WebProcure

23.2 RELEASE

APRIL 22, 2023

DOCUMENTATION VERSION 4.3.04.23

WebProcure™

This set of release notes pertains to the Web**Procure**™ 23.2 development release scheduled for Saturday, April 22, 2023.

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.*

CONTENTS

PRODUCT ENHANCEMENTS - GENERAL AVAILABILITY

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

ADMIN/PUBLIC BID BOARD

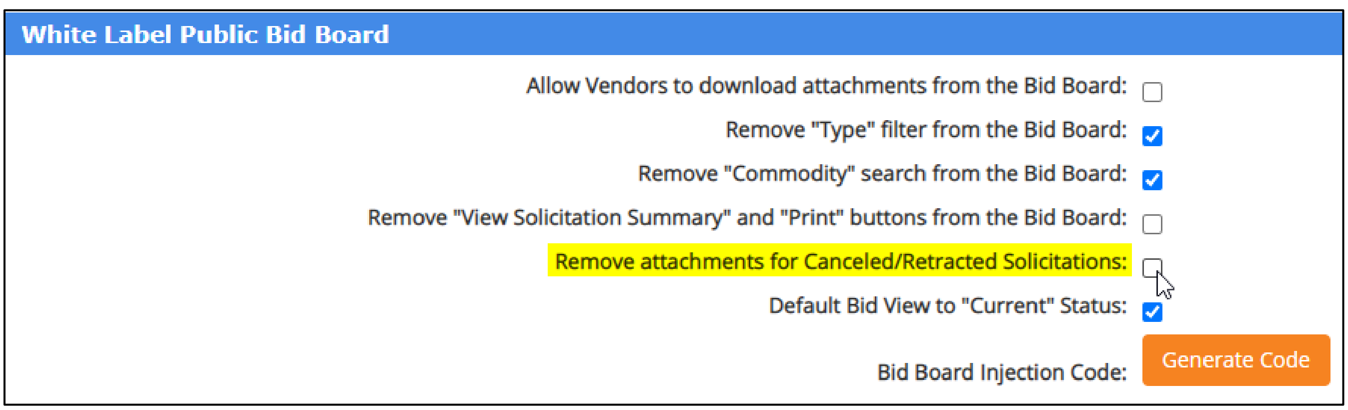
SETTING TO CONTROL DISPLAY OF ATTACHMENTS FOR CANCELED/RETRACTED SOLICITATIONS ON BID BOARD

Admin > Enterprise Administration > [Select Organization] > Organization Information > Edit General Org Info > White Label Public Bid Board
Public Bid Board

In the 23.2 release we have added an enterprise-level setting called **Remove attachments for Canceled/Retracted Solicitations** that controls the display of Solicitation Attachments on the Public Bid Board for Canceled/Retracted solicitations. Buying Organizations have different policies around whether these documents should remain visible to suppliers and the general public if a solicitation is Canceled/Retracted.

- ***Check*** the setting to NOT display Solicitation Attachments on the Public Bid Board for Canceled/Retracted solicitations

- Leave the setting ***unchecked*** (the DEFAULT setting) to continue to display Solicitation Attachments on the Public Bid Board for Canceled/Retracted solicitations



PRODUCT CHANGES

MODIFICATIONS TO THE APPLICATION THAT MAY IMPACT USER PROCESSES.

