SciQuest 15.3 Release
Summary of Changes

General SelectSite Enhancements

New Data Purge Feature

Overview
The data purge features provides the ability to purge the following items from their SciQuest site: shopping carts, documents (requisitions, purchase orders, invoices, receipts/packing slips, and contracts), and sourcing events. This feature can also be used as a way to deactivate users. Data purges are managed on a scheduled/reoccurring basis (i.e. it is not a one-time dump) and can be configured by frequency, date/time, type of data being purged, and data age.

Default Status: OFF

New Permissions: Manage Data Retention

Considerations
The Data Purge feature is a great addition to stay in compliance with data retention policies, as SciQuest mentions in its release notes. Only data that is five years or older can be purged from the site.
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SelectSite Available in Simplified Chinese and Dutch

Overview
SciQuest application now available in both Simplified Chinese and Dutch.

Default Status: N/A
New Permissions: N/A

Organization Dashboard Enhancements

Overview
SciQuest has released multiple new features related to their dashboards functionality, which was first rolled out in the 15.1 release. Widgets are now being grouped by category (e.g. contracts, shopping, etc). Additionally, the following new widgets have been added for use: Contract Alerts, Supplier Saved Search, Document Saved Search, Contract Saved Search, My Approvals, and Action Items.

Default Status: ON
New Permissions: N/A

Considerations

Dashboards are a great way to direct users to key places in the site for easy access, as well as provides summaries/graphics for certain content. The eCOE has recently implemented a homepage dashboard on the UCOP site to direct users to common links within the site, as well as external links to training and help.
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Breadcrumb Navigation at the Top of the Screen Persists when the User Scrolls

Overview
The breadcrumb navigation – hierarchical trail of web links navigating users to the page they are currently on – now persist at the top of the page when a user scrolls down.

Default Status: ON

New Permissions: N/A
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Summary of Changes

Enhancements to Mobile Functionality

Considerations: Mobile Functionality

Key new functionality has been added to SciQuest Mobile, first introduced in 15.2. Currently, SciQuest mobile functionality does not connect to user’s single sign-on (SSO). In other words, if campuses are utilizing SSO to prohibit employees who have left the university from accessing their SciQuest instances and not actively inactivating user profiles, then those employees could still access the mobile app. Please keep this in mind when contemplating the mobile app and its features.

NOTE: This issue would not apply to campuses using a local login.

New Approval Actions available in the Mobile App

Overview
The mobile application now gives approvers the ability to approve/reject a wider range of documents/content, including: contracts, sourcing events, and supplier data changes. This only applies if modules are active in your campus’ instance.

Default Status: ON

New Permissions: Ability to Configure Mobile Approval on the Organization Level, then the following (if enabled in your site): Mobile Approval > Contracts, Sourcing Events, and Supplier Profile Accept/Decline.

Ability to Configure the Approval Types available in the Mobile App on the Organization Level

Overview
Administrators now have the ability to permit at the approval-type level which approval actions are permitted on the mobile application.

Default Status: ON

Permissions: Ability to Configure Mobile Approval on the Organization Level, then the following (if enabled in your site): Mobile Approval > Requisitions, Purchase Orders, Invoices, Contracts, Sourcing Events, and Supplier Profile Accept/Decline.
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New Mobile Permissions for Users and Roles

Overview
SciQuest has rolled out the ability to have different approval permission settings in the mobile application, vs. the cloud-based application. Building off the feature above, the approvals are now configured at the approval-type level and can differ in mobile vs. cloud-based.

Default Status: ON

New Permissions: Ability to Configure Mobile Approval on the Organization Level, then the following (if enabled in your site): Mobile Approval > Requisitions, Purchase Orders, Invoices, Contracts, Sourcing Events, and Supplier Profile Accept/Decline.

Mobile App Push Notifications Available

Overview
Similar to other mobile applications, SciQuest has released the ability to enable push notifications on their mobile to notify them of approvals, etc. This is available by going to Settings > Receive Push Notifications on the mobile app.

Default Status: ON

New Permissions: N/A
Supplier Management Enhancements

Introduction to Supplier 360

Overview
This feature provides users to view a dashboard-style picture of an individual supplier – including activity information, contract and sourcing data, and more. Users who have been granted the ability to ‘Configure Supplier 360’ can customize these dashboards. The following widgets are available for use in customization of these dashboards: Contract Alerts, Internal Notes, Performance Snapshot, Products and Services, Risk Profile (TSM), RSS Feed, Saved Search: Contracts, Saved Search: Documents, Sourcing Summary, Supplier Details.

Default Status: ON

New Permissions: Configure Supplier 360
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Summary of Changes

Supplier Profile Updates

Overview
Significant changes have been made to the supplier profile configuration and layout. In addition to the Supplier 360 dashboard, the entire Supplier Profile sections have been reordered and moved around. See below for a full list of the changes that have been made. No impact on exports/imports.

Default Status: ON

New Permissions: N/A

Considerations
We’ve gone ahead and pulled the list of changes that have been made from SciQuest’s 15.3 release notes. Consider sending a copy of this to your Supplier Set-Up and Help Desk teams to aid them in getting used to the new supplier profile.

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eProcurement Enhancements

Enhancements to Budget Check Functionality in Shopping Cart

Overview
SciQuest has built upon its budget check functionality that was released in 15.2 to allow users to perform a budget check while in checkout (as opposed to workflow). In addition, the new budget check enhancements provides users with a graphical display of budget details. This feature now provides campuses who have enabled the budget check integration to validate in both cart and workflow.

Default Status: ON (default status only applies if budget check has been enabled)

New Permissions: View Budget Check Details in Cart

Considerations
The budget check feature is available with express checkout and the new document layout. It will not work for campuses who are still utilizing the old document layout, nor is it currently available for Banner campuses.

Form Request Enhancements

New Procurement Request Form Available

Overview
Building on the Forms Request feature that was released earlier this year, form creators now have the ability to generate Procurement Request forms. This step-by-step process allows administrators to create a forms process that features a wizard style navigation (look and feel similar to Contract Compliance Tracker) for eProcurement. Here are some key features around the new Procurement Request forms:

- Can conditionally drive workflow
- Can capture hourly rates and flat fees
- For sandwich model campuses, can capture and send back form fields in cart return
- Can specify form data that is sent in the supplier’s PO
- Can create multi-supplier forms that contain hosted catalog data (punchout not currently an option)
- Similar to traditional forms, Procurement Form Requests can be added to showcase and favorites

Default Status: ON

New Permissions: N/A
New Workflow Object that Evaluates Document Lines Created from a Quick Quote

Overview
Requisition document lines that were created from a Quick Quote form request can now be routed based off the information contained in the Quick Quote form.

Default Status: OFF

New Permissions: N/A

Advanced Dynamic Workflow Rule based on Form Request Template Name

Overview
New Advanced Dynamic Workflow (ADW) rule that allows organizations to route based off a form request template name

Default Status: ON

New Permissions: N/A
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Ability to Export and Import Form Request Templates

Overview
Organizations now have the ability to export and import form request templates. Similar to the import/export feature for traditional forms, the goal of the import/export feature is to allow organizations to export Form Request templates that were generated in UIT environments and import them into Production and, if applicable, Training environments. This reduces the administrative burden of duplicating Form Request creation in multiple environments.

Default Status: ON
New Permissions: View Organization Form Requests

General Contract Lifecycle Management Enhancements
Catalogs and Contracts Menu Changes

Overview
The ‘Manage Contract Types’ header has been renamed to ‘Contract Types’.

Default Status: ON
New Permissions: N/A

Before:        After: