

# WebProcure

## 23.3 RELEASE

JUNE 24, 2023

DOCUMENTATION VERSION 4.4.06.23

This set of release notes pertains to the WebProcure™ 23.3 development release scheduled for Saturday, June 24, 2023.

For additional information, please contact Proactis Customer Support at (866) 889-8533 or by e-mail at [webprocure-support@proactis.com](mailto: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 .....	4
ADMIN .....	4
▪ ABILITY TO SELECT A <b>DEFAULT ORGANIZATION</b> ON LOGIN.....	4
CONTRACTS .....	5
▪ ABILITY TO DESELECT SUPPLIERS WHEN CREATING A SOLICITATION FROM A MASTER CONTRACT .....	5
▪ AUDIT RECORDS ADDED FOR UPDATE TO CONTRACT HEADER CUSTOM FIELDS.....	5
PRODUCT ENHANCEMENTS - LIMITED AVAILABILITY.....	6
ADMIN/PUBLIC CONTRACT BOARD .....	6
▪ SETTING TO CONTROL DISPLAY OF CANCELLED CONTRACTS ON CONTRACT BOARD.....	6
PRODUCT CHANGES .....	7
CONTRACTS .....	7
▪ <b>CONTRACT ADMIN</b> DROPDOWN DISPLAY MODIFIED .....	7
LOGIN .....	7
▪ <b>PASSWORD RESET</b> LINK VALID FOR EXTENDED TIMEFRAME .....	7
PUBLIC BID BOARD .....	8
▪ NEW TOGGLE AND CHECKBOX OPTION FOR <b>ORGANIZATION</b> SECTION AND RESULTS DISPLAY .....	8
▪ <b>UNDER EVALUATION</b> AND <b>CLOSED</b> STATUSES COMBINED ON PUBLIC BID BOARD .....	9
▪ <b>VENDOR CHANGE DETAILS REPORT</b> FOR ALL ADDENDUM VERSIONS TO DISPLAY ON SOLICITATION VIEW.....	9
▪ <b>BID TYPES</b> SECTION DISPLAY ORDER CHANGE .....	10
PUBLIC CONTRACT BOARD.....	10
▪ CONTRACT BOARD <b>ATTACHMENTS</b> SORTING CHANGES .....	10
SOLICITATIONS.....	11
▪ NEW TOGGLE AND CHECKBOX OPTION FOR <b>ORGANIZATION</b> DROPDOWN AND RESULTS DISPLAY .....	11
▪ BREAKDOWN OF VENDOR RESPONSE DOCUMENTS ADDED IN EVALUATION COMMITTEE DOCUMENT SELECTION .....	12

▪ SOLICITATION AWARD DOC AVAILABLE IN <b>DOWNLOAD SOLICITATION DOCUMENTS</b> ZIP FOLDER AFTER BID IS FINALIZED .....	12
▪ <b>VENDOR BID NOTIFICATIONS</b> ENABLED BY DEFAULT + BID SUBMISSION CONFIRMATION MESSAGE UPDATED .....	13
▪ INCOMPLETE REQUIRED FIELDS FOR BID RESPONSE INDICATED TO VENDOR .....	14
PRODUCT FIXES.....	15
CONTRACTS .....	15
▪ <b>CONTRACT SEARCH</b> MISSING OR ERRONEOUSLY DISPLAYING ACTIONS FOR SOME STATUSES .....	15
▪ UNABLE TO MODIFY SUBCONTRACTORS VIA AMENDMENT ON CONTRACT WITH CATALOG.....	16
▪ <b>REMAINING BALANCE</b> CALCULATION DISPLAY ISSUE .....	16
▪ USERS NOT RECEIVING CONTRACT <b>EVENT NOTIFICATIONS</b> .....	17
PUBLIC BID BOARD/SOLICITATIONS .....	17
▪ BUYER-ONLY FIELDS DISPLAYING ON BID BOARD SOLICITATION SUMMARY .....	17
SOLICITATIONS.....	18
▪ <b>SOLICITATION SEARCH</b> MISSING OR ERRONEOUSLY DISPLAYING ACTIONS FOR SOME STATUSES .....	18
▪ PUBLISHED AWARD REPORT CHANGED FROM ORIGINAL FORM FOLLOWING VENDOR AWARD .....	18
▪ <b>VENDOR MAY EMAIL BUYER DIRECTLY</b> SOLICITATION HEADER CHECKBOX DOES NOT CARRY TO Q&A CENTER .....	19
▪ PRICE EVALUATION DOCUMENTS NOT INCLUDED IN EMAIL LINK TO EVALUATION COMMITTEE .....	20
▪ SOLICITATION CONTACT CHANGE CREATED INCORRECT AUDIT ENTRIES .....	20
VENDOR PORTAL.....	20
▪ INDIRECT <b>MAIN CONTACT ADDRESS</b> CHANGE DID NOT TRIGGER VENDOR STATUS CHANGE AND NOTIFICATION .....	20
WORKFLOW .....	21
▪ WORKFLOW APPROVAL STEPS OUT OF ORDER WHEN ADHOC APPROVERS ARE ADDED .....	21

# PRODUCT ENHANCEMENTS - GENERAL AVAILABILITY

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

## ADMIN

### ■ ABILITY TO SELECT A **DEFAULT ORGANIZATION ON LOGIN**

[Select Hyperlinked User Name in top right corner] > My Account > Organization Preferences > Organization's Information

When a user belonging to multiple organizations logs into WebProcure, their profile defaults the organization they are logged into to which organization they were added to first. To offer greater control to the user, we are adding the ability for a user to select their default organization on login so they do not have to change their organization each time they log in.

