The Tech Buy System will be unavailable from Friday, July 19, 2013 at 9 pm until Sunday, July 21, 2013 in order for all upgrades and functionality to be integrated into the TechBuy system. The system will be live again on the evening of July 21, 2013.

Highlighted items will apply to the end-users. The remaining items apply to Procurement Services staff.

If you have trouble viewing any of the screenshots you can enlarge the document by clicking on the Zoom option in the right hand corner of your screen.

1. **New Document Search Field – “With Revisions”**
   A revision within SciQuest represents a change to a purchase order. When a purchase order completes workflow but is later changed, that is referred to as a revision. In 13.2, users have new options and filters within document search to easily identify a PO that has been revised. Document search now contains two new advanced search options to locate documents with user or system revisions. These new options are also available as post-search filters. (This feature will be more beneficial when we start the new change order process in August - more info coming soon).

2. **Additional filter options for Custom Fields**
   The system currently captures information in an audit trail when a custom field is modified. Custom fields can be modified for a variety of reasons including changing or adding values, changing the description, changing the placement of the custom field on a document, or changing the type of custom field. (Checkbox, textbox, drop down) This feature allows you to further search the audit trail using two new options. The two new options are a Filter by User and a filter for Change Via.

3. **New items added to the Document Search Exports**
   To improve reporting processes and ease integration with external systems, two additional fields have been added to the document search exports:
   - The invoice Record Date has now been added to the invoice search full export.
   - The Accounting Date is already included in the invoice exports, but has now been added to the PR and PO Full and Transaction exports.
4. **Ability to Schedule Approval Substitutions**

In the event that an approver is absent or unavailable, a substitute approver can be assigned. Previously, it was not possible to assign a substitution timeframe. The substitution simply began when the substitute was assigned and ended when the substitute was removed. The application now has functionality that allows you to schedule start and end dates for a substitution. Similar to the “out of office” concept, this feature helps you plan ahead for absences and eliminates the need to end the substitution manually.

a) Click on the approvals tab>manager substitutions

![Image](https://example.com/image1.png)

b) Click on the assign tab (to select multiple folders, check on the check box next to each value you intend to assign a substitute approver for). After you check the desired values, then at the top of the page, click the "Go" button.

![Image](https://example.com/image2.png)
c) Click the “include date range for substitution” check box to setup the desired date range of the substitution.

![Assign Substitute](image)

**Click this checkbox to setup the desired date range.**

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d) Start entering the substitute’s name in the “substitute name” field. All users who have approval permissions in TechBuy will start to populate based upon name matches with what is entered. Click the assign button to set the substitute.

![Manage Substitutions - Requisition](image)

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**You may only have one substitute per folder.**
5. **Invoice Advanced Dynamic Workflow – New PO Document Total Line Level Rule**

Advanced Dynamic Workflow (ADW) rules can be created based on line-level criteria. Current available criteria for Invoice ADW include Line Total Amount, Line Unit Price, Product Type, Contract Type and more (for a list of all currently available criteria please see the Site Configuration Handbook). Previously, you could create a rule based on the invoice amount but not the PO amount associated with that invoice. In 13.2, SciQuest is adding the ability to create an Invoice rule based on the PO Document Total.

This feature is OFF (disabled) by default and can be enabled by configuring the proper workflow step(s) and by setting up advanced dynamic workflow with the appropriate settings.

- New Permissions related to this Feature: None
- When configuring a rule in Invoice Advanced Dynamic Workflow, select the Line Level rule for PO Document Total. From there, you may configure the criteria for the rule. Please see the Site Configuration Handbook for details on configuring ADW rules.
- Please contact your Client Partner to add or modify existing workflow steps that evaluate these criteria.

6. **New Supplier Profile Data**

Suppliers can manage their business and company data through the SciQuest Supplier Network Portal. They may also update addresses, contacts, diversity information and more. Customers may choose to use this information, or choose to override values for their own organization. With 13.2, suppliers and customers are able to capture and manage additional information in the Supplier Profile, and enhancements have been made to the way information is provided. New fields for managing business information, product classifications, geographic service area and diversity classifications are included. In addition, a supplier may now provide a Social Security Number (SSN) as the Tax ID type. These fields are available in the supplier export.

