

Periscope Product Suite

15.7 – Result Release Notes

November 13, 2020

Overview of 15.7 Release

Periscope is pleased to announce the coming availability of this version of our software.

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

- Periscope ePro
- Periscope Marketplace
- Periscope Catalog Manager
- Periscope Reconciler
- Periscope S2G
- Periscope Source

Focuses of 15.7:

15.7 introduces several exciting new feature sets to improve functionality and usability of our products. These large new feature sets are documented separately for clarity rather than in technical Release Notes - you can discuss these new features with your Periscope representative to learn how they could benefit your Agency, and how enable and use them.

ePRO CLM Integration

Agencies can now integrate to the Periscope CLM Contract Management tool. Users can create and update Contracts and RFXs from ePRO Bids, Bid Awards, and Purchase Orders, as well as a full range of Contract Lifecycle Management functionality. Additional setup and costs may be involved for ePRO customers.

Catalog Manager Catalog Permissions

A supplier can now control which Agencies can see and shop their catalogs, in case they only want to sell to certain locations or existing customers. This is in addition to the existing functionality to allow Agencies to choose which catalogs their users can see. These features are available to all Marketplace customers.

Marketplace Search Logic Improvements

The logic that controls which products are seen in Marketplace Search has been improved to provide even more consistent results – to quickly get users to the products and services they are looking for.

Marketplace Quantity Discounts

Quantity Discounts can now be added directly in Catalogs by the Supplier (or Agency), and those discounted prices are displayed in Marketplace and resulting ePRO documents. Also, any Price Breaks on ePRO Contracts that are linked to the Catalog are displayed and used. These features are available to all Marketplace customers.

Updates and Bug Fixes

Several customer requested updates and bug fixes were implemented. Discuss which updates were relevant to your organization with your Periscope representative. Please review below the detailed 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 epro-support@periscopeholdings.com.

Updating To This Version

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 of Updates and Bug Fixes for This Version

This list is focused on minor changes / fixes, rather than technical implementation of new functionality. Major new functionality listed above can be discussed with your Periscope representative to enable and get training.

Issue Type	Key	Module	Update	Configurable	Description	Release Version
Bug	BUYS-32068	Accounting	Do not Autofill Account Codes with Autocomplete	Configurable	As a BP or DA user, when Autocomplete Account Codes is Enabled, users typing in accounting fields will not see values selected unless the user specifically selects a value with their mouse or the arrow keys. Previously, the first value was used even if the user did not select it.	Test
Task	BUYS-32421	Bid	Score Sorting based on Ascending and Descending does not work	Standard	As a BP user, on Bid Tabulation, Score Summary tab, when sorting by Score, items are now shown in correct sort order.	Test
Bug	BUYS-32529	Bid	REQUEST for REVISIONS tab on BID TAB sends notification but doesn't allow Revision period to CLOSE; Vendor cannot enter revised quote	Standard	Fix for issue where Request for Revision tab won't allow vendors to submit quote revisions and Close Revision Period button doesn't render.	Test

Enhancement	BUYS-32648	Bid & Requisition	Requisition and Bid Documents - Item Details Page - Item Attributes Section	Standard	As a DA or BP user, when items with Attributes are added from Marketplace Cart to a Requisition or Bid, the Attribute Data now appears with the Item Attributes section.	Test
Bug	BUYS-32918	CLM	Agiloft error when saving vendor general info screen	Configurable	For agencies using CLM, as Vendor Administrator or Vendor, fixed an error occurring when saving Vendor General Info screen.	Result
Bug	BUYS-32407	General	Account Codes - Search as Type - Failing with large amount of account structures	Configurable	The BP or DA user, using Account code search as typed functionality, now functions as expected for customers with a large number of account codes.	Test
Bug	BUYS-32776	General	15.7.0/15.8.0: Login ID should not be included in New User Emails with Password	Standard	When a new user is created, the system sends an email to the designated email address. This email no longer includes the login ID of the user.	Test
Story	BUYS-32749	General	Organization Selector - Mobile	Standard	As Agency user, the Organization selector can now be used on Mobile devices to change the current Organization.	Test
Task	BUYS-32628	General	Update UAT online help per contract	N/A	Updated customer's online help.	Test
Bug	BUYS-32517	General	Documents in Ready for Approval status can't approve [stay in Ready for Approval] broken in 15.6	Standard	Fix for issue where documents in Ready for Approval status can't be approved.	Test

