

BuySpeed 15.6.0.5 (Production Release)

September 10, 2020

Overview of Periscope 15.6.0.5

Periscope is pleased to announce the availability of this version of BuySpeed. This release of BuySpeed is approved for use in production environments, and includes many feature updates from testing of initial releases of BuySpeed.

This release includes a number of feature updates and bug fixes in the following categories:

- Bid
- Contract
- Custom Columns
- Marketplace
- Purchase Order
- Requisition
- Utilities
- Vendor
- Vendor Management
- Security
- Source - Qualifications
- Source - Contracts Lite

Focus of this Release – Enhancements and Fixes for Issues

One of our main focuses for this release was addressing a large number of customer requests (over 30) to enhance and fix significant issues in BuySpeed and BidSync in the features listed above. Many of these changes will benefit a wide variety of customers and improve the overall utility and stability of BuySpeed.

Rebranding

As Periscope continues to integrate our full suite of procurement solutions, we are updating the names of our key offerings to reflect that. You may notice the following changes in branding going forward:

- ePRO (formerly BuySpeed)
- S2G (formerly BidSync Pro)
- Source (formerly BidSync Classic)
- Catalog Manager (Formerly PIMS)
- Marketplace (no change)

New Feature Set: Card Vault for Purchasing Cards

First released in 15.5, the latest release improved support for using Credit Cards and Purchasing Cards in BuySpeed – with a the new Card Vault feature set.

Features Include:

- Saving and editing cards for each user in a secure Card Vault
- Selection of Saved Cards for use on Requisitions and Purchase Orders
- Retrieval of card data by Vendors manually or through CXML
- Secured processes end-to-end

Full details can be provided through your Customer Success manager or implementation manager.

Catalog Manager: Formatting Help

For Agency & Vendor Users who are creating catalogs - for any products with formatting issues in the upload file, those products will be skipped but the rest of the products will be uploaded – so the user is not blocked. The user is provided with a downloadable log of any products with

formatting issues – so the user can quickly make adjustments and re-upload. This is provided to all users of Catalog Manager – please discuss any questions on this with your Periscope representative.

Enhancements: Security

Also implemented starting in 15.5+, we've enhanced security around allowed user login and password settings, which complements the new Card Vault functionality and enhances PCI compliance.

If agency currently has settings outside the new allowed ranges, **agency settings will be updated automatically** to meet minimum/maximum allowed values when 15.5+ is installed. The next time user resets their password, their new password must meet new ranges.

User will NOT be forced to reset their password when BuySpeed 15.6 is installed, even if password does not meet new allowed value ranges.

Changes include new allowed value ranges and defaults for the Login ID And Password Policy Settings:

- Minimum Password Length - At least 7 characters
- Maximum Password Length - At least 7 characters
- Enforce Alphanumeric Passwords - Enabled Always
- User Password Lifetime Days – Maximum - 90 Days or Less
- Password Reuse Prevention - 4 times or less
- Maximum Login Attempts before Lockout - 6 attempts or less
- Lockout Period (Minutes) - 30 minutes or more

Other Security enhancements

- When a new agency or vendor user is set up by an Agency or Vendor administrator
- Administrator will not manually enter a "temporary" password for user
- New user will receive an automated email including an auto-generated temporary password
- The automatic user timeout (log out) for "inactive" users is reduced from 30 minutes to 15 minutes.

Enhancements: Blanket Encumbrance

New features for agencies with financial system integration allow encumbering funds from a Blanket Purchase Order – allowing agencies to reserve funds for likely expenditures during the budget cycle. These features require specific setup and possible customization cost to integrate with an agency’s financial system – to learn more speak to your Periscope representative.

A setting “Enable Blanket Encumbrance” will be seen on the Purchase Order Document Settings page – it should **not** be Enabled except in coordination with Periscope project management team.

Updating To This Version

Please review below list of changes in this release and contact your Customer Success Manager to learn how this update can benefit your organization. Call us at 888-472-9102 or email agency-support@buyspeed.com.

The installer for this maintenance release is provided to customers using versions 14.x and 15.x at no additional cost, and Professional Services are not required to receive this release for those customers.