On the *Organization Preferences* tab of **My Account** under the *Organization's Information* section, we have added a **My Default Organization on Login** dropdown field.

The dropdown will display all organizations the user belongs to in alphabetical order for the user to select one organization from. Once the desired organization is selected, click the **Save** button to the right. The selected organization will be the defaulted organization in the top right when the user logs into WebProcure.

*My Account > Organization Preferences*

Personal Information Security Settings **Organization Preferences** Payment Options User Notifications

Preferences

Organization's Information

User Login ID: supportpc

My Default Organization on Login: Perfect City Social Services

Save Reset

*Default Organization on Login*

Perfect City Social Services John Adams 33

Organization Menu

## CONTRACTS

### ■ ABILITY TO DESELECT SUPPLIERS WHEN CREATING A SOLICITATION FROM A MASTER CONTRACT

Contracts > Contract Search > [Select Hyperlinked Master Contract Number/Name] > Create Solicitation

Until now, when a solicitation has been created from a master contract, all suppliers on the master contract are automatically invited to the solicitation and the list of suppliers is not editable. In this release, on the *Suppliers* step of solicitation creation we have made the Supplier checkboxes editable so that suppliers can be deselected from the solicitation.

Header

Requirements

Questionnaire

Attachments



Item Specs

Suppliers

Summary

Supplier Selection : 23000061 - Monthly Cleaning Services (Formal)

Note: This Formal Solicitation was created from a Master Contract containing pre-qualified vendors to fulfill this purchase. Additional vendors cannot be added to this Solicitation

[Check All] [Uncheck All]							
	Supplier	Location	MBE	WBE	SB	VOB	Actions
<input checked="" type="checkbox"/>	AABCO Group, LLC	5717 Brookstone Walk Acworth GA 30101-7811 United States		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	⋮
<input checked="" type="checkbox"/>	ACME Industrial	1 Bayport Way Newport News VA 23606 United States					⋮
<input checked="" type="checkbox"/>	ALTA COMMERCIAL CLEANING LLC	53 EAST MERRICK RD SUITE 125 FREEPORT NY 11520 United States					⋮
<input type="checkbox"/>	Andrew's Dry Cleaners  	1 Bayport Way Ste 120 Newport News VA 23606 United States					⋮

SaveExitPrevious StepNext Step

### ■ AUDIT RECORDS ADDED FOR UPDATE TO CONTRACT HEADER CUSTOM FIELDS

Contracts > Contract Search > [Locate Target Contract] > Actions > Contract History

We have added three new audit entries pertaining to the addition, update, and removal of Contract Header Custom fields, to *Contract History*. The audit entries are general notifications showing a change to a Contract Header Custom Field and do not display the actual content of the field.

- Contract Header Custom Field was added
- Contract Header Custom Field was updated
- Contract Header Custom Field was removed

# PRODUCT ENHANCEMENTS - LIMITED AVAILABILITY

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

## ADMIN/PUBLIC CONTRACT BOARD

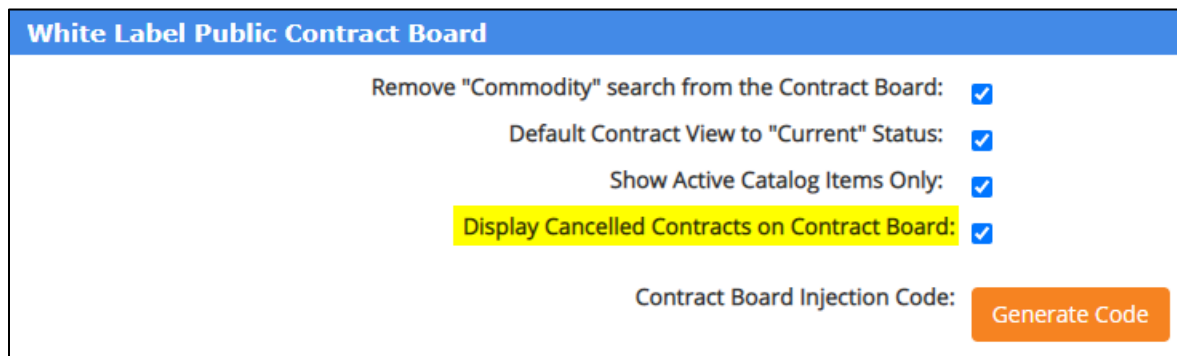
### ■ SETTING TO CONTROL DISPLAY OF CANCELLED CONTRACTS ON CONTRACT BOARD

Admin > Enterprise Administration > Organization Information > Edit General Org Info > White Label Public Contract Board  
Public Contract Board

Previously, contracts in a *Cancelled* status have not displayed on the Public Contract Board. At customer request, we have added a new Enterprise-level setting to control the display of these contracts for those who need them visible to the public.

The new setting is called **Display Cancelled Contracts on Contract Board** and by default, the setting is unchecked, meaning cancelled contracts will NOT display on the Contract Board. If checked, cancelled contracts WILL display.

