Site Basics Handbook**.

New Past Due Invoices Widget

In 16.3, a new **Past Due Invoices** widget is available for configurable dashboards. This widget allows users to view a list of invoices that are either past or coming due. The list can be viewed by *Past Due*, *Due Today* or *Due this Week*.

IMPACT

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

KEY POINTS OF THE FEATURE

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None
- The AP permission **Approve Invoices** is required. **Note**: The permission is located in **Permission Settings > Accounts Payable**.
  - Users who do not have the permission cannot add the widget to a personal dashboard. In addition, they are not able to view the widget on an organization dashboard.
  - Dashboard administrators who do not have the permission can add the widget to an organization dashboard but cannot view/test the content.
- The **Past Due Invoices** widget is included by default on the AP Home page. It can be added to both organization and personal dashboards.
- Adding the widget to a dashboard:
  - The widget can be selected from the **All** and **AP** widget categories.
  - The widget can be auto-sized.
  - Select a default view (Past Due, Due Today or Due this Week) for the widget in the **Show Invoices** field.
- Using the widget on a dashboard:
  - A default view is set when the widget is added to a dashboard. A user is able to change this view by selecting a value in the **Show Invoices** field. The widget displays the changed view the next time the user accesses the dashboard.
  - Invoice Number, Supplier Invoice Number, Supplier Name, Due Date and Total is displayed for each invoice in the list.
  - Invoice Number is a link that opens the invoice.
- Detailed instructions for configuring and using the Past Due Invoices widget can be found in Accounts Payable Widgets in the online help or **Site Basics Handbook**.

Update to the Invoice Summary Widget

The Invoice Summary widget displays a user's invoices from the last 90 days in a graph or a list view. In 16.3, the list view has been updated to include a **Supplier Invoice Number** column.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default.
- New Permissions related to this Feature: None
- A new **Supplier Invoice No.** column is available in the list view. If there is no associated supplier invoice number for an invoice in the list, the column is blank.
- For additional information about this widget, please see Accounts Payable Widgets in the online help or **Site Basics Handbook**.

SOURCING WIDGET UPDATES

As of 16.3, new widgets are available for customers that license Sourcing Director.

New Key Event Dates Widget

In 16.3, a new **Key Event Dates** widget is available for configurable dashboards. This widget provides a list of Sourcing Events (i.e. upcoming release, open dates, and close dates) and the status of those events (i.e. Approved, Open, Pending Review, Released, etc.). The widget displays the sourcing event's current state as well as the owners of the event. The widget also shows the next action step of the event (if applicable).

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None

- One of the following Sourcing permissions are required; *Create/Own Events*, *Manage Project Events*, *View Events*, *Archive Events*, *View Events*, *Archive Events*, *Approve/Reject Sourcing Events*, *Finalize Award Scenario*. **Note**: Sourcing permissions are located in **Permission Settings> Sourcing**.
  - Users who do not have at least one of the above permissions cannot add the widget to a personal dashboard. In addition, they are not able to view the widget on an organization dashboard.
  - Dashboard administrators who do not have at least one of the above permissions can add the widget to an organization dashboard but cannot view/test the content.
- The **Key Event Dates** widget is included by default on the Sourcing Events Home page. It can be included on both organization and personal dashboards.
- Adding the widget to a dashboard:
  - The widget can be selected from the **All** or **Sourcing** widget categories.
  - A default date range for the event dates is set by choosing an option in the **Date Range** field (*Previous 7 Days* or *Next 7 Days*).
  - In the **Include Draft and Pending Events** field, select *Yes* to include events with those statuses in the list. Selecting *No* means they will not be included.
  - The **Show Filters** field indicates if the **Date Range** and **Include Draft and Pending Events** fields display to dashboard users allowing them to change the view. Click **Yes** to show the filters or **No** to hide the filters.
  - The widget can be auto-sized.
- Using the widget on a dashboard:
  - A default date range for the widget is determined when the widget is added to the dashboard. If the widget is configured to show filters, a user is able to change this in the **Date Range** field. The widget displays the changed view the next time the user accesses the dashboard.
  - When the widget is added to the dashboard, it is cetermined if it will include Draft and Pending events by default. If the widget is configured to show filters, a user is able to change this in the **Include Draft and Pending Events** field. The widget displays the changed view the next time the user accesses the dashboard.
  - *Current Status*, *Next Key Event*, *Scheduled On*, *Event Number*, *Type*, *Title* and Owners are displayed for each event in the list.
  - The *Owners* column includes the name of the sourcing event owner. If there are multiple owners, a link may display in the column that notes the number of owners. Clicking on the link activates an overlay that displays all of the owners.
  - *Event Number* is a clickable link. Clicking the link opens the event.
- Detailed instructions for configuring and using the Key Event Dates widget can be found in <u>Sourcing Event Widgets</u> in the online help or **Site Basics Handbook**.

New Sourcing Event Summary Widget

In 16.3, a new **Sourcing Event Summary** widget is available for configurable dashboards. This widget provides a graphic summary of all sourcing events. There are several options for viewing the summary including:

- **Event Owner** - This view summarizes events by the users who are event owners.

- **Event Type** - This view summarizes events by the type; *Request for Proposal*, *Request for Quote*, *Request for Information*, etc.
- **Project** - This view summarizes events by sourcing project.
- **Status** - This view summarizes events by status; *Draft*, *Pending*, *Approved*, *Released*, *Open*, etc.
- **Supplier** - This view summarizes events by supplier..

The information in the widget is displayed as a bar graph. Clicking on a bar executes a search for the sourcing events in that category.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default but requires setup.
- New Permissions related to this Feature: None
- One of the following Sourcing permissions is required; *Create/Own Events*, *Manage Project Events*, *View Events*, *Archive Events*, *View Events*, *Archive Events, Approve/Reject Sourcing Events*, *Finalize Award Scenario*, *Create Events with Templates/Own Events*. **Note**: Sourcing permissions are located in **Permission Settings > Sourcing**.
  - Users who do not have at least one of the above permissions can not add the widget to a personal dashboard. In addition, they are not able to view the widget on an organization dashboard.
  - Dashboard administrators who do not have at least one of the above permissions can add the widget to an organization dashboard but cannot view/test the content.
- The widget is included on the **Sourcing Event Home** page by default. It can be added to both organization and personal dashboards.
- Adding the widget to the dashboard:
  - The widget can be selected from the **All** and **Sourcing** widget categories.
  - Select a default view (Event Owner, Event Type, etc.) for the widget by choosing an option in the **View Sourcing Events By** field.
  - Select the sourcing events that are summarized on the widget by default from the **Sourcing Events** field. *All Events* summarizes all of the organization sourcing events. *My Events* summarizes only the sourcing events for the user who is viewing the dashboard.
  - The **Show Filters** field indicates if the **View Sourcing Events By** and **Sourcing Events** fields display to dashboard users allowing them to change the view and sourcing events. Click **Yes** to show the filters or **No** to hide the filters.
- Using the widget on the dashboard:

- A default view (Event Owner, Event Type, etc.) is determined when the widget is added to the dashboard. If the widget is configured to show filters, a user is able to change this view in the **View Sourcing Events By** field. The widget displays the changed view the next time the user accesses the dashboard.
- A default value is for the sourcing events summarized on the widget (all events or my events) is set when the widget is added to the dashboard. If the widget is configured to show filters, a user is able to change this view in the **Sourcing Events** field on the widget. The widget displays the changed view the next time the user accesses the dashboard.
- The user can click on a bar in the graph to execute a search of all sourcing events summarized in that category. The user will be taken to a search results page.

- Detailed instructions for configuring and using the Sourcing Event Summary widget can be found in Sourcing Event Widgets in the online help or **Site Basics Handbook**.

ACCOUNTS PAYABLE ENHANCEMENTS

This section details enhancements that will be available in 16.3 related to the SelectSite Accounts Payable products.

Please note that several features that impact invoices also relate to CLM and Supplier Network features.

- Contract Invoice Approvers
- Invoice Workflow Routing Based on Contracts or Contract Invoice Approvers
- Supplier Ability to Generate Portal Invoice Based on a Contract, and Add and Modify Contract Line Items
- New Contract Validation Checks for Supplier Portal Sales Invoices and Credit Memos
- New Contract Setting to Allow Suppliers to Adjust Contract Non-Catalog Item Information on Portal Invoices and Credit Memos
- Ability to Add Default Account Codes to Contracts

Also, several new widgets are available to customize organization and personal dashboards. See the Dashboard Enhancements section for additional information.

All Form Attachments Included in Invoice Exports

Previously, if a Form Request was attached to an invoice, the invoice XML export message included the Form Request attachment information in the message. The Invoice XML Export did not include Form (legacy forms) attachments associated with the requisition. With the 16.3 release, all forms and form request attachments are included in the associated invoice xml export message. **Note**: The organization must have "include attachments in exports" setting turned on under connection management.

IMPACT

- Products Affected: Spend Director, Accounts Payable Director, AP Express
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Medium

KEY POINTS OF FEATURE

- This feature is **ON** by default
- New Permissions related to this Feature: None
- With the 16.3 release, all form attachments are now included in the Invoice XML Export.
    - Form Requests refers to the updated process for creating forms.
    - Forms refers to the legacy method for creating forms.

- The customer does not need to make any changes for the attachments to forms to be included if the organization is already configured to include attachments in invoice exports.
    - The organization setting for invoice export connections is located at: **Setup > document export > connection mgt** for connections that support invoices. Contact SciQuest if you have questions about your organization's invoice export settings.

Updates to Invoice Shipping and Handling Allocations

If your organization utilizes OneSource for tax integration from AP Director, the discount, shipping and handling charges on an invoice previously displayed at the header level and were not equally reflected at the line level. The appropriate values were sent to the tax engine service, leading to confusion when the invoice displayed in the UI, because the charges displayed in the organization's ERP sometimes did not match the information sent to OneSource for tax calculation purposes. Also, the settings to control how discounts, shipping, and handling charges are allocated to taxable or non-taxable items were configured by SciQuest only and could not be seen by customers.

With the 16.3 release, the settings to allocate discount, shipping and handling charges are available to all AP Director and AP Express customers, and are now located on the Buyer Invoice and Credit Memo document configurations. The settings can be enabled or disabled by an organization administrator. The selection for these options has not changed from what the organization had configured prior to the upgrade; only the area of the application in which they are configured has changed. Also with the 16.3 release, the line level tax, discount, shipping and handling charges are reflected in the UI at the line level as appropriate. Invoice exports and invoice images now correctly reflect the allocation of header amounts. In addition, when no line items are marked 'Taxable', new warning messages display that the header discount, header shipping, and header handling amounts are allocated across all the line items.

Note: While any customer with AP Director or Accounts Payable Express can enable or disable the tax calculation settings, only those customers with the OneSource integration will see the detailed calculations on the invoice.

IMPACT

- Products Affected: Accounts Payable Director, AP Express
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Medium

KEY POINTS OF FEATURE

- This feature is **ON** by default (however, the settings are **OFF** by default unless previously enabled by your organization)
- New Permissions related to this Feature: None
- The following settings are now available to all Accounts Payable Customers and are located on the Buyer Invoice and Credit Memo Document configuration pages: >**Setup > Configure Documents >**

Configure Buyer Invoice Document and are on the **General** tab of both the **Buyer Invoice** and **Buyer Credit Memo** configurations.

- Allocate Discount to Taxable Items Only
- Allocate Shipping to Taxable Items Only
- Allocate Handling to Taxable Items Only

- With the 16.3 release, the current settings will be migrated to the organization's current buyer invoice and credit memo document configurations. For future changes, an administrator can update the document configuration to enable or disable any of the settings related to discounts, shipping and handling for taxable items.
- The functionality for the configurations has not changed. See Allocate Shipping and Handling Charges to Taxable Items and Allocate Discounts to Taxable Items in the online searchable help or Accounts Payable Handbook for more information.
- If none of the line items on an invoice has "Taxable" checked:
    - The Header Discount, Shipping, and Handling will allocate across all line items according to the invoice UI's 'Allocation' drop-down value, and
    - Warning messages will display if any of the "Allocate to Taxable Items Only" settings were enabled in the document configuration.

Ability to Automatically Reject Portal Invoices with Price/Tax Discrepancies

Organizations may receive some invoices from a supplier via the supplier portal. When these invoices are sent to the customer, they enter the workflow process defined by the customer organization. However, some organizations may want to prevent an invoice from being sent to the organization if certain conditions are not met related to pricing or taxes.

