



16.2 RELEASE NOTES

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

JULY 31, 2016 - FINAL VERSION



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WELCOME

The **16.2 SciQuest Product Release** will be available in the production environment starting July 31, 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 16.1 and release 16.2 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 16.2 release.

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

<http://library.sciquest.com>

THIS DOCUMENT WILL HELP YOU:

- Prepare for SciQuest products version 16.2– available in your production environment on Sunday, July 31, 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.

16.2 SCHEDULING

To help prepare our customers for the upcoming 16.2 release, a list of KEY DATES is provided below. Please review the information and mark your calendars accordingly.

KEY DATES

The table below provides a list of key dates for the SciQuest 16.2 Product Release*.

| Event | Date and Time | Description and Details |
|--|--|---|
| Release Promotion: Test Sites Unavailable | Beginning July 8, 2016, 8am ET | The 16.2 release will be promoted to the Test (usertest) environment from Friday, July 8, 2016 8am ET through Sunday, July 10, 2016 12 pm ET. An email will be sent when the promotion is complete. |
| Release Validation in Test Environment | July 10, 2016 - July 29, 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 July 29, 2016, 9pm ET through July 31, 2016, 12pm ET | The 16.2 release will be promoted to the Production environment from Friday, July 29, 2016 9pm ET through Sunday, July 31, 2016 12pm ET. An email will be sent out when the promotion is complete. |
| Release available on Production Sites | Sunday, July 31, 2016 | This date indicates when the features and functionality associated with 16.2 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 16.2 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 June 10, 2016 on the Product Release Library | The pre-recorded video will present a preview of all features coming in release 16.21. |
| eProcurement (pre-recorded video) | Available July 8, 2016 on the Product Release Library | This pre-recorded video will present details about the features coming in 16.2 related to eProcurement products. |
| Mobile (pre-recorded video) | Available July 8, 2016 on the Product Release Library | This pre-recorded video will present details about the features coming in 16.2 related to the Mobile app. |
| Mobile (pre-recorded video) | Available July 8, 2016 on the Product Release Library | This pre-recorded video will present details about the features coming in 16.2 related to the Mobile app. |
| Total Supplier Manager (pre-recorded video) | Available July 8, 2016 on the Product Release Library | This pre-recorded video will present details about the features coming in 16.2 related to the Total Supplier Manager product. |
| Total Contract Manager (pre-recorded video) | Available July 8, 2016 on the Product Release Library | This pre-recorded video will present details about the features coming in 16.2 related to the Total Contract Manager product. |
| Accounts Payable Director (pre-recorded video) | Available July 8, 2016 on the Product Release Library | This pre-recorded video will present details about the features coming in 16.2 related to the Accounts Payable Director product. |
| Spend Radar (pre-recorded video) | Available July 8, 2016 on the Product Release Library | This pre-recorded video will present a preview of new capabilities in the Spend Radar product coming with 16.2 |

THE FEATURE SNAPSHOT FOR 16.2

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. **Note:** This information will be available with the Product Release Notes which will be published prior to the 16.2 release in the Test environment.
- **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. **Note:** This information will be available with the Product Release Notes which will be published prior to the 16.2 release in the Test environment.
- **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. **Note:** This information will be available with the Product Release Notes which will be published prior to the 16.2 release in the Test environment.
- **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. **Note:** This information will be available with the Product Release Notes which will be published prior to the 16.2 release in the Test environment.
- **Contact SQ** – Indicates that someone at SciQuest (Customer Support, Client Partner, or Sales) must be involved in order to enable and take advantage of the feature. A new license may be required, workflow changes, etc. **Note:** This information will be available with the Product Release Notes which will be published prior to the 16.2 release in the Test environment.

FEATURE SNAPSHOT

The following table provides a summary of features available starting July 31, 2016, along with an overview of who the change impacts, and how it is enabled in the system.

| Feature Name | Related Products | Impacted Users | Integration Impact | Setup/Visibility | | |
|---|--|-------------------|--------------------|------------------|----------------|------------|
| | | | | On by Default | Requires Setup | Contact SQ |
| Introduction of Portfolio Savings Manager | Portfolio Savings Manager | End Users, Admins | None | | | |
| Updates to Manage Organization Dashboards Page | All | End Users, Admins | None | | | |
| New Organization Resource Widget for All Products | All | End Users, Admins | None | | | |
| New Forms Dashboard Widget | All eProcurement | End Users, Admins | None | | | |
| New Sourcing Event Search Dashboard Widget for Sourcing Director | Sourcing Director | End Users, Admins | None | | | |
| Contract Alert Widget Updates for CLM Products: Filter and Export | Contract Compliance Tracker, Contract Manager Repository | End Users, Admins | None | | | |
| Additional Contract Summary Widget Options for CLM Products | Contract Compliance Tracker, Contract Manager Repository | End Users, Admins | None | | | |
| Mobile Shopping From PunchOut Suppliers | Mobile App, Spend Director | End Users, Admins | None | | | |
| New Columns Included in Price File Extracts | Spend Director | End Users, Admins | None | | | |
| Ability to Change Purchase Order Owner | Order Manager, Accounts Payable Director | End Users, Admins | None | | | |
| Financial Approver Page Enhancements in User Profile | eProcurement, Accounts Payable Director | End Users, Admins | None | | | |
| Ability to Use Accounting Codes in Form Request Workflow for Check Requests | Order Manager | End Users, Admins | None | | | |
| Supplier Registration and Review Approval Updates | Total Supplier Manager, Dynamic Qualification | End Users, | None | | | |

| Feature Name | Related Products | Impacted Users | Integration Impact | Setup/Visibility | | |
|--|---|-------------------|--------------------|------------------|----------------|------------|
| | | | | On by Default | Requires Setup | Contact SQ |
| Based on Dynamic Qualification Questionnaires | | Admins | | | | |
| Enhancements to Multi-ERP Supplier Export | Total Supplier Manager, Multi-ERP | End Users, Admins | High | | | |
| Financial Approvals for Invoices | Accounts Payable Director, AP Express | End Users, Admins | Low | | | |
| Ability to Display Account Codes Section on Invoice Simple and Advanced Manual Entry Pages | Accounts Payable Director, AP Express | End Users, Admins | None | | | |
| Allow the Invoice Creator to Select Invoice Owner Account Codes and Custom Fields | Accounts Payable Director, AP Express | End Users, Admins | None | | | |
| Ability to Edit Commodity Code for Multiple Lines on a Non-PO Invoice | Accounts Payable Director, AP Express | End Users | None | | | |
| Ability to Update Invoice Owner on PO-Invoices | Accounts Payable Director, AP Express | End Users, Admins | None | | | |
| Ability to Associate a Non-PO Line to a Purchase Order | Accounts Payable Director, AP Express, Order Manager | End Users, Admins | None | | | |
| Create a Non-PO Invoice from a Contract | Accounts Payable Director, AP Express, Contract Compliance Tracker, Contract Manager Repository, Total Contract Manager | End Users, Admins | None | | | |
| New Contract Budget/Spend Validation Checks on Invoices | Accounts Payable Director, AP Express, Contract Compliance Tracker, Contract Manager Repository, Total Contract Manager | End Users, Admins | None | | | |
| Assign a Contract to Multiple Line Items on an Invoice | Accounts Payable Director, AP Express, Contract Compliance Tracker, Contract Manager Repository, Total Contract Manager | End Users, Admins | None | | | |
| Add Contract Non-Catalog Items to Invoices | Accounts Payable Director, AP Express, Contract Compliance Tracker, Contract | End Users, Admins | None | | | |

| Feature Name | Related Products | Impacted Users | Integration Impact | Setup/Visibility | | |
|--|---|-------------------|--------------------|------------------|----------------|------------|
| | | | | On by Default | Requires Setup | Contact SQ |
| | Manager Repository, Total Contract Manager | | | | | |
| Remove Contract from Line Items on Requisitions, Purchase Orders and Invoices | Accounts Payable Director, AP Express, Contract Compliance Tracker, Contract Manager Repository, Total Contract Manager | End Users, Admins | None | | | |
| View Lifetime Spend on Contracts | Accounts Payable Director, AP Express, Spend Director, Contract Compliance Tracker, Contract Manager Repository, Total Contract Manager | End Users | None | | | |
| Enhanced Visibility to Contract Spend | Accounts Payable Director, AP Express, Spend Director, Contract Compliance Tracker, Contract Manager Repository, Total Contract Manager | End Users | Low | | | |
| Contract Dashboard Enhancements | Contract Compliance Tracker, Contract Manager Repository, Total Contract Manager | End Users | None | | | |
| Contract Advanced Search Enhancements | Contract Compliance Tracker, Contract Manager Repository, Total Contract Manager | End Users | None | | | |
| Ability to Customize Placement of Signature Placeholders on Contracts for Adobe Sign | Contract Manager Repository, Total Contract Manager | End Users, Admins | Low | | | |
| Ability to Use Token Only Authentication with Word | Total Contract Manager | End Users, Admins | Low | | | |
| Ability to Integrate Accounts Payable Invoice Data to Data Manager | Spend Radar | | None | | | |

MAINTENANCE RELEASE FEATURES

Some features were introduced in the maintenance releases after the 16.1 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:

Ability to Automatically Notify Managers with Document Approval Reminders

This feature was included in the May 5, 2016 maintenance release and allows an approver's manager to be copied on workflow email reminders. Please see the **SelectSite Maintenance Changes** document on the Product Release Library for additional information.

Indicate Invoice Image from Check Request Attachment

This feature was included in the May 5, 2016 maintenance release and allows attachments that are present on a Check Request form to be indicated as Invoice Images. Please see the **SelectSite Maintenance Changes** document on the Product Release Library for additional information.

New PO Integration Point to Update Internal Notes, Header Custom Fields and A/P Status

This feature was included in the May 16, 2016 maintenance release and allows customers to work with SciQuest to enable a new PO integration point to allow for updates to internal notes, header level custom fields and the A/P status field. Please see the **SelectSite Maintenance Changes** document on the Product Release Library for additional information.

PORTFOLIO SAVINGS MANAGER ENHANCEMENTS

This section focuses on enhancements to the Portfolio Savings Manager product on the SelectSite platform.

INTRODUCTION OF PORTFOLIO SAVINGS MANAGER

With release 16.2, SciQuest is introducing the new **Portfolio Savings Manager** solution to its Source-to-Settle suite of products. **Portfolio Savings Manager** is an on-demand management solution that provides a standard process to create, prioritize, measure and track savings initiatives within your organization.

Portfolio Savings Manager allows you to not only track forecasted and actual savings, but also establish due diligence checklists of tasks and deliverables, and track their progress against milestones. The solution delivers a centralized repository of savings initiatives across the organization, where savings forecasts and savings projections are tracked that you may measure progress against corporate savings target goals.

Portfolio Savings Manager includes the following features:

- A cloud-based initiative repository
- The ability to track deliverables' status and savings progress against savings targets
- A configurable initiative approval workflow process
- Configurable company-based commodity codes, descriptions, departments, and other attributes
- Intuitive savings initiative creation wizard, including creation of deliverables, tasks, and baseline savings forecast
- Project setup and configuration to manage savings initiative visibility across the organization
- The ability to relate (link) contracts and sourcing events from Contract Lifecycle Management and Sourcing Director to savings initiatives

For more information about Portfolio Savings Manager, please visit this page:

<http://www.sciquest.com/solutions/portfolio-savings-manager-savings-management-software>

DASHBOARD ENHANCEMENTS

Dashboards enhance usability of the application by allowing common tasks to be grouped on a single screen, helping to cut down on the need to navigate the site to perform those tasks. In 16.2, we will be continuing to provide dashboard features by adding to the available widgets. The new widgets will include contract, sourcing, forms and resource-related features. **Note:** The dashboard widgets available on the organization level will depend on the organization's licensed products.