*New Enterprise-Level setting in Admin*



**White Label Public Contract Board**

Remove "Commodity" search from the Contract Board: ☒

Default Contract View to "Current" Status: ☒

Show Active Catalog Items Only: ☒

**Display Cancelled Contracts on Contract Board:** ☒

Contract Board Injection Code: [Generate Code](#)

*Cancelled Contracts on Public Contract Board*



Clear Filter Apply Filter 16 Matching Contracts Found Page 1

**Status**

☒ Cancelled(16)

**Type**

☐ Contract - Agency (13)

☐ Contract - Commodity (3)

**PA580140060 | Resin Ribbon And Thermal Transfer Label Stock**  
Resin Ribbon And Thermal Transfer Label Stock  
Jun 14, 2014 - Jun 13, 2018  
Lentkopproducts

**CC115068003 | Aggregate Surfacing Material And Hauling Services Qualified**  
Aggregate Surfacing Material And Hauling Services Qualified Vendor Listing  
Jan 1, 2015 - Dec 31, 2017  
Capital Quarries Company Inc

# PRODUCT CHANGES

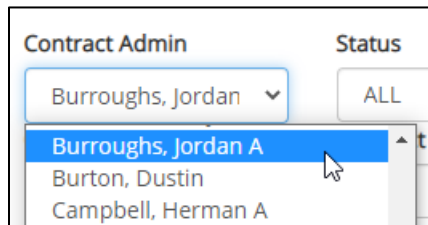
MODIFICATIONS TO THE APPLICATION THAT MAY IMPACT USER PROCESSES.

## CONTRACTS

### ■ **CONTRACT ADMIN DROPDOWN DISPLAY MODIFIED**

Contracts > Contract Search

In the 23.1 release, the **Contract Admin** dropdown result format was modified to 'Last Name, First Name.' However, the middle initial was awkwardly placed between the last and first name as 'Last Name, Middle Initial First Name' which can make it challenging to identify a user. We have changed this dropdown result format to 'Last Name, First Name Middle Initial' going forward.



## LOGIN

### ■ **PASSWORD RESET LINK VALID FOR EXTENDED TIMEFRAME**

WebProcure Login Page > Trouble Logging in?

When a user proceeds to reset their Web**Procure** password, an email notification is sent to the user with a password reset link. The password reset link was previously valid for 15 minutes and has now been extended to **1 hour** to accommodate situations in which the email is delayed in being received (i.e. due to email scans) or not seen right away by the user.

## PUBLIC BID BOARD

### ■ NEW TOGGLE AND CHECKBOX OPTION FOR **ORGANIZATION** SECTION AND RESULTS DISPLAY

Public Bid Board

In the 23.3 release, we have added a toggle to the *Organization* filter section to allow the user to select whether they want to see the Organizations listed in Hierarchical Order or Alphabetical Order.

If the toggle is set to 'Hierarchical Order' a checkbox called 'Include all sub-organizations' will appear.

- If 'Include all sub-organizations' is checked, when an organization is selected, all the organizations' sub-organizations will automatically be selected as well.
- If 'Include all sub-organizations' is unchecked, when an organization is selected, the organizations' sub-organizations will not be selected unless specifically checked.

The screenshot shows a dialog box titled "Select Organization(s)". At the top left, there is a checked checkbox labeled "Include all sub-organizations". To the right is a search bar labeled "Find Organization(s)". Below these are two view toggles: "Tree View" (selected with a tree icon) and "List View" (with a list icon). A "Sort : ASC" dropdown is also present. The main area displays a hierarchical tree of organizations, all of which are checked. The tree structure is as follows:

- Perfect City
  - Automation
  - Board of Appeals
  - Board of Elections
  - Board of License Commissioners
  - Perfect Administration
  - Perfect Business
  - Perfect City Paris
  - Perfect City Players
  - Perfect City Social Services
  - Perfect City Parks and Recreation
  - Perfect City Transportation

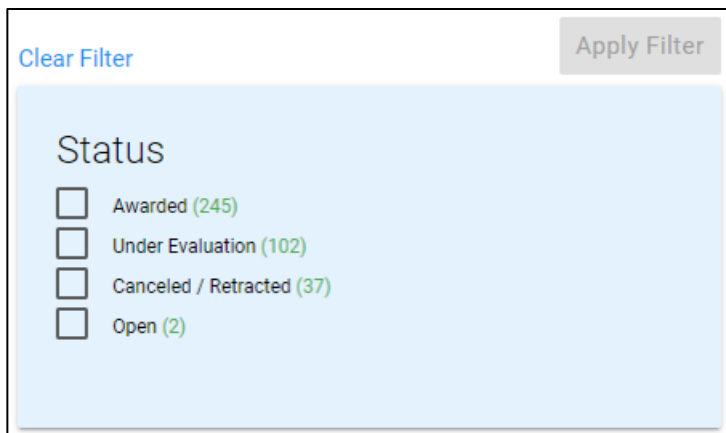
At the bottom of the dialog, there are four buttons: "CANCEL" (with an 'X' icon), "SELECT ALL" (with a checked checkbox icon), "DESELECT ALL" (with an unchecked checkbox icon), and "APPLY" (with a checkmark icon).



