

# NEW FEATURES IN MARKETPLACE As Of August 1, 2010

## Ability of Approvers to Return a Purchase Requisition instead of Rejecting

Currently, a requisition can be “rejected” or “approved” by an approver. SciQuest has added a new status to MarketPlace, “Return to Requisitioner,” which will return the requisition to the shopper to correct and resubmit. The shopper will be notified via email of a returned requisition. The reason the requisition was returned will be available in the email and in the requisition’s history.

### Key points of Feature for Approvers:

Requisitions with a “Returned” status are not rejected, but instead returned to the shopper for correction and resubmission.

This is a header level status so the entire requisition, including all line items, is returned to the shopper. The reason for the return should be included in the header-level notes field. If you mark items as rejected, the software will ask you to “un-reject” them before you can return the req to the shopper.

The notes included in the header of the response message are saved on the requisition’s history.

The shopper will receive an email notification that the requisition was returned and action is needed.

### Key points of Feature for Shoppers:

Requisitions with a “Returned” status are not rejected, but instead returned to the shopper for correction and resubmission.

This is a header level status so the entire requisition, including all line items, is returned to the shopper. The reason for the return should be included in the header-level notes field.

The notes included in the header of the response message are saved on the requisition’s history.

The email preference “PR rejected/returned” must be ON in the user’s profile in order for the user to receive an email notification that the requisition was returned and action is needed.

Requisitions returned to the shopper will be visible in the shopper’s Draft carts area. You will see a section called “My Returned Requisitions” (see below) where you will be able to open up your returned reqs, correct and re-submit.

My Returned Requisitions						Legend ?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Withdraw	
	2010-07-20 dambrol 01	7/20/2010		388.31 USD	<a href="#">Withdraw</a>	
	2010-08-02 dambrol 01	8/2/2010		13,332.00 USD	<a href="#">Withdraw</a>	

  

My Drafts						Legend ?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete	
	2010-06-24 dambrol 01	6/24/2010		111.00 USD	<a href="#">Delete</a>	

Requisitions that are returned can be withdrawn by clicking on the Withdraw button on the right. This is different than an un-submitted draft cart, which can be deleted (see above).

## Automatic Return of Requisitions Rejected by BANNER

A Banner budget authorization may fail due to an invalid user, invalid index, excessive shipping amounts (over \$999.99), or a capital equipment account code for an order under \$5,000. Currently these are rejected and the requisition is unable to be completed; the user must copy the “rejected” items to a new cart and start over again. We have added a new workflow setting that will return the requisition that failed budget authorization instead of rejecting it. Shoppers can correct and resubmit the requisition without having to create a new requisition.

### Key points of Feature:

This is a header level status so the entire requisition, including all line items, is returned to the shopper.

The reason for the rejection is saved on the requisition’s history.

The shopper will receive an email notification that the requisition was returned and action is needed.

The email preference “PR rejected/returned” must be ON in the user’s profile in order for the user to receive these emails.

The email for automatically returned requisitions is the same email that is sent for requisitions returned or rejected by an approver.

Requisitions returned to the shopper will be visible in the shopper’s Draft carts area. You will see a section called “My Returned Requisitions” (see below) where you will be able to open up your returned reqs, correct and re-submit.

My Returned Requisitions						legend ?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Withdraw	
	2010-07-20 dambrol 01	7/20/2010		388.31 USD	<a href="#">Withdraw</a>	
	2010-08-02 dambrol 01	8/2/2010		13,332.00 USD	<a href="#">Withdraw</a>	

  

My Drafts						legend ?
Active Cart	Shopping Cart Name	Date Created	Cart Description	Total	Delete	
	2010-06-24 dambrol 01	6/24/2010		111.00 USD	<a href="#">Delete</a>	

Requisitions that are returned can be withdrawn by clicking on the Withdraw button on the right. This is different than an un-submitted draft cart, which can be deleted (see above).