Updates to Manage Organization Dashboards Page

Organization dashboards are created and managed from the Manage Organization Dashboards page. In 16.2, some modifications have been made to the page including:

- Organizations are now able to modify the end-users view of Contract Dashboards. For additional information, please see [Contract Dashboard Enhancements](#).
- Users with the **Contract Configuration** permission are now able to access the page to configure a dashboard for the Contract Home page.
- Each dashboard location (*dashboard menu only*, *shopping home page* or *contract home page*) now has its own section on the screen. Previously, all dashboards were listed together and dashboard location was simply displayed in a column associated with the dashboard. Separating the dashboards in this manner will make it easier to see the location of each.

IMPACT

- Products Affected: All
- 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.
- Users with the **Contract Configuration** permission can access the page. This permission is located in **Permission Settings > Contracts > Contracts Permissions**. A user who has the Contract Configuration permission but not the Manage Organization Dashboards permission can only view and manage the contract dashboards. The ability to manage dashboard menu or shopping home organization dashboards is not available unless the user has the Manage Organization Dashboards permission.
- The dashboards are now organized by dashboard location:

- **Dashboard Menu Only** - Organization dashboards that are accessible to end users from the Dashboards menu in the banner.
- **Shopping Home** - Organization dashboards that are accessible to end users from the Shopping Home page.
- **Contract Home** - Organization dashboards that are accessible to end users from the Contract Home page.

New Organization Resource Widget for All Products

In 16.2, a new **My Resources** widget is available for organization and personal dashboards. This widget provides organizations and users the ability to display resource information for the site including information about the primary site contact, a link to the product release information, terms and conditions and a site map.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **On** by default but requires set up.
- New Permissions related to this Feature: None.
- The new widget is named **My Resources**. The widget can be located by selecting the **All** or **General** category in the **Add Widget** screen.
- The information displayed in the My Resources widget is the same resource information that is displayed on the Home page. Depending on your organization's set up, this information may include one or more of the following:
 - A link to the Product Release Library
 - A link to display site terms and conditions.
 - A site contact email address.
 - A site contact phone number.
 - Additional fields that may have been previously set up by your organization such as a site map or other links.
- You do not have the ability to configure the information in the actual widget. It simply displays what has already been set up. For additional information, please see [Configuring the Organization Message](#) in the online searchable help.
- If a user belongs to a business unit that has specific resource information configured, that is the information that displays to that user in the widget.



New Forms Dashboard Widget

In 16.2, a new **Forms** widget is available for organization and personal dashboards. This widget provides organizations and users the ability to display a customized list of forms and form requests on the dashboard. Users can access and fill out forms from the dashboard without having to navigate to the Forms screen.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **On** by default but requires set up.
- New Permissions related to this Feature: None.
- The new widget is named **Forms**. The widget can be located by selecting the **All**, **General** or **Shopping** category in the **Add Widget** screen.
- When configuring the widget, specific forms and form requests are selected to be accessible. Use the steps below to configure and assign forms to the widget:
 1. Add the widget to the dashboard. The **Forms** window displays.
 2. The widget is named Forms by default. You can change the name by overwriting the text in the **Name** field. You also have the option to enter text in the **Description** field.
 3. Click the **Add Form** button. A pop-up window displays.
 4. Depending on the type of form you would like to add, click the **Form** or **Form Request** radio button.
 5. You can begin typing in the **Select Form** field and the application will search for and display matching forms. You can also search for and select the appropriate form or form request by clicking on the .
 6. When you have selected a form, the **Name** field is the name of the form by default. You can change the name by overwriting the text in the field.
 7. Click the **Save Changes** button. The form is added.
 8. Repeat the steps above to include additional forms or form requests. The forms and form requests display in the order in which they were added. You can rearrange the order by clicking the  and dragging the form. The Edit button allows you to edit or delete a form.
 9. Once you have finished adding and placing the forms, click the **Save Changes** button.
- Rules for configuring the widget on an organization dashboard:

- An organization dashboard administrator who does not have the appropriate permission to view forms can add the widget but can not view the content. Dashboard admins can view forms they do not have access to, provided the forms were added by another admin.
- When a form is restricted by business unit, department, role or user, the dashboard administrator user must be a part of the restricted group in order to select the form for an organization dashboard. **Note:** Users with permission to administer shared favorites can add all forms regardless of this restriction.
- Rules for end-user visibility to the Forms widget on the organization dashboard:
 - If the end user does not have permission to view and use forms, the widget does not display.
 - If the end user does not have access to any of the forms in the widget, the widget displays with a message indicating this.
 - Forms that are restricted by business unit, department, role or user do not display to users who are not part of the restricted group. **Note:** Users with permission to administer shared favorites can view all forms regardless of this restriction.
- Rules for configuring the widget on a personal dashboard:
 - Users who do not have permission to view and use forms are not able to add the widget to a personal dashboard.
 - When a form is restricted by business unit, department, role or user, the user must be a part of the restricted group in order to select the form for a personal dashboard. **Note:** Users with permission to administer shared favorites can add all forms regardless of this restriction.
- To access a form or form request from the widget, the user simply clicks on the name. The form opens and can be filled out as normal.
- This feature applies to eProcurement forms only. Contract and Supplier Request forms cannot be accessed from the widget but can be added as links to the Quick Links widget.

New Sourcing Event Search Dashboard Widget for Sourcing Director

In 16.2, a new **Sourcing Event Search** widget is available for organization and personal dashboards. This widget allows organizations that use Sourcing Director to search for sourcing events from a dashboard. Users have the option to do a simple search directly from the widget or to access an advanced search page.

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 set up.

- New Permissions related to this Feature: None.
- The same permission(s) required to perform a sourcing event search through the Sourcing menu are required to perform the search from a dashboard. Searching for sourcing events requires the user to have at least one of the following permissions(located in **Permission Settings > Sourcing**); *Create/Own Events, Manage Project Events, View Events, Archive Events, Approve/Reject Sourcing Events, Finalize Award Scenario, View All Events or Create Events with Templates/Own Events.*
- The new widget is named **Sourcing Event Search**. The widget can be located by selecting the **All** or **Sourcing** category in the **Add Widget** screen.
- End users who do not have at least one of the permissions cannot add the widget to their personal dashboards.
- If the widget is included on an organization dashboard, it is not visible to end users who do not have at least one of the necessary permissions.
- Administrators who do not have the required search permissions can add the widget to an organization or dashboard, but are not able to see any related content.
- The widget contains a field to perform a simple sourcing event search. To do a simple search, enter text in the field and click the **Search** button.
- By default, the widget contains an **Advanced Search** link. When clicked, you are taken to an advanced search window where you can perform the advanced search. **Note:** The Advanced Search link can be removed in Field Management.

Contract Alerts Widget Updates for CLM Products: Filter and Export

In 16.2, SciQuest has made the following updates to the Contract Alerts widget. **Note:** This functionality has been available on the Contracts dashboard. While this is not new functionality, it is now available on the widget.


- Organizations now have the ability to filter the contract alerts displayed on the widget. Filter criteria includes contract owner (All, Mine or Other), alert type and alert date range. Displaying filters on the widget is optional. If you to display the filters, can also choose a default setting for each filter. For example, you can configure the contract owner filter to default to **Mine**.
- Organizations now have the ability to export the contract alerts directly from the widget.

IMPACT

- Products Affected: Contract Compliance Tracker, 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 set up.

- New Permissions related to this Feature: None.
- The following options are now available on the configuration screen when the Contract Alerts widget is added to an organization or personal dashboard:
 - **Show Filters** - Determines if the filters display on the widget. Check **Yes** or **No**. If you check No, the filters will not display to your end users and the widget will always be filtered by the configuration options you select in the configuration screen. If you select Yes, you have additional configuration options and your users will be able to change them when viewing the widget (see below):
 - **Contracts** - Select the option to which the widget will default. These include *All* (displays all alerts), *My Contracts* (displays alerts only for a user's own contracts) or *Other Contracts* (displays alerts for only others' contracts).
 - **Alert Type** - Select the option to which the widget will default. These include *All*, *Renewing*, *Expiring* or *Recently Expired*.
 - **Occurs Within** - Select the option to which the widget will default. These include *0 - 30 Days*, *31 - 60 Days* or *61 - 90 Days*.
- Filters on the widget display with the default settings but can be changed by the user if you have selected Yes to Show Filters. . Users can also choose to hide filter criteria on the widget by collapsing the fields.
- If an organization or personal dashboard already contained the Contract Alert widget, the filters were automatically added and displayed when 16.2 went live.
- A new option to export the contract alerts directly from the widget is available. Click on the  on the widget to export the contract alerts. The export contains alerts as they are filtered in the widget.

Additional Contract Summary Widget Options for CLM Products

In 16.2, an additional filter option is available on the Contract Summary widget. This filter allows users view the contract summary by all contracts or by their own contracts (My Contracts). When a status is selected, the bar graph on the widget updates to reflect the status.

IMPACT

- Products Affected: Contract Compliance Tracker, 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 set up.
- New Permissions related to this Feature: None.
- A new filter is available to the user on the widget. Options include *My Contracts* and *All*.
- When a user selects a filter option, the bar graph updates to reflect the filter.

- If an organization or personal dashboard already contained the Contract Summary widget, the filter was automatically added (defaulted to All) when 16.2 went live.

ENHANCEMENTS TO THE SCIQUEST MOBILE APP

This section details enhancements being made to the mobile app with release 16.2.

Mobile Shopping from PunchOut Supplier Catalogs

In 16.1, we introduced the capability to shop via the Mobile App from suppliers with hosted catalogs. With 16.2, we are adding the ability to shop from suppliers with mobile-friendly punchout sites. PunchOut shopping is available for Android and iOS mobile devices utilizing the Mobile App. PunchOut shopping is also available to Blackberry and Windows mobile device users who do not have the Mobile App installed. **However, supported operating systems may differ by supplier.**

The Supplier Integration Team is working with suppliers who currently have punchout integrations to identify those who have mobile-friendly sites. Those suppliers eligible to be mobile PunchOuts will be identified by a setting on the supplier profile, **Enable Mobile Punchout**. Once identified by the Supplier Integration Team, this setting will be on by default for the supplier. An organization administrator will be able to control the ability to punchout on a mobile device at the organization level, or for individual suppliers. All settings related to punchout availability for users will apply to the mobile punchout site as well. If configured, Level-2 PunchOut and Edit/Inspect will also be available via the Mobile App.

When selecting the **Shop** icon or **Shop** from the **Home** menu, users will see a new **PunchOuts** section containing the mobile-friendly punchout suppliers. Users will also see punchout suppliers who are accessible only via the desktop application, for informational purposes.

The punchout process will work the same as it does on the desktop version. Users will select products, and then bring the cart back into SelectSite in order to finish the cart process.

In addition, the advanced supplier search will contain an option to search for Mobile PunchOut Suppliers.

IMPACT

- Products Affected: All eProcurement products for organizations using the mobile app.
- End User Impact: Medium
- Admin User Impact: Medium
- Integration Impact: None

KEY POINTS OF FEATURE

- This feature is **ON** by default for suppliers with mobile-friendly punchout sites, and if your organization is already configured for mobile shopping
- Once a supplier is qualified by SciQuest to be a mobile friendly punchout supplier, a new setting for **Enable Mobile Punchout** will be turned **ON** in the supplier profile. The setting is located on the **eProcurement > Integration Settings** page, under the **PunchOut Settings** section.

