Web**Procure**

12.6 RELEASE

NOVEMBER 21, 2020

DOCUMENTATION VERSION 4.3.11.20

proactis

WebProcure™

This set of release notes pertains to the Web**Procure**™ 12.6 development release scheduled for
Saturday, November 21, 2020.

For additional information, please contact Proactis Customer Support at (866) 889-8533 or by e-mail at webprocure-support@proactis.com

***Document Note**: Underlined headings are active hyper-links, click the link to jump directly to the related online help topic.*

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PRODUCT ENHANCEMENTS - GENERAL AVAILABILITY

ENHANCEMENTS THAT ARE AUTOMATICALLY ENABLED FOR ALL CUSTOMERS, NO CONFIGURATION NECESSARY

ADMIN

CREATION OF NEW PRIVILEGES FOR ADMIN SECTIONS/SUBSECTIONS

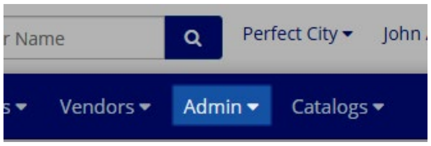
Admin > Enterprise Administration > [Select Organization] > Organization Information > Role Management
Admin > Enterprise Administration > [Select Organization] > Users > Edit Users > [Search User] > Edit > Request Info

Roles serve as containers to hold one or more privileges and then those roles are assigned to one or more users. **Role Management** is where the roles are created, edited, and managed. In the 12.6 release, we have created new categories that will allow organizations and sub-organizations to be more flexible in building roles relating to **Document** and **Field Libraries** and access to the **Admin** module.

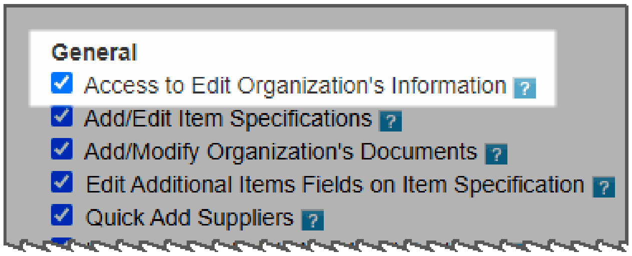
Roles and Privileges	
Category	**Privileges**
Admin – Admin	Admin *(Access to Admin link from Navigation Bar)*
Admin – Document	Assign Document Type
	Document Library Archive Document
	Document Library Delete Document
	Manage Contract Visibility
	Manage Document Library *(New)*
	Manage Document Types
	Manage Notification Library
	Manage Questionnaire Library
	Manage Solicitation Fields
Admin – Field	Document Field Mapping
	Manage Field Library
Admin – Organization	Upload Contracts
(partial list shown at right)	Upload Historical Pricing

NOTE: If a user does **not** have the privilege for a section or subsection, they will not see the corresponding **Admin** module menu option.

The new **Admin – Admin** privilege controls access to the **Admin** link in the navigation header.



This new privilege is in addition to the **Access to Edit Organization's Information** permission.



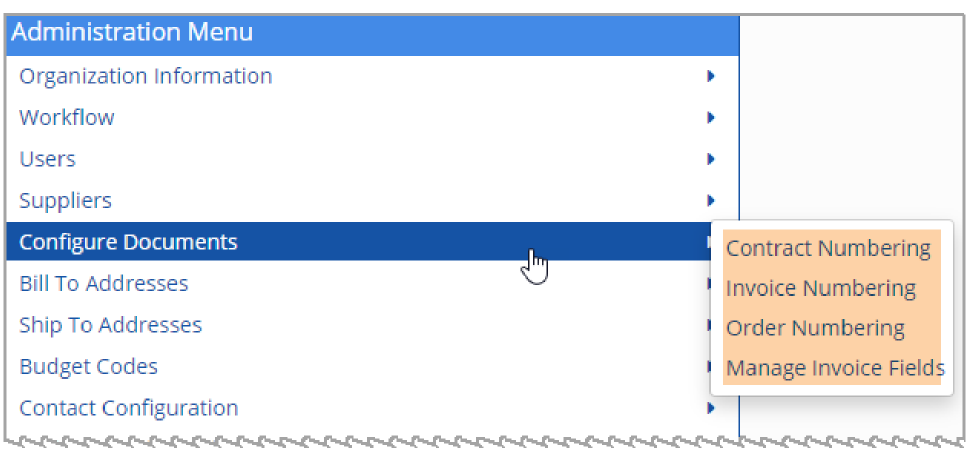
This privilege and permission separation were designed to accommodate the following:

- Users with the **Access to Edit Organization's Information** permission will **be able** to see all **Admin** menu options that are **not** tied to the privileges listed in the table above.
  - This type of user will only be able to access the **Admin** menu options based on the privileges that their assigned roles contain.
- Users with the **Admin – Admin** privilege will **not** be able to see any **Admin** menu options that are not tied to the privileges listed in the table above.
  - This type of user will only be able to access the **Admin** menu options based on the privileges that their assigned roles contain.

As an example, the image below represents a user that only has:

- the **Access to Edit Organization's Information** permission, and
- none of the privileges listed in the table above.

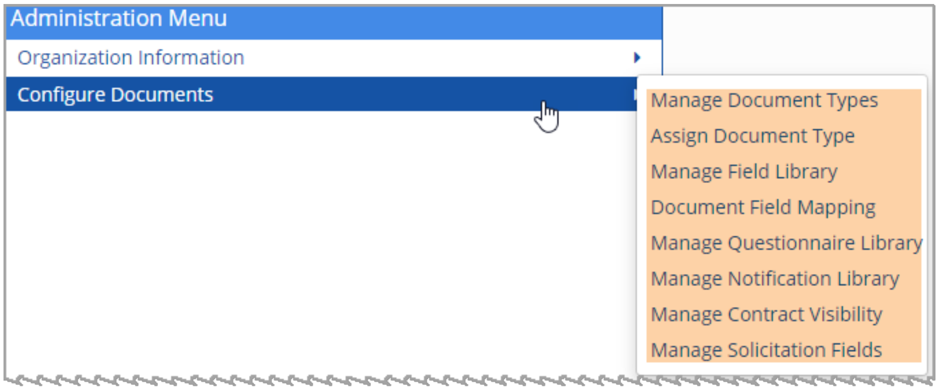
As a result, this user sees only those **Admin** menu options that are not tied to the assigned privileges listed in the table above.



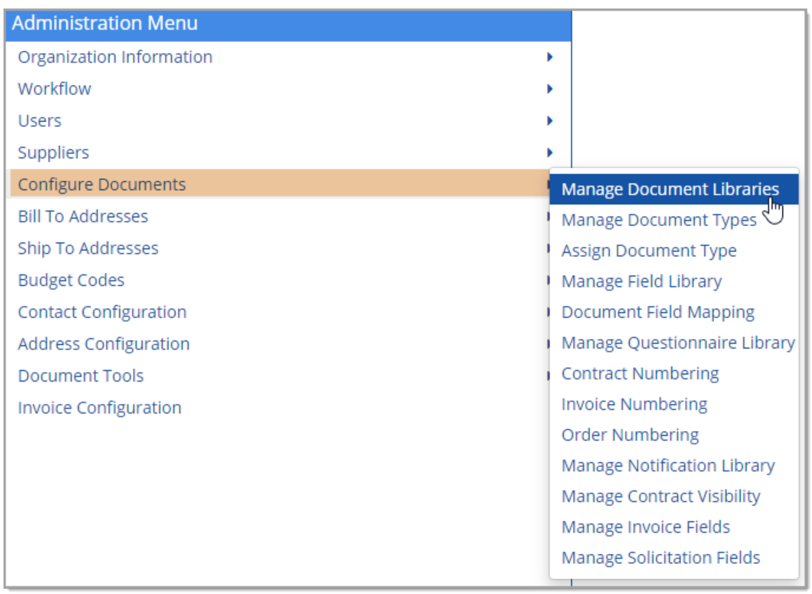
Using the following image as another example, the image represents a user that only has:

- the **Admin – Admin** privilege, and
- all of the privileges listed in the table above.

As a result, this user only sees the **Admin** menu options that are tied to the assigned privileges listed in the table above.



In addition to the roles and privileges changes, we are adding in a new **Manage Document Libraries** subsection to the **Configure Documents** section of the **Administration Menu**. Access to this new subsection will be controlled by the new **Manage Document Library** privilege.



NOTE:

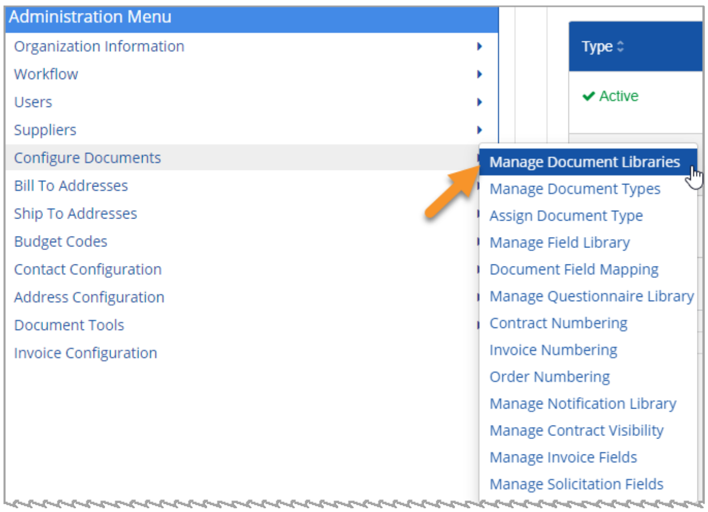
- The **Add/Modify Organization Documents** permission grants users the ability to add documents to the **Contract** and **Solicitation Libraries** using the new **Manage Document Libraries** link; described in next enhancement.
- The **Manage Document Library** privilege, (referenced in the table above), controls the display of the menu option.