ADMIN

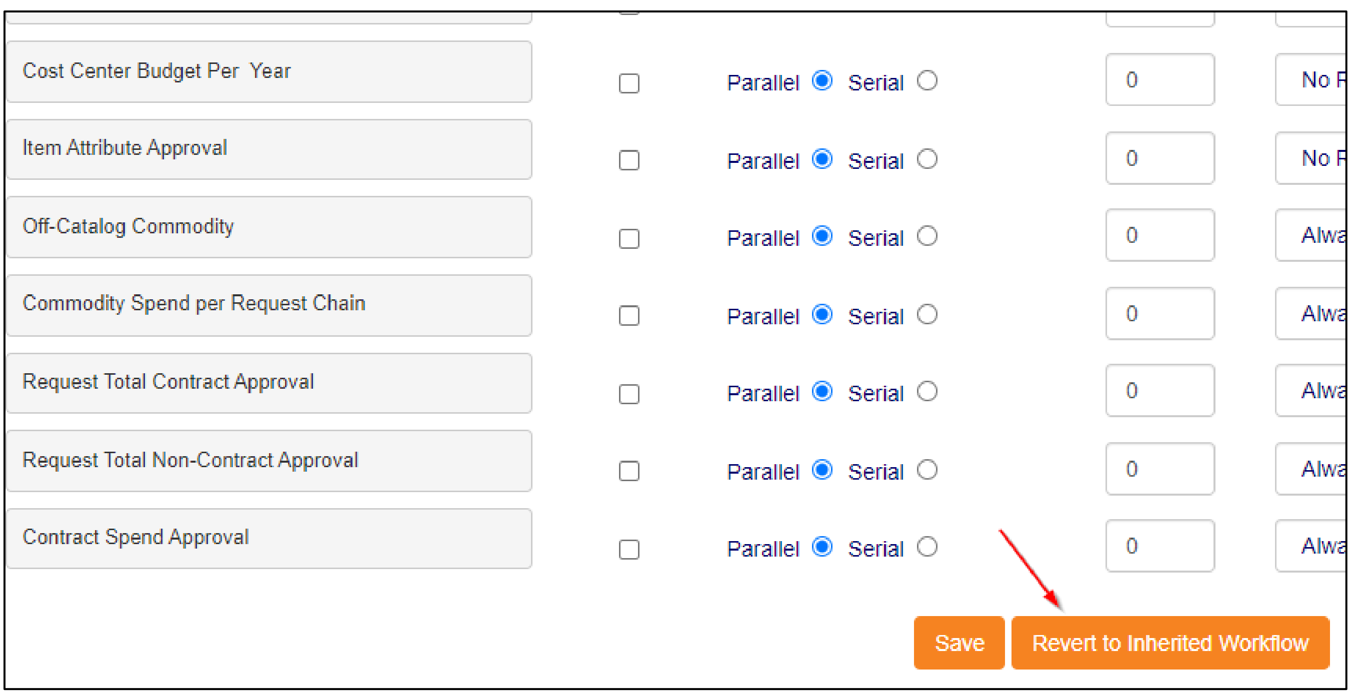
CHANGE TO **REQUEST WORKFLOW** CONFIGURATION INHERITANCE FLOW

Admin > Enterprise Administration > [Select Organization] > Workflow > Request Workflow

On the Request Workflow screen, if a Sub-Organization has overridden the inherited configuration from the Head Organization, previously a button labeled **Delete Workflow** would display. The **Delete Workflow** button should have deleted the overridden configuration by the Sub-Organization, but instead an error appeared, and there was no way for the user to return back to the Request Workflow screen, where the inherited workflow configuration from the Head Organization displayed.

In the 23.2 release, the **Delete Workflow** button has been relabeled to **Revert to Inherited Workflow** to clarify the action this button performs. When **Revert to Inherited Workflow** is clicked, the button will return the user to the Request Workflow screen, displaying the inherited workflow configuration from the Head Organization with the option to **Override Workflow Configuration** via a button at the bottom of the screen.

*Display when **Override Workflow Configuration** button is clicked*



*Display when **Revert to Inherited Workflow** button is clicked*

Cost Center Budget Per Year	False	Parallel	0
Item Attribute Approval	False	Parallel	0
Off-Catalog Commodity	False	Parallel	0
Commodity Spend per Request Chain	False	Parallel	0
Request Total Contract Approval	False	Parallel	0
Request Total Non-Contract Approval	False	Parallel	0
Contract Spend Approval	False	Parallel	0

Override Workflow Configuration

EMAIL NOTIFICATIONS

▪ WEBPROCURE SUPPORT EMAIL ADDRESS UPDATED ON ALL EMAIL NOTIFICATIONS

Email Notifications

The WebProcure Support email address has changed and is now updated on the footer of all WebProcure email notifications.

Old Email Address: WebProcure.Support@proactis.com

New Email Address: WebProcure-Support@proactis.com

Need Help?