## ■ UNDER EVALUATION AND CLOSED STATUSES COMBINED ON PUBLIC BID BOARD

Public Bid Board

The Public Bid Board has previously separated out the statuses *Closed* and *Under Evaluation*. When a solicitation has reached its end date, it moves to a *Closed* status and once supplier responses are reviewed, the status changes to *Under Evaluation*. As these statuses are not split out in the Solicitation Search within the WebProcure application and do not need to be differentiated to the public, we have combined *Under Evaluation* and *Closed* to be a single status – *Under Evaluation* – on the Public Bid Board.



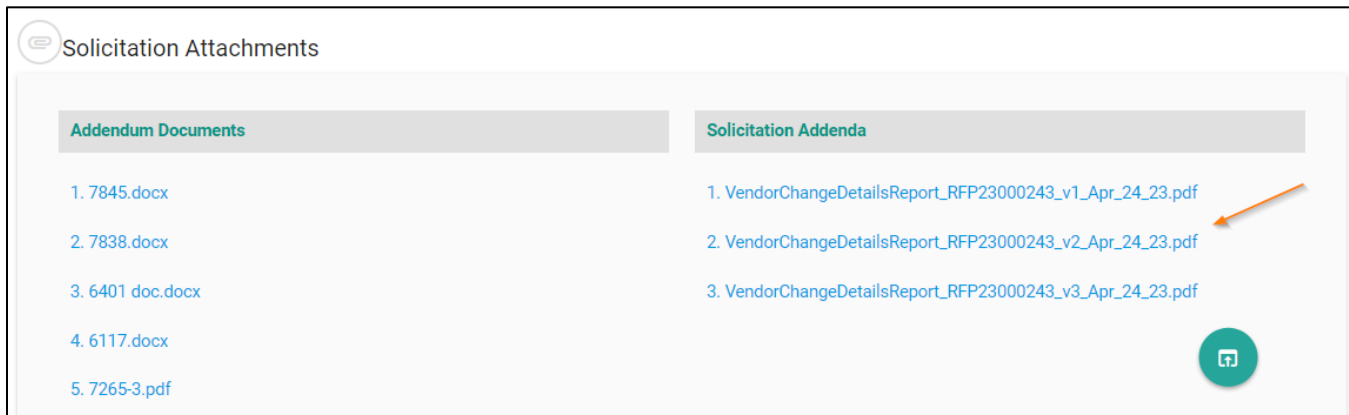
The screenshot shows a filter panel for the Public Bid Board. At the top, there are two buttons: "Clear Filter" in blue text and "Apply Filter" in a grey button. Below these is a section titled "Status" in bold. Under "Status", there are four checkboxes, each followed by a status name and a count in parentheses:

- ☐ Awarded (245)
- ☐ Under Evaluation (102)
- ☐ Canceled / Retracted (37)
- ☐ Open (2)

## ■ VENDOR CHANGE DETAILS REPORT FOR ALL ADDENDUM VERSIONS TO DISPLAY ON SOLICITATION VIEW

Public Bid Board

Previously, the **VendorChangeDetailsReport** (which highlights changes made in an addendum) would only display on the Public Bid Board solicitation view for the most recent solicitation addendum. We have made a change to now display the **VendorChangeDetailsReport** for all addendum versions, which is consistent with what buyers and vendors have access to within WebProcure.



The screenshot shows the "Solicitation Attachments" section of the Public Bid Board. It features a header with a document icon and the text "Solicitation Attachments". Below the header, there are two columns of attachments:

- Addendum Documents:**
  - 1. 7845.docx
  - 2. 7838.docx
  - 3. 6401 doc.docx
  - 4. 6117.docx
  - 5. 7265-3.pdf
- Solicitation Addenda:**
  - 1. VendorChangeDetailsReport\_RFP23000243\_v1\_Apr\_24\_23.pdf
  - 2. VendorChangeDetailsReport\_RFP23000243\_v2\_Apr\_24\_23.pdf
  - 3. VendorChangeDetailsReport\_RFP23000243\_v3\_Apr\_24\_23.pdf

An orange arrow points to the first addendum document, "VendorChangeDetailsReport\_RFP23000243\_v1\_Apr\_24\_23.pdf". A green circular button with a document icon is located at the bottom right of the attachments list.

## ■ BID TYPES SECTION DISPLAY ORDER CHANGE

Public Bid Board

The *Bid Types* filter section will now be ordered alphabetically, instead of being ordered based on the number of results for each Bid Type.

### Bid Types


- ☐ IFB for non-IT Goods and Services (5)
- ☐ Invitation to Bid (18)
- ☐ Request for Information (10)
- ☐ Request for Proposal (37)
- ☐ Request for Quote (6)


## PUBLIC CONTRACT BOARD



## ■ CONTRACT BOARD ATTACHMENTS SORTING CHANGES



Public Contract Board

*Attachments* is now ordered alphabetically and the sort arrow icon to the right of *Attachment Name* is updated to indicate that it can be used to change the sort to descending order, if desired.

 Attachments

Attachment Name ^ 

 2023 Catering Menus.pdf 

 2023 Outreach and Education Division Conference Addendum 01.docx 

## SOLICITATIONS

### ■ NEW TOGGLE AND CHECKBOX OPTION FOR **ORGANIZATION** DROPDOWN AND RESULTS DISPLAY

Solicitations > Solicitation Search

Similar to the change made on the Public Bid Board, we have added a toggle beside the *Organization* dropdown to allow the user to select whether they want to see the Organizations listed in Hierarchical Order or Alphabetical Order. The 'All' option will continue to display first.

In addition, we have added a checkbox called 'Include all sub-organizations.'