▪ MANAGEMENT OF DOCUMENT LIBRARIES

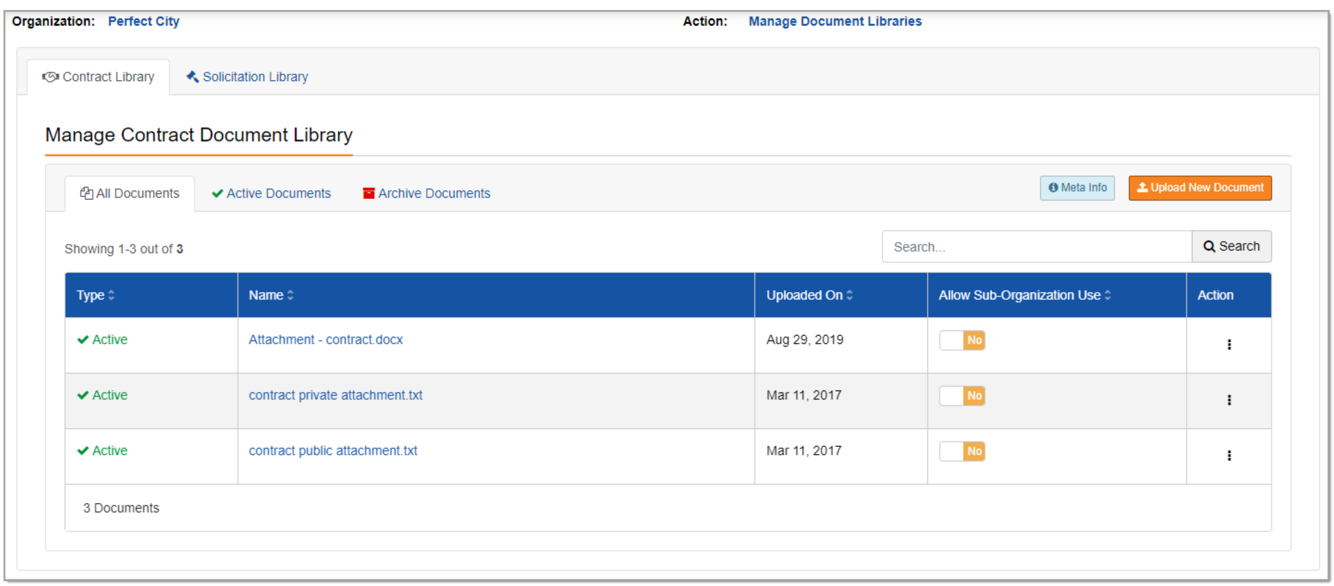
Admin > Enterprise Administration > [Select Organization] > Configure Documents > Manage Document Libraries

In conjunction with the newly created privileges, described above, the management of the document libraries for contracts and solicitations has been moved to the **Configure Documents** section. This enhancement allows customers to manage documents on a per organization basis.

Look for the new link called **Manage Document Libraries**. This link will only be available to users with the assigned privilege of **Manage Document Library**.

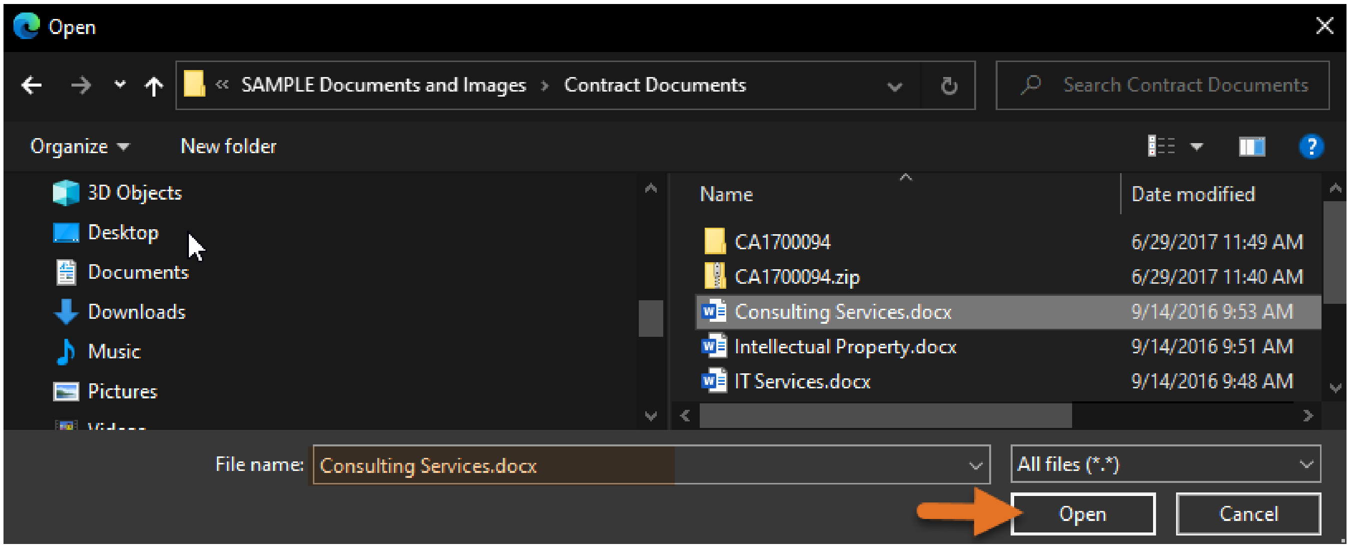


The **Manage Document Libraries** link opens to the **Manage Contract Document Library** tab.



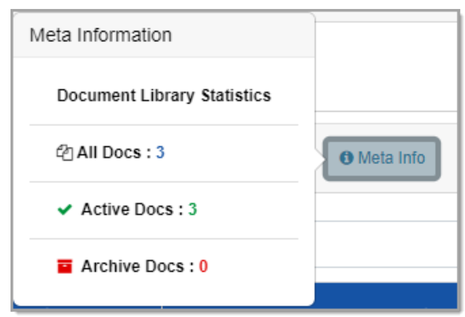
Secondary tabs within each library include **All Documents**, **Active Documents**, and **Archive Documents**. By default, you will land on the **All Documents** tab within the **Contract Document Library**. The ability to upload new documents and determine whether sub-organizations may use documents is also available.

Let's start with the **Upload New Document** action. Once selected, you may navigate to the local or network location of the document you wish to upload. As with other upload processes, select the document and click **Open**.



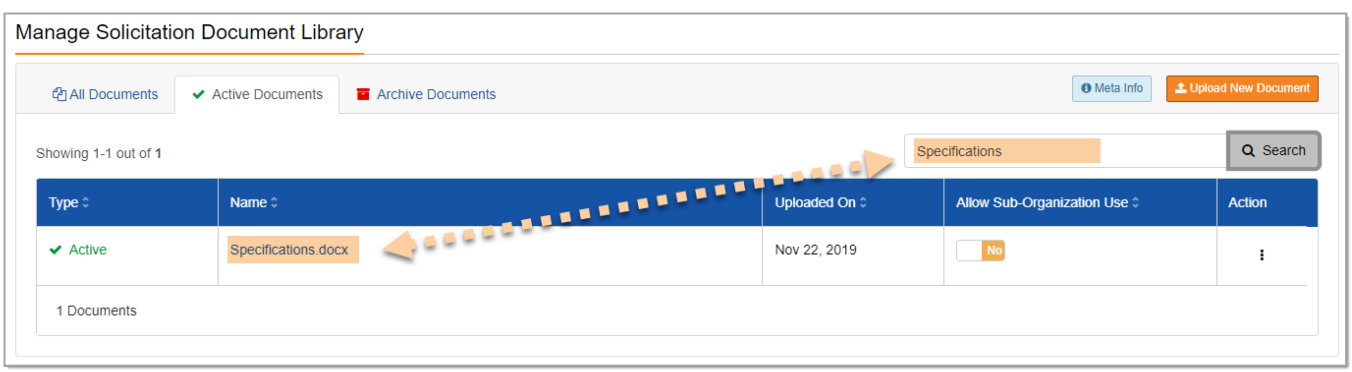
Meta Information is basically data that describes other data. Also commonly referred to as **Metadata,** it is used to create systemic and reliable ways to manage data. Select the **Meta Info** box to view summarized statistics about the specific **Document Library**.

Using the image at the right as an example, there are a total of 3 documents and all 3 are **Active Docs**.



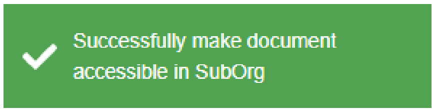
If the listing of documents is lengthy, use the **Search** field to enter a complete or partial keyword and click **Search.** This listing will refresh to display only those documents that match your entered keyword.