Periscope offers the following Professional Services:

- On-Site Training
- Installations
- Interface and Integration Services
- Custom Development
- Workflow and Process Analysis
- Project Management

Change Log for This Version

Key	Module	Update	Configurable	Description
BUYS-32591	Bid	Award notification does not include all vendors awarded something when Agency individually selects/processes multiple Vendors who are awarded	Standard	Fixed issue where Award notification email does not list all the vendors awarded item
BUYS-32138	Bid	Issue with 100,000+ item Bid items/award tab	N/A	Update to fix issue in customer environment
BUYS-32596	Bid	Items are cancelled after partial bid award is made, no award notification is sent	Standard	Fixed issue in this use case where award notification emails were not sent.
BUYS-32269	Bid	MMCAP - PROD - Cannot access Summary Tab - Time out	N/A	Update to fix issue in customer environment
BUYS-31603	Bid	Quote - Custom Column Equivalencies - Not Populating on Quote Create	Standard	Update to fix issue where Custom Column equivalencies were not correctly transferring from a Bid field to the equivalent Quote field.
BUYS-32175	Contract	Contract Dashboard - In Progress - Improve Performance	Standard	Update to improve performance on the Contracts dashboard when large number In-Progress MBPOs are listed.

BUYS-32141	Contract	Contracts Dashboard - Show MBPO doc type	Standard	Update to feature to show MBPO type Purchase Orders in list on Contract dashboard
BUYS-29137	Contract	Contracts Dashboard - Sort by Buyer Issue	Standard	Update to fix issue where sorting the Contracts dashboard list by the Buyer field was not displaying expected results.
BUYS-32147	Contract	Search - Contract/Blanket Type - Show MBPOs	Standard	Update to feature to show MBPO type Purchase Orders in Search Results for document type Contract
BUYS-31078	Custom Columns	Custom Column - Document Link type - Not Updating in CO or Amendment	Standard	Update to fix issue where Document Link custom columns were not displaying correctly in Change Orders and Bid Amendments.
BUYS-32280	General	Account Codes - Search as Type - Enable Config	Configurable	New feature, creates configuration to enable or disable the Search As You Type feature for Account Codes, allowing customers to choose to use feature or not.
BUYS-32031	General	BuySpeed Crashes when using Advanced Search	Standard	Update for issue in customer environment

BUYS-30919	General	Multiple Login Failure Error Msg	Configurable	New feature to all agencies to use Standard Text (custom) for the message that is displayed to users who are locked out of their account due to multiple failed login attempts.
BUYS-31319	General	Pending Approval Emails - Allow New Table Values in Standard Text	Configurable	Update to allow additional table values to be used in Standard Text
CPP-2133	Marketplace	Catalog Sharing - Use BuySpeed Orgs from MBPO	Standard	New feature: for a Catalog that is linked to a Contract, for the Organizations that are included on the Control Tab for linked Contract - the catalog will be automatically Shared to those Organizations when Catalog and Contract are linked.
CPP-2106	Marketplace	Marketplace - Display More Info field as URL	Standard	New feature to display the "More Info" field on Product Details page as a clickable link when a URL is present. Allows user to quickly click out to More Info link rather than having to copy and paste URL.
CPP-2195	Marketplace	Marketplace - Prevent Adding Direct Release Item to Solicitation Enabled Req	Standard	Updated to prevent user from adding a Direct Release item to a Requisition that is Solicitation Enabled (which would be a conflict)
CPP-2356	Marketplace	Marketplace Error Products -can't click on existing file/task in Buyspeed GUI	Standard	Fixed issue where 404 error encountered by Marketplace Admin to the Products Upload and click on the files.