With the 16.3 release, new organization and supplier-level configurations are available to validate prices and taxes on a supplier portal sales invoice before the supplier can send the invoice to the organization from the portal. This validation also applies to supplier invoices sent via cXML and bulk import invoices from the supplier.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **OFF** by default but can be enabled by an organization administrator
- New Permissions related to this Feature: None

- A new organization level setting is located at **Accounts Payable > AP Administration > Configure AP Settings** in the **Supplier Configurations** section: **Enable Validation of Price and Taxes in Sales Invoice**. If enabled, supplier invoices (cXML and via supplier portal) must have unit prices and tax amount that are equal to or less than the associated purchase order unit price and tax amounts in order to be sent to the customer.
    - The setting is disabled by default.
    - If enabled, all supplier invoices sent cXML or via the supplier portal will be validated for price and tax line amounts, unless explicitly disabled for a supplier.
    - If disabled, no supplier invoices sent cXML or via the supplier will be validated for price and tax line amounts, unless explicitly enabled for a specific supplier.
- The new supplier level setting is available in the supplier profile under **About > System Settings** in the **AP Configuration** section. The supplier setting inherits the organization setting by default, but can be overridden for the specific supplier.
- A user must have the **AP Configuration** (Permission Settings > Accounts Payable > Accounts Payable) or **System Configuration** (Permission Settings > Administration > System Administration) permission to affect the organization setting. A user must have the **Manage Supplier Profile** (Permission Settings > Administration > Supplier Profile Administration) permission to affect the supplier setting.
- When the setting is enabled at the supplier level, sales invoice and credit memo line-level validations will be performed against the associated PO unit price and tax for each line.
    - When creating an invoice from a purchase order in the supplier network or customer branded portal: If the supplier enters a unit price and/or tax for a line greater than the associate purchase order amount for the line, the supplier will see an error message displayed for the line, and will not have the ability to send the invoice to the customer from the portal.
    - When generating a cXML invoice message to send to the customer: If the unit price or tax for a line is greater than the associated purchase order amount of the line, the cXML invoice is rejected and will not be imported into the customer organization. The supplier has the ability to view failed cXML invoice imports via the supplier network portal.

Trustweaver Validation for Invoices

Trustweaver allows companies to validate their electronic invoices against a government transaction registry and registers the buyer transaction with government authorities to increase invoice compliance. With the 16.3 release, a new license is available to enable Trustweaver validation for invoices. This feature can be used with suppliers who provide cXML invoices to your organization. SciQuest will act as a hub to receive the signed invoice document from the supplier, and then send the invoice to Trustweaver, who validates the supplier signature. **Note**: The initial version will be available in the U.S., Canada, and European Union.

IMPACT

- Products Affected: Accounts Payable Director, AP Express
- End User Impact: None
- Admin User Impact: Low

- Integration Impact: **High**

KEY POINTS OF FEATURE

- This feature is **OFF** by default and must be enabled by SciQuest
- New Permissions related to this Feature: None
- A new license is available to enable Trustweaver validation for cXML invoices received from suppliers. Contact SciQuest to enable the license and update the invoice workflow process.
- Any cXML-enabled supplier invoice can be validated using Trustweaver if the supplier includes the required extrinsic data (signature information) used in the validation process. The country code on the supplier invoice will be matched to the country on the purchase order.
- When the Trustweaver validation step is configured and a supplier sends the appropriate information in a cXML invoice:
  - The supplier invoice message is validated for the appropriate signature information including a base-64 encoded invoice, the invoice format, the signature format, and the buyer and supplier country codes.
  - If the signature information is not valid or does not match what is in the signed document provided by the supplier, the invoice will fail Trustweaver validation.
  - The history on the invoice document will indicate Trustweaver validation was performed and if there were any errors returned by Trustweaver.
- Once the invoice is validated, the invoice information is sent to Trustweaver and archived for future auditing needs.
  - Organizations will be provided login information for Trustweaver archiving in order to view validated supplier cXML invoices.

ERP Budget Validation Workflow Step Available for Non-PO Invoices

Organizations with external ERP systems used for budgeting can validate a purchase requisition from SelectSite against the ERP information through a PR Validation step in workflow. Invoices generated from the validated purchase orders do not need an additional ERP check. However, if a non-PO invoice is required, there was previously no external validation against an ERP system for invoice workflow. With the 16.3 release, a new invoice workflow step and integration is available to validate a non-PO invoice against an external ERP system (not Banner specific). The workflow step can allow for automatic approval, return, or rejection of the invoice at the header or line level. Notifications can be sent to the invoice owner upon returns or rejections. A new invoice export DTD (1.14) version is required.

IMPACT

- Products Affected: Accounts Payable Director, AP Express
- End User Impact: None
- Admin User Impact: Low

- Integration Impact: Medium

KEY POINTS OF FEATURE

- This feature is **OFF** by default and must be enabled by SciQuest
- New Permissions related to this Feature: None
- A new invoice workflow step and integration is available to validate a non-PO invoice against an external ERP system (not Banner specific.)
- When the non-PO invoice is submitted, the new workflow step will automatically approve, return, or reject the invoice:
  - The non-PO invoice request is sent to the organization's ERP system to verify funds.
  - If no lines on the invoice can be validated for available funds, the invoice will reject at the header level.
  - When one or more lines (but not all lines) get rejected, the invoice is returned at the header level.
- A user can choose to enable email and in-app notifications for invoice returns and rejections.
- You must contact SciQuest to include the new workflow step in your organization's invoice workflow process, and to enable New Invoice Export DTD Version 1.14.

Update to Custom Field Configuration Based on Invoice Owners

With the 16.2 release, functionality was introduced to allow updates to Invoice Owners on an invoice. Part of this feature allowed for custom fields to be configured so that the values would update when the invoice owner changed. With the 16.3 release, organizations with Contract Compliance Tracker or Total Contract Manager can add default account codes to a contract. Because of this feature and the other organization configurations available to set account codes on non-PO invoices, this configuration is no longer needed. Accounting codes are updated on non-PO invoices if the invoice owner changes and the associated account codes are different from the previous settings.

IMPACT

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

KEY POINTS OF FEATURE

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

- The configuration **Do not update based on Invoice Owner** was previously available when configuring custom fields. The setting was available at **Setup > Configure Documents > Manage Custom Fields** for fields enabled for invoices. With the 16.3 release, the configuration is no longer needed. Custom fields are updated on non-PO invoices if the invoice owner changes and the associated account codes are different from the previous settings.
- See Ability to Add Default Account Codes to Contracts for more information on the new feature to set account codes on a contract that are copied to an associated invoice.