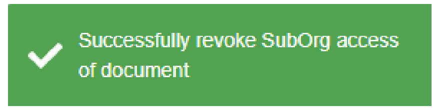
The document listing contains hyperlinked column headings that you may select to choose a column as the primary sort, click again to switch between ascending and descending order**.**



- **Type** – The **Type** column indicates if the document is **Active** or **Archived**.
- **Name** – The document **Name** is an active hyperlink and may be selected to view in a new browser window.
- **Uploaded On** – The date the document was uploaded into the system. When viewing archived documents, the **Uploaded-On** value will reflect the date in which the document was archived.

- **Allow Sub-Organization Use** – Use this toggle switch to determine **Yes** or **No** as to whether sub-organizations will be able to access this document when creating or amending a contract or solicitation (depending on the library you are in).
  - If you change the **Allow Sub-Organization Use** setting, the respective confirmation alert will display.





  - After uploading a new document, the default setting will be **No.**
- **Action** – The following table identifies the main points regarding each of the available **Actions**.

Download

- Select to download a copy of the document for viewing, saving, printing, etc.

Archive

- Select to move an **Active** document into an **Archived** status. Archiving means the document will be deactivated and no longer be available for selection when creating or amending a contract or solicitation (depending on the library you are in when archiving).
- If the document was shared from a parent organization, the **Archive** option will not be available from the **Actions** menu.
- The **Archive** action will not impact document attachments on any **Active** or **Archived** contract or solicitation.
- If a document is archived and exists on a contract or solicitation in **Draft** status, when the contract or solicitation owner submits the document, a warning message displays. Users will need to access the attachment and remove/replace.
- Once a document is archived, it may be reinstated and placed back into an **Active** status.
- An archived document may be deleted.

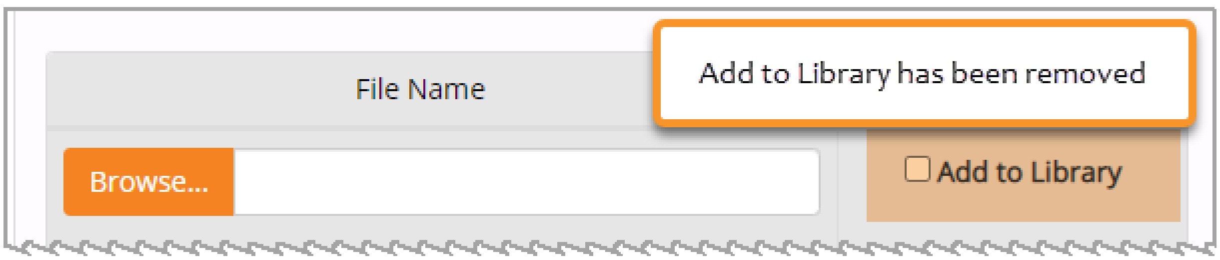
Delete

- Select to remove the document from a library.
- If the document was shared from a parent organization, the **Delete** option will not be available from the **Actions** menu**.**
- The **Delete** action will not affect document attachments on any **Active** or **Archived** contract or solicitation. These will persist for document integrity.
- If a document is deleted and exists on a contract or solicitation in **Draft** status, when the contract or solicitation owner submits the document, a warning message displays. Users will need to access the attachment and remove/replace.

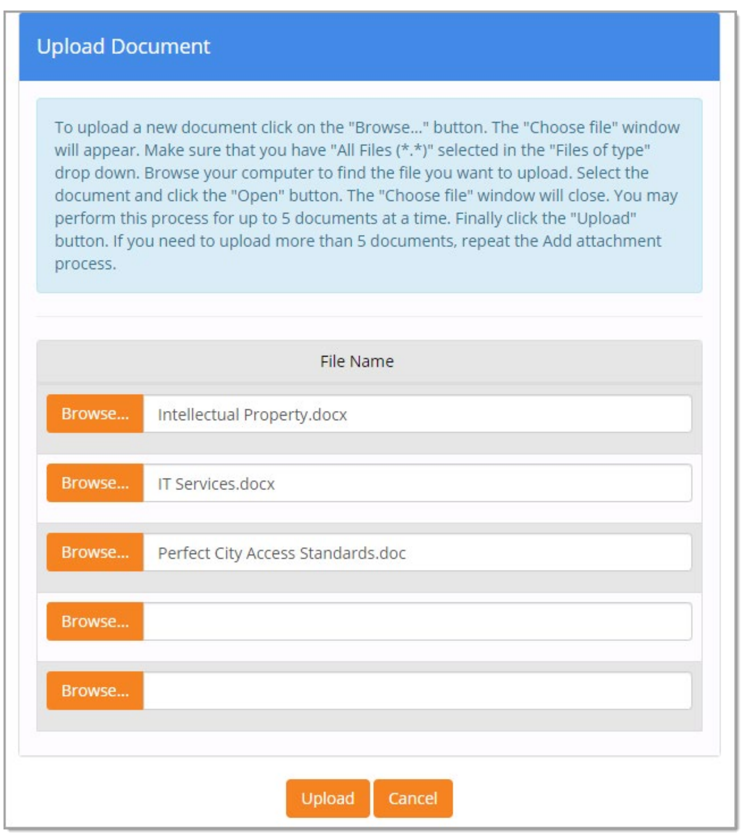
Other key points include:

- Any documents allowed for use by parent organization will:
  - Display as read-only without the ability to **Archive** or **Delete**.
  - Be available for use by all contract and solicitation creators in the sub-organizations in the applicable module.
- Any documents allowed for use at the user's organization level will:
  - Have the **Archive** or **Delete** options available for selection.
  - Be available for use by all contract and solicitation creators in the organization that the document was added to – in the applicable module.

As we have now centralized management of the document libraries, we have removed the ability for users to add documents to the library when creating or editing a contract or solicitation. The **Add to Library** checkbox is no longer available when uploading attachments.

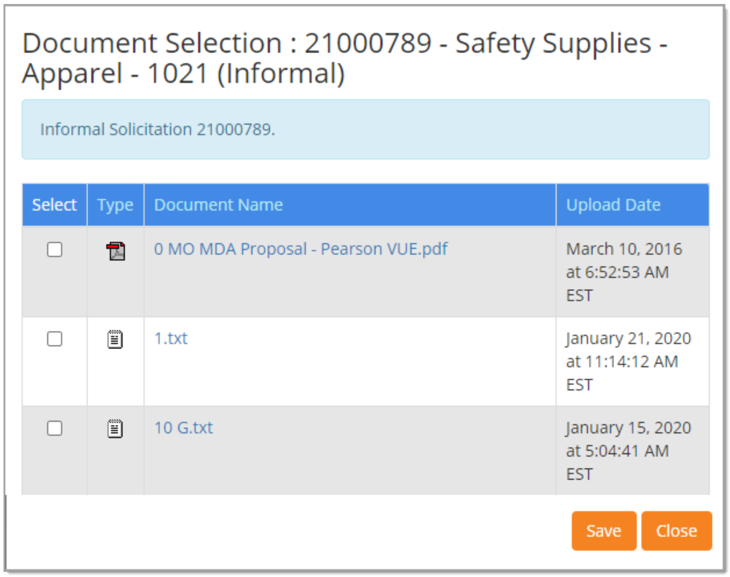


The **Upload Document** modal window has been updated as shown in the example image below:

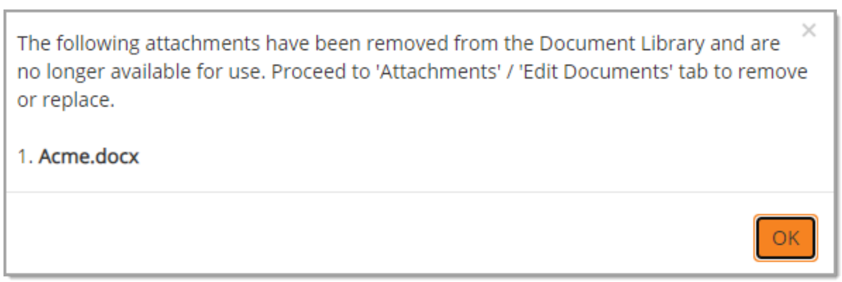


When users select the **Upload Documents from Library** button, the displayed documents will be those that are available to their organization only, meaning uploaded by their organization's **Document Manager(s)**, or documents that have been allowed for use by a parent organization's **Document Manager(s)**.

Additionally, the ability to delete documents directly from the library within the **Document Selection** modal window, has been removed. As document deletion is now managed in the new **Manage Document Libraries**, you'll notice that the **Delete** icon is no longer available.

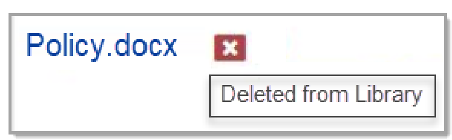


If a document attachment in the **Document Library** is archived or deleted, and it exists on a solicitation or contract in **Draft** status, when the solicitation or contract owner submits the document, a pop-up will display:

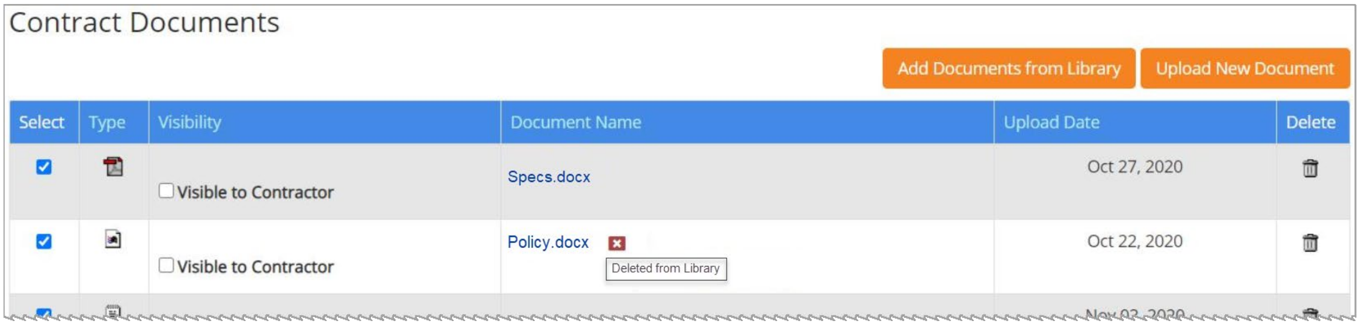


These changes have been applied to both the **Contract** and **Solicitation** modules.