- The setting is OFF for suppliers until SciQuest qualifies the supplier as having a mobile-friendly punchout shopping site.
- Only those suppliers who already have a punchout integration configured for the organization will be available via the Mobile App when the setting is enabled. The setting will not appear if the supplier does not have punchout integration with the organization.
- Once enabled by SciQuest, an organization can choose to disable the setting if they do not want the supplier available for punchout shopping in the Mobile App. This setting does NOT affect shopping from the supplier via punchout in the application.
- When selecting the **Shop** icon or **Shop** from the **Home** menu, users will see a new **PunchOuts** section.
 - Selecting this section will list PunchOut sites the user can access that are mobile-enabled.
 - PunchOut suppliers who do not have mobile-friendly sites will be listed in a separate **Mobile Punchout Not Enabled** section, and will only be accessible via the desktop version. This is to avoid confusion as to why a user might see PunchOut sites in the desktop application that are not available in the Mobile App.
- When a user navigates to a supplier's mobile punchout, items are added to the cart and returned to the SciQuest Mobile App. Items are listed in the cart with a punchout icon. The quantity can be updated in the Mobile App cart.
- When searching for products in Hosted catalog via the Mobile App, any Level 2 Punchout items will be available via mobile if the supplier is enabled for mobile punchout.
- The **advanced supplier search** now contains a new **Type** selection for **Mobile PunchOut** suppliers. When this Type is selected, only those suppliers that have the **Enable Mobile Punchout** setting enabled will display in search results. Also, the **PunchOut Supplier** selection will be available as a Type filter for search results.
- As a reminder, the following organization and user settings must be configured in order to have access to mobile shopping. There is no new requirement for punchout shopping:
 - The organization must have Mobile Shopping enabled to shop via the Mobile App. This setting is found under **Site Configuration > General Site Settings > Manage Mobile Configuration > Users may shop via mobile**.
 - A user must have the **Mobile Shopping** permission enabled (Permission Settings > Mobile) and must have access to a punchout site in their user profile. If a user already has permissions to shop a punchout via the desktop application, there are no additional permissions needed for mobile punchout shopping.

SUPPLIER MANAGEMENT ENHANCEMENTS

This section focuses on 16.2 supplier management enhancements in SelectSite.

New Columns Included in Price File Extracts

Price file extracts are useful for viewing the current pricing information for a supplier catalog, and also for comparing versions for approval. With the 16.2 release, several new columns have been added to the single and comparison price file extract formats. The extracts will now contain the SciQuest Supplier ID (if the organization is configured to show this field), the Supplier Number, and the Available Beginning Date for the price file as provided by the supplier.

IMPACT

- Products Affected: SpendDirector
- 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
- Three new columns are available in the Single and Comparison Price File Extracts:
 - **SciQuest Supplier ID** - This column is displayed only if the organization has enabled the setting to expose SciQuest ID in the application (**Site Configuration > General Site Settings > System Settings and Configuration > Misc Setting: Show SciQuest Supplier Id**).
 - **Supplier Number** - This column contains the Supplier Number the customer has assigned in the supplier's profile.
 - **Prices Available Beginning** - This is the date assigned by the supplier when submitting the price file. This will appear for the most recent price set version being viewed or compared.
- As a reminder, price file extracts are requested from the **Site Configuration > Hosted Catalog and Order Configuration > Hosted Catalog Price Sets** page, or in the supplier's profile on the **eProcurement > Price Sets** page.

EPROCUREMENT ENHANCEMENTS

This section details enhancements that will be available in 16.2 related to the SelectSite eProcurement products.

Ability to Change Purchase Order Owner

Currently, a Requisitioner becomes the Purchase Order Owner when the purchase order is created. When invoices are created from the purchase order, the Purchase Order Owner then becomes the Invoice Owner. However, in the case of standing purchase orders, for example, it is possible the Purchase Order Owner should change from time to time to allow for Invoice Owners to be updated to the new owner as new invoices are created against the purchase order. With the 16.2 release, users with the appropriate permission can edit the Purchase Order Owner. Also, users can search for purchase orders with a modified owner via advanced document search.

Also with this feature, organizations can choose to configure two new settings to automatically change the Business Unit and/or Department on the purchase order based on the new Purchase Order Owner. These options only apply if the organization utilizes business units or departments. Once a Purchase Order Owner is changed, subsequent invoices will reflect the updated owner.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **OFF** by default but can be enabled by an administrator
- New Permissions related to this Feature: **Update Purchase Order Owner** (Permission Settings > Orders > My Orders/Organization Orders)
- Users with the new permission will see the option to **Change PO Owner** in the available actions when viewing the list of purchase orders via document search or approvals.
 - The action is not available when viewing a single purchase order.
 - The purchase order can be in any status.
 - The purchase order does not have to be assigned to the person making the change (in the case of PO's pending approval).
- Two new organization settings are available at **Site Configuration > Configure Documents > General Document Configuration Settings: For Purchase Orders when the Owner is modified**.
 - **Set the Business Unit to the Owner's Business Unit**: With this option enabled, the Business Unit on the purchase order will be updated automatically to the unit assigned to the updated

Purchase Order Owner. Without this option enabled, the business unit can be updated manually on the purchase order document.

- **Set the Department to the Owner's Department:** With this option enabled, the Department on the purchase order will be updated automatically to the department assigned to the updated Purchase Order Owner. Without this option enabled, the department can be updated manually on the purchase order document.
- These options only apply if your organization utilizes business units or departments.
- When selecting the option to **Change PO Owner** and **Go**, an overlay displays:
 - Begin entering a user's name, username or email, or select the search icon to search for users.
 - Enter a comment indicating why the change is being made.
 - If you selected multiple purchase orders, you can expand **Selected Purchase Orders (x)** and deselect any of the purchase orders you do not want to change to the new owner.
 - When you have confirmed the new owner and purchase orders to be changed, click **Save Changes**. A confirmation message displays, indicating the change may take several minutes to take effect.
 - History for the purchase order captures that the PO owner was updated, who made the update, and the previous and current owner.
- If the purchase order is associated with any active recurring invoices, the user will have the option to update the Invoice Owner to the new Purchase Order Owner. The user must have the **Update Invoice Owner for PO Invoices** permission to change the Invoice Owner.
- A new **advanced document search** option is available to search for purchase orders: **With Modified Owner**.
 - The option is available in the **Status Flags** section of purchase order advanced search.
 - When selected for search, only those purchase orders that have had an owner change will be displayed, and according to other search criteria provided.
 - All users with permission to search for purchase orders can see the new advanced search option. The new permission is not required.
- When viewing the purchase order document, an information icon ⓘ displays beside the Owner Name. Selecting the icon displays hover text indicating the owner was changed with a link to **View History** for the document.
- If you perform a PO revision after the owner has changed, the new owner will be reflected in the revision (and potentially exported if your organization utilizes that integration).
- New invoices created from the purchase order will inherit the new owner. The Invoice Owner for existing invoices associated with the purchase order will NOT change. However, users with the appropriate permission can update the Invoice Owner (see [Ability to Update Invoice Owner on PO Invoices](#) for more information).
- For additional information, see [Changing the Purchase Order Owner](#) in the **Shopping Handbook** or online searchable help.

Updated Interface for Managing Financial Approvers

When organizations utilize the Financial Approver workflow step for requisitions, purchase orders, or invoices, the workflow process routes the document to the user's designated financial approver based on the purchasing limits set in the user profile or for the user's role.

With the addition of [Financial Approvals for Invoices](#) in the 16.2 release, the **Financial Approvers** page in the user profile has been updated. When adding a financial approver, the user can search for approvers based on permission to approve requisitions, purchase orders, invoices, or all three documents. The user can easily see which document types a financial approver has authority to approve.

IMPACT

- Products Affected: eProcurement, Accounts Payable Director
- 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
- Financial approvers are managed in the user profile at **Default User Settings > Financial Approvers**. There is no change to the location for managing financial approvers in the user profile.
- The page has been updated to reflect the users who are designated as financial approvers for requisitions, purchase orders, and invoices. A green check (✓) indicates an approver is authorized for that document, while a red "x" (✗) indicates the approver is not an authorized approver for the document.
- An **Action** column contains a dropdown button with the following options:
 - **Set as Preferred**. Use this action to set a particular approver as preferred.
 - **Remove Preferred**. Use this action to remove the preferred indication from an approver.
 - **Remove**. Use this action to remove a user as a financial approver.
- To add a financial approver, select the button to **Add Approver for...**
 - You have the option to search for approvers of **Requisitions** only, **Purchase Orders** only, **Invoices** only, or **All** documents.
 - A user search overlay displays, allowing you to search for approvers based on your previous selection. Only those users with permission to approve the document you selected, or all documents if selected, will be returned in results.
 - Click **[select]** for the appropriate approver.
 - The name is added to the list of **My Approvers**, with indications as to which documents the user is authorized to approve. You have the option to set the new user as preferred.

- Preferred approvers are indicated with **(Preferred Approver)** beside the name (no change to current page).
- History captures that an approver was added to the Financial Approvers section (no change from current functionality).
- For more information about financial approvals, see the following topics in the indicated handbooks or online searchable help:
 - [Managing Financial Approvers and Approval Limits in the User Profile](#) in the **Site Basics Handbook**.
 - [Requisition and Purchase Order Financial Approval](#) in the **Shopping Handbook**.
 - [Invoice Financial Approval](#) in the **Accounts Payable Handbook** or online searchable help for more information

Ability to Use Accounting Codes in Form Request Workflow for Check Requests


As check requests get finalized and submitted into workflow, they need the same level of scrutiny and review regular requisitions do, since they represent a financial commitment from the institution. Adding account codes to ADW rules allows customers to configure their approval rules as they see fit to mimic requisition workflow if appropriate.

With 16.2, a new Advanced Dynamic Workflow (ADW) rule is available for **Form Request Workflow**. The document level rule will look for the presence or absence of a specific custom field value or range of values on the **Check Request** form, and will evaluate the custom field values against the defined ADW rule to route the document to the right approver. This new rule is only available for Form Request workflow for Check Requests.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **OFF** by default but can be enabled by an organization administrator
- New Permissions related to this Feature: None
- When configuring ADW in Form Request Workflow (**Site Configuration**  **> Workflow Setup > Form Request Workflow Setup > Advanced Dynamic Workflow > Rules Management**), a new document level rule for "single custom field value or range" is now available.
- To configure the rule, select **Add rule**, and then select the new option for **single Custom Field value or range** and click **Go**.

- Select the desired custom field name from the dropdown menu. All active custom fields will display.
 - Select the operator of **equal to**, **not equal to**, **between**, or **not between**.
 - Enter a value or range of values.
 - Save the rule.
- When the rule is active and contained in a rule group in the organization's workflow process, the document will be routed to the designated approver's folders if the workflow rule is triggered.
 - If the new rule is not in a group that is active in your organization's form request workflow, contact SciQuest to update the workflow process to include the appropriate rule group.

TOTAL SUPPLIER MANAGER

This section focuses on enhancements to the Total Supplier Manager product, in addition to general enhancements.