Enhancement	BUYS-32487	General	External Search - Vendor Search Results - Disable Export	Configurable	As Internal Administrator, new configuration is available to allow Agency to HIDE all Export (PDF, CSV) options on the Vendor Search for External / Public Users.	Result
Task	BUYS-32879	Invoice	Invoices Duplicate Approved for Payment if Approved	Standard	As AP user, fixed issue where if multiple users Approved an Invoice in a short time period, both approvals could be recorded causing issues for financial integration.	Result
Story	CPP-2399	Marketplace	Catalog Manager - G2B Punchout Setting - Hide for Supplier	Configurable	As an Supplier user on the Supplier Profile, the "G2B Vendor" setting is not longer seen to prevent those users from inadvertently changing setting. Setting still available to Catalog Managers for Internal Catalogs.	Test
Enhancement	CPP-2369	Marketplace	Marketplace Cart - Punchout Items - Remove Highlighted Text Format	Standard	The Shopper will no longer see Punchout items in the Shopping Cart as highlighted.	Test
Bug	CPP-2305	Marketplace	Catalog Manager - Vendor - "My Products" Shows Other Supplier's Items	Standard	The Supplier Catalog Manager, on My Product screen, user will no longer see Product from other Suppliers.	Test
Enhancement	CPP-2289	Marketplace	Config Send Cart Only to Req	Configurable	The Agency Internal Administrator, on the Document Settings screen, will now have the option to set Marketplace Cart to only allow sending to a Requisition.	Test
Bug	CPP-2230	Marketplace	Catalog Manager - Contract Linking - "Multiple Categories" Instead of Catalog Name	Standard	Catalog Manager user, On Contract Linking screen, previously the would see "Multiple Categories" instead of the Catalog Name, if Multiple Categories were applied to Catalog. The user will no	Test

					longer see "Multiple Categories", they will now see the Catalog Name.	
Bug	BUYS-32626	Marketplace	Non-Punchout Item - Release Punchout Requisition Created	Standard	As BP or DA user, in Marketplace Cart, for items that are not G2B Punchout, when adding to an existing Release Requisition, items are now added to the existing Requisition, rather than to a new Punchout Release.	Test
Bug	CPP-2359	Marketplace	Share Catalog To ORGs - ORGs not auto-populating based on the Control Tab of the linked MBPO	Configurable	The ORGs on the Share Catalog To ORGs screen are now auto-populating based on the Control Tab of the MBPO that has On-Contract Items linked to Products on the Catalog.	Test
Bug	CPP-2366	Marketplace	Standalone ORG - Marketplace - Feature Names not appearing on Page 1	Configurable	In Standalone Orgs, all pages of Marketplace Search results now show Feature Names on Products shared from another ORG, rather than only on the first page.	Test
Bug	BUYS-32814	Marketplace	Prod: catalog files not uploading to marketplace	Standard	As Catalog Manager, fixed issue fixed where when trying to upload catalog files tot marketplace the file shows "no data yet" and does snot upload.	Test
Bug	BUYS-32796	Marketplace	Marketplace: catalog file upload not running, marketplace page reloading every 5 seconds	Standard	Fixed issue where Catalog Manager Product Upload appears to be continuously refreshing about every 5 seconds.	Test

Bug	BUYS-32630	Marketplace	Quick Punchout Configuration - UX Issue when bringing Products back to ePro/Marketplace	Standard	Fixed issues with the workflow when Agency enables the Periscope Marketplace Quick Punchout configuration and try to purchase a Product from a Supplier's G2B website.	Test
Bug	CPP-2439	Marketplace	Catalog Manager - My Products Tab - Products not activated by my ORG appear and are shoppable	Standard	As Catalog Manager and Shopper, resolved issue where Products on Catalogs that are not activated for Agency still appear on the My Products Tab and are shoppable in Marketplace.	Result
Bug	CPP-2479	Marketplace	Marketplace - Brand Filter - Brand Name with two words splitting into separate options	Standard	As Marketplace Shopper, in Search Results, fixed issue in where a single Brand value was broken into two Brand filter values.	Result
Bug	BUYS-32781	PO	BP user able to take an action on an MBPO outside their ORG	Standard	Fixed issue where BP user was able to cancel, or clone the MBPO if it is outside their ORG but user ORG is on Control tab.	Test
Bug	BUYS-32751	PO	Unable to create Release POs	Standard	Fixed issue where Agency user was unable to create a Release Purchase Order from a self-approved Release Requisition.	Test
Task	BUYS-32632	PO	Customer Test Failure: Vendor being sent notification on PO's with AA/EEOC errors	Standard	Fixed issue in customer specific financial integration.	Test