A new visual indicator has been added to the **Contract Documents** and the **Attachments** tab of solicitations. The **red-squared X** identifies that a document that is currently associated to the contract or solicitation has been deleted or archived.



The example image below represents the **Contract Documents** step of creating a contract by copying another contract.



MIGRATION

In support of this enhancement, the 12.6 release will also include several migration scripts to accomplish the following:

- Transfer all existing documents in **Contract Library** to head organization.
- Transfer all existing documents in **Solicitation Library** to head organization.

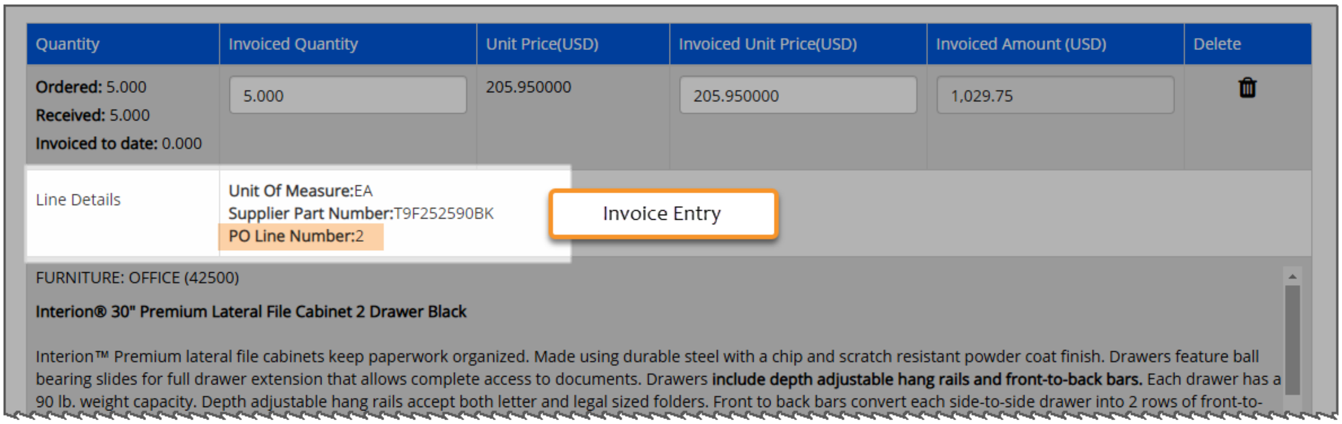
The transferred documents will be migrated to the head-organization and the **Allow for Sub-Organization Use** toggle switch on those documents will be set to **Yes**. This ensures that sub-organizations do not lose access to the documents they need.

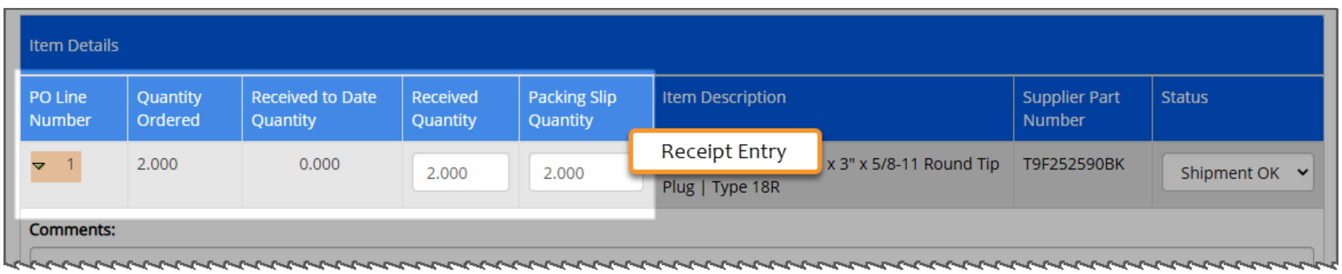
Head-organization Document Managers may determine which documents should remain at head-organization and which need to be provided to sub-organization Document Managers for upload into their organization's library.

▪ ADD ORDER LINE NUMBERS TO RECEIPT AND INVOICE ENTRY PAGES

Order > View All > [Search Order] > Receive
Invoice > Create New

In the 12.6 release, we have added the **PO Line Number** to each of the receipt and invoice entry pages. See the example images below to see the location of the added reference:



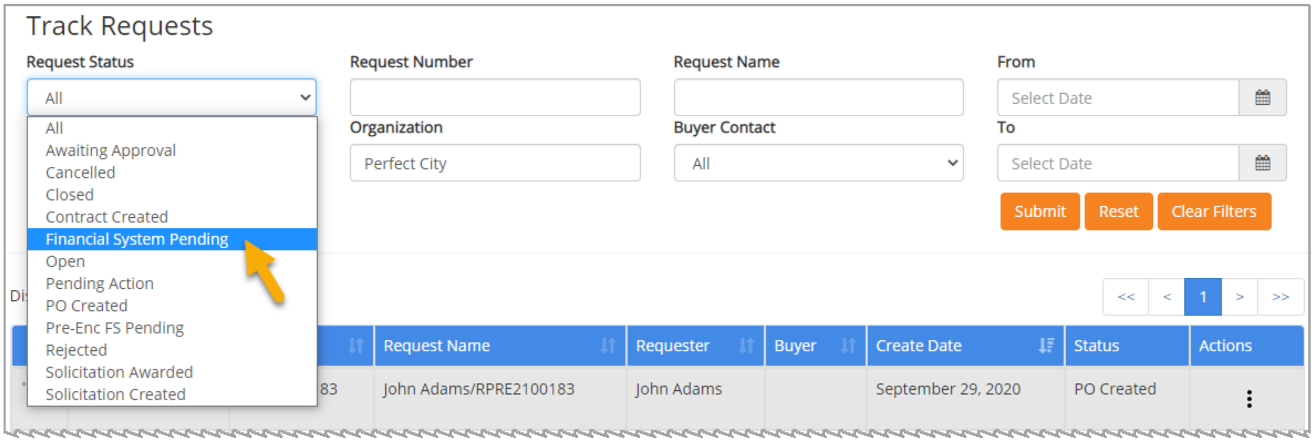


REQUEST

▪ FINANCIAL SYSTEM PENDING STATUS ADDED TO TRACK REQUESTS

Request > View All

A number of filters are available to refine the listing of the **Requests.** In the 12.6 release, we have added **Financial System Pending** status to the **Request Status** drop-down menu.



For those customers that are integrated with an external financial system, selecting this status allows you to view only those requests in which a response has not yet been received back from the financial system.

PRODUCT ENHANCEMENTS - LIMITED AVAILABILITY

ITEMS THAT WERE DEVELOPED PER CLIENT REQUEST; ADDITIONAL CONFIGURATION AND ENABLEMENT IS REQUIRED

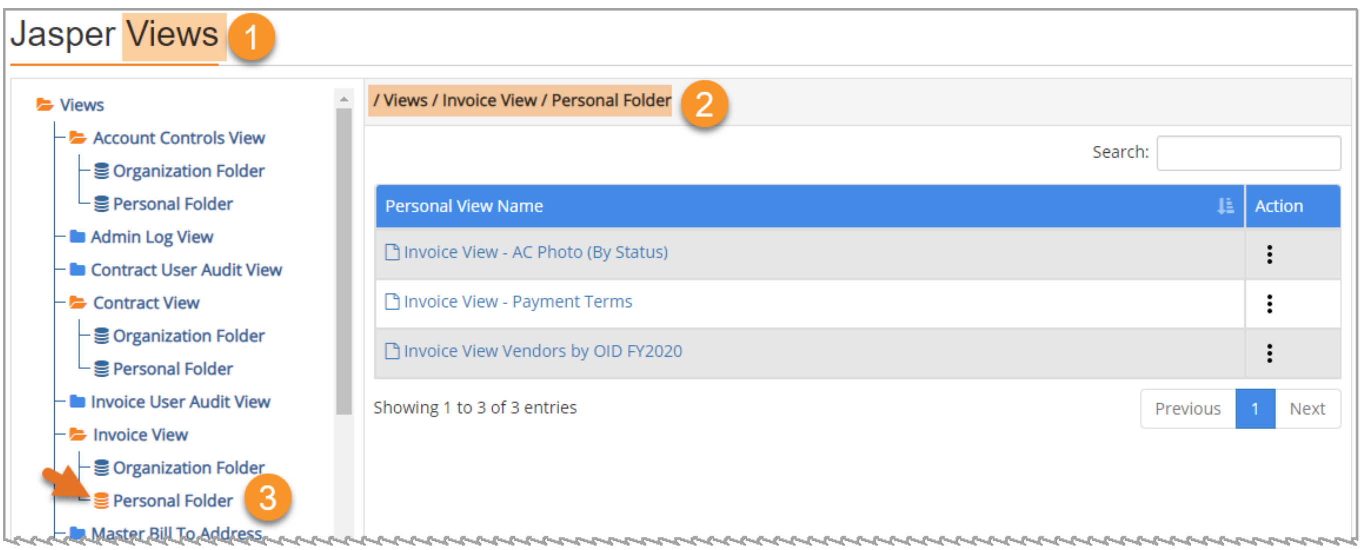
ANALYTICS

CONTINUED IMPROVEMENTS TO PERSONAL REPORTING

Admin > Enterprise Administration > [Select Organization] > Organization Information > Role Management
Analytics > Create Report
Analytics > Execute Report