New Permissions related to this Feature: The new View Supplier TIN/SSN permission is required for users to view the SSN within the supplier profile. The new permission can be set at the role or user level and is found in the Administrator Permissions, and it is disabled by default.
- The current Federal ID Number field has been renamed to Tax Identification Number.
  There is no impact to the current data contained in this field.
- The Active field has been renamed to Status.
- All new fields are located on the General tab of the supplier profile. Customers may enter values for suppliers they manage. For suppliers the customer does not manage, they may use the provided value, or choose to override with different values.
  - Details about the new fields:
    - Status: This is an existing field previously named Active. A check in this field indicates that supplier is active.
    - Tax Identification Number: This is an existing field previously named Federal ID No.
    - Tax ID Type: If Individual/Sole Proprietor is selected in the Legal Structure field, this field is visible. The Tax ID type can be set to Federal ID or Social Security Number and the value entered in the field. Note: If the end-user does not have the View Supplier TIN/SSN permission enabled, the SSN is masked in the UI and export.
    - Date Established: The date the supplier’s business was established.
    - Number of Employees: The number of employees for the supplier organization. This information is used in determining if a supplier meets the Small Business Enterprise Diversity classification.
    - Annual Sales: The supplier may enter annual sales for the previous 3 calendar years. The application automatically displays the correct calendar years. This information is used in determining if a supplier meets the Small Business Enterprise Diversity classification.
    - NAICS Code – A supplier may select a single primary code from the standardized NAICS code list. Once a primary code is selected, the supplier has the option of selecting multiple secondary codes. This information is used in determining if a supplier meets the Small Business Enterprise Diversity classification.
    - Customer Commodity Codes: Your organization’s managed commodity codes are available for selection. Note: This field is exposed to suppliers with relationships with AP or Sourcing Director customers only.
    - Geographic Service Area: The supplier can select one or more service areas for their products/services.
    - State Service Area: If USA was selected as a Geographic Service Area, you may then select specific states as their State Service Area.
    - Diversity Classifications: In an effort to support organizations’ commitment to Supplier Diversity initiatives this field allows suppliers to easily select appropriate diversity classifications such as Woman-Owned Small Business, Veteran Owned Business, or Minority Business Enterprise. Please note that Small Business Enterprise cannot be manually selected but is configured automatically based on the data in the number of employee and most recent
annual sales. Note: Your organization may have existing Supplier Classes that include diversity information. The Diversity Classification field does not replace supplier classes.

7. **Reorganization of the Supplier Profile**

The supplier profile is where administrators and catalog administrators go to review and update supplier data. In 13.2, we reorganized the supplier profile to be more intuitive, thereby making it easier for organizations to locate supplier data. For example, all shopping specific data fields will be located under the Shopping Configuration header under the Configuration tab.

New section headers (Company Information, Business Information, Products/Services, and Diversity Classification) have been added to the General tab, and data fields have been appropriately organized under these new headers. See the table below for additional details.

- The Supplier Portal Contact section was removed from the supplier profile.
- A new Configuration tab is available. This tab contains fields that were previously on the General tab. The fields moved to the Configuration tab are fields related to the supplier configuration (vs. company or business information). Note: The options available on the Configuration tab will depend on your organization’s licenses.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Old Location</th>
<th>New Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Has Catalog?</td>
<td>General</td>
<td>Configuration &gt; Shopping Configuration</td>
</tr>
<tr>
<td>Send email when content changes</td>
<td>General</td>
<td>Configuration &gt; Shopping Configuration</td>
</tr>
<tr>
<td>Show catalog status in supplier portal</td>
<td>General</td>
<td>Configuration &gt; Shopping Configuration</td>
</tr>
<tr>
<td>Coming Soon</td>
<td>General</td>
<td>Configuration &gt; Shopping Configuration</td>
</tr>
<tr>
<td>New Supplier</td>
<td>General</td>
<td>Configuration &gt; Shopping Configuration section</td>
</tr>
<tr>
<td>Allow non-catalog items</td>
<td>General</td>
<td>Configuration &gt; Shopping Configuration</td>
</tr>
<tr>
<td>Allow general form purchases</td>
<td>General</td>
<td>Configuration &gt; Shopping Configuration</td>
</tr>
<tr>
<td>Message to display when non-catalog item is disabled</td>
<td>General</td>
<td>Configuration &gt; Shopping Configuration</td>
</tr>
<tr>
<td>Show buyer invoice information in supplier portal</td>
<td>General &gt; Supplier Portal Settings</td>
<td>Configuration &gt; AP Configuration</td>
</tr>
<tr>
<td>Business Unit Vendor Id(s)</td>
<td>General &gt; Business Unit Settings</td>
<td>General &gt; Company Information</td>
</tr>
<tr>
<td>Restrict Fulfillment Centers By Business Unit</td>
<td>General &gt; Business Unit Settings</td>
<td>Configuration &gt; Business Unit Configuration</td>
</tr>
<tr>
<td>Web Site URL</td>
<td>General &gt; Additional Info</td>
<td>General &gt; Company Information</td>
</tr>
<tr>
<td>DUNS No.</td>
<td>General &gt; Additional Info</td>
<td>General &gt; Company Information</td>
</tr>
</tbody>
</table>
8. **Improved Supplier Addresses and Contacts**