Supplier Registration and Review Approval Updates Based on Dynamic Qualification Questionnaires

The Dynamic Qualification feature in Total Supplier Manager is used to develop and assign questionnaires to suppliers in order to evaluate the supplier for doing business with your company. When a questionnaire is assigned to a supplier and responses are given, the supplier is routed through supplier review or supplier registration workflow according to the organization's workflow processes. Previously, the only available rules for questionnaires were based on the Questionnaire Category, Questionnaire Questions, or the Questionnaire Response Status. These rules did not prevent an approver from being asked to approve the same questionnaire multiple times if suppliers were assigned different questionnaires. With the 16.2 release, a new Advanced Dynamic Workflow (ADW) rule is available that evaluates the Questionnaire Title and Supplier Response Status before routing the supplier through workflow. The other questionnaire rule options continue to be available.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **OFF** by default but can be configured by an administrator
- New Permissions related to this Feature: None
- A new document-level rule is available in **Supplier Registration** and **Supplier Review** Advanced Dynamic Workflow that will evaluate **Questionnaire Titles and Supplier Response Status**.
 - When this rule is selected, the user will be prompted to select **one of the following values** or **not one of the following values** for **Questionnaire Title**. Select one or more Available Questionnaire Titles, and then click the right arrow to move it to the Selected Questionnaire Titles box.
 - Select a Supplier Response status of **equal to** or **not equal to** one of the following: Archived, Complete, Incomplete, Reviewed.
 - When the rule is active, both the specific questionnaire title and the supplier response status will be evaluated as configured as the questionnaire moves through Supplier Review and/or Supplier Registration workflow.

- Supplier Registration ADW Rules are configured at: **Site Configuration > Workflow Setup > Supplier Registration Workflow Setup > Advanced Dynamic Workflow > Rules Management**.
- Supplier Review ADW Rules are configured at: **Site Configuration > Workflow Setup > Supplier Registration Workflow Setup > Advanced Dynamic Workflow > Rules Management**.
- The rule must be in a Rule Group that is already active in the organization's workflow process. If not, contact SciQuest to update the workflow process to include the Rule Group with the Questionnaire rules.

Enhancements to Multi-ERP Supplier Export and Monitoring

Organizations may have multiple ERP systems connected to SelectSite. With this release, two enhancements are available to help organizations better manage the way suppliers are exported to multiple ERP systems, as well as monitoring real time supplier exports:

- Each supplier profile contains an ERP Sync page under the Workflow and Review section. On this page, settings are edited for each ERP id for the type of data that should be exported after an import: **Export all data**, **Export selected data**, or **do not export**. Previously, the default value was to **Export all data** after an import, so users had to uncheck any ERP number they did not want included with the export. With 16.2, the default value is now **Export selected data** after an import, with the information that was imported selected to be included with the next export job.
- Users with a single ERP system currently have access to monitoring queued and exported suppliers on the **TSM Real Time Supplier Exports** page. With the 16.2 release, organizations with multiple ERP systems now have access to the **TSM Real Time Multi ERP Supplier Exports** page.

IMPACT

- Products Affected: Total Supplier Manager, Multi-ERP
- End User Impact: Low
- Admin User Impact: Medium
- Integration Impact: **High**

KEY POINTS OF FEATURE

- This feature is **ON** by default
- New Permissions related to this Feature: None
- The **ERP Sync** page under the Workflow and Review section of the supplier profile has been updated to now default to Export selected data after an import. Only the elements selected will be included with the next export job.
 - A user will continue to have the ability to select and deselect additional elements to be exported as appropriate.
 - The user can also change the specific supplier option to be **Export all data** or **do not export**.

- Organizations with multiple ERP systems now have access to the **TSM Real Time Multi ERP Supplier Exports** page in their application.
 - The page is located at: **Site Administration > Find and Fix Errors > TSM Real Time Multi-ERP Supplier Export**
 - On this page, users will see recent supplier exports to various ERP systems, as well as suppliers in the queue that are pending or in error. Users will have the ability to requeue the supplier for export.

ACCOUNTS PAYABLE ENHANCEMENTS

This section details enhancements that will be available in 16.2 related to the SelectSite Accounts Payable products.

Please note that several features that impact invoices also relate to CLM features. Please refer to [Create a Non-PO Invoice from a Contract](#), [New Contract Level Budget/Spend Validation Checks on Invoices](#), [Assign a Contract to Multiple Line Items on an Invoice](#), [Add Contract Non-Catalog Items to Invoices](#), and [Remove Contract from Line Items on Requisitions, Purchase Orders and Invoices](#) for details about those features.

Financial Approvals for Invoices

Currently, organizations can utilize a Financial Approvals workflow step for requisitions and purchase orders. This workflow step allows for limits to be set for requisitions and purchase orders in a user's profile. When those limits are reached on a requisition or purchase order, the user's designated financial approver becomes the next approver for the document in workflow. With the 16.2 release, the Financial Approver workflow step is now available for invoices. This means that financial approvals can be enforced for PO and non-PO invoices.

The user profile contains new fields on the [User Purchasing and Approval Limit Values](#) page for setting invoice limits. With limits in place for Invoice Owners, the organization can then contact SciQuest to configure a new workflow step for financial approvals. With this workflow step activated, the invoice owner's financial approver will be set as the next approver on the invoice when invoice limits are reached.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **OFF** by default and you must contact SciQuest to configure the updated workflow
- New Permissions related to this Feature: None
- To utilize this feature, the organization must be configured to use financial approvers in workflow. You must contact SciQuest to enable this setting.
- When an organization is configured to use financial approvers in workflow, the user profile contains a section to set financial approvers: [Default User Settings > Financial Approvers](#). Users designated for financial approval apply to requisitions, purchase orders, and invoices.
- New fields for setting invoice limits are available under the [User Profile > Ordering and Approval Settings > User Purchasing and Approval Limit Values](#). The available limits are as follows:
 - **Invoice Limit** - Set this value to enforce workflow approval for the total amount on the invoice.

- **Invoice Line Limit** - Set this value if you want to trigger approval based on the value of an individual invoice line.
- **Invoice Approval Limit** - This is a financial limit for an *approver's* approval limit. If an invoice total amount exceeds this amount for an approver, an additional financial approval step will be required.
- **Invoice Line Item Approval Limit** - This is a financial limit for an *approver's* line item approval limit. If any line items in the invoice exceed this amount for an approver, an additional financial approval step will be required.
- The Buyer Invoice document configuration should be updated to include the **Next Approver** field (Site Configuration > Configure Documents > Configure Buyer Invoice Document).
- The Invoice workflow configuration must be updated to include Financial Approver workflow step, and you must contact SciQuest to update the workflow. The Financial Approver workflow step can be anywhere in the buyer invoice workflow process. (For requisitions and purchase orders, the financial approver workflow step continues to be available as the initial step in workflow only.)
- If the Invoice Owner changes while the invoice is in Draft status, the Financial Approver (Next Approver) on the invoice will change to reflect the financial approver set for the new Invoice Owner according to the limits set in the user profile. If the invoice is in workflow, the Invoice Owner can be changed, and will affect the Financial Approver step if it has not yet occurred in workflow. If the Financial Approver step has already occurred, the Invoice Owner change has no effect on financial approval.
- This feature applies to manual invoices, and to invoice imports via cXML, OCR, DMR, supplier portal and check request invoices.
- For more information, see [Invoice Financial Approval](#) in the **Accounts Payable Handbook** or online searchable help.

Ability to Display Account Codes Section on Invoice Simple and Detailed Manual Entry Pages

Previously, the Account Codes section for an invoice was available for display only the **Buyer Invoice** page. With the 16.2 release, the buyer invoice and credit memo document configurations can now be updated to include the Account Codes section on the manual simple and detailed invoice entry pages. Two new configuration options are available to display groups that contain splittable or grouped custom fields on the **Simple Manual Entry** page and **Detailed Manual Entry** page. This feature makes it easier to configure all codes you have identified as a group to be placed on the invoice document at one time, rather than adding individual fields to a section. Also, this feature allows for account code values to be selected during the invoice entry stage, before the invoice is completed and submitted to workflow.

IMPACT

- Products Affected: 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 and can be enabled by an administrator
- New Permissions related to this Feature: None
- Two new options are available on the **General** tab of Buyer Invoice document configuration: **Site Configuration > Configure Documents > Configure Buyer Invoice** - in the **Configuration Parameters** section:
 - **Display groups that contain splittable or grouped custom fields on the Simple Manual Entry page.** When this option is enabled, the Account Codes section with your configured splittable or grouped custom fields are displayed on the Simple Manual Entry page. The fields are editable on the Simple Manual Entry page and the Buyer Invoice (codes) section. Values can be updated on either page.
 - **Display groups that contain splittable or grouped custom fields on the Detailed Manual Entry page.** When this option is enabled, the Account Codes section with your configured splittable or grouped custom fields are displayed on the Detailed Manual Entry page. The fields are editable on the Detailed Manual Entry page and the Buyer Invoice (codes) section. Values can be updated on either page.
- The two new options are also on the Buyer Credit Memo document configuration, and must be configured separately.
- When an option is enabled and the organization utilizes the **Classic** invoice document layout, a new **view/edit by line item** hyperlink displays in the codes section that will navigate the user to the **Codes** page of the document.

Allow the Invoice Creator to Select Invoice Owner Account Codes and Custom Fields

As of the 16.1 release, AP customers have the ability to select code favorites in the user profile, which can be selected and applied on invoices created by that user. With the 16.2 release, a new organization setting allows invoice account codes and custom field values to be updated based on the Invoice Owner's profile values. For example, if an AP clerk is creating an invoice for another user (the Invoice Owner), the clerk will be able to see and select from a set of accounting code favorites in the Invoice Owner's user profile, as well as all other codes and custom fields to which the Invoice Owner has access. While an invoice creator might not have access to the same custom fields as the Invoice Owner, the creator will have the ability to see and select from the owner's available values on the invoice; access to custom fields in other areas of the application is based on a user's permissions.

The Invoice Owner code values will be available for selection only while the invoice is in **Draft** status. After the invoice is in workflow, only those values applicable to the approving user in a workflow step will be available. This feature applies to both manual PO and non-PO invoices, as well as DMR invoices in Draft status.

The new organization setting along with a new custom field setting determines if the account codes and custom fields are automatically updated based on changes to the Invoice Owner on a non-PO invoice.

IMPACT

- Products Affected: 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 administrator
- New Permissions related to this Feature: None
- A new organization setting is available for **Update Invoice Custom Field values based on Invoice Owner** located at **Accounts Payable > AP Administration > Configure AP Settings**. This setting must be enabled in order for the logged in user to see the Invoice Owner's account codes / custom fields for selection on the invoice.
 - The invoice creator sees a section for accounting codes and the option to **Select from your code favorites**. This dropdown contains codes saved as **Favorites for Check Requests & Invoices** assigned in the logged in user's and the Invoice Owner's user profile.
 - Select the appropriate favorite list to populate the account codes / custom fields.
 - A user must have favorites configured for **Custom Field and Accounting Code Defaults > Code Favorites for Check Requests & Invoices** in order to see them available for selection.
- In addition to selecting from the Invoice Owner favorites, the new setting allows for the logged in user to select from all custom field values to which the invoice owner has access.
- The option to select from the Invoice Owner's codes is only available while the invoice is in **Draft** status. Once the invoice is in workflow, only the logged-in user's codes are available for selection.
- **Invoice Owner Changes:** If the Invoice Owner is changed, the account codes will **NOT** automatically update for a **PO invoice**, since codes are inherited from the purchase order. However, for **non-PO invoices**, two settings determine if the account codes are updated when the Invoice Owner is changed:
 - The new organization setting for **Update Invoice Custom Field values based on Invoice Owner**. If the setting is OFF, no custom fields values will be updated if the Invoice Owner changes. The values, however, can be manually edited on the invoice. If the setting is ON, the custom field values will automatically update based on the Invoice Owner for non-PO invoices only.
 - A new custom field level setting for **Do not update based on Invoice Owner**. By default, the setting is not enabled, allowing the specific field to be updated automatically if the Invoice Owner changes. If enabled, the specific custom field will not update when the Invoice Owner is changed, even though the organization setting to update is enabled. This setting only applies to non-PO invoices.
- For non-PO invoices, values will not be set automatically if any of the following exist:
 - Manual edits have occurred on the invoice custom fields.
 - A Non-PO Invoice rule applies and defines the custom fields.

