A “Before and After” Guide for SelectSite 9.2

Shopping, Favorites, Forms, and More...
SelectSite 9.2 will be available on July 26th in the Production environment.

It is very important that users are aware of the changes related to the home page, product search and search results, favorites, and forms.

To help our customers prepare its users, we have created a “Before and After” guide. This document walks through common tasks performed and documents the primary changes associated with these tasks.

If you have additional questions, please contact SciQuest Customer Support.
Shopping: Simple Search

The simple, or *standard* search allows users to enter one or more keywords in a text box and quickly review search results. Search results (items) must include all of the keywords entered to display. With the new release, simple searches can be performed across all product verticals OR for one specific product vertical.

**Before**

- The **Product Search** sub-tab was available from the **home** or **product search** (main) tabs. Simple Search / Advanced Search could be toggled by clicking on the link in the upper right-hand corner of the box.

**After**

- Accessed from **home/shop → shop** tab, the simple search displays upon login.

- **Simple search NOW** allows you to choose a vertical, then enter keywords. This combination provides a robust search, and in many cases, eliminates the need for advanced search. By default, **Everything** is selected, which searches across all products.
- The default logic for the search is “must include all words,” which is a change from 9.1.
- Include similar terms and other preferences can now be selected by choosing advanced search and the change preferences link (refer to Advanced Search page).

**How the Search worked:**

- The Simple Search could only be performed across all product verticals (a specific vertical could not be selected).
- By default, the “include any of the keywords” logic was used, but the “must include all the keywords” logic could be selected and would be remembered.
- The Simple vs. Advanced Search setting and the “Include similar terms” option was remembered by the application.
Shopping: Advanced Search

Advanced search allows users to enter additional criteria to generate more specific search results than with simple search. The search criteria available depends on the product vertical selected and whether or not the organization uses custom catalog attributes. By default, once advanced search is opened after login, it will remain open with subsequent searches.

Before

- The Product Search sub-tab was available from the home or product search (main) tabs. Simple Search / Advanced Search could be toggled by clicking on the link in the upper right-hand corner of the box.

- How the Search worked:
  - Advanced search could be performed across all verticals or a specific product vertical (Lab Supplies chosen in example).
  - The search criteria varied depending on the vertical chosen.
  - The Simple vs. Advanced Search setting and the “Include similar terms” option was remembered by the application.

After

- Accessed from home/shop → shop tab, the simple search displays upon login. Click advanced search to start.

- As before, advanced searches can be performed by vertical or by all categories (Everything) and the criteria varies based on the vertical selected. The criteria options have been renamed and reorganized, but are the same as before. Include similar terms can be used on a “per search” basis from advanced search.

- Click the change preferences link to define default search settings, including whether or not advanced search should remain open after selecting.
Shopping: From the Purchasing Showcase

The Purchasing Showcase is used to highlight specific suppliers and forms, and ultimately to direct user spend. Although using the Purchasing Showcase is not required for an organization, it is recommended.

**Before**
- The Purchasing Showcase displays both featured suppliers (hosted, punch-out, and non-catalog suppliers) AND Features Services (forms).
- The Purchasing Showcase could be accessed from the **home** or **product search** tabs, as shown below.

**After**
- The **Purchasing Showcase** functions exactly as before. The main differences are:
  - A single access location: On the **home/shop → shop** tab.
  - The headings are now listed as **Showcased Suppliers** and **Showcased Services**.
  - The supplier icons are now outlined and equally sized.

**NOTE:** If your organization is not using the Purchasing Showcase, this area on the screen will be blank.

**NOTE:** This task is only applicable to organizations currently using the Purchasing Showcase.
Shopping: From a Punch-out Supplier

Punch-out shopping allows users to access a supplier’s external website, shop directly on the site, and return selected items back to the cart for processing. Punch-out access is typically provided for suppliers with highly configurable items or frequently changing items/prices.

Before

- The primary access point for supplier punch-outs was from the **Punchout** Section of the home and product search pages (as shown below).
- Access to a supplier’s punch-out site is also available through search results and the Purchasing Showcase (both of which require administrative setup). **These two access points do not change with the new release.**

After

- Supplier Punch-outs are listed by vertical directly below the Showcased Suppliers and Services.
- The Punch-out access and sites function exactly as before.
- The supplier icons are now outlined and equally sized.

**NOTE:** If your organization is not using Punch-out suppliers or a user is not set up to view punch-outs, this area on the screen will be blank.

**NOTE:** This task is only applicable to organizations currently using Punch-out Suppliers.
Shopping: Quick Order using Catalog No.

This task allows users to enter a product catalog number (SKU) and if an exact match is found, the item is automatically added to the cart. Both the supplier and manufacturer part numbers are searched with Quick Order. This functionality is for hosted catalogs only and up to five catalog numbers can be entered at once.