- If 'Include all sub-organizations' is checked, when an organization is selected, all of its sub-organizations' solicitations will be included in the search results.
- If 'Include all sub-organizations' is unchecked, when an organization is selected, its sub-organizations' solicitations will NOT be included in the search results.

The screenshot shows the 'Solicitation Search' interface. At the top, there are two tabs: 'Date Range' and 'Organization'. The 'Organization' tab is active, showing a dropdown menu with 'All' selected. A hand cursor is pointing at the dropdown arrow. Below the tabs, there is a 'Select Organization(s)' section. It includes a checkbox labeled 'Include all sub-organizations' which is checked. To the right of this checkbox is a search bar labeled 'Find Organization(s)' with a magnifying glass icon. Below the search bar, there are two view options: 'List View' and 'Tree View', with 'Tree View' selected. To the right of the view options is a sort option labeled 'Sort : ASC'. The main area displays a tree view of organizations. The root node is 'Perfect City', which is expanded and has a checked checkbox. Under 'Perfect City', there are several sub-organizations, each with a checked checkbox: 'Automation', 'Board of Appeals', 'Board of Elections', 'Board of License Commissioners', 'Perfect Administration', 'Perfect Business', 'Perfect City Paris', 'Perfect City Players', 'Perfect City Social Services', and 'Perfect City Parks and Recreation'. At the bottom of the interface, there are four buttons: 'Cancel', 'Select All', 'De-Select All', and 'Apply'. The 'Apply' button is orange. To the left of the 'Apply' button, the text 'No org selected' is displayed.

## ■ BREAKDOWN OF VENDOR RESPONSE DOCUMENTS ADDED IN EVALUATION COMMITTEE DOCUMENT SELECTION

Solicitations > Solicitation Search > [Select Hyperlinked Bid in 'Under Evaluation' status] > Actions > Evaluate Supplier Responses > Manage Evaluation Committee > Evaluation Materials

A buyer setting up an Evaluation Committee to evaluate supplier responses for a solicitation will need to select the files the committee should receive for their review. Now, when selecting these documents on the *Evaluation Materials* step, the 'Vendor Response Documents' will have a further breakdown by Vendor and Attachment, with checkboxes next to each for added flexibility in which materials are included.

Teams Evaluation Materials Publish Summary

Select the solicitation documents below that will be accessible to evaluators

**Available Files**

- ☐ CPPC23000743\_Apr\_24\_23\_solicitation\_doc.pdf
- ☐ CPPC23000739\_74039\_bid\_response.xlsx
- ☒ CPPC23000738\_140503\_bid\_response.xlsx
- ☒ CPPC23000734\_74039\_bid\_response.xlsx
- ☐ Two Teams HQ
  - ☒ 2030\_74039\_bid\_response.xlsx
  - ☐ CPPC23000743\_74039\_bid\_response.xlsx
  - ☐ CPPC23000739\_74039\_bid\_response.xlsx
  - ☒ CPPC23000739\_145037\_bid\_response.xlsx
- ☒ Two Teams HQ
  - ☒ Report1682243177280.xls
  - ☒ 755\_149975\_bid\_response.xlsx
  - ☐ 755\_125710\_bid\_response.xlsx
  - ☐ 755\_74039\_bid\_response.xlsx
  - ☐ 772\_Apr\_25\_23\_solicitation\_doc.pdf
  - ☐ 2033\_74039\_bid\_response.xlsx
  - ☒ ASTG0424\_2023424\_Contract Report.xls
  - ☒ CPPC23000743\_Apr\_24\_23\_solicitation\_doc.pdf
- ☐ Solicitation Audit
- ☐ Solicitation Summary - Addenda
- ☐ Bid tab Report
- ☐ Questionnaire Report

**Selected Files**

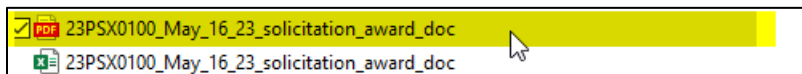
- ☐ Solicitation
  - ☐ Response Documents
    - ☐ Vendor Response Documents
      - ☐ Andrews Dry Cleaners
        - ☒ CPPC23000738\_140503\_bid\_response.xlsx
        - ☒ CPPC23000734\_74039\_bid\_response.xlsx
        - ☒ 772\_Apr\_25\_23\_solicitation\_doc.pdf
        - ☒ 2033\_74039\_bid\_response.xlsx
      - ☐ Two Teams HQ
        - ☒ CPPC23000743\_Apr\_24\_23\_solicitation\_doc.pdf
        - ☒ ASTG0424\_2023424\_Contract Report.xls
        - ☒ 2030\_74039\_bid\_response.xlsx
        - ☒ CPPC23000739\_145037\_bid\_response.xlsx
        - ☒ Report1682243177280.xls
        - ☒ 755\_149975\_bid\_response.xlsx

## ■ SOLICITATION AWARD DOC AVAILABLE IN DOWNLOAD SOLICITATION DOCUMENTS ZIP FOLDER AFTER BID IS FINALIZED

Solicitations > Solicitation Search > [Locate 'Finalized' Bid] > Actions > Download Solicitation Documents

The **Download Solicitation Documents** folder contains a variety of documents from the lifecycle of the solicitation, including Solicitation Award Report, Buyer Attachments and Vendor Attachments. One document, titled **Bid Award Report History** (Formal) and **Quote Award Report History** (Informal) with a file name of **[Solicitation Number]\_[Date Created]\_solicitation\_award\_doc.pdf**, was accessible while the bid was *Under Evaluation*. However, as soon as the award was finalized, the document was no longer included in the folder. The **Bid/Quote Award Report History** contains a summary of the vendors' Header, Requirements and Questionnaire responses, and is important for some customers' audit purposes.