CONTRACT LIFECYCLE MANAGEMENT ENHANCEMENTS

This section details enhancements that will be available in 16.3 related to the CLM products Contract Compliance Tracker (CCT) and Total Contract Manager (TCM). Please note that changes made to Contract Compliance Tracker will also affect Total Contract Manager.

Note: Release 16.3 features General and Dashboard enhancements that may affect organizations using CLM. This includes the **Contracts Dashboard** page being renamed **Contracts Home**. Please see:

- General Enhancements
- Dashboard Enhancements

GENERAL CLM ENHANCEMENTS

In 16.3, the following enhancements will be available for all CLM products.

Contracts Menu Name Changes

As part of multiple menu name changes, the **Catalogs and Contracts** menu item will be renamed to **Contracts**. In addition, the **Contracts Dashboard** menu item will be renamed to **Contracts Home** to correspond with naming conventions in other areas of the system.

See Main Navigation Menu Item Updates and Home Page Name Changes for more information.

IMPACT

- Products Affected: Contract Manager Repository, Total Contract Manager.
- 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

Contract Navigation and Save Buttons Display without Scrolling

Contract pages will be updated so that the Previous, Next, and Save Progress buttons are always displayed at the bottom of the screen no matter where the user is on the page.

This update is part of a change that affects other areas of the application. See Navigation and Save Buttons Display without Scrolling for more information.

IMPACT

- Products Affected: Contract Manager Repository, Total Contract Manager.
- 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

Updates to Contract Advanced Search

A new option will be added to the Contract Manager search filter on Contract Advanced Search. If this option is selected, the search results will only display contracts that have the person who is currently logged into the application listed as a contract manager. This will also affect **Saved Search: Contracts** widgets added to contract dashboards - if the option is selected on the saved search used for the widget, the system will display contracts for whoever is logged into the system.

New search filters have also been added to the eProcurement section allowing users to search for contracts based on contract codes.

IMPACT

- Products Affected: Contract Compliance Tracker, Total Contract Manager
- 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.
- On the **Search Contracts - Advanced** page, new settings on **Contract Manager** search filter determine which contracts are displayed in the search results. Choose one of the following radio buttons:
  - **Any** - This is the default setting. Selecting this option does not filter for contract managers on the contract.
  - **Me** - Select to display only those contracts where **the person currently logged into the system** is a contract manager. This means contract managers will only see their own contracts in the search results.
  - **Pick...** - Select to display only those contracts that have the individuals selected in the Contract Manager search filter listed as contract manager. If this option is selected, an additional field is displayed where you can search for and select users by using the type ahead or clicking the search icon.

  If the **Me** setting on the Contract Manager filter is used in a saved search, and the saved search is added as a **Saved Search: Contracts** widget to a contracts dashboard, the results displayed in the widget will change based on who is logged into the system, so that a contract manager will only see their own contracts. For example, Contract Manager A will only see contracts that have Contract Manager A listed as a contract manager. Contract Manager B will only see contracts that have Contract Manager B listed as contract manager.

  Note: This option is also be available for Document Search. See New Advanced Search Setting for Document Search and Contract Search for more information.
- Contract (account) code search filters have been added to the **Search Contracts - Advanced** page in the **eProcurement** section, allowing users to search for contracts based on contract (account) codes. The contract (account) code search filters are the same fields that are displayed in the Code Defaults on Invoice section on the eProcurement Setup page and are unique for each organization. See Ability to Add Account Codes to Contracts.

Contract Users and Contacts Page Updated

The contract Users and Contacts page has been updated to include the new Contract Invoice Approvers feature and improve the user experience.

IMPACT

- Products Affected: Contract Manager Repository, Total Contract Manager.
- 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
- A new **Users from Project** section displays internal users who have access to a contract based on Project settings. Previously this list was under the Internal Users subheading.
    - The **Make Confidential** / **Make Not Confidential** button has moved from the top of the page and is now displayed to the right of the Users from Project subheading.
    - The number of users within the section are displayed in brackets after the subheading, for example **(Users from Project (6)** means six users have access to the contract based on project settings.
- The **Internal Users** subheading has been removed. Contract Managers, Invoice Approvers and Stakeholders are now listed under **Users and Contacts**.

Ability to Add Default Account Codes to Contracts

A new section on the contract **eProcurement Setup** page provides the ability to add default account codes to a contract. Account codes added to a contract are automatically applied to invoice line items associated with the contract, saving invoice managers the time required to search for and apply the correct account codes to individual line items on invoices. Users can use new advanced search filters to search for contracts based on contract account codes. Contract account codes can also be added or updated via CSV or XML imports and exports.

IMPACT

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director or AP Express.
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: Low

KEY POINTS OF FEATURE

- This feature is **On** by default but optional for use.
- New Permissions related to this Feature: None
- A new **Code Defaults on Invoice** section on the **eProcurement Setup** page is used to add default account codes to a contract. Account codes on a contract are automatically applied to invoice line items associated with a contract:
    - The section is displayed only after a supplier (CCT) or primary second party (TCM) is added to a contract.

  - **The fields displayed in the Code Defaults on Invoice section are unique to each organization.** They are based on account code custom fields from the organization's buyer invoice configuration document.

  - Default account codes on a contract are also referred to as contract codes.

  - Contract codes are included when copying a contract.

- **Setup**

  - Organizations must have account code custom fields set up on their active buyer invoice configuration. These fields are displayed as contract code fields on a contract and are unique for every organization. Restrictions placed on the account code custom fields in the buyer invoice configuration document will apply to the code fields on a contract.

  - **Important Note:** On organization custom fields (**Setup > Configure Documents > Manage Custom Fields**), the custom field definition setting **Do not update based on Invoice Owner** has been replaced with this feature. As of 16.3, account codes are updated on non-PO invoices if the invoice owner changes and the associated account codes are different from the previous setting.

- The following elements must be in place for CCT and TCM:

  CCT

  - Once a **supplier** is added to a contract, the **Code Defaults on Invoice** section is displayed on the **eProcurement Setup** page. Contract account codes are blank until populated.

  TCM

  - The contract type used by the contract must have eProcurement enabled (**Contract Administration > Contract Types > About** tab).

  - Once a **primary second party** is added to a contract, the **Code Defaults on Invoice** section is displayed on the **eProcurement Setup** page. Contract account codes are blank until populated.

- Clicking **Add** in the **Code Defaults on Invoice** section opens a window where codes are added to the contract. In this window users may select from organization values. They may also select from their code favorites. If they have permissions to custom fields, these permissions are set on the user's profile (My Profile > Permissions Settings > Custom Fields). User code favorites are displayed by default if the user has only one value.

- Each contract code field displays two options for adding or changing codes:

  - **Select from profile values...** - Allows users to select codes based on code favorites in their user profile.

  - **Select from all values...** - Users can select from organization values.

- **Split codes** - Funds can be distributed to multiple account codes by splitting codes. The **add split** link can be used to define how invoice line item totals are divided between multiple account codes. Funds can be distributed by **% of Qty** (percentage of quantity) or by **% of Price** (percentage of price). The split values must total 100%. Click **recalculate / validate values** to refresh the calculations or **remove** to delete a line.

- Stakeholders on the contract will see the codes as read-only.

- **Updates** - Once a code has been added to a contract, **Edit** and **Delete** hyperlinks can be used to modify the codes:
  - Codes can be edited until the contract is expired or completed.
  - Deleting the codes removes them from the contract, but it does not affect the account code group they were listed under.
- **Contract Advanced Search**
  - Contract (account) code search filters have been added to the **Search Contracts - Advanced** page in the **eProcurement** section, allowing users to search for contracts based on contract (account) codes. The contract (account) code search filters are the same fields that are displayed in the Code Defaults on Invoice section and are unique for each organization.
- **Contract Codes on Invoices**
  - On invoices created from a contract, codes from the contract are displayed on the invoice header and all line items.
  - Invoice line items manually added from a contract will display account codes from that contract.
  - If the contract does not have account codes, account codes on invoice line items are populated as per other organization rules.
- **Consortium Contracts**
  - Contract codes on consortium contracts are *not* shared between the parent organization and consortium members. A shared contract in a member organization will display contract codes as they correspond with the active buyer invoice document configuration of the member organization.
- **Contract Summary**
  - A new **Code Defaults on Invoice** field on the **Configure Contract Summary Screen** controls whether or not the **Code Defaults on Invoice** link is displayed in the Contract Summary as follows:
    - When **Admin/Manager** checkbox is selected, contract administrators and contract managers will see a **Code Defaults on Invoice** link on the Contract Summary overlay and on the Summary page of the contract. Clicking the link will open a window displaying the account codes on a contract.
    - When the **Full**, **Partial**, or **Limited** checkboxes are selected, the **Code Defaults on Invoice** link will show on the Contract Summary overlay and on the Summary page of a contract according to the visibility set on the contract being viewed.
    - The **Code Defaults on Invoice** link will not be displayed if the field is not selected for a particular visibility.

- **Contract Codes CSV or XML Import/Export**
  - Contract codes can be imported or updated through new import/export features:
    - The **Contract Codes CSV Import/Export** feature is available to organizations with either the Contract Compliance Tracker (CCT) or Total Contract Manager (TCM) licenses.
    - The **Contract Codes XML Import/Export** feature is available to organizations with the Total Contract Manager license only.
  - The new **Contract Codes CSV Import/Export** page contains links to a blank template to be used for imports and a guide with detailed instructions on the feature. Links to these documents can be found by navigating to **Contracts** **> View Import/Export Results**, clicking the **Import/Export Actions** button and selecting **Contract Codes Import Template** or **Detailed Contract Codes Import Instructions**.
  - **Important!** If an organization uses contract import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Contract Invoice Approvers

A new **Contract Invoice Approver** user type on contracts allows contract managers to define a set of users who are authorized to approve invoices and invoice line items assigned to a contract. This allows organizations to define invoice approvers for individual contracts rather than have one rule with approvers that applies to all contracts.

If there are invoice approvers on a contract, when invoices or invoice line items are assigned to that contract they can be routed to the invoice approval folder and approved by one of the invoice approvers named on the contract.

In addition, new ADW rules are available to base invoice workflow routing on contracts and contract invoice approvers. See Invoice Workflow Routing Based on Contracts or Contract Invoice Approvers.

IMPACT

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director or AP Express.
- End User Impact: Medium
- Admin User Impact: **High**
- Integration Impact: Low

KEY POINTS OF FEATURE

- This feature is **Off** by default but can be enabled by an organization administrator. **Note:** The use of this feature also requires workflow steps that are configured by your system administrator and SciQuest.
- New Permissions related to this Feature: None

- The feature can be enabled or disabled for an organization as follows:
  - Navigate to **Accounts Payable** > **AP Administration** > **Configure AP Settings** > **Accounts Payable Settings**.
  - Select the **Use Contract Invoice Approvers on Contracts** checkbox to enable the use of invoice approvers on contracts for an organization. This will cause the "**Invoice Approvers**" option to be displayed on the **Users and Contacts** page, where contract managers can select invoice approvers for a contract. The users selected will be able to approve invoices and invoice line items populated from the contract.
  - Clear the checkbox to disable the feature. If the setting is enabled and later disabled, contract invoice approvers will lose their access to the contract.
  - Workflow must also be configured to use this feature. See Invoice Workflow Routing Based on Contract Invoice Approvers.
- If the feature is enabled for an organization, a new **Invoice Approver** option is displayed on the contract **User and Contacts** page, where contract managers can add invoice approvers for the contract.
  - Contract invoice approvers must be internal users who have the appropriate invoice approval permissions, including the ability to search for invoice approvals and view invoices. Removing invoice approval permissions from a user's profile will also remove them from the contracts where they are listed as invoice approvers. History pages will reflect the change.
  - Multiple contract invoice approvers can be added to a contract. A maximum of 10 invoice approvers can be added at one time.
  - Contract invoice approvers have the same access to the contract as contract stakeholders.
  - Contract invoice approvers are included in copied contracts.
- **CSV and XML Import/Exports**
  - Contract invoice approvers on a contract can be updated through **CSV** or **XML Import/Export**. Contract invoice approvers will be displayed in the new **InvoiceApprovers** column on import/export files.
  - **Important!** If an organization uses contract import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Invoice Workflow Routing Based on Contracts or Contract Invoice Approvers

In connection with the new Contract Invoice Approver feature, a new workflow step routing method allows invoice workflow rules to route to contract invoice approvers on invoice lines assigned to contracts with those users defined.

With the new routing method we have also introduced two new ADW workflow rules to assist with validation of invoice lines that are associated with contracts:

- The first ADW rule will allow an organization to check if contracts have been assigned to the invoice.
- The second ADW rule will allow a user to determine if contract invoice approvers exist on invoice lines that are associated with contracts.

Both of these ADW rules can be used in combination with the new routing method to send the invoice to contract invoice approvers. See also Contract Invoice Approvers.