Support Team
Monday through Friday
8:00AM to 8:00PM EST (excluding holidays)
WebProcure-Support@proactis.com
(866) 889-8533

Mailing Address
Proactis
Attn: WebProcure Customer Support
One BayPort Way, Suite 225
Newport News, VA 23606

PRODUCT FIXES

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

ADMIN

ORDERS CLOSED WITH **ORDER CLOSURE TOOL** HAD INCORRECT CLOSE DATE

Admin > Enterprise Administration > [Select Organization] > Document Tools > Order Closure

When a purchase order was closed using the **Order Closure** tool and the **Include ERP Integration with Bulk Order Closure** organization setting was unchecked, the PO Close Date was displaying as *January 01, 1800*. This has been corrected to display the applicable PO Close Date that the purchase order was closed using the **Order Closure** tool.

ANALYTICS

REQ COMMODITY NAME FIELD DISPLAYING REQ COMMODITY

Analytics > Create Report > Req and PO View

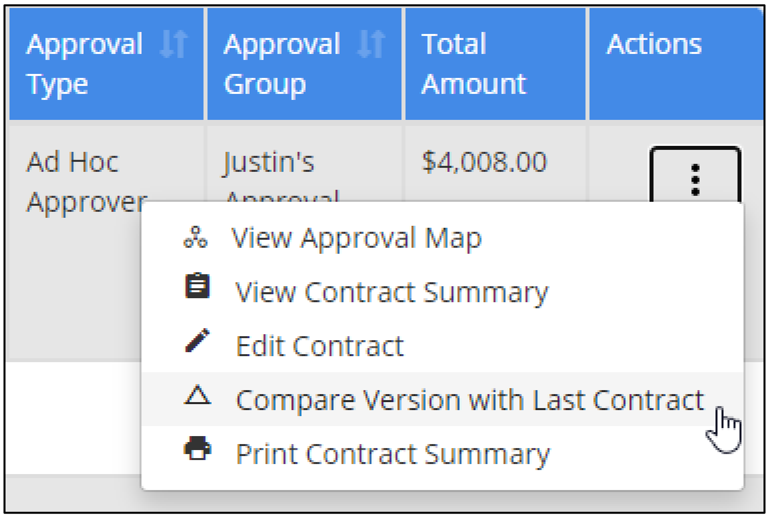
For customers using the NIGP commodity code taxonomy, the **Req Commodity Name** field in the *Req and PO View* was incorrectly displaying the commodity code instead of the commodity description. With the 23.2 release, the **Req Commodity Name** will display the commodity description as expected.

APPROVAL INBOX

COMPARE VERSION WITH LAST CONTRACT ACTION MISSING FOR AD HOC APPROVER

Approval Inbox

Previously, if an ad hoc approver was added to a contract workflow, when that approver navigated to the Approval Inbox and clicked the **Actions** icon, the *Compare Version with Last Contract* action did not display. This action is now available to the ad hoc approver so they can compare the original contract against the amended contract version.



CONTRACTS

▪ CUMULATIVE ENCUMBERED/EXPENDED VALUE, REMAINING BALANCE AND % VALUE TO GO FIELDS NOT REFLECTING CORRECT AMOUNTS

Contracts > View Current > [Select Hyperlinked Contract Number]
Contracts > View Current > [Locate Contract] > Actions > Print
Contracts > View Archived > [Select Hyperlinked Contract Number]
Contracts > View Archived > [Locate Contract] > Actions > Print
Contracts > Search Contract (New) > [Select Hyperlinked Contract Number]
Contracts > Search Contract (New) > [Locate Contract] > Actions > Print

An issue was reported in which the contract *Pricing Information* fields **Cumulative Encumbered/Expended Value**, **Remaining Balance**, and % **Value to Go** were displaying incorrect amounts and percentage. Investigation confirmed that **Total Paid** was not being reflected in the **Cumulative Encumbered/Expended Value**, and as a result, the **Remaining Balance** and % **Value to Go** fields were also not accurate. **Total Paid** is now being considered in **Cumulative Encumbered/Expended Value** and all three fields have correct amounts.