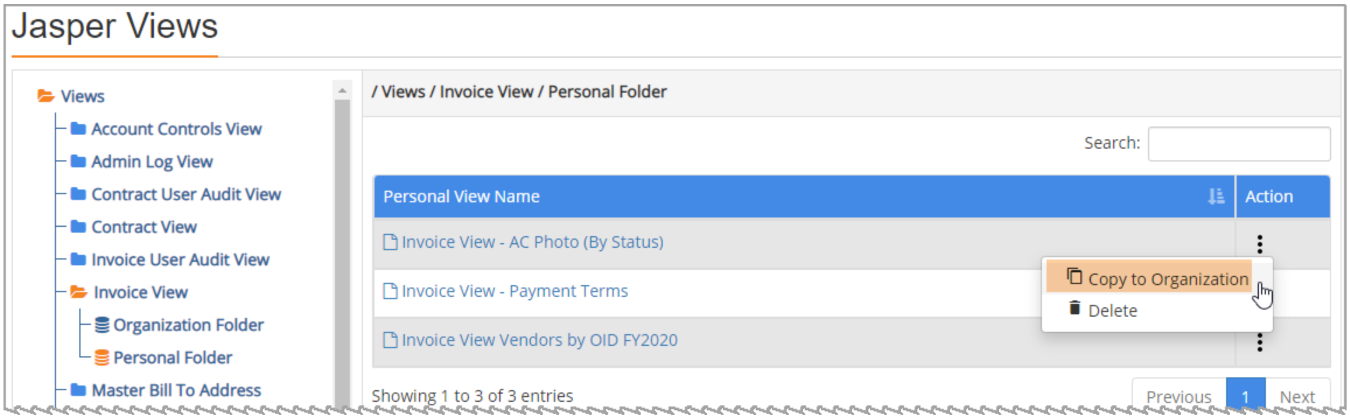
For those customers that have expressed interest in the new **Personal Reporting** functionality, we have enabled it in their **User Acceptance Testing** (UAT) environment. This brand-new feature allows users to create their own reports and save them to their personal directory. It also allows for refined access to organization and public views and reports. With the release of 12.6 we are responding to customer feedback and enhancing this feature in a number of ways.

We have updated the landing page for **Analytics > Create Report**:



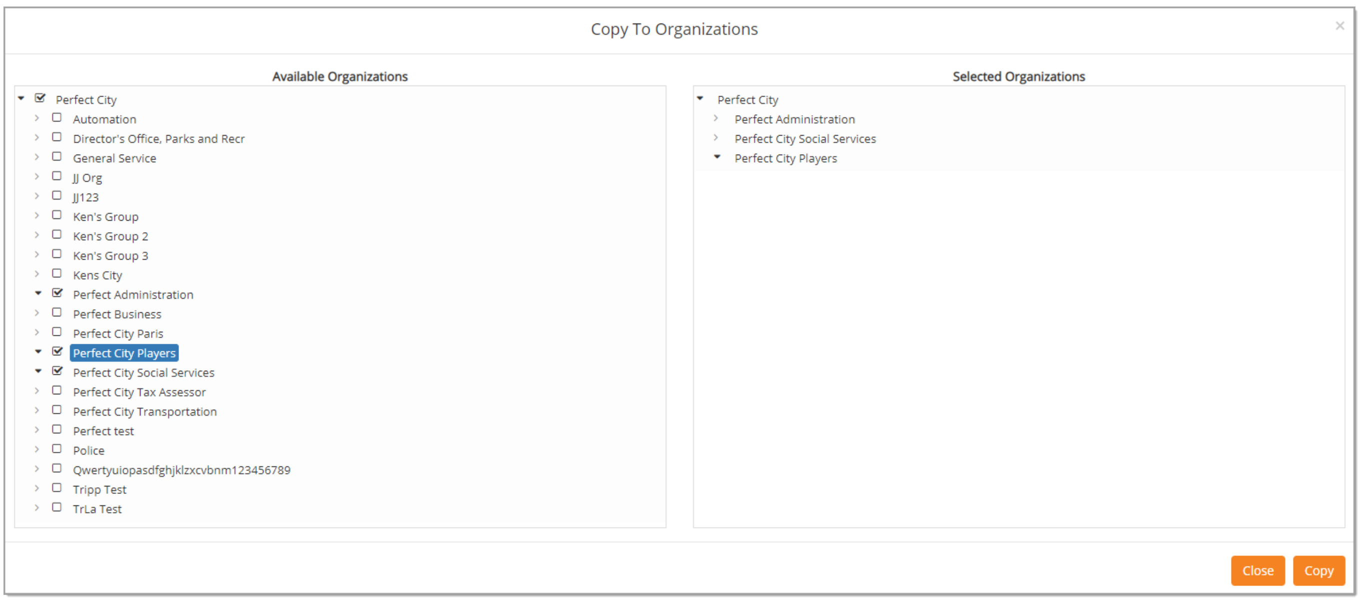
1. The title page has been changed from **Jasper Reports** to **Jasper Views** to better align with the purpose of this page. This is where you choose a starting view to create and access your own personal view and if desired, share your personal views with one or more organizations.
2. We have added in a directory path to identify the folder contents you are currently viewing.
3. Also, the color of the icon changes to **orange** to identify the folder that you are currently viewing.

The **Copy to Organization** action on a view or report has been improved for greater control and easier management. The example image below represents copying a view, but this change has also been applied to the copying of reports.



Selecting **Copy to Organization** opens a new modal window.

NOTE: The organization that you are currently logged into, will be checked by default.



The **Copy to Organizations** window displays two columns: **Available Organizations** and **Selected Organizations.** The organizations displayed in the **Available Organization** list will include:

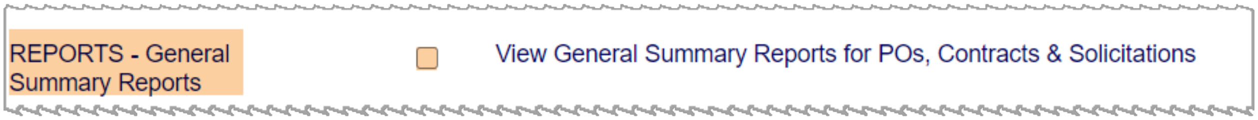
- Organization that you are currently logged into.
- Child organizations of the organization that you are currently logged into.

As in other areas of the application where multiple selections are made, click the right-facing arrow to expand the listing of organizations. Check the box next to one or more organizations in the **Available Organizations** column on the left. As each organization is selected, the **Selected Organizations** column on the right automatically updates to show the organization. To remove an organization from the **Selected Organizations** column, simply clear the check box next to the name of the organization in the **Available Organizations** column.

When finished with your selection, click **Copy** to perform the copy function to the selected organizations.

Additionally, the following fix has been applied to the **General Summary Reports** privilege:

- The **General Summary Reports** privilege has been modified so that it does not control the display of views. A user will not have to have this privilege enabled in order to see any other views.



INVOICE

ACCOUNT CODE DESCRIPTION ADDED ON PAYMENT VOUCHER & MULTIPLE PAGES

Invoice > Create Payment Voucher
Invoice > View All > [Document Type = Payment Vouchers] > View

For those of our customers that utilize **Account Code Distributions,** users allocate the total of the line item or items across one or more account codes during the process of creating a **Payment Voucher**. As these account codes may not necessarily be memorized or universally understood, we have added a new information icon next to the **Account Segment Code** on the following **Payment Voucher** pages:

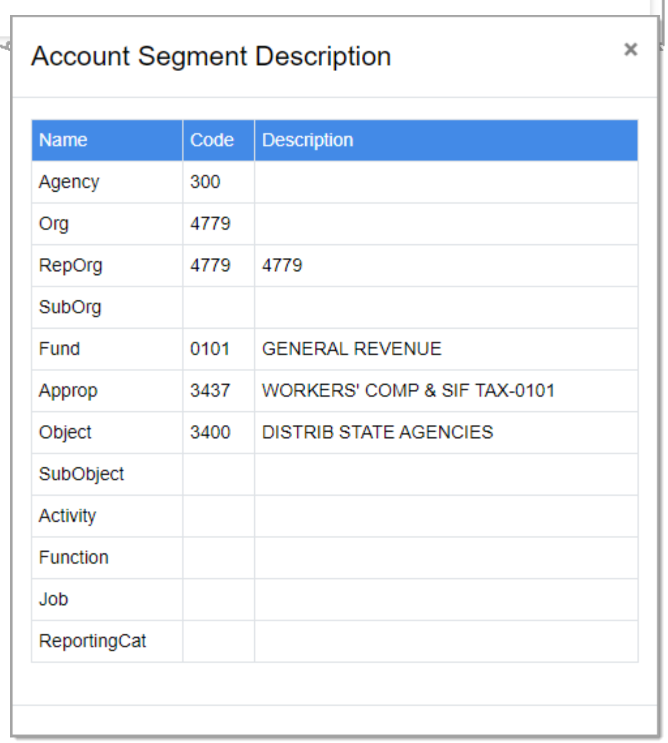
- Payment Voucher **View**
- Payment Voucher **Create**
- Payment Voucher **Edit**

Users may click the icon to view the **Account Segment Description.**

The example image at the right represents the **Account Segment Description** modal window that opens when the information icon is selected.