The **Bid/Quote Award Report History** will now continue to be available in the **Download Solicitation Documents** zip folder after the solicitation is in a *Finalized* status.



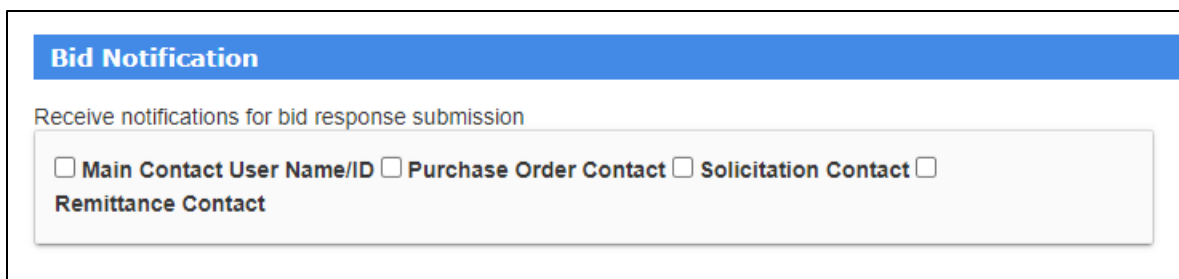
---

## ■ **VENDOR BID NOTIFICATIONS ENABLED BY DEFAULT + BID SUBMISSION CONFIRMATION MESSAGE UPDATED**

Vendor Portal > [Select User Name] > My Account > Edit Main Org Info

Vendor Portal > Solicitations > View Current Solicitations > [Locate Target Bid] > Add New Response > Submit

Previously, when a vendor registered with an Enterprise Buying Organization, bid notifications (emails sent confirming the vendor's bid response submission) would not be automatically enabled. To enable them, the vendor had to go to their Vendor Profile and check off which users they wanted to be notified:



There have been many occurrences in which vendors expected to receive an email confirmation of their bid submission but did not have Bid Notifications enabled. This has caused confusion and concern about whether their bid was successfully submitted. To address this, we have made a change so that by default when a vendor registers, the **Main Contact User Name/ID** and **Solicitation Contact** will automatically be checked to receive bid notifications.

Additionally, when the vendor submits their response, we have updated a confirmation message which displays to them to provide more clarity:

- Old Message:
  - *Submission confirmation email sent*
- New Message:
  - *Your bid has been submitted successfully. You will receive a confirmation email if you have notifications enabled.*

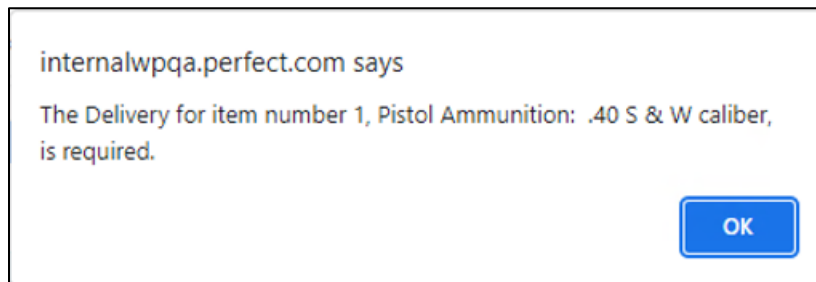
---

- **INCOMPLETE REQUIRED FIELDS FOR BID RESPONSE INDICATED TO VENDOR**

Vendor Portal > Solicitations > View Current Solicitations > [Locate Target Bid] > Add New Response

While working on their bid response, if a vendor did not complete a *Required* field, a pop-up message would appear indicating that a field was incomplete. However, the message would not mention which field(s). In this release, we have modified the pop-up message the vendor receives to highlight the specific Required field(s) that need to be completed.

*Example Pop-Up Message:*



## PRODUCT FIXES

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

## CONTRACTS

### ■ CONTRACT SEARCH MISSING OR ERRONEOUSLY DISPLAYING ACTIONS FOR SOME STATUSES

Contract Search

The following actions were missing for the (new) Contract Search and have been added:

Contract Status	Actions ADDED
Active	View Source Request Details Post-Award Evaluation
Amendment Approver Edit	View Source Request Details Post-Award Evaluation
Amendment Awaiting Approval	Post-Award Evaluation
Amendment Pending	View Source Request Details Post-Award Evaluation
Amendment Rejected	Post-Award Evaluation
Approver Edit	Post-Award Evaluation
Awaiting Approval	Post-Award Evaluation
Cancelled	Create Amendment Request for contract amendment View Source Request Details Post-Award Evaluation
Expired	Create Amendment View Source Request Details Post-Award Evaluation
Rejected	Post-Award Evaluation
Request for Amendment	View Source Request Details Post-Award Evaluation

Scheduled Amendment	Post-Award Evaluation
Unissued	View Source Request Details Post-Award Evaluation

The following actions were displaying erroneously for the (new) Contract Search and have been removed:

Contract Status	Actions REMOVED
Amendment Pending	Approval Map
Cancelled	Edit
Request For Amendment	Approval Map

---

## ■ UNABLE TO MODIFY SUBCONTRACTORS VIA AMENDMENT ON CONTRACT WITH CATALOG

Contracts > Contract Search > [Locate 'Active' Contract] > Actions > Create Amendment

Prior to the 23.3 release, a user could not add or remove subcontractors on contract amendment if the contract had a catalog. Instead, when they attempted to modify the subcontractors via the Subcontracting Level Allocation section, the user was met with a *'Contractor can be changed only when there are no Catalogs associated to the contract'* error message.