IMPACT

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director or AP Express.
- End User Impact: Low
- Admin User Impact: **High**
- Integration Impact: None

KEY POINTS OF FEATURE

- This feature is **Off** by default and must be enabled by SciQuest. Administrator setup is also required.
- New Permissions related to this Feature: None
- **Please contact SciQuest to modify your workflow to support the new routing method.** A workflow step will need to be configured by SciQuest to point to contract invoice approvers. Once this step has been created, any rules that point to this step will then route to contract invoice approvers for approval, instead of assigned approvers on the rule.
- The new ADW rule element **Has Contract** tells the system to check if invoices or invoice line items have been assigned to contracts:
    - The rule element can be added to an ADW workflow step by navigating to **Setup > Workflow Setup > Invoice Workflow Setup**. Click **Advanced Dynamic Workflow**, then **Rules Management**. In the **Document-Level Rules** section click **Add Rule** and add the **Has Contract** rule.

- The **Has Contract** rule provides the following routing options if there is a contract assigned to an invoice or invoice line item:
    - All Lines Have a Contract
    - Any Lines Have a Contract
    - Any Lines Do Not Have a Contract
    - No Lines Have a Contract

- The new ADW rule element **Contract Invoice Approvers** tells the system check if there are contract invoice approvers on a contract assigned to an invoice or invoice line item.
    - The rule element can be added to an ADW workflow step by navigating to **Setup > Workflow Setup > Invoice Workflow Setup**. Click **Advanced Dynamic Workflow**, then **Rules Management**. In the **Document-Level Rules** section click **Add Rule** and add the **Contract Invoice Approver** rule.
    - The **Contract Invoice Approver** rule provides the following routing options if there are invoice approvers on a contract:
        - All Contract Lines have a Contract Invoice Approver
        - Any Contract Lines Have a Contract Invoice Approver
        - Any Contract Lines Do Not Have a Contract Invoice Approver
        - No Contract Lines have a Contract Invoice Approvers

- Contract invoice approvers are listed on the contract, not the rule. All invoice approvers listed on the contract will have access to the invoice approval task in the shared Contract Invoice Approval folder. Navigate to **Documents > Approvals > My Approvals** and select **Contract** in the **Type** filter. Only one user needs to approve the invoice before the document will proceed through workflow.

- The Contract Invoice Approval folder has been updated to display the contract number.

Updates to Line Selection on Invoices and Line Items Associated with a Contract

Enhancements have been made to line item selection when creating an invoice from a contract or adding line items from contracts to improve the user experience. These changes affect both buyer-side invoices and supplier portal invoices.

IMPACT

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable, Accounts Payable Express
- 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
- The following changes have been to the **Line Items to Add** section that is displayed on the **Create Invoice** page (when creating an invoice from a contract) and the **Add Lines from Contract** overlay (when adding lines from a contract to an invoice). These changes are displayed on both buyer-side invoices and supplier portal invoices unless indicated otherwise:

  Under the **Line Items to Add** subheading:

  - The **Search Contract Non-Catalog Items** link has been changed to **Search Items on Contract**. Expanding the link displays the **Part No.** and **Description** fields where users can enter item information to search for. Partial searches are possible on the description but not on the part number. The link is not displayed if the contract does not contain non-catalog items.
  - The **Add Additional Lines to Invoice** link has been changed to **Add Items Not on Contract**.
  - The message containing line item information has been moved. The **Line Items to Add** subheading now indicates the number of line items that have been added in brackets, along with the maximum number of line items that can be added at one time, e.g., **Line Items to Add (3) - 5 Maximum**. The count increases as items are added.
  - Error and warning messages have been changed to make them more noticeable. They are now displayed just above the line items, and the color has been changed.
  - A new **Product Size** column has been added to the line item fields.
  - The **Catalog Number** field has been renamed to **Part No.** and has switched places with the **Description** column.
  - The **Price** field has been renamed to **Unit Price**. It is now required and cannot be blank. A $0.00 value can be entered.
  - Additional enhancements to the supplier portal invoice interface allow suppliers to enter taxes, discounts, shipping and handling charges, as well as substitute items.

New Contract Setting to Allow Suppliers to Adjust Contract Non-Catalog Item Prices on Portal Invoices and Credit Memos

In 16.3, a new contract setting allows organizations to determine at the contract level whether suppliers can adjust contract non-catalog item prices on portal invoices and credit memos. If the setting is enabled on a contract, suppliers can change a contract non-catalog item's price on portal invoices and credit memos if the contract non-catalog item has been added from that contract.

IMPACT

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director or AP Express.
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: Low

KEY POINTS OF FEATURE

- This feature is **On** by default.
- New Permissions related to this Feature: None
- A new **Allow Portal Invoice Enabled Suppliers to Edit Contract Item Price** radio button has been added to the **eProcurement Setup** page. The setting controls whether suppliers are allowed to change a contract non-catalog item's price when creating a portal invoice or credit memo from a contract, or adding non-catalog line items from a contract.
  - If **Yes** is selected, suppliers can edit prices on contract non-catalog line items on portal invoices and credit memos. Yes is the default setting and reflects current functionality.

    Important Note: This setting applies to price only. Part No., Description, Product Size, Packaging and Extended Price fields cannot be edited by a supplier even if the setting is enabled.

  - If **No** is selected, suppliers cannot edit the price on contract non-catalog line items on portal invoices and credit memos. A message will indicate to the supplier that they cannot edit this information.
- The ability to edit **Package** and **Product Size** fields for contract non-catalog items on portal invoices and credit memos has been removed.
- The setting does not apply to non-catalog items added to an invoice that are not applied from a contract.
- **CSV and XML Import/Exports**
  - A new **AllowSupplierEditItems** column has been added to CSV and XML import/export files and allows the setting to be updated via import.
  - **Important!** If an organization uses contract import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

Supplier Ability to Generate Portal Invoice Based on a Contract, and Add and Modify Contract Line Items

The process of managing contract information on supplier portal invoices and credit memos has been updated to match enhancements made to buyer-side invoices in 16.2 and simplify the steps needed to associate contract information with supplier portal invoices and credit memos.

In 16.3, portal invoicing-enabled suppliers who can create non-PO invoices now have the ability to **create a portal invoice or credit memo based on a contract**. In addition, the process of **adding** or **updating** contract line items on a supplier portal invoice or credit memo will be updated to match the process used for buyer-side invoices. This includes draft invoices in the Network Portal as well as the Customer Branded Portal. When creating a portal invoice or credit memo from a contract, the supplier has the ability to:

- Add items to the invoice from a contract.
- Add non-catalog items to the invoice "on the fly," allowing users to add non-catalog items that are not on the contract to the invoice.
- Include tax, shipping, and handling information for contract line items.
- Make item substitutions on contract line items. **Note:** Your organization must be configured to allow suppliers to substitute items.