Previously, Fulfillment Addresses and Remittance Addresses were created and stored in different areas of the supplier profile. To associate a contact with an address, that contact had to be configured with the address information. The address could not use contact information already configured in the Contacts tab. In 13.2, we have streamlined the address, contact and fulfillment information. Fulfillment and remittance addresses have been consolidated in a single Address tab. The Contacts tab has also been updated. Contact information configuration no longer includes address information. Instead, you have the ability to link the contact to an address. Finally, a new Fulfillment Centers tab has been added.

Fulfillment Addresses and Remittance Addresses tabs have been consolidated in a single Addresses tab. Address information no longer includes contact information such as name, phone number, email, etc.

- The Contacts tab has been updated. Contact information no longer includes address information such as street, city, state, zip, etc. Fulfillment and Remittance are options for Contact Type.
- Fulfillment contacts can be linked to fulfillment addresses. Remittance contacts can be linked to remittance addresses. The linking task is performed from the Contacts tab.
- Previously, all fulfillment center information (including general ordering and order distribution setup) was configured in the Fulfillment Addresses tab. In 13.2, fulfillment center information is configured and maintained in the Fulfillment Centers tab. When you create a fulfillment center, you can associate a fulfillment address and/or remittance address that were created in the Addresses tab.

*(Please go look at an active vendor to notice the changes in the setup)*.

**What happened to my existing data?**

- Fulfillment address and remittance address data that existed prior to 13.2 has been migrated to the new Addresses and Contacts tabs.
- New addresses have been created in the Addresses tab from the address information. Information from fulfillment addresses is stored as fulfillment address type. Information from remittance addresses is stored as remittance address type.
- New contacts have been created in the Contacts tab from the contact information. Information from fulfillment addresses is stored as fulfillment contact type. Information from remittance addresses is stored as remittance contact type.
- The migrated addresses/contacts retained the name they had on the Remittance/Fulfillment Addresses tabs. For example, if the fulfillment address was named Southeast Fulfillment Center, the migrated fulfillment address will also be called Southeast Fulfillment Center. The contact name will be the same as the value that was in the Contact Name field under the Fulfillment/Remittance Addresses tab. If there was no value present, the field will be populated with the Fulfillment Center or Remittance Name (i.e. Fulfillment Address 1).
- Address information from Contact data that existed prior to 13.2 has been migrated to the Addresses tab.
Previously, contact information included address information for that contact. That address information has been migrated to the Addresses tab and new addresses created. Address information that comes from a fulfillment contact type will be stored as a fulfillment address. Address information that comes from a remittance contact type will be stored as a remittance address. Address information from any other contact type will be stored as a physical address. The name of the address will be the same as was on the Contact.

Primary Fulfillment and Remittance addresses will be identified with “primary” in the address name.

Addresses and contacts that were previously part of the same record are linked together automatically.

Customers are only able to link contacts/addresses to records they own. This may mean that if they have a read-only version and not an editable version, they will need to create a second version of that address/contact.

If the address/contact is owned by another organization, such as SciQuest or the supplier’s portal, and the customer overrode any of the address/contact fields prior to 13.2, the customer will see two versions of the address/contact: one that is read-only and one that is customer-owned and editable. The read-only version will be flagged as inactive by default.