Ability to Edit Commodity Code for Multiple Lines on a Non-PO Invoice

Previously, a user could change the commodity code for all line items on a requisition by selecting the appropriate lines and choosing **Change Commodity Code** in the **For selected line items** dropdown. Commodity codes could be changed or added on an invoice with PO and/or non-PO lines, but it had to be done at the line level. With the 16.2 release, the option to **Change Commodity Code** for selected lines now exists for non-PO invoice documents. For invoices with PO lines, the option continues to be available to edit the commodity code for each line individually.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **ON** by default
- New Permissions related to this Feature: None
- When a non-PO invoice is created, the option to **Change Commodity Code** is available in the **For selected line items** dropdown above the invoice lines. When selected, the user can enter or search for a commodity code to apply to each selected line on the invoice. In order to see this option:
 - The invoice document configuration must include the Commodity Code field.
 - The invoice cannot contain any lines associated with a purchase order. If any PO lines are on the invoice, the option to change all lines is not available. The option to change the code for individual lines is available.
 - The user must have permission to edit the invoice.
 - The invoice must be in draft status or in workflow. If the invoice has completed workflow, the option will not display.

Ability to Update Invoice Owner on PO Invoices

Currently, the Invoice Owner for a non-PO invoice can be edited. Invoices associated with a purchase order, however, inherit the Purchase Order Owner as the Invoice Owner and previously could not be edited. In some cases, the Invoice Owner may need to be changed in order to route the invoice correctly, and credit the appropriate person for the invoice. With the 16.2 release, users with the appropriate permission now have the ability to edit an Invoice Owner on an invoice created from a purchase order.

Users can edit the Invoice Owner at the header level for a single invoice from the invoice document. If there are multiple purchase orders and owners associated with a single invoice, only those lines that have the same owner as the Invoice Owner at the header level will be changed. Also with this feature, organizations can configure options to automatically change the Business Unit and/or Department on the invoice based on the new Invoice Owner. These options will only apply if the organization utilizes business units or departments.

IMPACT

- Products Affected: 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 and can be enabled by an administrator
- New Permissions related to this Feature: **Update Owner for PO Invoices** (Permission Settings > Accounts Payable > Accounts Payable)
- The Buyer Invoice document configuration must contain the Invoice Owner field at the header level. The option is not available if Invoice Owner is displayed at the line level only.
- When a user has the new permission enabled, a user can change the Invoice Owner by selecting the **edit** button for the area where the Invoice Owner field is displayed at the header level:
 - A link for **select a different user...** displays under the Invoice Owner name. Select the hyperlink and search for/select another user as the Invoice Owner.
 - The Invoice Owner will update at header level. The update is made to each line of the invoice where the Invoice Owner was the same as the header level. If a line had a different owner than the header, the line value will not update.
 - Changes can be made to invoices in any status.
 - If there are recurring invoices associated with the invoice being changed, the user will be prompted if the Invoice Owner should change for future invoices.
- There are two new organization settings related to this feature at **Accounts Payable > AP Administration > Configure AP Settings**:
 - **Set the Invoice Business Unit to the Owner's Business Unit** - With this setting enabled, if an Invoice Owner changes, the Business Unit is automatically updated to the new Invoice Owner's business unit. This option only displays if the organization has the Multi-Business Unit license.
 - **Set the Invoice Department to the Owner's Department** - With this setting enabled, if an Invoice Owner changes, the Department is automatically updated to the new Invoice Owner's department.
 - The Business Unit and/or Department will only change at the header and on the lines where the Invoice Owner was the same at the header level. If a line has a different Invoice Owner than the header, the Business Unit and/or Department do not change.

- If either of these organization settings are not enabled, the Business Unit and/or Department will remain unchanged if the Invoice Owner is changed. However, the option to select the new owner's Business Unit and/or Department is available.
- This feature already exists for non-PO invoices. There is no change to the behavior for non-PO invoices.
- Because PO invoices inherit account codes from the purchase order, the account codes do not change based on changes to the Invoice Owner. For non-PO invoices, the account codes do change with Invoice Owner changes.

Ability to Associate a Non-PO Line to a Purchase Order Line

Imported invoices can indicate an associated purchase order line for the lines on the invoice. Previously, purchase order lines could not be associated with lines on an invoice created via the application or from a Supplier Portal. With 16.2, users now have the option of selecting a purchase order line to associate with an invoice line. When associating the PO line, the description, commodity codes, and account codes are pulled from the purchase order and displayed for each invoice line associated.

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
- A user can now associate a non-PO invoice line to a purchase order line, therefore populating the description, commodity codes, and account codes from the purchase order on the invoice.
 - The Commodity Code field should be displayed on both the Purchase Order and Buyer Invoice document configurations.
 - The same accounting codes should be configured on both the Purchase Order and Buyer Invoice document configurations. However, if the accounting codes differ between the two document types, the codes in common will show on the Invoice for the PO line.
 - When selecting to associating an invoice line with a PO, the PO's to select from are from the same supplier.
- When a non-PO invoice is in draft form, a new selection for **Associate to PO Line** is available in the **For selected line items** dropdown above the invoice lines. Select the appropriate lines to associate, and click **Go**.

- The purchase order search displays in a separate window, with the supplier populated as read only. Enter other search criteria as appropriate.
- From purchase order search results, you can select to view details about the purchase order if needed.
- Click **[select]** from the purchase order results to see the lines available for selection.
- Click **[select]** for the line to associate with the invoice. The overlay closes and the invoice line is refreshed with the selected line information from the PO, including the description, commodity code, and account codes.
- If the commodity code from the PO was mapped to a specific custom field, the Invoice PO Line will keep the default mapped value for the mapped Custom Field from the Purchase Order.
- Changing the commodity code on the PO line after associating the PO line to the invoice will not change the custom field value on the Invoice PO Line.
- Any custom field values on the line in the purchase order that are now associated to an invoice will not be changed by non-PO code rules, user code favorites, or user custom field values. Because these values originated from the PO and have already gone through approvals and budget validations, the values will remain with the line.

CONTRACT LIFECYCLE MANAGEMENT ENHANCEMENTS

In 16.2, several enhancements have been made to the CLM products: Contract Compliance Tracker (CCT) and Total Contract Manager (TCM).

Changes are grouped by product. Please note that changes made to Contract Compliance Tracker will also affect Total Contract Manager.

Note: Release 16.2 features enhancements in other SciQuest products that may affect organizations using CLM. Please see [Dashboard Enhancements](#) and [Accounts Payable Enhancements](#).

GENERAL CLM ENHANCEMENTS

In 16.2, the following enhancements have been made for all CLM products.

Create a Non-PO Invoice from a Contract

Currently, if an invoice is created that is not associated with a purchase order (non-PO invoice), product information must be added manually as non-PO lines. If the invoice contains items that need to be associated with a contract, that item information must be duplicated in the invoice and manually associated with the contract.

In 16.2, users can create invoices for contracts that don't have a purchase order, making it simpler to manage payments and reduce invoice entry time in situations where the contract itself is considered the purchase order and invoices are submitted against it. Users now have the ability to create a non-PO invoice directly from a contract and choose which non-catalog items from the contract will be added to the invoice. This feature allows for better usability especially for those organizations with a majority of invoices based on a contract and not associated with a purchase order.

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: None

KEY POINTS OF FEATURE

- This feature is **On** by default but optional for use
- New Permissions related to this Feature: None

- The following elements must be in place:

Organizations

- For consortium contracts, if a consortium parent has the CCT license, and a consortium member does not, the member is allowed to create invoices from shared contracts.

Contracts

- Invoices 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** and has the **Allow Non-PO Invoices** setting enabled on the supplier profile (Supplier Profile > eProcurement > Integration Settings > Allow Non-PO invoices).
- For organizations with CCT only, the contract must have a start date in the past.
- For organizations with TCM, the contract must be in one of the following statuses: **Executed: In Effect, Superseded, Complete, Expired**; with start and end dates that encompass the invoice date. If there is no invoice date, the current date (i.e., today's date) is used. An invoice cannot be created from contracts in the following statuses: *Draft, Executed: Future, Archived, Terminated*.

Users

- Users need the **Create Non-PO Invoice/Credit Memo** (Permissions > Accounts Payable > Accounts Payable) permission.
 - Users need access to the contract through one of the following permissions: **Contract Administrator, Contract Manager, Consortium Contract Administrator** (Permissions > Contracts).
- On contracts, the **Create Invoice** process can be initiated from three places:
 - **Contract Search** - In contract search results, highlight the contract to create an invoice for, expand the **Open Summary** menu and select **Create Invoice**.
 - **Contract Actions** - Open a contract. Expand the **Contract Actions** menu and select **Create Invoice**.
 - **Contract Summary** - On the Contract Summary page, click the **Create Invoice** button near the top of the page.
 - When the Create Invoice option is selected, the **Create Invoice** window opens and displays the following information that is used to create the invoice:
 - **Contract Name, Contract Number, Start Date** and **End Date** fields are populated from the contract header.
 - **Supplier Invoice Number** and **Invoice Date** fields are used to enter information from second party or supplier's invoice but are not required.

- All **non-catalog items** from the contract are displayed, along with their description, quantity and price. This is where users decide which non-catalog items are added to the invoice by modifying the quantity for a line item. All items with a quantity greater than 0 will be added to the invoice. **Line items with a quantity of 0 will not be added to the invoice.**
 - The quantity and price of the item can be changed in this table.
 - Items can be sorted by the Catalog Number column.
 - A **Search Contract Non-Catalog Items** link allows users to search for specific items listed on the contract.
- An **Add Additional Lines to Invoice** link can be used to add non-catalog items to the invoice "on the fly". Clicking the link opens a table where users can enter non-catalog items that they want to be on the invoice when it is created, but are not currently listed on the contract:
 - Non-catalog items entered in the table are added to the invoice and assigned to the selected contract, but they are **not** added to the contract.
 - The fields available for capturing item information are: Description, Catalog Number, Quantity, Price and Packaging.
 - There is a maximum limit of contract non-catalog items that can be added to an invoice at one time. Once the limit is reached, a warning message will appear and the user has three options: they can create the invoice with the existing number of items (and add more items later), remove additional items that have been added, or reduce the quantity on existing contract items to 0, which means they will not be added to the invoice.
- Once the **Create** button is clicked, the invoice is created and the user is directed to the Detailed Manual Entry tab of the invoice where they can continue to process the invoice.
- Once the invoice is created:
 - The **History** tab on the invoice indicates that the invoice was created from a contract.
 - If the invoice is still in Draft mode, the **Add lines from Contract** button on the invoice can be used to add non-catalog items from a contract to the invoice. See [Add Contract Non-Catalog Items to Invoices](#).

New Contract Level Budget/Spend Validation Checks on Invoices

Currently, organizations with Contract Compliance Tracker and Accounts Payable Director or AP Express can configure requisitions to show a warning or error if a purchase requisition is associated with a contract and does not meet limitations specified on the contract for minimum or maximum contract spend, maximum line item quantities, or if a contract budget is exceeded. Previously, however, if an organization created a contract that was not tied to a purchase order resulting from a validated requisition, the minimum/maximum limitations and contract budget could not be enforced.