Now, a user can successfully amend a contract with a catalog to add or remove subcontractors without receiving an error message.

---

## ■ REMAINING BALANCE CALCULATION DISPLAY ISSUE

Contracts > Contract Search > [Select Hyperlinked Contract Number/Name]

Issues were reported around contracts showing a negative balance, or a positive balance lower than the amount that should be available. Upon review it was determined that the **Remaining Balance** on the contract was being calculated incorrectly and erroneously subtracting the **Total Paid** value from the true **Remaining Balance**.

**Remaining Balance** is now correctly displaying based on the following calculation:

- Total Contract Value – Initial Expended Value – Cumulative Encumbered/Expended Value



## USERS NOT RECEIVING CONTRACT EVENT NOTIFICATIONS

Contracts > Create new > Notifications

Contracts > Contract Search > [Locate Target Contract] > Actions > Edit > Edit Notification

Email Notifications

Customers reported an issue with users not receiving any contract Event Notifications (Total Value, Effective Date, Expiration Date, Insurance and Certificate Expiration.) Investigation found that if a contract was created by copying another contract, the Event Notifications for the new contract would not fire. The 23.3 release corrects the issue so that Event Notifications will be sent according to the Trigger, Agency Email and Contractor Email set up for contracts created via the Copy action.

Event Notifications				
Number	Type	Trigger	Agency Email	Contractor Email
1.	Total Value	25	jennifer.crossan@proactis.com	yiping.ossner@proactis.com
2.	Effective Date	14	jennifer.crossan@proactis.com	yiping.ossner@proactis.com
3.	Expiration Date	30	jennifer.crossan@proactis.com	yiping.ossner@proactis.com
4.	Insurance and Certification Expiration	30	jennifer.crossan@proactis.com	yiping.ossner@proactis.com

## PUBLIC BID BOARD/SOLICITATIONS

### BUYER-ONLY FIELDS DISPLAYING ON BID BOARD SOLICITATION SUMMARY

Solicitations > [Formal or Informal] > Create > Questionnaire

Solicitations > Solicitation Search > [Locate 'Not Submitted' Bid] > Actions > Edit Solicitation

Public Bid Board > Print/Download Solicitation Summary

When a user creates a Questionnaire as part of a Solicitation, there is a checkbox option on a question for **Buyer-Only**, meaning the question will not be visible to the supplier, via the Vendor Portal and the Public Bid Board. It was revealed that **Buyer-Only** questions were showing in the *Solicitation Summary* PDF print, available to download from the Public Bid Board Solicitation View. Going forward, **Buyer-Only** fields will no longer display on this PDF and will only be accessible to the buyer when logged into WebProcure.

*Solicitation Summary* PDF Print



## SOLICITATIONS

### ■ SOLICITATION SEARCH MISSING OR ERRONEOUSLY DISPLAYING ACTIONS FOR SOME STATUSES

#### Solicitation Search

The following actions were missing for both Informal and Formal solicitations on the (new) Solicitation Search and have been added:

Solicitation Status	Actions ADDED
Awaiting Approval	Solicitation Pre-Issue Workflow Review
Canceled/Retracted	Solicitation Workflow Review
Under Evaluation	Award Report Publish Award Report Submit for Pre-Award Approval

The following actions were displaying erroneously for the (new) Solicitation Search and have been removed:

Solicitation Status	Actions REMOVED
Awaiting Approval	Solicitation History Retract/Cancel Q&A Center
Not Submitted	Solicitation History Q&A Center

### ■ PUBLISHED AWARD REPORT CHANGED FROM ORIGINAL FORM FOLLOWING VENDOR AWARD

Solicitations > Solicitation Search > [Locate 'Under Evaluation' Bid] > Actions > Publish Award Report

Solicitations > Solicitation Search > [Locate 'Finalized' Bid] > Actions > Award Report History

In the 22.3 release, the ability to publish multiple different versions of the **Award Report** was added, prompting the introduction of the **Award Report History** which lists each report created. A buyer may elect to publish an initial pre-award report following bid close, to show the vendors and their submitted pricing. Then once the solicitation is awarded, a second report is created showing the list of awarded vendors with their responses and attachments.

In the above scenario with these two reports, it was found that after the solicitation was awarded, the first report created pre-award had changed to now display the awarded vendors. The report no longer appeared as it had when initially published.

In the 23.3 release, we have made the following correction: When an **Award Report** is published, it will remain in its original form even after additional reports are published which contain different information. (Note: The exception to this is if the **Award Report** is unpublished and the information is intentionally modified by the buyer.)