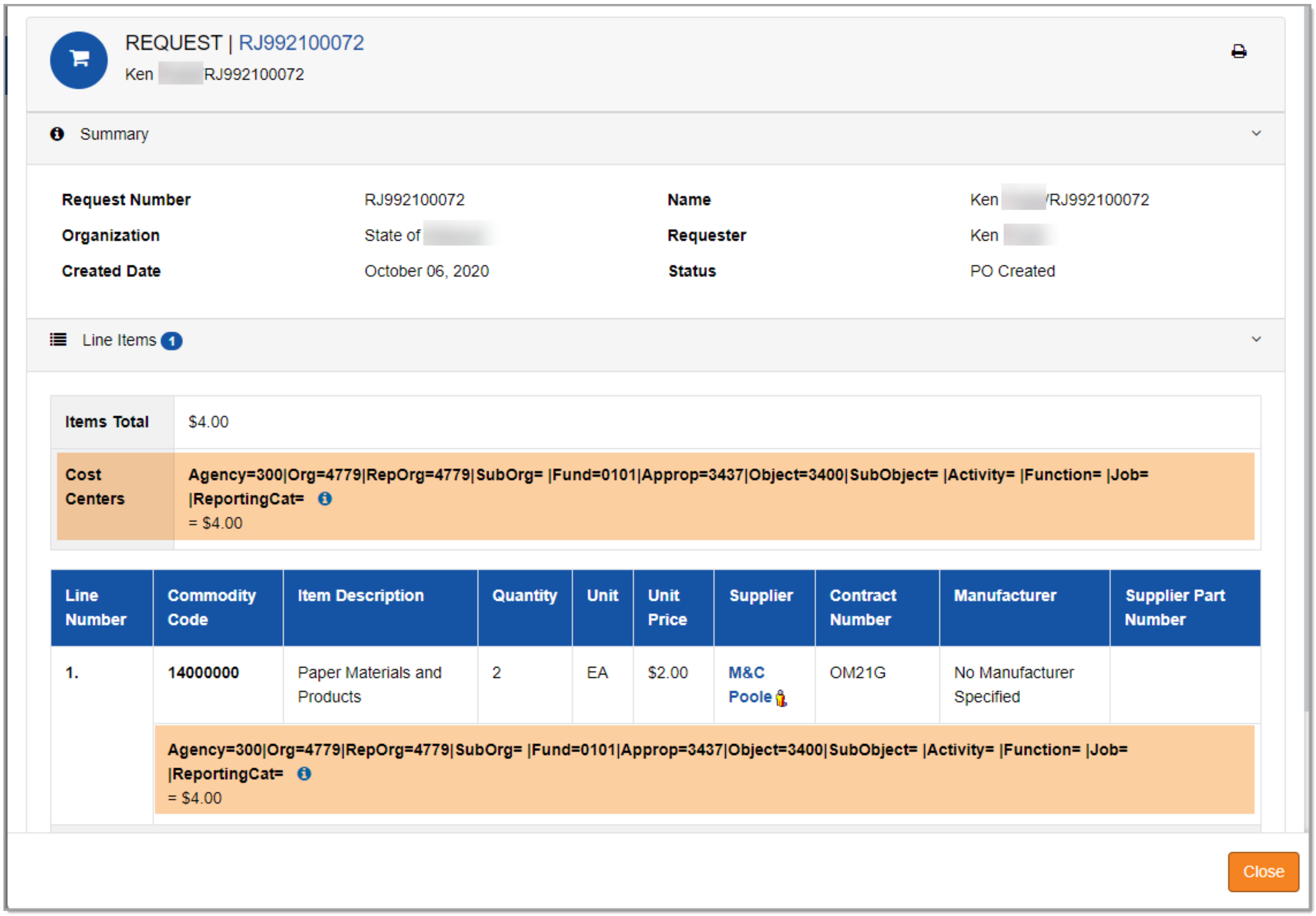
Additionally, we have replaced the hover over action of **Account Segments** with the new information icon on the following pages:

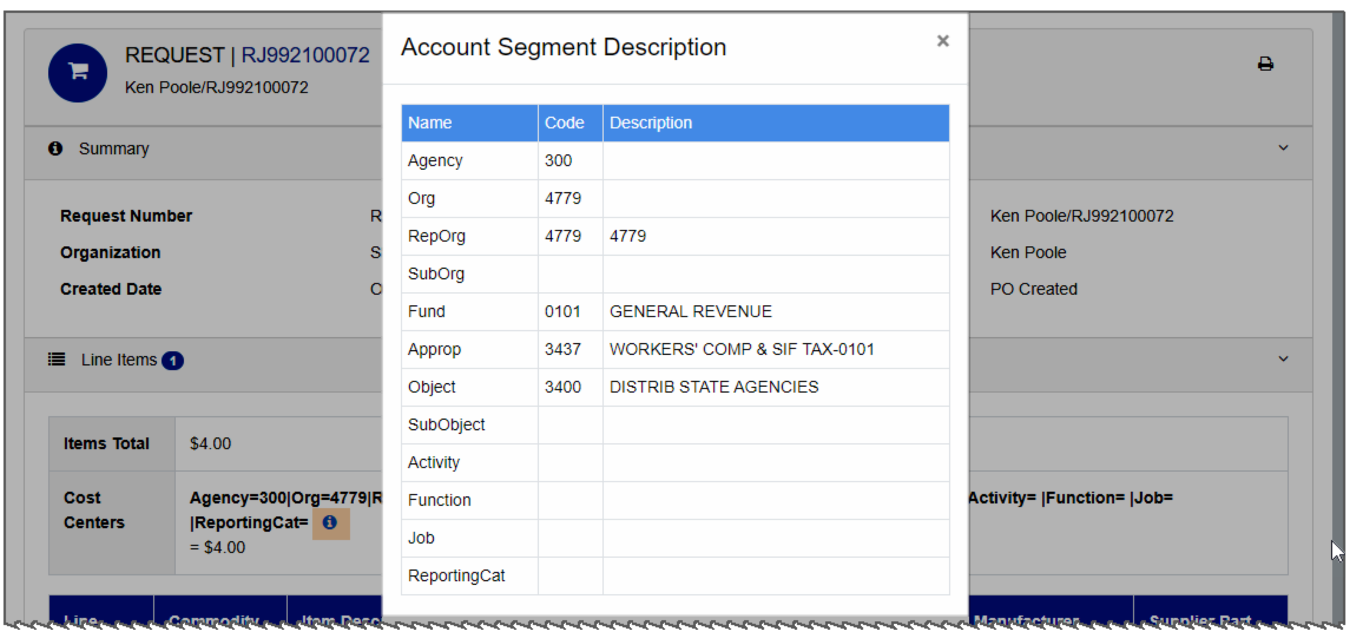
- **Track Requests**
- **Track Orders**
- **Purchase Order History**
- **Approval Inbox**
- **Invoice Summary**



- **Invoice Items**
- **Request** Modal in **Document Cross Reference View**
- **PO** Modal in **Document Cross Reference View**

The following example images show the information icon on a **Request** modal window accessible from the **Document Cross Reference View.** Clicking the icon opens the **Account Segment Descriptions.**





▪ TWO ENVELOPE – ALL BUYER VISIBLE PROPOSALS AVAILABLE TO PUBLISH IN AN AWARD REPORT

Solicitations > Formal Solicitations > Create > [Select Two Envelope as Evaluation Type]

Some of our customers are utilizing a two-envelope system that separates vendor responses to **Formal Solicitations** into two sealed bids, or envelopes: a technical proposal and a cost proposal. The envelopes are evaluated independently to ensure procurement integrity and reduce the risk of pricing criteria unfairly influencing the evaluation process. In this release, we have updated the publishing of an **Award Report** to ensure that it includes all buyer-visible proposals.

The table below defines what the buyer can see or publish in an **Award Report**.

Event	Technical Proposal	Cost Proposal
Bid Closes	All Vendors	No Vendors
Technical Evaluation Submitted	All Vendors	Vendors Who Passed Technical Evaluation
Bid Awarded and Approved	All Vendors	Vendors Who Passed Technical Evaluation
Bid Finalized	All Vendors	Vendors Who Passed Technical Evaluation

- The **Technical Proposals** for all vendors are available to publish in **Award Report** **after bid close**.
- The **Cost Proposals**, for vendors who passed the technical evaluation, are available to publish in **Award Report** **after the technical evaluation is submitted**.

PRODUCT CHANGES

MODIFICATIONS TO THE APPLICATION THAT MAY IMPACT USER PROCESSES.