See also New Contract Setting to Allow Suppliers to Adjust Contract Non-Catalog Item Information on Portal Invoices and Credit Memos and New Contract Validation Checks on Supplier Portal Invoices and Credit Memos for additional changes that affect this feature.

IMPACT

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director or AP Express.
- 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
- The configuration to **Allow Non-PO Invoices** must be enabled on the supplier profile (Supplier Profile > eProcurement > Integration Settings > Allow Non-PO invoices).
- Contracts must meet the following requirements:
  - Supplier invoices or credit memos can be created from the original contract, renewals, or amendments (amendments apply to organizations with TCM only).
  - The contract must have a **supplier** or **second party** that is **active for shopping**.
  - The invoice date must fall within the start and end dates on the contract. If there is no invoice date, the current date (i.e., today's date) is used.
  - For organizations with TCM, the contract must be in one of the following statuses: ***Executed: In Effect***, ***Superseded***, ***Complete***, ***Expired***. Supplier invoices and credit memos cannot be created from contracts in the following statuses: ***Draft***, ***Executed: Future***, ***Archived***, ***Terminated***.

- The new supplier portal interface is similar to the buyer-side system for creating non-PO invoices from contracts, adding contract line items to invoices and assigning or removing contracts from line items on invoices.

New Contract Validation Checks for Supplier Portal Invoices and Credit Memos

New contract validation checks have been added to supplier portal invoices, credit memos, and supplier portal invoice imports, so that suppliers invoicing against a contract will immediately know if line items associated with a contract are within contract thresholds. New settings in Accounts Payable define what the system does and the validation messages that are displayed if contract line items on supplier portal invoices and credit memos do not match contract settings.

This will improve the data accuracy and allow supplier portal invoices and credit memos that have not gone through the requisition or purchase order process to be validated against limits set on the contract.

IMPACT

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Accounts Payable Director, AP Express
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: None

KEY POINTS OF FEATURE

- This feature is **Off** by default but can be enabled by an organization administrator
- New Permissions related to this Feature: None
- Organizations must have eProcurement enabled:
  - For organizations with CCT only, this is automatic for all contracts.
  - For organizations with TCM, eProcurement must be enabled for the organization and also for each contract type.
- Three new Accounts Payable configuration settings define how the system handles validations for line items associated with a contract on supplier portal invoices (including imports) or credit memos.
- **These validations will only occur on line items assigned to a contract after the 16.3 release.**
- Validation occurs when supplier portal invoices and credit memos are created from a contract, when line items are assigned to a contract on supplier portal invoices and credit memos, and when contract line items are manually added by a supplier.

- The new validation settings are under **Accounts Payable** > **AP Administration > Configure AP Settings > Supplier Configuration Parameters**:
  - **Check Contract Applicability on Sales Invoice** - Controls what the system does when a contract line item does not match applicability settings defined on the contract.
  - **Check Item Quantity and Contract Spend Limits On Sales Invoice** - Controls what the system does when a contract line item line manually added by a supplier exceeds the **maximum** setting for contract spend or line item quantities set on the **Budget and Spend** page of the contract. **Note:** This validation applies to maximum settings only.
  - **Check Contract Item Price On Sales Invoice** - Controls what the system does when the price on a contract line item is different from the price set for the item on the contract. **Note:** This setting does not apply to credit memos.
- Each field can be set to one of three levels:
  - **Ignore** - The validation is skipped and no message displayed to the user.
  - **Warning** - Users will see a warning symbol and a message indicating the error, but the invoice or credit memo can be sent to the customer without the supplier correcting the information.
  - **Error** - Users will see an error symbol and a message indicating the error and the invoice or credit memo cannot be sent to the customer until the error is fixed.
- When assigning contracts to line items on supplier portal invoices or credit memos, the enabled validation messages will appear in the **header** and on the appropriate **line item**. Since multiple lines can be associated to multiple contracts and each contract can have different settings, some line items may have messages and some may not.

TOTAL CONTRACT MANAGER ENHANCEMENTS

In 16.3, the following enhancements will be available in Total Contract Manager (TCM).

Ability to Set Contract to Start When Executed

A new option on the contract Start Date field provides the ability to define a contract start date as the day the contract is fully executed. If the option is selected, the system will automatically enter the contract start date on the day the contract reaches ***Executed: In Effect*** status.

The new setting provides greater flexibility for contract managers and administrators when the start date may not be known upon initial creation of the contract. Because the start date is automatically populated by Total Contract Manager, contract managers no longer need to monitor when contracts are approved and manually enter the start date.

IMPACT

- Products Affected: Total Contract Manager
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: Medium

KEY POINTS OF FEATURE

- This feature is **On** by default.
- New Permissions related to this Feature: None
- A new **Update Start Date Upon Execution** checkbox on contracts allows contract managers to define the contract start date as the day the contract is fully executed. If the option is selected, the contract start date will be automatically updated by the system "on the fly" to reflect the date and time that the contract is fully executed:
    - For contracts moving through contract workflow within the system, this is the **date** and **time** that the contract reaches ***Executed: In Effect*** status.
    - For eSignature contracts, this is the **date** and **time** that the **final signer completes their eSignature of the contract** OR the date and time entered when the signed contract is manually uploaded.
- A new **contract type** option allows organizations to control the default setting of the **Update Start Date Upon Execution** checkbox on contracts:
    - Navigate to **Contracts** > **Contract Administration** > **Contracts Types** > **About** tab.
    - Choose one of the following options next to **Update Start Date Upon Execution** and save changes:
        - Select **Yes** to have the checkbox selected by default on all contracts created from contract type. Contract managers may choose to turn the feature off at the contract level.
        - Select **No** to leave the checkbox blank by default on all contracts created from the contract type. Contract managers may choose to turn the feature on at the contract level.

    > **Note:** The default setting affects how the checkbox is initially displayed on contracts, but contract managers can choose to select or clear the checkbox on a contract by contract basis.

    - Changes to the setting will only apply to new contracts going forward - existing contracts will not be affected.
- When the **Update Start Date Upon Execution** checkbox is selected, the contract manager must also enter a **provisional start date** in the Start Date field. The Start Date settings can be modified at any time while the contract is in Draft status. Once the contract reaches ***Executed: In Effect*** status, the start date is automatically entered by the system and displayed in the Start Date field on the contract header. It replaces the provisional start date.