With this release, organizations can set up budget and spend validation checks for invoices. In addition, a new minimum line item quantity validation check is now available for both requisitions and invoices. On contracts, users can choose to use the same maximum/minimum limits for invoices as are designated for requisitions, or designate different levels specifically for invoices.


Document configuration is required to enable the validation settings for invoices, and new fields on contracts will be used to set minimum/maximum limits. Once configured, the new validation checks on invoices will scan for budget totals and minimum and maximum contract spend and line item quantity limits on associated contracts, so that users invoicing against a contract will immediately know if they are within a contract's spend and line item quantity limits. If a contract budget is designated and Enforce Budget is enabled, the invoice document will show an error or warning (as configured for invoice documents) if the contract budget is exceeded.

This will improve the data accuracy of the invoice by validating the contractually controlled elements and provide greater financial compliance. It will also allow contract invoices that have not gone through the requisition or purchase order process to be validated against budget limits.

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **On** by default but optional for use
- 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.
- The **Buyer Invoice configuration** must be updated to include warning and error messages when assigning contracts to invoice line items:
 - The following validation settings are located under **Site Configuration**  **> Configure Documents > Configure Buyer Invoice Document**. Under the **Layout Details** tab, click the **Contract No.** field (for both Submit and Workflow validation rules):
 - If Contract Budget exceeded
 - If Minimum Contract Spend per Invoice not Met
 - If Maximum Contract Spend per Invoice Exceeded
 - If Minimum Line Quantity per Invoice not Met
 - If Maximum Line Quantity per Invoice Exceeded

- Each validation rule can be set to one of three levels:
 - **Ignore** - The validation is skipped and no message is displayed to the user.
 - **Warning** - Users will see a warning symbol and a message indicating the error, but can continue with the process.
 - **Error** - Users will see an error symbol and a message indicating the error and cannot continue with the step until the problem is fixed.
- On **Contracts**, updates have been made to the following areas:

Budget and Spend Page

- For **contract budget** validations, a value must be entered in the **Budget** field and **Enforce Budget** must be selected. When the Enforce Budget is set to Yes on a contract, the validation check will compare invoice line item totals against the remaining contract budget. If the invoice total from all lines associated with the contract is greater than the remaining budget for invoices on the contract, an error or warning will appear, as defined on the Buyer Invoice configuration for the organization.
- For **contract spend** and **line item quantity** validations, two new sections are used to set the minimum and maximum limits that will trigger validation on invoices:
 - A new **Limits Per Requisition** section allows users to set minimum and maximum limits for contract spend and line item quantities for contract requisitions. The **Minimum Contract Spend per PR**, **Maximum Contract Spend per PR** and **Maximum Line Item Quantity per PR** fields that previously appeared on the Budget and Spend page have been moved to this section and are displayed. A new field has been added where users can enter the **Minimum Allowed Line Item Quantity Spend**.
 - A new **Limits Per Invoice** section allows users to set minimum and maximum limits for contract spend and line item quantities for contract invoices. A **Same as Requisitions** checkbox allows the minimum and maximum values that have been entered for requisitions to be automatically applied to invoices without entering the information twice. If the checkbox is selected, the Limits Per Invoice section will collapse and values entered in the Limits Per Requisition section will be used for invoices. If the checkbox is blank, the Limits Per Invoice section will expand and values entered in Limits Per Invoices section will be used for invoices.

Contract Summary

- Minimum/maximum contract spend and line item quantity limits for requisitions and invoices can be displayed in a table on the bottom of the **eProcurement, Budget, and Spend** section in the **Contract Summary**.
- Display settings for these fields are controlled by the following new fields that have been added to the **Configure Contract Summary Screen**:
 - Contract Spend Limits
 - Contract Line Item Quantity Limits
- If the fields are enabled for the contract summary, but no values exist on a contract, dashes are displayed in the fields.
- Requisition and invoice limits will not be displayed on the contract summary if an organization does not have the Requisition Manager or Invoice Manager licenses.

CSV or XML Import/Export

- Minimum/maximum contract spend and line item quantity limits on a contract can be updated through CSV or XML Import/Export. They will be displayed as the following fields/columns on import/export files:
 - Minimum Contract Spend per PR*
 - Maximum Contract Spend per PR*
 - Maximum Line Item Quantity per PR*
 - Minimum Line Item Quantity per PR
 - Minimum Contract Spend per Invoice
 - Maximum Contract Spend Per Invoice
 - Minimum Line Item Quantity Per Invoice
 - Maximum Line Item Quantity Per Invoice
 - UseReqLimitsForInvoice - Indicates that the minimum and maximum contract spend and line item quantity limits set for requisitions on this page will also apply to invoices. If this field is set to TRUE, the four fields used to set the minimum/maximum limits for invoices will not appear in the import/export file and any values previously entered will be overridden by the requisition settings. If this field is set to FALSE, minimum/maximum fields for both invoices and requisitions are included in the import/export file.

*These are existing fields from the Budget and Spend page. All other fields are new for this release.

- **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.
- When assigning contracts to line items on **Invoices**, the enabled validation messages will appear in the **invoice header** if there is one contract associated with the invoice, or on the appropriate **line item** if there are multiple contracts associated with the invoice. Since multiple lines can be associated to multiple contracts and each contract can have different minimum/maximum values, some items may have messages and some may not.

Assign a Contract to Multiple Line Items on an Invoice

Previously, contracts could be assigned to an invoice at the individual line level only, one line item at a time. In 16.2, a contract can be assigned to multiple lines on an invoice at once. This is especially helpful when creating non-PO invoices with many items from the same contracted supplier, speeding up the process and improving efficiency.

On an invoice, the option to assign a contract to lines is available at the header level, which will associate all applicable lines on the invoice to one contract. The action is also available at the line level, where users can choose specific lines to assign to a contract. This allows different contracts to be applied to separate line items.

For invoices that already have contracts assigned to line items, a new **Change Contract** link is displayed under the **Contract Number** field in the header.

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 **On** by default
- New Permissions related to this Feature: None
- The following elements must be in place:

Invoices

- The feature is available for **PO invoices**, **non-PO invoices** and **credit memos** created manually.
- The invoice must be in either Draft status or in workflow.
- The supplier on the invoice must match the supplier or second party on the contract.


Contracts

- The contract must have a supplier or second party that: **matches the supplier on the invoice**, is **active for shopping**, and has the **Allow Non-PO Invoices** setting enabled on the supplier profile (Supplier Profile > eProcurement > Integration Settings > Allow Non-PO invoices).
- For organizations with CCT only, the contract must have a start date in the past.
- For organizations with TCM, the contract must be in one of the following statuses: **Executed: In Effect**, **Superseded**, **Complete**, **Expired**; with start and end dates that encompass the invoice date. If there is no invoice date, the current date (i.e., today's date) is used. Items cannot be assigned to invoices from contracts in the following statuses: *Draft*, *Executed: Future*, *Archived*, *Terminated*.

Users

- Users need to be able to edit the invoice through one of the following permissions: **Edit Pending Invoices (Any Approval Folder)** (Permissions > Accounts Payable > Invoice Approvals), **Create PO Invoice/Credit Memo** or **Create Non-PO Invoice/Credit Memo**(Permissions > Accounts Payable > Accounts Payable).
- Users need access to the contract.
- **Important Note!** Invoice owners and users with the **Apply any contract to invoices** permission will be able to view contracts that can be applied to line items, even if they would not normally have access to the contract. This includes confidential and consortium contracts.

- Contracts can be assigned to invoice line items on the invoice header or at the line level. The area chosen will affect which options are available:
 - At the **header** level - This option will associate all applicable lines on the invoice to one contract. Expand the **Available Actions** menu on the contract header and select **Assign Contract to All Lines**, then click **Go**.
 - At the **line** level - This option allows a contract to be assigned to specific lines that users have selected, which allows different contracts to be applied to different line items. In the Line Item Details section, select the checkbox to the right of each line item to be assigned to a contract. Expand the **For selected line items** drop down and select **Assign Contract to Selected Lines**, then click **Go**.
- Selecting the **Assign Contract to All Lines** or **Assign Contract to Selected Lines** option opens the **Assign Contract to Selected Lines** window. It displays a list of contracts that can be assigned to line items, sorted by contract number.

Note: All columns except Version and Status can be sorted. Clicking an information icon  next to a contract will open its contract summary. Users with access to the contract can click **Go to Contract** to open it.

- Once the contract to be assigned is selected in the **Assign Contract to Selected Lines** window, the user has two options for applying the lines:
 - **All Selected Lines** - This will assign the contract to the lines selected by the user. This option will **overwrite** any existing contract selections on the chosen line items. A validation message will indicate that previous contract selections are about to be replaced.
 - **Only Lines with No Contracts Assigned** - This will assign the contract to all applicable lines that have not yet been assigned to a contract.
- On invoices that have contracts assigned to them, a new **Change Contract** link is displayed under the **Contract Number** field in the header.
- There is a maximum limit of lines that can be assigned to an invoice at one time. Once the limit is reached, a warning message will appear.

Add Contract Non-Catalog Items to Invoices

Accounts Payable users creating invoices can now add non-catalog items from an existing contract to the invoice and have those lines automatically associated to the contract in one action.

A new **Add Lines from Contract** option on invoices in Draft status will copy over selected items and general information from a contract with the use of a wizard. The wizard also provides the ability to 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. The items are assigned to the contract on the invoice, but are not added to the contract itself.

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 **On** by default
- New Permissions related to this Feature: None
- The following elements must be in place:

Invoices

- The feature is available for **PO invoices**, **non-PO invoices** and **credit memos** created manually.
- The invoice must be in Draft status.
- The supplier on the invoice must match the supplier or second party on the contract.


Contracts

- The contract must have a **supplier** or **second party** that: **matches the supplier on the invoice**, is **active for shopping**, and has the **Allow Non-PO Invoices** setting enabled on the supplier profile (Supplier Profile > eProcurement > Integration Settings > Allow Non-PO invoices).
- For organizations with CCT only, the contract must have a start date in the past.
- For organizations with TCM, the contract must be in one of the following statuses: **Executed: In Effect**, **Superseded**, **Complete**, **Expired**; with start and end dates that encompass the invoice date. If there is no invoice date, the current date (i.e., today's date) is used. Items cannot be added to invoices from contracts in the following statuses: *Draft*, *Executed: Future*, *Archived*, *Terminated*.

Users

- Users need to be able to edit the invoice through one of the following permissions: **Edit Invoices** (Permissions > Accounts Payable > Accounts Payable), **Create PO Invoice/Credit Memo**, **Create Non-PO Invoice/Credit Memo** (Permissions > Accounts Payable > Accounts Payable).
- Users need access to the contract.
- **Important Note!** Invoice owners and users with the **Apply any contract to invoices** permission will be able to view contracts that can be applied to line items, even if they would not normally not have access to the contract. This includes confidential and consortium contracts.

- A new **Add Lines from Contract** button is displayed on invoices in Draft status in the Line Item Details section. Clicking the button opens a wizard that takes users through the following steps:
 - The first **Add Lines from Contract** window displays a list of contracts that have a supplier or second party that match the supplier on the invoice and contain non-catalog items that can be added to the invoice.

Note: All columns in this screen except Version and Status can be sorted. Clicking an information icon  next to a contract will open its contract summary. Users with access to the contract can click **Go to Contract** to open it.