▪ EMAIL AND USER NOTIFICATION, AUDITING CORRECTIONS FOR ADMINISTRATIVE DOCUMENTS

Email Notifications
User Notifications
Contracts > View Current > [Locate Contract] > Actions > Contract History
Contracts > View Current > [Locate Contract] > Actions > Contract History
Contracts > Search Contract (New) > [Locate Contract] > Actions > Contract History

In the 23.1 release, we added ***Managing Administrative Documents on a Contract – Addition of Contract Manager field***, an improvement to the **Administrative Documents** feature. In the 23.2 release we have addressed reported issues of the associated email notifications, user notifications and audit entries displaying the user's Username instead of First Name and Last Name.

Updated Email Notification Example:

Contract Administrative Attachment

John Adams,

Jenny Crossan added new administrative document "EXHIBIT B - Price Schedule 070123 to 123123_UPDATED.docx" to contract SC2300108

Updated Audit Entry Example:

March 24, 2023 at 2:01:18 PM	Jenny Crossan	Contract Manager Jenny Crossan from Perfect City added administrative document 'EXHIBIT B - Price Schedule 070123 to 123123_UPDATED.docx'

Additionally, we have corrected the following issues of email and user notifications mentioning the wrong user as having added or deleted an Administrative Attachment:

- When an email is sent to the Contract Administrator for an Administrative Attachment added by the Contract Manager, the email erroneously says that the Contract Administrator added the Administrative Attachment

- When an email is sent to the Contract Manager for an Administrative Attachment added by the Contract Administrator, the email erroneously says that the Contract Manager added the Administrative Attachment

- When an email is sent to the Contract Administrator for an Administrative Attachment deleted by the Contract Manager, the email erroneously says that the Contract Administrator deleted the Administrative Attachment

- When an email is sent to the Contract Manager for an Administrative Attachment deleted by the Contract Administrator, the email erroneously says that the Contract Manager deleted the Administrative Attachment

- When a user notification displays for an Administrative Attachment deleted by the Contract Manager, the notification erroneously says that the Contract Administrator deleted the Administrative Attachment

CONTRACTS/PUBLIC CONTRACT BOARD

▪ PARTIAL LIST OF SUBCONTRACTORS DISPLAYING ON CONTRACT BOARD

Contracts > Create new
Contracts > View Current > Edit
Public Contract Board

In the 23.1 release, we introduced updates to the **Diversity Allocation** Contract Header section to offer a Subcontractor-specific section (**Subcontracting Level Allocation**) to add associated Diversity Allocation information.

An issue was identified in which only a partial list of Subcontractors added to the **Subcontracting Level Allocation** section displayed on the Public Contract Board in the **Supplier Diversity Information** section of the contract. Now, all Subcontractors will display and we have added page numbering to accommodate a longer list of Subcontractors (10 results display per page.)

DOCUMENT CROSS REFERENCE VIEW

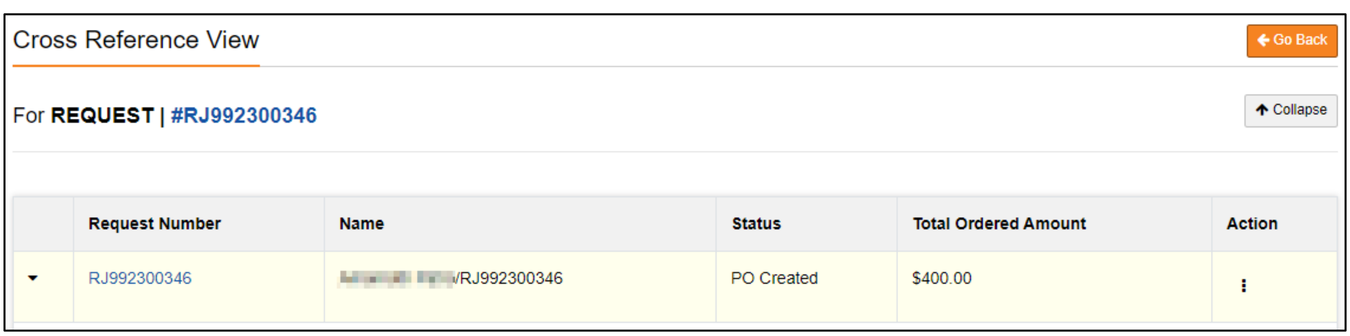
▪ REQUEST DISPLAYING INCORRECT SUPPLIER FOR PURCHASE ORDER DISPATCHED TO DISTRIBUTOR

Document Cross Reference View

The **Document Cross Reference View** was showing an incorrect Supplier on the Request display and the Request Summary window in the case of a Purchase Order dispatched to the Distributor instead of the Contractor. The Contractor was displaying, even though the Distributor was the Supplier on the Purchase Order, Receipt and Invoice.