- The **Update Start Date Upon Execution** option is displayed in the contract creation wizard, on the contract header, when creating *Salesforce* contracts from a sales opportunity, and contract requests if a Start Date field has been added to a Question page on the contract request templates. It is also available on all new, copied, renewed, and amended contracts. Here is how it affects the following contract scenarios:

  eSignature Contracts

  - The full executed date is the date and time that the final signer completes their eSignature of the contract. This is entered automatically by the system.
  - If a contract is manually uploaded in the Out for Signature step, a new **Fully Executed Date** field in the Upload Fully Executed Contract window (**Contract Actions > Upload Fully Executed Contract**) allows the user uploading the contract to enter the fully executed start date.
  - **Important for organizations using Update Start Date Upon Execution with eSignature** - We recommend that organizatins using this feature with eSignature set up a manual approval workflow step at the very end their contract workflow to ensure there is one final manual approval after eSignature automatically updates the contract status and start date. This prevents the situation where the contract immediately moves to ***Expired*** status because the contract end date is reached before the contract has completed the workflow.

  Salesforce **Contracts**

  - In *Salesforce*, the **Update Start Date Upon Execution** checkbox is displayed when generating a contract from a sales opportunity (under **Opportunities > SciQuest Contracts**). If the option selected, the system will add a start date to the contract when it reaches ***Executed: In Effect*** status in Total Contract Manager.

    Note: This update is available on *Salesforce* versions 1.1 and higher. Users with an earlier version of *Salesforce* will not see the Update Start Date Upon Execution checkbox. Please contact your Customer Success Manager for instructions on how to upgrade *Salesforce*.

  Start Date Placeholders in the Microsoft Word App

  - If the **Update Start Date Upon Execution** option is selected on a contract, Start Date placeholders inserted into contract text will display "**Upon Execution**" in the text rather than a date. This will not change once the executed start date is entered by the system – the start date can only be viewed in the Start Date field on the contract header in Total Contract Manager.

  Copied Contracts

  - The **Update Start Date Upon Execution** setting is copied into new contracts, but actual start dates entered by the system are not copied.

  Contract Requests

  - Adding a standard Start Date field to the Questions page of a contract request template will automatically cause the **Update Start Date Upon Execution** checkbox to be displayed on contract requests created from the template.

- **CSV and XML Import/Exports**
    - A new **StartOnExecution** column has been added to CSV and XML import/export files and allows the setting to be updated via import.
    - **Important!** If an organization uses contract import or export files to integrate with other internal systems, the change to these files may cause issues with that integration. Please check with your system administrator to determine the impact of these changes.

New Visibility Setting for Contract Stakeholders

A new setting has been added to contract Projects to improve the control that organizations have over the information that stakeholders see on contracts they have access to. The new setting provides two options that apply to all contracts in a project. Organizations can define whether stakeholders can view contract summaries only, or have read-only access to the full contract.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **On** by default.
- New Permissions related to this Feature: None
- The new **Stakeholder Access** setting has been added to the **Contracts > Projects** page. Navigate to **Contracts** > **Contracts > Contract Administration > Projects**, select a project, and click the **Contract Users** tab.
- To define what stakeholders accessing contracts in a project will see, click the Edit icon next to the **Stakeholder Access** subheading. The options displayed depend on whether the project is a parent or child in the hierarchy:

    Parent

    - **Summary Only** - Select if contract stakeholders can view the Contract Summary only. This is the default setting for parent projects.
    - **Full Contract Details** - Select if contract stakeholders have read-only access to the full contract.

    Child

    - **Use Parent Project Setting (Summary Only)** - Displayed on child projects only. Select to use the Stakeholder Access settings configured on the parent project immediately above it in the hierarchy.

Changes to the setting on parent projects will automatically apply to child projects, unless settings have been changed at the child level. This is the default setting for child projects.

  - **Summary Only** - Select if contract stakeholders can view the Contract Summary only.
  - **Full Contract Details** - Select if contract stakeholders have read-only access to the full contract.

- Old or existing projects will have stakeholder access set as follows:
  - **Parent** projects will be set to **Summary Only**.
  - **Child** projects will be set to **Use Parent Project Setting (Summary Only)**.
- The contract stakeholder access setting applies to confidential contracts.
- The setting does not apply to users with the Contract Super User permission as it overrides all other contract visibility settings.

SOURCING DIRECTOR ENHANCEMENTS

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

Note: Release 16.3 features General and Dashboard enhancements that may affect organizations using Sourcing Director. This includes the **Sourcing Events Dashboard** page being redesigned and renamed **Sourcing Events Home**. Please see:

- General Enhancements
- Dashboard Enhancements

SOURCING EVENT ENHANCEMENTS

This section contains updated features related to Sourcing Events for Sourcing Director.

Supplier Notifications for Public Q&A Board Responses

Buyers and suppliers can use the **Q&A Board** on an event to communicate during that event. Previously, although suppliers were notified when the buyer responded directly to a question they submitted, they were not notified when the buyer either responded publicly to a question submitted by another participating vendor, or when the buyer posted a public Q&A entry with information that could apply to them.

With the 16.3 release, when a buyer responds publicly to a question from a different supplier, or posts a public Q&A entry to an event, all suppliers participating in that event can receive email and in-app notifications alerting them to this activity. This allows suppliers to be notified when new information is posted that may be pertinent to them.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default.
- New Permissions related to this Feature: None.
- Suppliers will receive the notifications as long as they have them enabled within their user profiles.

MAINTENANCE RELEASE FEATURES

Some features were introduced in the maintenance releases after the 16.2 release. Detailed information about the use of these features can be found in the **SelectSite Maintenance Changes** document located on the Product Release Library (library.sciquest.com). These features include:

NEW CONTRACT WORKFLOW NOTIFICATION PREFERENCE

A new Contract Workflow Notification Preference has been created, allowing users who have it enabled on their user profile to receive contract approval notifications when they are an approver on a contract approval workflow step.

CHANGES TO CONTRACT APPROVAL WORKFLOW NOTIFICATIONS

Contract approval workflow notifications are only sent to users who are designated as approvers on a contract approval workflow step and who have the Contract Workflow Notification preference enabled on the their user profile. Contract managers who are not designated as an approver on a contract approval workflow step will not receive contract approval notifications.