

MARKETPLACE 14.1 RELEASE/UPGRADE NOTES

EFFECTIVE MARCH 30, 2014

New Features Snapshot

Feature name / Description	Impacted users	Brief Description of Feature
Full Transition to Phoenix Interface	ALL users	Users MUST be on Internet Explorer 8 or above, Firefox, Chrome or Safari in order to be able to access Marketplace
Excel Export Documents Upgraded to Use Latest File Format	ALL users	Certain file exports will now be in the latest Excel form (.xlsx); many exports will continue to be in CSV (comma-separated values) format
Efficient Assignment of Contracts to Cart/PR Line	Requisitioners, Purchasing Staff	New “Copy To Other Lines” function is available which allows quick association of contracts across multiple line items.
New Checkout Process – Express Checkout	Requisitioners	Quicker, more stream-lined checkout process (user-selectable)
Create Bookmarks for Commonly Used Pages	ALL users	Users can create bookmarks for commonly-accessed pages
Ability to Set My Home Page	ALL users	Users can set their own Home page (IE, first page that loads when entering Marketplace)

General Enhancements

Full Transition to Phoenix Interface

MarketPlace’s 14.1 release brings a mandatory transition to our new user interface, the Phoenix UI. Any users who have still not upgraded their web browsers to a more recent version of Internet Explorer **WILL NO LONGER BE ABLE TO ACCESS THE Marketplace system.**

With the adoption of this enhanced UI, users will enjoy a more logically organized, task-driven series of menus. Breadcrumbs across the top of each page help users know where they are in the application, and provide an easy path to related areas of functionality. Some of the key benefits of the new UI include the vertically oriented, icon-based side menu that remains on the screen no matter where users are in the application. This task-oriented grouping of key functionality helps users easily identify the key areas where they do their day-to-day work. Users will also find great benefits to the new top banner, which houses the user profile, bookmarks, notifications and action items, and quick search menu. Finally, a well-organized and easy to access user profile and user management screen consolidates all of the key tasks users will need to access in order to configure the site in a way that is specific to their needs. As always, SciQuest strives to provide

education and assistance to help our administrators and end-users learn our new functionality, so we encourage customers to take advantage of the additional information we have provided on the transition to the new user interface.

Impact

Users Affected: All Shopping and Inventory Products.

End User Impact: High

Key points of Feature

This feature will be ON (enabled) by default.

As of 14.1, Classic interface will no longer be available. All customer sites will automatically display Phoenix interface. All handbooks and online help have been updated to reflect the new interface.

Excel Export Documents Upgraded to Use Latest File Format

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

Impact

Users Affected: All Shopping and Inventory products.

- End User Impact: None
- Admin User Impact: Low

Key Points of the Feature

- This feature will be ON (enabled) by default.
- Excel exports affected by this change include:
 - Supplier Export
 - User Feedback Export
 - Customer Supplier Enablement Export
 - Supplier Portal Supplier Enablement Export
- Microsoft provides a compatibility patch for versions earlier than 2007. It is possible that this patch is already installed on user machines. If you are not using Excel 2007, please contact your IT Department to confirm that the patch is installed.

Efficient Assignment of Contracts to Cart/PR Line Items

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

Impact

- Users Affected: Requisitioners, Purchasing staff
- End User Impact: Low

Key points of Feature

- This feature is ON by default.
- Provides a much more efficient process for assigning contracts to Cart/PR line items
- Assigning and saving a contract to a line item, within a Cart or Requisition, establishes a baseline for multi-item Contract association. A new *copy to other lines...* link is exposed within the line item to which the Contract has been associated. When this link is selected, a new Contract Association pop-up screen is presented that lists all of the line items, within the Cart or Requisition, to which the associated Contract could possibly apply. When the appropriate line items have been selected in the Contract Association pop-up and the Copy button selected, all of the new contract associations will be represented within the user's Shopping Cart / PR.
- This enhancement does not apply to Express Checkout

New Checkout Process: Express Checkout

Requisitioners can use the new Express Checkout, a new optional checkout process that is more intuitive and user-friendly. The new checkout process feels more like a standard e-commerce checkout process and is easier for shoppers to use.

Impact

Users Affected: Requisitioners
End User Impact: Medium

Key points of Feature

- This feature can be used as an option or users can set it to be the default check-out process in their profiles.
- New Permissions related to this Feature: None
- The existing checkout process has not changed but is now referred to as **Advanced Checkout**.
- Express Checkout has a new visual design, and features preset checkout steps including:
 - **Shipping**: allows users to view and edit their shipping address and shipping options.

- **Billing:** allows users to view and edit their billing address, billing options and credit card.
- **Account Codes:** allows users to view and edit their account codes, including account splits, by selecting from their code favorites.
- **Order Review:** allows users to review the information entered on other account steps, as well as all line items and supplier information for their order.
- Express checkout contains preset data elements on the checkout screens. Although the configuration is not customizable by the organization, if a data element is not configured to show on the Advanced checkout screen it will not show on Express Checkout.
- Whatever permissions a user has for viewing and editing Advanced checkout are the same permissions the user will have for Express checkout.
- Some advanced options (such as overriding information by line item) have been removed from the Express Checkout process as they are often not commonly needed by infrequent shopper users.
- Users can switch between Express and Advanced checkout using links available on the checkout screens.
- Express checkout can be configured as the default checkout process by each user:
 - A new **Checkout Settings** link has been added to **User Information and Settings > Default User Settings** in the user profile.
 - You can configure the **Default Experience** on the screen to select the default checkout process.

Create Bookmarks for Commonly Used Pages

A new Bookmark feature is available in the Phoenix interface. Bookmarks can be configured for quick access to commonly used pages. Users can add, remove and/or reorder their bookmarks at any time.

Note: This feature replaces the Classic interface method for customizing navigation tabs.

Impact

Users Affected: ALL

End User Impact: Low

Key points of Feature

- This feature is ON (enabled) by default and is optional for use.
- New Permissions related to this Feature: None
- This feature is only available in the new Phoenix interface.
- The **Bookmarks** menu is located in the top banner and can be accessed by clicking on the star icon or pressing Alt-K.
- To bookmark a page, the user should navigate to that page, open the Bookmarks menu and click **Bookmark this page** in the bottom right corner.
- The **Edit** button in the Bookmarks menu allows users to delete or reorder their bookmarks.
- Only menu items are available to be added as bookmarks. If a user attempts to add a lower level page as a bookmark (such as a specific requisition), the system will automatically locate the menu item associated with that page (such as Document Search) to create the bookmark.

Ability to Set My Home Page

The home page is the page displayed to a user after logging in to the application. A new feature is available in the Phoenix interface to allow users to set their own home page. Previously, the home page was determined by the organization and users were not able to select a different page. Note: This feature replaces the Classic interface method for customizing navigation tabs.

Impact

Users Affected: ALL

End User Impact: Low

Key points of Feature

- This feature is ON (enabled) by default and is optional for use.
- New Permissions related to this Feature: None
- To set a page as the homepage, the user should navigate to the appropriate page and open the **User Menu** by clicking on the user's name in the top banner. Clicking on the **Set My Home Page** link allows the user to set the current page as the home page. Additional options are available including display of the user's current home page and the ability to revert back to the default home page.
- Only menu items are available to be set as a user's home page. If a user attempts to set a lower level page as their home page (such as a specific requisition), the system will automatically locate the menu item associated with that page (such as Document Search) to set their homepage.