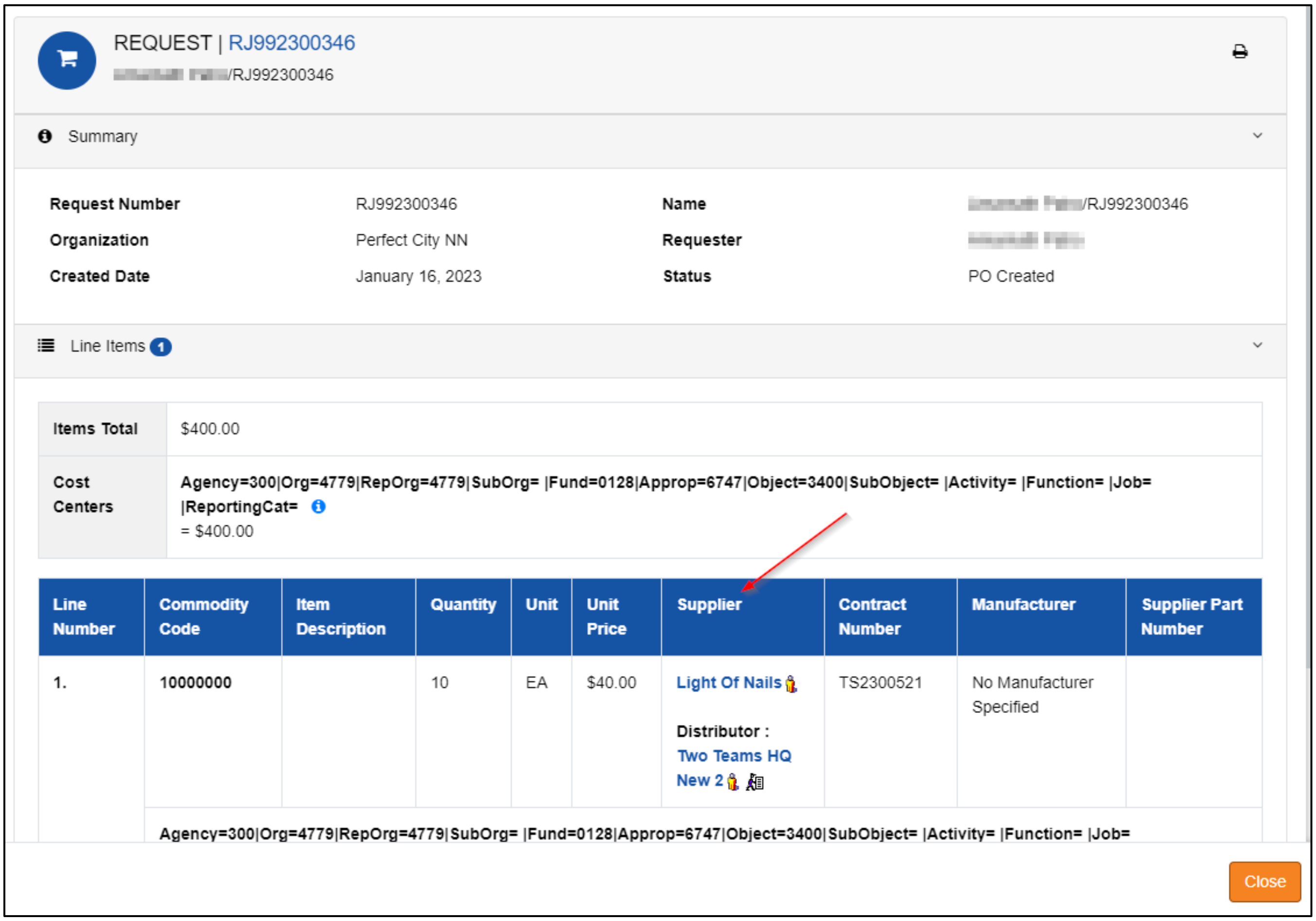
We have removed the **Supplier** field from the Request display on the **Document Cross Reference View** because technically a Request does not have a Supplier. A Purchase Order attached to the Request can be referenced to see the Contractor and Distributor split out with an icon indicating to which supplier the Purchase Order was dispatched.