Before

- The **Quick Order** sub-tab was available from the **home** or **product search** tabs.
- The catalog number(s) were searched for the product vertical selected on the left side of the screen.

![Before Image]

After

- Accessed from **home/shop → shop** tab, directly below hosted catalog search (**Go to: quick order**).
- Select the product category, then enter the catalog number(s).
- If an exact match is found, the **Cart Confirmation** displays directly below the Catalog No. entry area. Click the **back to shop...** link to return to shopping.
Shopping: Browse by Supplier

This task allows users to see what suppliers are available, how items and services can be ordered from suppliers (hosted searching, non-catalog and form ordering, punch-out shopping) AND what items and item categories are available from a supplier (hosted suppliers only).

**Before**
- Accessed from **home** or **product search** tabs, below hosted product search (**Other Searches**).

**After**
- Accessed from **home/shop → shop** tab, directly below the simple/advanced search (**Browse: suppliers**).
- Once selected, the following window displays. This screen functions exactly as before. Click the home/shop tab to return to shopping.
Shopping: Browse by Category
This task allows users to view all hosted catalog data by category and sub-category. This functionality is equivalent to opening numerous paper catalogs from many suppliers to the same section – cleaning products for example.

Before
- Accessed from home or product search tabs, below hosted product search (Other Searches).

After
- Accessed from home/shop → shop tab, directly below the simple/advanced search (Browse: categories).

- Once selected, the following window displays. This screen functions exactly as before. Click the back to shop... link to return to shopping.

- NOTE: You can also refine a search “by category” from the product search results.
Product Search Results: Before

The Product Search Results displayed BELOW the search entry criteria and oftentimes, required significant scrolling to find an item.

Items are listed in a spreadsheet-style format, and users had to “show product details” to see key information, including product images.

All text was the same size, making it difficult to locate key information such as product description and price.

Sorting was accomplished by selecting the triangular icons on top of the column headers.

Filtering by Supplier and Category was accomplished through filter icons.

Product details shown below
Product Search Results: After

The new product search results allow users to focus on key information such as item description and price. The results are also shown much higher on the screen and require less scrolling. Sorting and filtering has been updated to be more user-friendly and offer additional options such as sorting by price and filtering by unit of measure.

- Sorting is now accomplished through the **Sort by drop-down box** (previously by column headings).
- Search results can easily be refined (filtered) by keyword, supplier, category, or packaging UOM (all available on the left side of the screen).
- **NEW:** Sort by Price (high to low and low to high) and Refine by Packaging UOM (each, pack, case, etc)
- If available (from the supplier), the **product image** is included in the search results and can be made larger for viewing.
- A item-specific legend is provided for product flags and supplier classes. Mouse-over any of the icons for the legend to display (as shown on bottom right).
- The Action drop-down box and Go button have been replaced by various options on the screen.

**IMPORTANT:** The order of search results does not change with this release – only the presentation of the information.
Adding Items as Favorites

Favorites are created for items that are ordered frequently by a user or recommended for selection by the organization. Favorites can be added from multiple places in the application, including product search results, non-catalog form, the cart, forms, and more.

Before

- Favorites could be added from many places, but oftentimes, were added from the product search results (shown below).

- Standard users could add one or more items to a selected personal folder or sub-folder. To create a new folder, the user was required to exit the screen and go to the Favorites navigation tab.

After

- As before, favorites can be added from many places in the application. To add a favorite from the product search results, click the add favorite button below the Add to Cart button.

- Users can add the item to a personal or shared folder (depending on the user's privileges). New folders and subfolders can also be created directly from this screen.
Working with Favorites: Before
Prior to 9.2, favorites items could be added to the cart from the my favorites navigation tab and Product Search. Favorites were classified as personal (my) favorites or organization favorites.

Before
- The **my favorites** navigation tab was used to view favorites items and forms. Items could be added to the cart from the Active Folders sub-tab, but a separate sub-tab (Edit Folders) was required to create new folders, rename folders, etc.
- Favorites could also be selected (but not edited) from the Product Search → Favorites sub-tab as shown below.

- Two types of favorites existed:
  - Personal favorites – which allowed users to create personal folders and add items to these folders.
  - Organization favorites – Favorites folders and items set up by a system administrator and viewable by ALL SelectSite users.
After

The presentation and layout of the Favorites navigation tab improves significantly with this release.

Favorites can also be accessed directly from the home/shop → shop tab, directly below the simple search (Go to: favorites).

Working with Favorites: After
In addition to personal favorites (my favorites), Shared favorites allows organization-wide favorites sharing as well as sharing within groups. A group can be a department, a role, or specific users.

- As before, users can create personal folders and add items, move items, rename items, delete items, and order directly from the favorites tab. Benefit: All this is accomplished through a single screen (manage and edit tabs removed).
- Shared Favorites provide departmental and group favorites viewable by the appropriate users.

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