CONTRACTS

- ### MASTER CONTRACT AND DO NOT DISPATCH CHANGE

Contracts > Create New > [Contract – Header Information] > [Check Master Contract] > [Clear Do Not Dispatch Contract checkbox]

Master Contracts or **Master Agreements** are often used to develop a pool of qualified vendors. With intention and by default, the **Do Not Dispatch Contract** checkbox is marked, (pre-selected) when creating a **Master Contract.** As a result of the **Do Not Dispatch Contract** checkbox being checked, the contract is prevented from being emailed to the contractor or contracted vendor. An issue was submitted in which users that chose to clear this box encountered a system error when advancing from the **Contract – Notification** step to the **Contract Clauses** step. To prevent this system error, we have hidden the **Do Not Dispatch Contract** checkbox when creating or editing **Master Contracts**. In addition, the release of 12.6 will include a script to update the **Do Not Dispatch** status for all existing **Master Contracts**.

PRODUCT FIXES

CORRECTIONS FOR ERRORS, FLAWS, MISTAKES, FAILURES, AND/OR FAULTS THAT PRODUCE AN INCORRECT OR UNEXPECTED RESULT OR BEHAVIOR.

ADMIN / CONTRACTS

- ### RE-APPROVAL WORKFLOW NOT WORKING AS EXPECTED WITH AD-HOC APPROVERS

Admin > Enterprise Administration > [Select Organization] > Workflow > Contract Workflow > Amendment
Contracts > Create New > [Complete Contract] > Submit
Approval > Approval Inbox

Request for Contract Amendment allows users to request a contract amendment for a contract that they, themselves, **do not own**. We received report of an issue relating to re-approval rule behavior when utilizing the **Request for Contract Amendment** feature. In this scenario, an **Ad-Hoc Approver** at the end of the workflow chain amended the contract, and this triggered re-approval by the agency organization that submitted the request. This was not the desired behavior because the contract is owned by the head organization and should not require re-approval by the agency organization submitting the request, if an edit such as a contract value increase, is made.

With the 12.6 release, we have added a customer-specific workflow configuration for each **Document Type** (**Request**, **Contract**, and **Contract Amendment**) with the options ***Always Re-Approve*** and ***Do Not Re-Approve***. The selected option will determine the **Ad-Hoc Approver** re-approval behavior when an approver changes a document while it is in workflow.

NOTE: This is an internal customer setting that will need to be configured by your **Customer Operations Manager**.

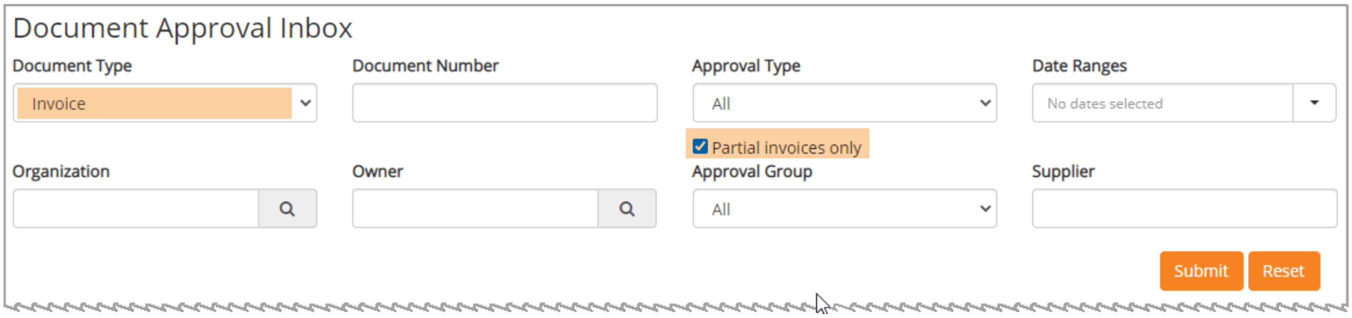
APPROVAL

APPROVAL INBOX FILTERING ISSUE

Approval > Approval Inbox

A defect was found relating to a specific scenario:

- Approvals filtered by **Document Type** of **Invoice** and the **Partial Invoices Only** checkbox selected.



The system displayed a blank white screen for users that had attempted to filter their pending approvals using the above steps. We have updated the code to ensure that refining the listing of approvals based on this combination of filters, will run without error.

CONTRACTS

SEARCHING ARCHIVED CONTRACTS USING SEARCH ADMIN RETURNS NO RESULTS

Contracts > View Archive > [Select specific user from the Contract Admin drop-down menu] > Submit

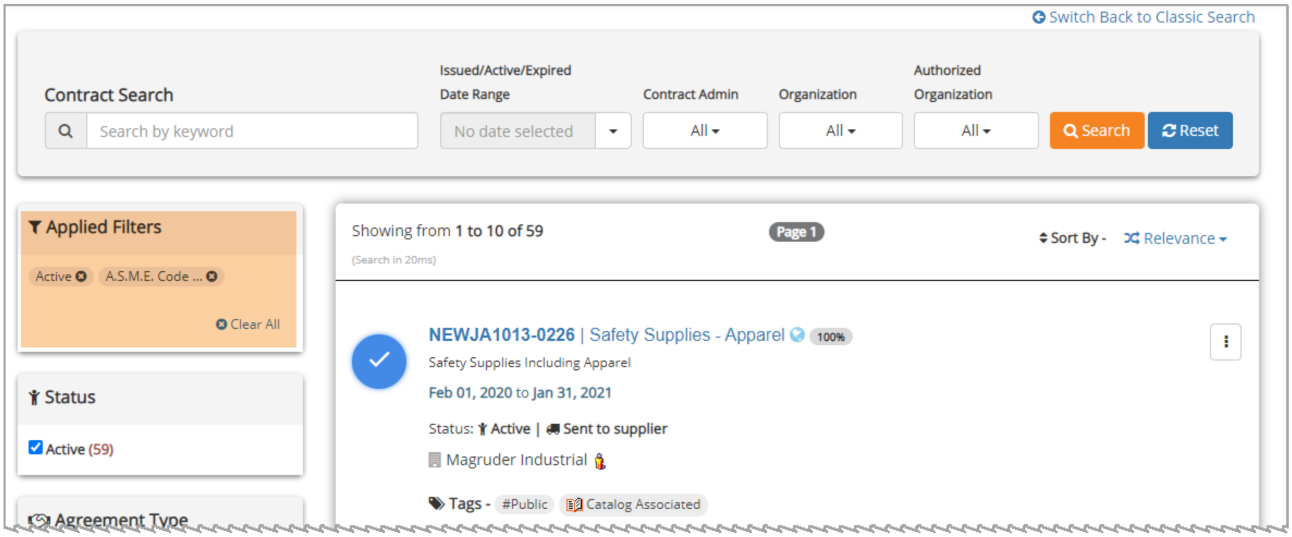
An issue was reported in which searching for archived contracts based on a particular **Contract Admin** returned no results. Additionally, the selected **Contract Admin** would revert to the **All** value after selecting **Submit** to launch the search. The 12.6 release resolves this issue and the search function works correctly in this scenario.

ISSUES SURROUNDING THE NEW CONTRACT SEARCH

Contracts > Contract Search

The latest version of **Contract Search** in the application is a very robust and streamlined way to locate one or more contracts. Multiple filters are available for selection; however, several issues were found when working with the various filter types. The 12.6 release corrects the following behaviors:

- Removing an **Applied Filter** resulted in displaying all applied filters twice.
- Clearing the check box for the **Agreement Type** did not remove that type from the **Applied Filter** display.
- Removing a single **Commodity** selection from the **Applied Filter** box using the **x**, removed *all* commodity filter selections.



CONTRACTS / ORDER / VENDOR PORTAL

▪ PURCHASE ORDER NOT AVAILABLE TO DISTRIBUTOR IN VENDOR PORTAL

Contracts > Create New
Request > Create New > [Item Associated with Contract] > Submit Request
Log into Vendor Portal: Orders > View Orders

The **Distributors** section on a contract is used to designate the recipient or recipients of the contract-related purchase orders. An issue was found in which the **Distributors** received an email with the purchase order attached, however, the contract-related purchase orders were not visible inside of the vendor portal. As of the 12.6 release, when a **Distributor** is selected as the vendor when creating a request/purchase order against a contract, the purchase order will only display for the selected **Distributor**, and not the **Contractor**, in the vendor portal.

INVOICE

▪ PAYMENT VOUCHER SEARCH DISALLOWED USING SPECIAL CHARACTERS

Invoice > View All > [Search for Document Type: Payment Vouchers] > [Enter Supplier Name with Special Character]

When investigating an issue in which **Payment Vouchers** could not be located when searching on a particular supplier, we found that special characters were not accepted. For example, is a user were to search for a payment voucher associated with ***A&B Supplier***, the ampersand (&) prevented the search from working properly. With this release, we have corrected this problem to make sure special characters are allowed.

▪ AUTO RE-MATCH SHOWS QUANTITY ZERO MATCHED ON FINAL MATCH

Invoice > View All > [Search for Document Type: Invoices]

If enabled by your organization, **Auto-Matching** will attempt to:

- Match invoices that have been submitted through the **Vendor Portal** to receivers before the workflow is launched.
- Match invoices that have been submitted by **Integrated Suppliers** through the **API** to receivers before the workflow is launched.
- Match invoices that have been entered by the buying organization to receivers before the workflow is launched.