Request Display



On the Request summary window we have synced the Supplier column with the **Request** module *View All* screen, where we display both the Contractor and Distributor under the Request *Line Items*.

Request Summary Window



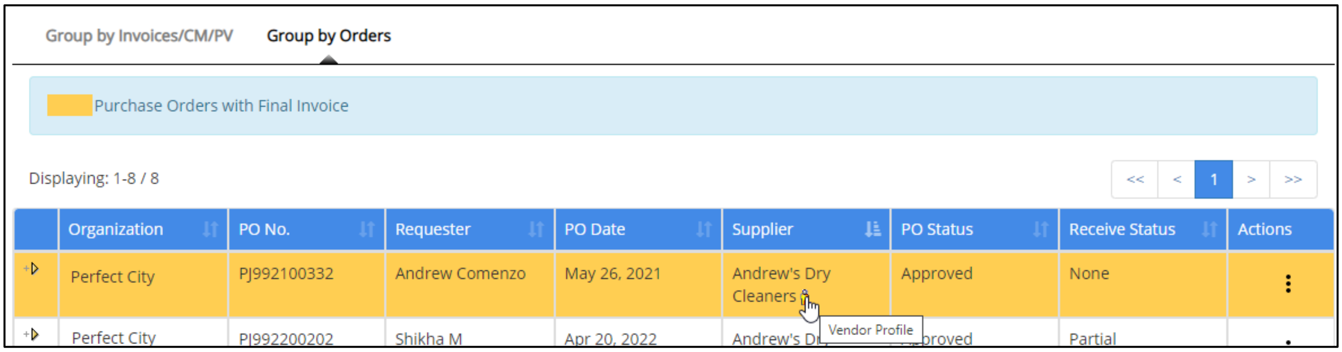
INVOICE

VENDOR ICON OPENS PROFILE FOR INCORRECT SUPPLIER WHEN PURCHASE ORDER DISPATCHED TO DISTRIBUTOR

Invoice > View All > Group by Orders

In the case of a Purchase Order dispatched to the Distributor, on the Invoice/Credit List *Group by Orders* tab, the Supplier column correctly displayed the Distributor. However, clicking on the Vendor Profile icon next to the Supplier opened with the Contractor's Vendor Profile erroneously.

This issue has been corrected so that the Vendor Profile icon displayed next to the correctly-displayed Purchase Order Dispatch Supplier (the Distributor) will open the Vendor Profile of the Distributor.



SOLICITATIONS

▪ INTERNAL ERROR WHEN SAVING COPIED NEW ITEMS AND SELECTING EXISTING LIBRARY ITEMS

Solicitations > [Formal or Informal] > Create > Item Specs
Solicitations > [Formal or Informal] > View Current > Edit > Edit Item Specs

An issue was identified in which copying and saving a newly created item or an item selected from the Item Spec Library would result in a red screen error. This has been corrected so any copied item will successfully save and get added to the *Selected Item Specs* list without an error displaying.

▪ VENDOR RESPONSES ACCESSIBLE WHEN FORMAL SOLICITATION CANCELLED BEFORE CLOSING DATE/TIME

Solicitations > [Formal Solicitations] > View Archived > Retracted/Canceled Solicitations > [Locate Solicitation] > Actions > Download Solicitation Documents
Solicitations > Solicitation Search (New) > [Locate Formal *Canceled/Retracted* Solicitation] > Actions > Download Solicitation Documents

Prior to the 23.2 release, if a Formal solicitation was cancelled prior to the closing date/time, the buyer could still access the vendor responses through the *Download Solicitation Documents* action. In the case of a Formal solicitation being cancelled before it was to close, the vendor responses should never be visible to the buyer. This issue is now remedied to ensure the vendor responses are not accessible via the *Download Solicitation Documents* action.