Enhancement	BIDS-1107	Reconciler	Reconciler - Ability to view and export sales data on Paid/Pending Sales Reports		In Reconciler, on the Sales Summary Page, users are able to view details on sales reports that have already been paid and they have the ability to export the details into a CSV report.	Result
Story	BIDS-1059	Reconciler	Admin Fee Report Bugs & Modifications		In Reconciler, on the admin fee report, the user will now see additional columns of data. An issue was also fixed on this report where some fields were not populating correctly.	Result
Enhancement	BIDS-1130	Reconciler	Reconciler - Self POs need to calculate the correct Admin Fee on Flat Fee (\$) Contracts		In the Reconciler, when calculating admin fees for flat fee contracts, the fee will now be based on the quantity of items that the user self-reported.	Result
Bug	BIDS-1129	Reconciler	Reconciler - Sales Detail View - Self Added POs - PO Date Incorrect on CSV File Export		In the Reconciler, on the exported admin fee report, the PO date will now reflect the correct date that the user self-reported on the sales detail page in the application.	Result
Task	BUYS-32810	S2G	Hide option to log into ePRO with S2G credentials	Standard	A Supplier, logging into ePRO, will no longer have the option to login to ePRO using their S2G credentials.	Test
Bug	BC-516	S2G	Classic sending out Links Notifications when supposed to be disabled		In BidSync Classic, users will no longer receive LinksPlus bid notification emails if the notification setting is set to "Never". This resolves some reported incidents where users were receiving unwanted emails.	Result

Task	BIDS-1116	S2G	Support email address incorrect in S2G		In S2G, on the support tab, the email address for the support team has been updated as part of the PHI rebranding project.	Result
Task	BIDS-1115	S2G	S2G Re-Brand Updates Needed - Name+URL Specific		In S2G, on the emails that are sent to customers, the URLs and email address for the support team have been updated as part of the PHI rebranding project.	Result
Bug	BIDS-204	S2G	Password Expired Reset Button Does not do anything		In S2G, when resetting an expired password, the user will proceed to the next step and be able to enter in a new password when they click the reset password button. This resolves an issue where the button was non-responsive	Result
Bug	BUYS-32634	Search	Internal Advanced Search - Contracts - Status Column Sort Issue	Standard	When using Advanced Search for Contract, results are now seen correctly when sorting by Status.	Test
Bug	BUYS-32507	Search	Internal Advanced Search - Contracts/Blankets	Standard	In Advanced Search for POs, MBPOs that are ALL ORG or that have my current Org listed on Control Tab are now shown in Search Results.	Test
Task	BC-397	Source	Vendor unable to complete digital signature	Standard	Supplier, digitally signing an offer in docusign, will now be able to complete the digital signature. Fixed an issue where special characters were preventing completion.	Test
Bug	BC-511	Source	Blank Screen When Trying to Download Bid Packet		In Classic, when downloading the bid packet, users with the most current versions of Chrome, Firefox & IE will now be able to download the bid packet by clicking on the download button.	Result

Task	BUYS-32747	Utility	SAVI utility not functioning	N/A	Fixed customer financial system issue.	Test
Enhancement	BUYS-32765	Vendor	Quote - Keep User In In-Progress Quote	Standard	Vendor user, when viewing "Open Bids", if they choose to Create a New Quote for a Bid where they already have an In-Progress Quote, vendor will receive a alert to prompt them to choose Create a New Quote or Continue In Progress Quote.	Test
Bug	BUYS-32609	Vendor	Tax Id Numbers are replaced with asterisks	Standard	Fixed issue where when Hide Vendor's Own Tax ID for Vendor Users configuration is enabled, and Vendor Admin selecting the "Show" button on Vendor Tax ID, the first 5 digits of the vendor's tax id appear to be overwritten with asterisks.	Test
Task	BUYS-32764	Vendor	ePRO Vendor Registration - S2G checkbox default - change to uncheck	Standard	Supplier, resetting their password in ePRO (with S2G integration On), now needs to check the register with S2G box if they want to opt in. It is no longer checked by default.	Test
Bug	BUYS-32883	Vendor	Warning Message on Bids	Standard	As Vendor user, fixed issue on Bid where false Quote Already Exists warning was occurring when no Quote existed.	Result
Task	BUYS-32783	Vendor	Updating Suppliers outside of US	Standard	As Vendor Administrator, fixed issues where Vendors located outside the United States would not Save.	Result
Bug	BUYS-32880	Vendor	S2G Checkbox Dialog Box Errors	Standard	As Vendor user, fixed issue where new Vendor was not able to register for S2G using checkbox on ePRO registration screen.	Result

Task	BUYS-32820	Vendor	Password Reset Process Update	Standard	As Vendor User, updated reset password screen, if new password does not meet security requirements (capitalization, special characters, etc.), those requirements are now displayed to user.	Result
Story	BUYS-32531	Vendor	New registering vendor seller admin ID and password go to company email not admin/user email	Standard	As Vendor user, fixed issue where new user registration emails were going to the Company email rather than the new user's email.	Result

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