- Selecting a contract and clicking **Next** opens a second window that displays information from the contract and is where users select which non-catalog items are added to the invoice by modifying the line item quantity:
 - **Contract Name, Contract Number, Start Date** and **End Date** fields are populated from the contract header.
 - All **non-catalog items** from the contract are displayed, along with their description, quantity and price. This is where users decide which non-catalog items are added to the invoice by modifying the quantity for a line item. All items with a quantity greater than 0 will be added to the invoice. **Line items with a quantity of 0 will not be added to the invoice.**
 - The quantity and price can be changed for the invoice line item in this table.
 - Items can be sorted by the Catalog Number column.
 - A **Search Contract Non-Catalog Items** link allows users to search for specific items listed on the contract.
 - The **Add Additional Lines to Invoice** link is used to add non-catalog items to the invoice "on the fly". Clicking the link opens a table where users can enter non-catalog items that they want to be on the invoice when it is created, but are not currently listed on the contract:
 - Non-catalog items entered in the table are added to the invoice and assigned to the selected contract, but they are not added to the contract.
 - The fields available for capturing item information are: Description, Catalog Number, Quantity, Price and Packaging.
 - The **Change Contract** link returns users to the previous page where they can choose a different contract.
 - Clicking the **Add Lines** button will add line items with a Quantity greater than 0 to the invoice and the user is directed to the Detailed Manual Entry tab of the invoice where they can continue to process the invoice.
- There is a maximum limit of contract non-catalog items that can be added to an invoice at one time. Once the limit is reached, a warning message will appear and the user has three options: they can add the existing number of items to the invoice (and add more items later), remove additional items that have been added, or reduce the quantity on existing contract items to 0, which means they will not be added to the invoice.

Remove Contract from Line Items on Requisitions, Purchase Orders and Invoices

On requisitions, purchase orders and invoices, a new menu option provides the ability to remove assigned contracts from multiple line items at once, speeding up the process and improving efficiency.

IMPACT

- Products Affected: Contract Compliance Tracker, Total Contract Manager, Spend Director, Order Manager, Accounts Payable Director, AP Express
- 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 following elements must be in place:

PRs, POs, and Invoices

- The feature is available for requisitions, purchase orders and invoices.
- The Remove option is not available unless there is at least one line item assigned to a contract.

Users

- Users need permission to edit the requisition, purchase order, or invoice.
- The **Remove Contract from All Lines** or **Remove Contract from Selected Lines** options are available where contract information is updated in the following areas if there is at least one line item assigned to a contract:
 - **Requisitions** - The Summary tab on both the old and updated interface, and in the Final Review section in the updated interface.
 - **Purchase Orders** - The Purchase Order Summary tab, the Taxes/S & H tab and on Accounting Codes on both the old and updated interface. In the updated interface it is displayed in the Summary section and all other sections under Purchase Order.
 - **Invoices** - All tabs and sections.

- Contracts can be removed from documents on the header or at the line level. The area chosen will affect which options are available:
 - At the **header** level - This option will remove contracts from all lines on the document. Expand the **Available Actions** menu on the contract header and select **Remove Contract From All Lines**, then click **Go**.
 - At the **line** level - This option allows a contract to be removed from specific lines that users have selected. In the Line Item Details section, select the checkbox to the right of each line item to be removed from a contract. Expand the **For selected line items** drop down and select **Remove Contract from Selected Lines**, then click **Go**.
- Depending on your system settings, it may take up to 24 hours for the Lifetime Spend and Actual Spend totals to reflect new invoice amounts assigned to the contract.

View Lifetime Spend on Contracts

For organizations using eProcurement, a new **Lifetime Spend** link on contracts shows a summary of contract spend calculated for all versions of the contract, including renewals and amendments (if applicable). Contract administrators and contract managers can quickly view contract spend totals and make decisions about future spending without navigating away from the contract.

Spend totals from PR's, PO's and Invoices are displayed. On consortium contracts, lifetime spend totals are displayed for both the parent and published member organizations.

Lifetime spend totals are also shown in the new **Lifetime Summary** bar chart on the Budget and Spend page.

For more contract spend updates, see [Enhanced Visibility to Contract Spend](#).

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **On** by default.
- New Permissions related to this Feature: None
- Organizations must have eProcurement enabled before Lifetime Spend is displayed:
 - 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.
- Click the **Lifetime Spend** link in the top left corner of a contract (i.e., the "sticker" section) to display a summary of all spend assigned to the contract from purchase requisitions, purchase orders, and invoices. Lifetime spend totals are based on:
 - PR, PO and Invoice spend from **all versions** of the contract, including renewals and amendments (where applicable).

Note: For organizations using Contract Compliance Tracker only, the Lifetime Spend totals will not include amendments as CCT does not use amendments.

- Totals include both **committed and actual spend** for all contract statuses.
- Totals also incorporate any **adjustments** made in the Actual Spend by Version table on the Budget and Spend page.
- Clicking the **Details...** link directs users to the **Actual Spend by Version** table on the Budget and Spend page of the contract, where they can view a complete breakdown of spend totals by contract version. See [Enhanced Visibility to Contract Spend](#).
- Lifetime Spend totals are updated on all contract versions, so the amounts displayed remain constant no matter which version is open. For example, if the original contract has \$100 in invoice spend, and a renewal adds \$50, the Lifetime Spend **Invoice:** total will show \$150 on the original contract, all renewals, and all amendments.
- Organizations with **consortium contracts** will see two links:
 - The **Lifetime Spend** link shows contract spend totals specific to your organization.
 - The **Lifetime Member Spend** link shows spend totals for all member organizations:
 - For **parent organizations**, this means the totals will be the sum of all spend assigned to the contract by all subscribers and will show the total contract spend by all consortium members.
 - For **member organizations**, this means the totals will only show a summary of spend by organizations that you have published the contract to.
 - For consortium contracts, clicking the **Details...** link will take users to the **Published Member Spend** table on the Budget and Spend page, which displays information specific to consortium members. See [Enhanced Visibility to Contract Spend](#) for more information.

- Lifetime spend totals are also displayed in the **Lifetime Summary** bar chart on the Budget and Spend page. It shows spend for PR's, PO's and Invoices for all versions of the contract, color coded by version. See [Enhanced Visibility to Contract Spend](#).
- Depending on your system settings, it may take up to 24 hours for the Lifetime Spend and Actual Spend by Version totals to reflect new PR, PO and Invoice Spend amounts assigned to the contract.

Enhanced Visibility to Contract Spend

For organizations using eProcurement, enhancements to the contract Budget and Spend page and Contract Summary provide better visibility into contract spend, allowing users to view all committed and actual totals assigned to a contract from purchase requisitions, purchase orders and invoices on one page. Contract managers can quickly see all monetary totals related to the contract without opening additional pages or other areas of the system.

Updates to the contract **Budget and Spend** page include:

- New charts show contract spend at a glance.
 - The **Budget Summary** chart shows spend totals and remaining budget totals for the open contract and indicates when spend totals are approaching the contract budget limit. If the budget for a contract is \$0, this chart is hidden.
 - The **Lifetime Summary** chart encapsulates spend across all versions of the contract, color coded by version. Users can click options in the legend so that only information for selected versions is displayed in the bar graph.
- A new **Actual Spend by Version** section provides key information on contract spend for **each version** of a contract. Contract spend totals for purchase requisitions, purchase orders and invoices are broken out for each renewal and amendment (if applicable). From here users can also make adjustments to spend totals, access related records, or open a different version of the contract.
- For consortium contracts, a new **Published Member Spend** section displays the same type of information as the Actual Spend by Version section, but the data is specific to consortium members. It contains an additional **Published Members** column that shows the total number of members to which the contract is published. Clicking the hyperlink in this column opens a breakdown of spend per consortium member, providing a complete picture of how spend has been allocated across the consortium for the contract.
- New **Limits Per Requisition** and **Limits Per Invoice** sections are used to set limits for contract spend and line item quantities. These updates works with new validation checks for invoices enhancement and are described in detail here [New Contract Level Budget/Spend Validation Checks on Invoices](#).

New fields have also been added to the **eProcurement, Budget and Spend** section of the **Contract Summary** that show actual and committed spend totals for purchase requisitions, purchase orders and invoices as well as remaining budget totals.

REMAINING BUDGET

Remaining budget totals allow contract managers and administrators to quickly see how much budget remains on a contract without navigating away from the contract or opening several records to calculate totals.

New **remaining budget** calculations have been added next to each PR Spend, PO Spend and Invoice Spend total on the Budget and Spend page and in the Contract Summary. They show spend as a dollar amount or as the **percentage** that each spend total represents of the total contract budget, and how many dollars remain in the contract budget each case.

The **Budget Summary** chart on the Budget and Spend page also shows remaining budget values for the contract that is open. Clicking on a **Remaining** dollar value in the chart provides details of the calculation.

For more contract spend updates, see [View Lifetime Spend on Contracts](#).

IMPACT

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

KEY POINTS OF FEATURE

- This feature is **On** by default.
- 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.
- For organizations with TCM, a new **Budget Calculation** option under **Contract Administration > General Contract Settings** defines how credit memos are calculated for invoice remaining budget totals on contracts. The following options are listed next to **How Should Credit Memos be applied to a Contract's Remaining Invoice Budget**. The system will read these settings and do one of the following:
 - If the **Do Not Apply** option is selected (default), credit memo amounts are ignored and **will not be applied** to remaining invoice budget totals on contracts.
 - If the **Apply to Referenced Contract Only** option is selected, credit memo amounts **will be applied** to remaining invoice budget totals on contracts.
 - This option is only available for invoices.
 - Changes to the setting are applied to new contracts only.

- On **Contracts**, updates have been made to the following areas:

Budget and Spend Page

- New charts have been added to the contract Budget and Spend page:
 - The **Budget Summary** bar chart shows spend totals for the contract that is open. Grouped by PR Spend, PO Spend and Invoice Spend, each bar shows the **percentage** that each spend total represents of the total contract budget, and how many dollars remain in each case. Clicking on a remaining dollar value opens an overlay showing details of the calculation. If the budget for a contract is \$0, this chart is hidden.

The chart is color-coded to indicate when spend totals are approaching the contract budget:


- **Green** indicates spend that is 74% or less of the total contract budget.
 - **Yellow** indicates spend that is between 75% and 94% of the total contract budget.
 - **Red** indicates spend that is 95% or more of the total contract budget.
- The **Lifetime Summary** bar chart shows spend for PR's, PO's and Invoices for all versions of the contract, color coded by version. It provides a look at data from the Actual Spend by Version section in a graphic format. Users can toggle the renewal and amendment versions listed in the legend on and off so that the bar graph only shows data for the selected version(s).
- A new **Actual Spend by Version** section provides key information on contract spend for **each version** of a contract. **PR Spend**, **PO Spend** and **Invoice Spend** totals are listed in columns, and information for each renewal and each amendment is displayed on a separate row:
 - **This Version** on a row indicates the contract version you are in.
 - You can **change contract versions** from within the Budget and Spend page. On any row in the Actual Spend by Version table, click the information icon ⓘ to open the contract version's Contract Summary page. From there, clicking **Go to Contract** will refresh the page and open that version of the contract. The **This Version** indicator moves to the row of the newly opened contract. The values displayed in the Lifetime Spend table do not change as they are calculated for all versions of the contract.
 - **Remaining budget** calculations are shown for **each spend total** on **each renewal** and **each amendment** (if applicable). Under each spend total, it shows the percentage that the spend total reflects of the total budget for that version along with the contract budget for that version. For example, if a contract has a budget of \$100.00 and the PR Spend total is \$90.00, the remaining budget information displayed under the PR Spend total would be (90% of \$100.00).

Note: For organizations using Contract Compliance Tracker only, the Actual Spend by Version table will not show amendments as CCT does not use amendments.