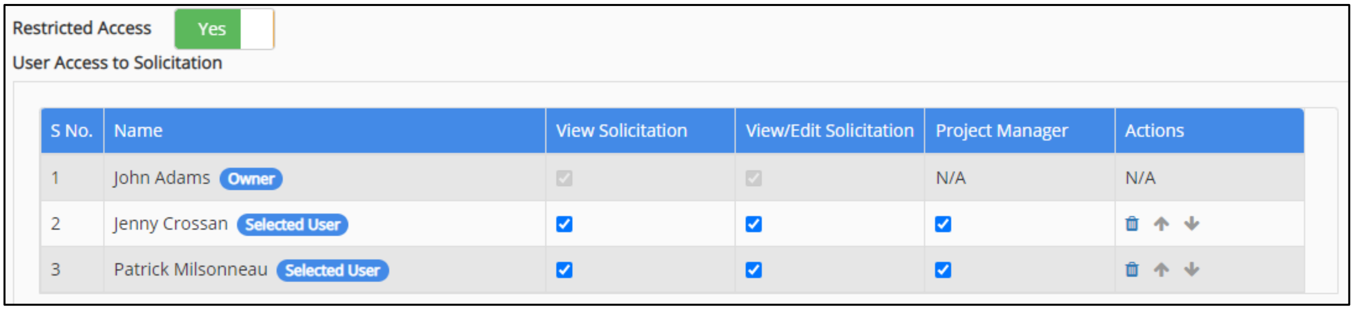
▪ DISPLAY ISSUE ON **ACTIONS** COLUMN OF **RESTRICTED ACCESS** SECTION

Admin > Enterprise Administration > [Select Organization] > Workflow > Solicitation Workflow
Solicitations > [Formal or Informal] > Create
Solicitations > [Formal or Informal] > View Current > Edit Prior to the 23.2 release

The 23.1 release included a new product enhancement called ***Solicitation Project Manager Approval Rules and Project Manager addition to Solicitation Restricted Access List***. If more than one Restricted Access user has

Project Manager checked, up and down arrows display in the **Actions** column to select the order the *Project Manager* users will be pulled into the Solicitation Workflow. A minor display issue was identified where the up and down arrows were displaying next to each person in the Restricted Access list, regardless of whether they were a *Project Manager*.

This has been fixed so that the up and down arrows will only display if more than one user has *Project Manager* checked, and will display next to *only* those users with *Project Manager* checked.


Restricted Access Yes

User Access to Solicitation

S No.	Name	View Solicitation	View/Edit Solicitation	Project Manager	Actions
1	John Adams Owner	☑	☑	N/A	N/A
2	Jenny Crossan Selected User	☑	☑	☑	
3	Patrick Milsonneau Selected User	☑	☑	☑	

▪ **REVIEW/AWARD** AND **VIEW ARCHIVED** SOLICITATION SEARCH NOT WORKING

Solicitations > [Formal or Informal] > Review/Award
Solicitations > [Formal or Informal] > View Archived

Users were experiencing issues searching for solicitations on the *Review/Award* and *View Archived* screens when using the Title or Solicitation Number as search criteria. The search would erroneously return zero results. We have refined the search query to ensure that the solicitation the user is searching for will be returned in the search results.