CPP-2251	Marketplace	PIMS - External Catalog Product Counts	Standard	The Catalog Admin can now see a count of the total number count of all Products on an External Catalog.
CPP-2139	Marketplace	PIMS - Product Upload - Continue Processing After Error	Standard	New Feature to allow Product Upload file "Run" process to skip any rows where an error is found, and to continue processing file. Thus, only error rows will not be included in Catalog, rather than entire Product Upload not processing.
CPP-2140	Marketplace	PIMS - Product Upload - Display "Failed" Count	Standard	New Feature to provide a count of any Product Upload rows that failed to process when file was "Run"
CPP-2141	Marketplace	PIMS - Product Upload Error Log	Standard	New Feature to provide a spreadsheet download from the Task list, that identifies location and value for any errors that occurred when a Product Upload file was "Run"
CPP-1631	Marketplace	PIMS - Strip Extended ASCII Characters	Standard	Update to automatically remove Extended ASCII characters (which are not supported in Marketplace) from Product Uploads, which allows files that include those non-allowed characters from failing to process.
CPP-2248	Marketplace	Search Results - Feature Name not displaying	N/A	Fixed issue for customer test environment

CPP-2234	Marketplace	Search Results - Feature Names - Sort Rules for Shared Org Catalogs	Standard	Updated for Feature Name sorting logic from a Catalog Owner org to be applied to the Shared Org when that catalog's items are included in Search Results
CPP-2215	Marketplace	Search Results - Shared Catalogs - Shared Org Not On Contract Seeing "Expired"	Standard	Fixed issue where a Shared Catalog that was not linked to a contract was incorrectly showing "Contract Expired" on the Shared Org Search Results
CPP-2241	Marketplace	Search Results - Shared Org Catalogs - Show Feature Name Icons	Standard	Updated for Feature Name icons to be displayed on a Shared Catalog in the Org which it was shared to
CPP-1167	Marketplace	Search Results - Show Solicitation Enabled tag on Choose Options button	Standard	Update to show "Solicitation Enabled" label when applicable on Add to Cart / Choose Options button
CPP-2136	Marketplace	Search Results - Some field results are Case Sensitive	Standard	Updated to allow Search Results based on Product Tag or Packaging to be found regardless of upper or lower case of search terms or search results (Search is now non case-sensitive)
CPP-2249	Marketplace	Search Results - Unable to add Products to Shopping Cart	N/A	Fixed issue for customer test environment
CPP-2018	Marketplace	Shopping Cart - Punchouts - Configuration to Use Default Punchout Values and Bring Items to Cart	Configurable	New Feature that creates configuration to allow Marketplace Cart to automatically use default punchout Department and Location settings - rather than asking User to enter them. If enabled this allows user to bring Punchout items back to

				their cart rather than going directly to a requisition.
CPP-1887	Marketplace	Shopping Cart Items - Variant Fields - Copy to BuySpeed - PO, Bid, CO, Amend	Standard	New feature to automatically carry over data from several fields on Marketplace catalog items to their respective fields on items in resulting BuySpeed documents.
BUYS-31890	Purchase Order	MA-UAT: Slow Performance on Purchase Order and Contract/Blanket Top Navigation Search Results	Standard	Update to fix issue in customer environment
BUYS-31083	Purchase Order	PO - Change Order Cancel - Email Notification - New Standard Text	Configurable	New feature, to allow Agency to specify specific Standard (custom) text for email notifications to Vendors for PO Change Orders that Cancel the PO. Previously notifications for PO Cancellations used same text as non-cancellation Change Orders.
BUYS-31028	Purchase Order	Purchase Order Acknowledge Notification - Multiple Sent Due to Multiple Clicks	Standard	Update to fix issue where multiple email notification could be sent when the "Acknowledge" button is clicked multiple times - now only one message will be sent.
BUYS-31185	Requisition	Automatically Send Direct Release - Standalone Taking Setting from Parent	Standard	Update, for Standalone orgs to determine if Release Requisitions should be Direct Sent, use the setting from the Parent Org
BUYS-31306	Requisition	Demand Requisition does not Send to Multiple Participants	Standard	Update to fix issue where a Demand type Requisition, where multiple Vendors are selected, was not sending notifications to all selected Vendors.
BUYS-32074	Requisition	Informal Quote: Clicking on "Manage Attachments" in seller login throws an exception	Standard	Update to fix issue with error occurring for Vendor user when attempting to take Manage Attachments action.