- **Adjustments** can be made to PR, PO and Invoice totals for any version of the contract by clicking the **Adjust** button in the appropriate row.
- Clicking a PR Spend, PO Spend or Invoice Spend **value** will open a **Document Search** page where all records related to that value are listed. For example, clicking a PR Spend total will direct users to a Document Search page that lists all the purchase requisitions with line items assigned to the contract version.

- For consortium contracts, a new **Published Member Spend** section contains the same type of information as the Actual Spend by Version table, but the data is specific to consortium members. An additional **Published Members** column shows the total number of members to which the contract is published. Clicking the hyperlink in this column will provide breakdown of spend per consortium member. You cannot use the ⓘ icon to change contract versions or click on a value to view open related documents in the Published Member Spend table.
- The **Contract spend by department** report has been updated to include the contract version.

Contract Summary

- The following fields have been updated in the **eProcurement, Budget and Spend** section of the Contract Summary to show spend totals for purchase requisitions, purchase orders and invoices along with their remaining budget totals:
 - PR Spend
 - PO Spend
 - Invoice Spend
- Display settings for these fields are controlled by corresponding PR Spend, PO Spend and Invoice Spend options that have been added to the eProcurement, Budget and Spend section of the **Configure Contract Summary Screen** (Catalogs and Contracts  > Contract Administration > Configure Contract Summary Screen).
- **CSV or XML Import/Export**
 - The following new fields are displayed as fields/columns on CSV or XML export files only and cannot be updated through import:
 - PRBudgetRemaining
 - POBudgetRemaining
 - InvoiceBudgetRemaining
 - **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.
 - See [New Contract Level Budget/Spend Validation Checks on Invoices](#) for additional updates to CSV and XML Import/Export files.
- Depending on your system settings, it may take up to 24 hours for the Lifetime Spend and Actual Spend by Version totals to reflect new PR, PO and Invoice Spend amounts assigned to the contract.

Contract Dashboard Enhancements




In 16.2 the **Contracts Dashboard** has been replaced with a configurable dashboard format so that organizations can customize the dashboard that is displayed to all users who have access to the area. A SciQuest default Contracts Dashboard is provided, or organizations can create their own versions. At any time, organizations can restore the system default dashboard by deleting or deactivating any customized dashboards.

New contract widgets are available to add to organization and personal dashboards. See [Dashboard Enhancements](#) for additional information.

IMPACT

- Products Affected: Contract Compliance Tracker, 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 following permissions are required:
 - Users with the **Manage Organization Dashboards** permission (Permission Settings > Administration > System Administration > Manage Organization Dashboards) can create and modify contract dashboards and other types of dashboards.
 - Users with the **Contract Configuration** permission (Permission Settings > Contracts > Contract Configuration) can create and modify contract dashboards only.
- A Contracts Dashboard supplied by SciQuest is displayed by default when users navigate to the Contracts home page from the left menu (**Catalogs and Contracts**  > **Contracts** > **Contracts Dashboard**).
- If a user has the Manage Organization Dashboards or Contract Configuration permission, a **Configure This Dashboard** link is displayed in the top right corner of the Contracts Dashboard page. Clicking the link will allow them to make a copy of the default Contracts Dashboard and modify it by adding or removing widgets. When the revised dashboard is published, the default dashboard is replaced with the customized version and is what users will see (as defined by their permissions) when they navigate to the Contracts home page (**Catalogs and Contracts**  > **Contracts** > **Contracts Dashboard**).
- Customized contract dashboards can be made visible to specified user roles or business units, so that only users with one of the specified user roles or business units will see the customized dashboard. If a user has access to the Contracts Dashboard through a Contract Manager or Contract Administrator permission, but does not have one of the specified roles or business units, they will see the SciQuest default Contracts Dashboard.
- Updates to a customized Contracts Dashboard can be made through the **Configure This Dashboard** link or by navigating to **Site Administration**  > **Administration** > **Manage Organization Dashboards** and selecting **Edit** or **Settings** from the **Actions** menu next to the appropriate dashboard. Users with the Contract Configuration permission are able to access contract dashboard information only and cannot create or copy non-contract dashboards from this page.
- If an organization no longer wishes to use customized contract dashboards, they can restore the system default Contracts Dashboard by deleting or deactivating their customized dashboards.

Contract Advanced Search Enhancements

The Contracts Advanced Search page has been updated for easier viewing. Key search filters have been moved to the top of the page and be placed in a table format so they are aligned and will stack above each other in narrow browser windows.

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
- To better allow users with large screens to take advantage of extra space, search filters in the **Search Contracts – Advanced** page will now be displayed in two columns for users with wide browser windows. They will still be displayed in one column for users with narrow browser windows.
- The Supplier / Second Party search filter will change according to the licenses held by an organization:
 - For organizations with **CCT** only - The Supplier and Supplier Class search filters have moved from the Supplier sub-section to the top of the Search Contracts - Advanced page. The Supplier sub-section has been removed.
 - For organizations with **TCM** - The Second Party search filter has moved from the Contract Parties sub-section to the top of the page. The Contract Parties sub-section has been renamed to **Contract Party Options** and contains the First Party and Primary Second Party Class search filters.
- For organizations with **TCM**, radio buttons above contract party search filters have been changed to "Any Of" and "All Of":
 - **Any Of** - Select the **Any Of** radio button if any one of the values in the search filter can be contract parties on the contract.
 - **All Of** - Select the **All Of** radio button if all of the values in the search filter must be contract parties on the contract. This will return fewer search results.

TOTAL CONTRACT MANAGER ENHANCEMENTS

In 16.2, the following enhancements are available in Total Contract Manager (TCM).

Ability to Customize Placement of Signature Placeholders on Contracts for Adobe Sign

An addition to the eSignature feature allows organizations using Adobe Sign (also known as Adobe Document Cloud) as their eSignature provider to manually position signature block placeholders on eSignature contract documents, so they can clearly indicate who needs to sign where. This is useful for adding signature fields to third party contracts where it is not possible to modify the text.

Contract managers can manually place signature block placeholder fields (such as Signature, Date or Initial fields) anywhere on a contract document. They can add signature placeholders for multiple signers on one document.

Organizations still have the option to have signature block placeholders inserted automatically by the system, in which case they are inserted in the first available white space at the bottom of the contract.

IMPACT

- Products Affected: Total Contract Manager.
- End User Impact: Low
- Admin User Impact: Medium
- 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
- This option is available to organizations that have the eSignature feature enabled for their organizations and are using Adobe Sign as their eSignature provider.
- It can be used with Microsoft Word and PDF format documents.
- Signature block placeholders can be set up for multiple signers on one document.
- Contract workflow must be set up to include an extra step for signature block placement. Contact your customer success manager for information on how to configure contract workflow for this step.

- There are two options for signature block placement:
 - **Manual** - Allows the contract manager to go into the contract document that is being sent, choose where to insert signature block placeholders on the contract, then send the contract out for signature. This is done through an extra step in the contract workflow.
 - **Automatic** - The system automatically inserts signature block placeholders in the first available white space on the bottom of a contract and the placement cannot be changed.
- These settings can be configured in two places:
 - **Organization level** (default) - Organizations define the default settings for signature block placement on the **eSignature** tab under **General Contract Settings**. Users can edit **Adobe Document Cloud Settings** and select the appropriate option in the **Placement of Signature Block Fields** drop down. Changes to the settings apply to all new contracts using eSignature.
 - **Contract level** - Users can override organization settings for signature block placement as long as the contract is in Draft status. On a contract's **eSignature** page, users can edit **Settings** and select the appropriate option in the **Placement of Signature Block Fields** drop down. Once a contract is in workflow the settings cannot be changed.
- To **manually** place signature block placeholders on eSignature contracts:
 - The contract is submitted for approval.
 - Once the contract reaches the **ESignature Setup** step in the contract workflow, the contract manager selects **Launch eSignature** from the **Contract Actions** menu. They will be taken to the document in Adobe Sign where they can drag and drop signature placeholders from the top of the screen onto the document. If no signature blocks are placed, the system will insert signature block placeholders in the first available white space at the bottom of the contract.
 - When all the signature blocks are in place, the contract manager clicks **Send** from Adobe Sign. The contract is sent to signers listed on the eSignature tab on the contract and the contract moves to the **Out For Signature** step in workflow. In this step of the workflow, the contract manager is waiting for the signers to sign the contract, and the status for each signer is displayed to the left of the signer's name in the eSignature page. Clicking the information icon will show when the document was sent, viewed and returned.
- For the individuals who are signing the contract electronically:
 - When the designated signer opens the email in Adobe Sign, they have the option to sign the contract, delegate another person to sign the contract, or decline to sign the contract, in which case the contract will display an error on the Out for Signature step. In the system, the contract manager can open the History to see that the signer declined to sign.
 - If a user chooses to sign the contract, they will enter the information for each signature block placeholder as set up by the contract manager. When they have completed all the signature fields, a **Click to Sign** button will be displayed at the bottom of the page.
 - Once the **Click To Sign** button is selected in Adobe Sign, the information is sent back to the contract in SelectSite. The contract will move out of workflow to a finished state, and the signer's status on the eSignature page will indicate **Complete** (signed).


Ability to Use Token Only Authentication with Word

In 16.1, users needed to enter a password each time they logged into the SciQuest Contract Authoring for Word App. In 16.2, a new authentication method is available to organizations that allows users who have logged into SelectSite to use the Word App without entering a password. Designed for use with single sign on, as long as a user has signed into SelectSite they will be allowed into the Word App.

IMPACT

- Products Affected: Total Contract Manager
- End User Impact: High
- 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.
- New Permissions related to this Feature: None
- Users need access to the Word App from CLM through the **Contract Manager**, **Contract Administrator**, **Contract Configuration**, or **Manage Contract Templates and Clauses** permissions (Permission Settings > Contracts > Contracts Permissions).
- Organizations choose which authentication method they want to use for the Word app through a new **Word App Authentication Method** option under **Site Configuration** (Site Configuration  > General Site Settings > System Settings and Configuration > configuration tab). It provides two options:
 - **Token with password** (default) - Users logging into the Word App for the first time need an activation code, and after that they also enter their SelectSite password each time they open the Word App if it has been longer than 30 minutes since they last logged in.

Note: This option preserves existing functionality. If the setting is not changed, there are no differences from 16.1.

- **Token only** - Users will not need to enter a password to open the Word App if they are already logged into SelectSite. If an organization has selected this option:
 - The first time users log into the Word app from SelectSite they will need to enter their activation code, then click the **Continue** button in the Word App panel on the right. Clicking **Continue** will open the Word App. If a user clicks the "**Not [user name]?**" link they will be asked for an activation code.
 - After the initial login, the Word App will open automatically from either SelectSite or Word if the user has a SelectSite session open. If the user does not have SelectSite open, a message will indicate that they need to log into Total Contract Manager before they can open the Word App.

SPEND RADAR/DATA MANAGER ENHANCEMENTS

Ability to Integrate Accounts Payable Invoice Data to Data Manager

Invoice data plays an important role in spend analytics. For organizations that license both Data Manager and AP Director, this data should include invoices created and managed in the application. Previously, there was no automated way to integrate AP Director invoice data with Data Manager. Invoice data needed to be exported from the application and then loaded in to the system in the same way as any other file that is loaded for processing. In 16.2, SciQuest is providing a feature that allows application invoice data to be imported in to Data Manager, where it runs through all applicable rules for cleansing, post-processing, supplier normalization, etc. The data can then be viewed in Spend Radar. For information about adding this feature, please contact SciQuest.