▪ QUESTIONNAIRE TEMPLATE OUT OF ORDER ON SOLICITATION

Admin > Enterprise Administration > [Select Organization] > Configure Documents > Manage Questionnaire Library
Solicitations > [Formal or Informal] > Create New > Questionnaire
Solicitations > [Formal or Informal] > View Current > [Locate Solicitation] > Edit > Edit Questionnaire

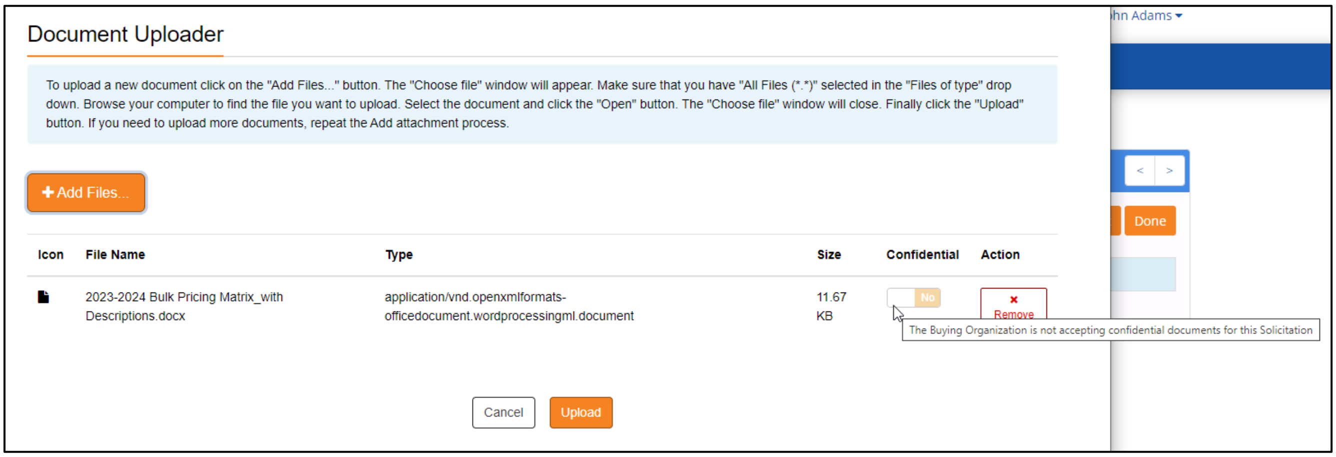
Prior to the 23.2 release, when a Questionnaire Template was added to a solicitation, the questions would appear in a different order than what was specified in the template. A fix has been applied to maintain the order of the questions as they appear in the Questionnaire Template.

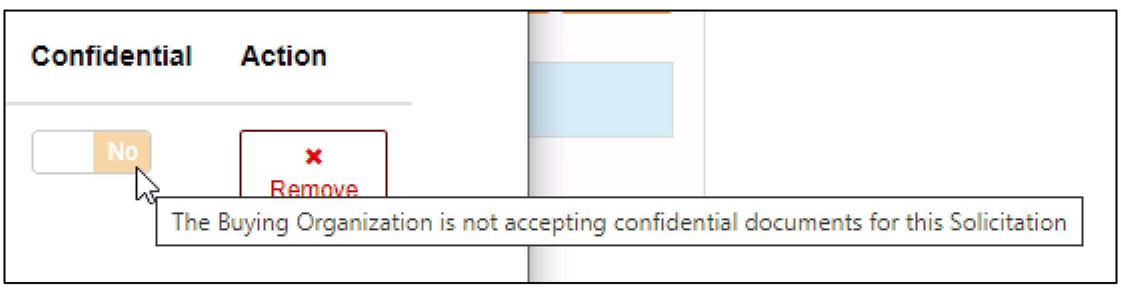
SUPPLIER CAN MARK DOCUMENTS CONFIDENTIAL WHEN **ALLOW CONFIDENTIAL DOCUMENTS** SETTING IS UNCHECKED

Admin > Enterprise Administration > [Select Organization] > Organization Information > Edit General Org Info > Solicitation Management

In Enterprise Admin, there is a solicitation setting called **Allow Confidential Documents**. If checked, participating suppliers can designate uploaded attachments as **Confidential** in their bid response. If unchecked, suppliers cannot mark their uploaded attachments as **Confidential**. It was found that when **Allow Confidential Documents** was *unchecked*, suppliers could still mark documents as **Confidential.** This is now corrected so that the supplier-facing **Confidential** toggle on their uploaded attachments is correctly respecting the **Allow Confidential Documents** setting selection.

*Screenshots showing disabled **Confidential** toggle when **Allow Confidential Documents** is unchecked*





For additional information, please contact Proactis Customer Support:

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