▪ **VENDOR MAY EMAIL BUYER DIRECTLY SOLICITATION HEADER CHECKBOX DOES NOT CARRY TO Q&A CENTER**

Solicitations > [Formal or Informal] > Create  
Solicitations > Solicitation Search > [Locate ‘Not Submitted’ Bid] > Actions > Edit Solicitation > Edit Header  
Solicitations > Solicitation Search > [Locate Target Bid] > Actions > Q&A Center

At the bottom of the Solicitation Header screen under *Vendor Q&A Duration* there is a **Vendor may e-mail buyer directly** checkbox. By default, this checkbox is unchecked. Previously, this selection would not carry over to the Q&A Center. Even if the **Vendor may e-mail buyer directly** checkbox was unchecked on the Solicitation Header, the toggle of the same name in the Q&A Center would be set to ‘On.’

We have made a change to respect the Solicitation Header **Vendor may e-mail buyer directly** selection on the Q&A Center as well for consistency. This will prevent a situation in which the buyer does not want to be emailed but misses that the option is enabled on the Q&A Center.

*Solicitation Header*

Vendor Q&A Duration

☒ Specify Vendor Q&A Duration

Vendor Q&A Start Date and Time (EDT)

05/29/2023, 8:15 AM

Vendor Q&A End Date and Time (EDT)

06/04/2023, 8:00 PM

☐ Vendor may e-mail buyer directly

*Q&A Center*

Solicitation Q&A Center

Vendor May Email Buyer Directly Off

---

- **PRICE EVALUATION DOCUMENTS NOT INCLUDED IN EMAIL LINK TO EVALUATION COMMITTEE**

Solicitations > Solicitation Search > [Locate 'Under Evaluation' Bid] > Actions > Evaluate Supplier Responses > Manage Evaluation Committee  
Evaluation Committee Email Notification

A few occurrences were reported of Price Evaluation documents not being visible to the Evaluation Committee for a Two-Envelope Solicitation after the Technical Evaluation was submitted. The buyer had checked 'Vendor Response Documents' to be sent; however, the email sent to the Evaluation Committee Members contained only vendors' Technical Evaluation documents (none for Price Evaluation.) This issue has been corrected so that the Evaluation Committee Members will have access to the Price Evaluation documents following the completion of the Technical Evaluation phase.

---

- **SOLICITATION CONTACT CHANGE CREATED INCORRECT AUDIT ENTRIES**

Solicitations > Solicitation Search > [Locate Target Bid] > Actions > Edit Solicitation  
Solicitations > Solicitation Search > [Locate Target Bid] > Actions > View Audit Detail

When the *Solicitation Contact* was updated on a Solicitation, two different issues were found. First, the *Solicitation Contact* change resulted in additional audit entries being created for other fields that were not modified. Second, in one case the *Solicitation Contact* change was not reflected in the audit at all. The update should have created a single audit entry for *Solicitation header was edited*. The 23.3 release ensures that an audit entry for Solicitation Contact posts correctly, and extra audit entries are not being incorrectly added.

## VENDOR PORTAL

---

- **INDIRECT MAIN CONTACT ADDRESS CHANGE DID NOT TRIGGER VENDOR STATUS CHANGE AND NOTIFICATION**

Admin > Enterprise Administration > [Select Organization] > Organization Information > Edit General Org Info  
Vendor Portal > [Select User Name] > My Account > Edit Main Org Info > Edit Users > [Select User] > User Information

The *Main Contact Address* for a vendor can either be changed directly (via Vendor Portal > [Select User Name] > My Account > Edit Main Org Info) or indirectly, by updating the contact address for the vendor user. If changed via the latter method, this was not triggering a vendor status change to 'Pending' and notification of change (if the applicable checkboxes are checked in *Vendor Configurable Fields*.) Now, if *Main Contact Address* is changed, regardless of whether it is directly or indirectly via vendor user address update, the vendor status change and notification will trigger as configured.

Vendor Configurable Fields	
Fields that will trigger a notification of change	Fields that will trigger a change in status to pending Head Org)
<input checked="" type="checkbox"/> Company Name	<input checked="" type="checkbox"/> Company Name
<input checked="" type="checkbox"/> Doing Business As	<input checked="" type="checkbox"/> Doing Business As
<input checked="" type="checkbox"/> Enterprise Type	<input checked="" type="checkbox"/> Enterprise Type
<input type="checkbox"/> Exempt from backup withholding	<input type="checkbox"/> Exempt from backup withholding
<input checked="" type="checkbox"/> Medical or Legal Service Provider	<input checked="" type="checkbox"/> Medical or Legal Service Provider
<input checked="" type="checkbox"/> Company Address	<input checked="" type="checkbox"/> Company Address
<input type="checkbox"/> Main Contact	<input type="checkbox"/> Main Contact
<input checked="" type="checkbox"/> Main Contact Address	<input checked="" type="checkbox"/> Main Contact Address

## WORKFLOW

### ■ WORKFLOW APPROVAL STEPS OUT OF ORDER WHEN ADHOC APPROVERS ARE ADDED

Solicitations > Solicitation Search > [Select Hyperlinked Solicitation Number/Name for 'Not Submitted' Bid] > Approval Preview

An issue was identified in which adding adhoc approvers to an existing workflow at the start or before another approver in the workflow chain results in the workflow approval steps being mislabeled and appearing out of order (i.e. Approval Steps 2, 3, 1, 4.) This has been corrected so the addition of adhoc approvers at any place within the workflow order will retain the correct labeling and order of the approval steps.

For additional information, please contact Proactis Customer Support:

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