Organizations still have the ability to make different addresses and contacts active, or set as a primary address/contact for their organization.

9. **Enhanced Supplier Search Results**

System administrators and catalog administrators frequently use the Supplier Search to locate suppliers for review and updates. In 13.2 we are introducing several enhancements to the Supplier Search Results page that make the process of accessing and exporting supplier data quicker and more efficient.

A new Advanced Search option, Diversity Classifications, is available that allows you to search for suppliers based on their configured classifications. You can select the appropriate classification by entering it in the type-ahead field or by using the search feature.

- The information displayed in the supplier search results has been updated to allow for easier identification of important information, and the ability to filter from search results. Enhancements include:
  - The DUNS number and new Diversity Classifications field display in the search results, if provided.
  - You can activate/deactivate a supplier or access a supplier profile via the new Manage dropdown on the search results listing.
  - Supplier search results can be filtered by Status and Type.
  - Organizations may Export Selected Suppliers from search results. Previously, administrators could only export all supplier search results.
  - When you access a supplier profile from search results, a new navigation feature allows you to scroll to the previous or next supplier in the results list, go to a different supplier in the search results, or return to the initial search results.

Note: Diversity flags are manually set by Procurement Services and may not be real-time.

10. **Updated Accounts Payable Dashboard**

The Settlement home page (AP Dashboard) has been redesigned to be more user-friendly and display more meaningful information to invoice processors, approvers, and managers. Users will see new sections with new features, as well as enhancements to current sections.

New Create Invoice section on the dashboard allows users to quickly create all types of invoices. This functionality requires Create PO Invoice/Credit Memo or Create Non-PO Invoice/Credit Memo permission.

- New Search section allows users to quickly search by invoice number, PO number, or supplier invoice number. This functionality requires View My Invoices or View Organization Invoices permission.
- New Recently Entered section showing the most recently entered invoices and credit memos from the past week. This functionality requires Create PO Invoice/Credit Memo or Create Non-PO Invoice/Credit Memo permission.
- Pending Approvals section provides enhanced visibility into invoices awaiting approval. This functionality requires Approve/Reject Invoices permission.
- New Expiring Discounts section shows users what early payment discounts are expiring within a user-defined date range (1-10 days). This functionality requires Approve/Reject Invoices and View Organization Invoices permissions.

As stated above, the new AP Dashboard will display varying information depending on a user’s permissions, so be sure to test out the new functionality with each of the different AP roles in your organization.
11. **Enhancements to Actions for Invoice Status Changes**

Logic has been added to reopen any soft-closed POs when an invoice against the PO is marked cancelled. Additionally, matching will now be triggered when an invoice is “un-cancelled”.

- Cancelling any invoice against a Soft Closed PO will result in the PO being automatically reopened. POs in Closed status will not be reopened.
- Previously after an invoice was cancelled it was no longer evaluated in matching, even if the invoice was changed from cancelled back to an active status. Going forward changing an invoice from cancelled status to any other status will re-trigger matching for that document.

12. **Changes to Invoice Department and Business Unit**

In the past, Purchase Order-based invoices had inconsistencies with the department and business unit present at the header and line. At the header, the department and business unit would reflect the invoice creator, while the line level would reflect the department and business unit of the PO/Invoice owner. This has been changed in 13.2. Both the header and line-level department and business unit fields will populate from the PO/Invoice owner. Additionally, non-PO invoices line-level department and business unit now properly reflect the header level invoice owner’s department and business unit.

When searching for invoices by Department or Business Unit, the associated PO Department/Business Unit is returned in results.
- The Invoice workflow for department and business unit is based on the line level values, so it is unaffected by this change.
- The owner of Non-PO invoices is editable at the header-level only. The department and business unit values will propagate to the invoice lines after a change to the invoice owner.

13. **Status field now optional for Invoice Status Update Integration**

Previously an invoice status was required for all status update messages. In 13.2, the status field is optional. Organizations using the status update integration now have the option of only sending updates to custom fields or attachments.

Note: The University will be required to change to the new “Phoenix” format prior to March 2014. We have decided to go-live November 1, 2013. We will have training sessions at the end of October to ready the campus for the new interface. The interface has the same functionality but aesthetically is very different and will take some getting accustomed to.