BUYS-30189	Requisition	Release Requisition - MBPO with Receive By Dollar - Qty Editable	Standard	Update to fix for issue where a Release Requisition allowed editing Quantities on items, when the related MBPO was set to Receive By Dollars. Now user can only edit Dollars in this case, as expected.
BUYS-32410	Search	External Search - Contract & Bid Search Option	Standard	As non-logged in user (Public), searching for Contracts using the "Contract & Bid Search" link now shows all relevant results.
BUYS-32507	Search	Internal Advanced Search - Contracts/Blankets	Standard	Contracts/Blankets Advanced Search, MBPOs that are ALL ORG or that have my current Org listed on Control Tab are now shown in Search Results.
CPP-2283	Search	Search Results - Sort Considering Feature Names for Shared Catalogs	Configurable	For an agency that has shared multiple catalogs with other Organizations, Shoppers searching under those Organizations will now have the same product sort order search results.
BC-490	Source	500 error when showing all line items on bids with large numbers of items	Standard	Fixed issue where bids with 100+ line items, the line item page can be extended to show all items, but will give a 500 error when attempting any action that moves away from or refreshes the page (saving, reviewing response, switching to show fewer items)
BC-446	Source	Agencies getting a "Session Expired" message in the i-frame		
BC-442	Source	Contracts Lite Amount Workflow not Recognizing Amounts		

BC-287	Source	Offers on Bids Report breaks if Bid Type includes & character		
BC-311	Source	Qualifications not accurate		
BC-402	Source	Vendors entering qualifications clears out agency-managed qualifications		
BUYS-29664	Utility	NJ: BRS Ignores Non Match on NCTL Status	N/A	Fix for customer specific utility
BUYS-32067	Utility	OR PROD/UAT: Duplicate Inactive Vendor Remit Addresses Loaded	N/A	Update to fix issue for agency specific utility
BUYS-32142	Utility	OR Vendor Address Utility - Email Output Modification	N/A	Updates to customer utility
BUYS-32212	Utility	TXGLO - SageMIP Utility is reducing the encumbrance by the total of approved invoices when a Change Order is applied.	N/A	Update to fix issue in customer specific utility
BUYS-31909	Vendor	Admin Users - Delete Multiple In Progress Vendors	Standard	New features to improve ease of use for Agency Administrator users, on the In Progress Vendors screen. Allows user to filter list by a date range, and delete multiple or all In Progress (incomplete) Vendor records displayed.

BUYS-31176	Vendor	Bid - "Send Email" Manual Notification Sent to Vendor Issue	Standard	Update to fix issue, for "Send Email" action on Bids to manually notify selected Vendors about the Bid, where email was not being sent.
BUYS-32531	Vendor	New registering vendor seller admin ID and password go to company email not admin/user email	Standard	During New User setup for a Vendor, notifications for a user/password setup now go to the user's email, rather than the Vendor level administrative email
BUYS-31743	Vendor	NV PROD: Reference Vendor does not Save	N/A	Update to fix issue in customer environment
BUYS-32170	Vendor	Seller Admin - Hide EIN/Tax ID Option	Configurable	New configuration feature, to allow Agency to prevent Vendor users from seeing their own EIN/Tax ID, to prevent unauthorized access to that sensitive data.
BUYS-31960	Vendor	Send Vendor Notification to Email for Address Type Selected	Standard	Update to feature, for POs, Change Orders, Bids and Amendments - to send Vendor notification emails to the address selected by the agency user on the document. Previously, email notification were sent to the default address set by the Vendor, regardless of address selected on document.
BUYS-32492	Vendor	Vendor being sent notification on PO's with AA/EEOC or BRC errors (Hotfix)	Standard	Fixed customer specific issue where when the PO was "Sent" it looks like the status is updated to 3PS, but when the AA/EEOC or BRC error is returned, it reverts back to 3PRS. However, in the middle of that, the notification is being sent to the Vendor when it should not be because of the error.

BUYS-31886	Vendor	Vendor Profile - Public View - Hide Remit Address	Configurable	New feature to add configuration allowing Agency to hide or show Vendor's Remit Address in the public view (a user who is not logged in) of a Vendor Record. This could provide additional privacy to vendors.
BUYS-32758	Vendor	Vendor Registration - S2G checkbox default - change to uncheck	Standard	As a Vendor registering, S2G Registration checkbox is unchecked by default. Vendors will have to opt IN to S2G registration.

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