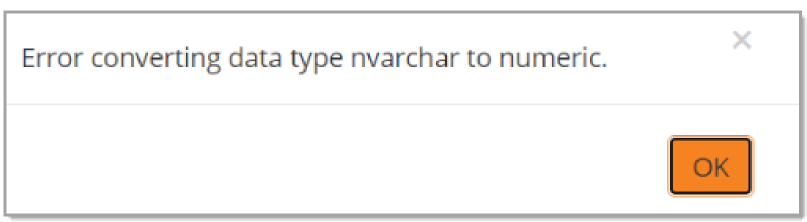
If a buyer- or supplier-entered invoice was not initially matched and then a receipt is submitted, the auto-matching process will re-launch and perform the match.

An issue was found whereby the buyer created multiple receipts, each for partial invoice quantity, but when final receipt was entered, the match quantity reverted to **zero (0)**. In the 12.6 release, we modified the associated code to ensure that after each receipt, including the final receipt, the matched quantity will update correctly.

▪ ERROR UPON INVOICE SUBMISSION RELATING TO INVOICE ACCOUNT SEGMENT APPROVAL

Admin > Enterprise Administration > [Select Organization] > Workflow > Invoice Workflow
Invoice > Create New

The **Invoice Account Segment Approval** workflow rule allows administrators to assign workflow action based on one or more accounting **Segment Names and Segment Values.** Users received a data conversion error when submitting an invoice that triggered the **Invoice Account Segment Approval** workflow rule.



We found that this error was tied to configuring the workflow rule but did not present itself until invoice submission. In 12.6 release, we have corrected the corrupted data to ensure invoice submission can complete.

▪ INVOICES WITH MISSING AND INVALID UNIT PRICES AND QUANTITIES WERE UPLOADED THROUGH INVOICE IMPORT

Invoice > Invoice Import

The **Invoice Import** functionality provides users with a standardized template to upload invoices in bulk. It is controlled by the **Bulk Invoice Import** switch available in the **Invoice Management** section of the **Edit General Org Info** page. Several validation processes were found to be missing and as a result, invoices that should have not been successfully uploaded, actually were.

We have updated the application to ensure that the application will not accept (error on) the following import scenarios:

- **Missing Unit Price**
- **Unit Price containing Special Characters or Letters**
- **Missing Quantity**
- **Quantity containing Special Characters or Letters**
- **Quantity of zero (0)** – This matches the user interface behavior when creating an invoice.

INVOICE / VENDOR PORTAL

▪ DELETE BUTTON VISIBLE IN VENDOR PORTAL ON BUYER-CREATED INVOICE

Supplier Log In: Invoices > View All

In a previous release, we updated the logic relating to the **Delete** action on invoices inside the **Vendor Portal**. The system had been incorrectly using the **Invoice Match Status** instead of the **Invoice Status** in the validation process that determines when the **Delete** button on the **Invoice Summary** page is available.

The release of 12.6 ensures that the **Delete** button is only available for invoices in the following statuses:

- **Created (*By Vendor*)**
- **Rejected to Supplier**
- **Auto-Rejected to Supplier**

Additionally, we made multiple adjustments on the buyer side when viewing vendor-created invoices:

- Removed the **Delete** button that had been visible on the **Invoice Summary** page for vendor-created invoices.
- Buyers are no longer able to see vendor-created invoices that have not yet been submitted. Prior to this release, buyers were able to search by **Supplier Invoice Number** and see vendor-created invoices that had not been submitted.
    - These unsubmitted invoices are no longer viewable in the buyer’s type-ahead search for **Buyer** or **Supplier Invoice Number**.

▪ UNDER REVIEW FILTER NOT WORKING CORRECTLY IN VENDOR PORTAL

Supplier Log In: Invoices > View All

Vendors may filter their listing of invoices by **Purchase Order No.**, **Invoice/Credit No.**, **Requester**, **Status** and/or **Organization**. Invoices that are **Under Review** are invoices that have been viewed by the buying organization and are currently going through an approval workflow and/or being processed. Additionally, for those buying organizations that utilize an external financial system, the **Under Review** status remains until the response from the financial system is received. These types of invoices may not be edited or deleted by the vendor.

An issue was found in which filtering based on the **Under Review** status did not return all of the invoices with that particular status. We have corrected this issue in the 12.6 release.

SOLICITATIONS

▪ UNABLE TO SAVE EDITS ON REQUIREMENTS

Solicitations > [Formal or Informal Solicitations] > View Current > [Locate Solicitation] > Edit > Edit Requirements

The **Field Library** was designed to allow authorized users to select and/or create appropriate instructions, terms, legal content, and data collections fields for inclusion in solicitations and contracts. These fields can then be mapped to the **Requirements** step when creating a solicitation and/or to the **Clauses** step when creating a contract.

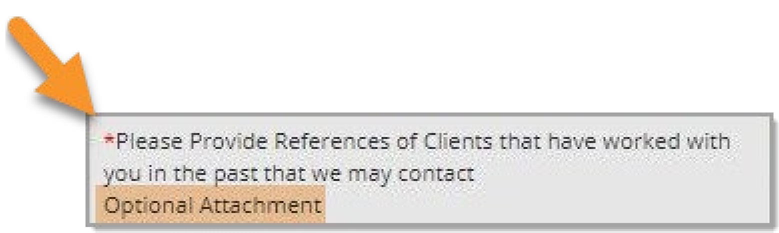
Several releases back, we replaced the auto-save functionality with a new floating **Save** button. This button is always visible and moves with you as you work and scroll on the **Requirements** or **Contract Clauses** pages. Several users reported receiving an error when using this new button to save an edited **Mandatory Requirement**. The 12.6 release resolves the error and ensures the floating save button works without issue.

SOLICITATIONS / VENDOR PORTAL

▪ QUESTIONNAIRE SETTING FOR REQUIRED ATTACHMENT IS LISTED AS OPTIONAL IN VENDOR PORTAL

Solicitations > [Formal or Informal] > Create > [Complete Header, Requirements as needed] > [Create Attachment Type Question set to Required]
Supplier Log In: Solicitations > View Current Solicitations > Submit / Edit Response

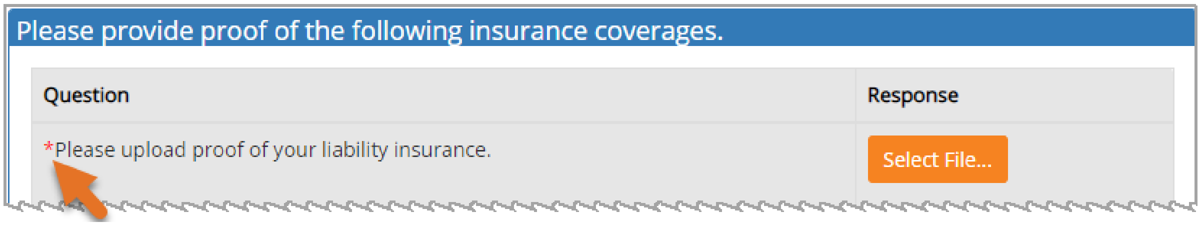
Buyers have the option to utilize the **Questionnaire** functionality to ask questions of a supplier within a solicitation. One of the available question types to configure is an **Attachment Response**. In addition, buyers can designate that **Attachment Response** as required. **Attachment Responses** that were designated as required were displayed with a red asterisk (*), however, a statement also displayed: **Optional Attachment** as shown in the example image below:



The **Optional Attachment** message is intended for those questions in which an attachment is *in addition* to the answer to the question.

These conflicting identifiers caused confusion to our vendor users when responding to a solicitation. With the release of 12.6, we have removed the phrase of **Optional Attachment** on required attachment response questions.

- Required **Attachment Response** questions will be marked with a red asterisk (*) only.



Please note the following:

- If you have an **Attachment Response**-based question, and it is not required, the vendor's answer to the question is the attachment, therefore, the **Optional Attachment** messaging will **not** display.
- If you have a **Text**-, **Drop-Down**- or **Yes/No**-based question, buyers may elect to allow for vendors to provide an attachment in addition to their entered answer. In these instances, the **Optional Attachment** messaging **will** display.

VENDOR MANAGEMENT

USERS WITHOUT VIEW VENDOR VALIDATIONS PERMISSION ABLE TO VIEW VALIDATIONS ON ENHANCED VENDOR PROFILES

Vendors > View Vendors > [Search for Vendor] > [Select Hyperlinked Supplier Name]
Admin > Enterprise Administration > [Select Organization] > Users > Edit Users > [Search for User] > Edit

Vendors have the opportunity to create a promotional page via the **Enhanced Profile Information** link within their vendor portal. Vendors may include specials or unique offerings, listings of provided products and services, and more. This entered information is visible to the buying organizations.

One of the **General** permissions that may be assigned to a user profile is **View Vendor Validations**. For those customers that utilize vendor validation, assigning this permission to a user grants that user visibility of the **Validations** tab on a vendor's profile.

An issue was reported in which users that did not have the **View Vendor Validations** permission could still view the **Validations** tab on an enhanced vendor profile. The release of 12.6 ensures that regardless of the vendor profile type (enhanced or not) users will only have visibility of the **Validations** tab when they have the appropriate permission assigned.

For additional information, please contact Proactis Customer Support:

(866) 889-8533 or by e-mail at webprocure-support@proactis.com