## New Change Supplier Action on the Cart and Requisition (Changing Supplier on All Items)

Shoppers and approvers can now change the supplier on multiple line items in one step. A new action has been added to the cart and requisition action drop-down called **Change Supplier**. Selecting this action provides a supplier search where a supplier can be chosen and applied to all of the selected line items.

### Key points of Feature:

All shoppers/requestors will see the **Change Supplier** option in the line item action dropdown of their carts and requisitions.

Approvers will see the **Change Supplier** option in the line item action drop-down on the requisition.

The supplier can be changed using this bulk action on both non-catalog items and forms.

This option cannot be used on hosted, punch-out, or contract non-catalog items. If the cart or requisition consists of only these types of items, the **Change Supplier** option will not appear.

The **Change Supplier** option can be used to choose a new supplier, choose a different fulfillment center, or customize order distribution depending on the user’s permissions. The supplier is validated to ensure that the supplier can be used on the selected line items before the lines are updated with the selection.

## Product Search Engine Improvements

As MarketPlace has grown, a number of areas around product search have been identified for improvement. With the most recent release, end-users may notice a change in the items presented in search results. The goal is to return results that better match the shoppers' expectations and most closely relate to the terms entered in the product search fields.

### **Key points of Feature:**

#### **Product Search:**

As mentioned above, the focus of this release was to improve the quality of results returned for user/shopper's searches. Therefore, the definitions behind the "best match" result have been reviewed and improved. These changes should be seamless to your end-users, however, users may notice better results from the following types of searches performed:

#### **Part Number searches (also known as SKU or Catalog number):**

- \_ Exact match to catalog or manufacturer part number is prioritized in search results.
- \_ A partial match on part number returns closest matching or similar results (this is a "begins with" match).
- \_ If multiple strings of text are entered (e.g. "123 456 789") then all components of that string must be present in the part number for the item to be returned. For example if "123 456 789" is entered into Product Search, the part numbers "123-456-789" and "123-456-789-000" would be returned, and "123-456" would not.

#### **Keyword searches:**

- \_ Plural searches – Both singular and plural entries of the same term will return similar results. This functionality also applies to searchable keywords on contracts, contract forms, contract items, suppliers, favorites, and forms (e.g. if a shopper searches for "latex-free gloves" or "latex-free glove" the results will contain both the singular and plural results in the same weight class).
- \_ Searches containing or not containing hyphens, spaces, and other miscellaneous characters – Entries differing by included/excluded characters (e.g. TOF1234 vs. TOF-1234) return similar results.
- \_ Product Size searches – Differing UOM syntax entries (e.g. 100 ml vs. 100ml) return similar results.
- \_ Misspelled search entries – For example, misspelled "dispensirs" will return "dispensers" or "dispensing" (et al) in the results.

**Relevancy of Results:** With the product search enhancements, users should see a decrease in the number of irrelevant results returned in their searches.

**Note:** Search has been improved to work more effectively when specific search terms are entered. For example, the search results will be much more relevant if the keywords, "wide-mouth Erlenmeyer flask" are entered into Shop at the Top instead of just the single word, "flask."

Due to the behind-the-scenes enhancements to the product search engine, the "Include Similar Terms" option is no longer required for returning similar search results.

#### **Advanced Search:**

In advanced search, the **preferences** link has been removed and the **Hide Advanced Search on search results** option has been directly placed on the Advanced Search window.

## Additional Product Search Filter: By Manufacturer

Shoppers can now filter their product search results **by Manufacturer Name**. This allows users to quickly find items from a specific Manufacturer.

### **Key points of Feature:**

The "By Manufacturer Name" filter works in a similar fashion to other product search filters, allowing users to filter search results to show specific manufacturers within a product search result set. It appears along with other product search filters in the "Filter Results" box on the left-hand-side of the product search results page.

Some normalization functionality around the "by Manufacturer Name" filter has been added to eliminate as many duplicate manufacturer names (i.e. supplier names with different syntax) as possible; however, users may see some similarly named manufacturers due to the variances in supplier data.