eMACS 24.1 Release
Vendor Management New Search Functionality.

IMPORTANT:

The eMACS 24.1 release upgrade will be promoted to the eMACS Production environment beginning Friday, March 15, 2024, at 7 PM MDT/MST through Sunday, March 17, 2024, at 10 AM MDT/MST. During this time frame the Production environment WILL NOT be available to agencies or vendors.

Agencies are asked to review events they may have opening during or around this time frame and consider if any action is necessary, i.e., extending Open Date, and if applicable, the Q&A Submission Close Date. The Q&A Submission Close Date for the Q&A Board is often missed in this review.

Listed below are changes taking immediate effect on Monday, March 18, 2024. These changes should NOT affect existing functionality, permissions, or access rights.

This document explains the New Vendor Search functionality in the Vendor Management module.

NOTE – There are some search features that may not be applicable to every eMACS user, but the information is listed in this document to explain the entire new vendor search features. The document notes those sections that may not apply.

State Financial Services Division
State Procurement Bureau

Mitchell Building, Rm 165
PO Box 200135
Helena, MT 59620
406-444-2575

Vendor Management – New Search Functionality

Vendor Search - New Experience View Enhancements

eMACS has updated the search experience for various documents over past releases. A new experience view for Vendor Search has been available for the past two releases. The new user interface provides a consistent, modern, and end-to-end experience for users with easier access to important functions, enhancing the user experience. Based on the devices being used, desktop, tablet or mobile, the new responsive layout also offers adaptive display sizes for user convenience.

With this release, the new experience for Vendor Search is no longer considered in Beta. Features that are standard with the classic (current) Vendor Search and other enhancements are available in the new experience.

As a reminder, users access the Vendor Search page in the new experience view as follows:

- The new Vendor Search view is displayed by default.
- A Choose Your Experience toggle at the bottom-right of the screen allows users to switch between the new and classic views at any time. NOTE - The new experience view for Vendor search will be fully activated for all organizations with the 24.2 release. The toggle to return to the classic view will no longer be available with 24.2.

User Impact

- The new experience view for Vendor Search is no longer a Beta version, so the links for What's beta?, What's New?, and Got Feedback? are no longer available. The new search experience has all the same features of the classic search. A user currently has the Enable new search experience setting to toggle between new and classic view.
- With this release, the search experience now contains all of the same features and functions of the classic search. The new search experience provides a simplified search process and more efficient management of the search results. Updates for the 24.1 release include the following options available in classic search:

    a) Options have been added to the Actions dropdown for adding Vendors to a Vendor Group (Please contact eMACS Helpdesk for more information.)

    b) All Export formats are available with appropriate visibility restrictions for sensitive Information. (The ability to EXPORT will not be available and users need to contact eMACS help desk for assistance).

    c) Additional Filters have been added so that all filter options available in the classic search are now available. Note: Some search filters may have a different label from the classic search.

d) The previous "Vendor Saved Search" widget can no longer be added but existing instances are still visible on dashboards. Users are encouraged to instead use the Display Search Results widget that will respect the activated search. The Vendor Saved Search widget will be converted in a future release.

Vendor Search New Experience View features:

With the enhanced view, the Search for a Vendor page displays Vendors who are in network and active for shopping (status) for eProcurement customers. The default search results can be customized by applying filters and then selecting to pin filters (explained below).

Quick Filters and My Search

An Expand/Collapse button beside the Search Vendors header allows you to view or hide the Quick Filters and My Searches panels on the left. Select again to hide.

- Quick Filters - This area displays filters available to further refine search results. As with other search results pages, simply select or deselect options from the filter list to refine results. You can continue to use the Add Filter dropdown above search results, which will update the Quick Filters information.

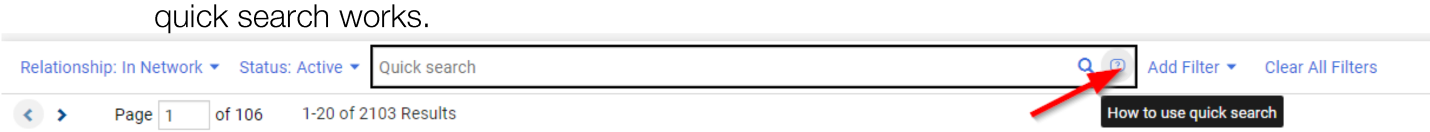
- My Searches allows you to navigate to your own saved searches.

Quick Search

1. Enter a Vendor name or number in the Quick search field.

2. Click the search icon . Matching Vendors are returned in the search results.

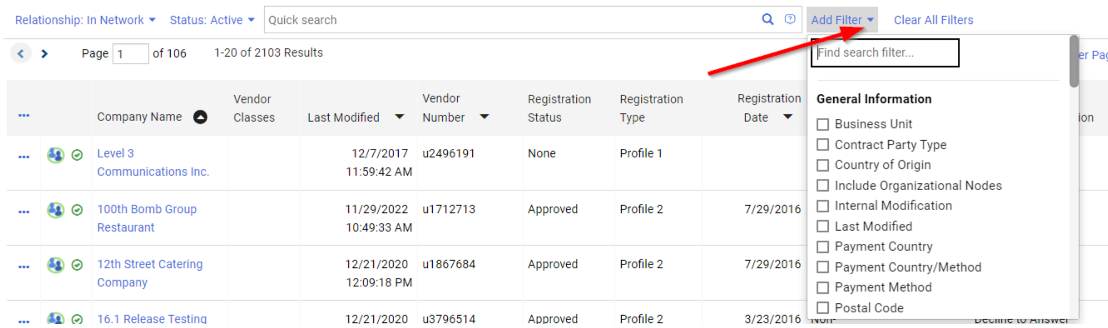
3. Select the How to use quick search icon in the Quick search field to learn more about how quick search works.



Advanced Search

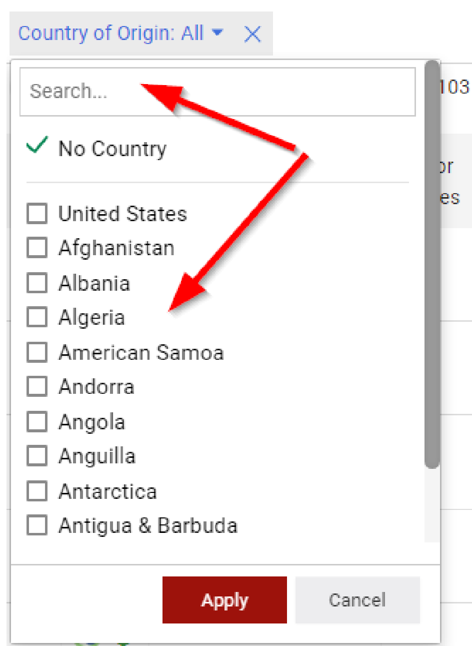
Use the filter options to perform a more specific search.

1. Click the Add Filter button (located to the right of the Quick search field). A list of available filters displays.



2. You can search for a specific filter by entering a value in the field. The list of filters will be refined, and only matching filters will be displayed.

3. Click the checkbox for the appropriate filter; configuration options will display. For example, if you choose Status, an overlay displays from which you can select the appropriate status values. Important: When there are many options, a list of "suggested" values is displayed with the configuration overlay. To choose a value that is not in Suggested list, enter a value in the search field.



4. When you have made the appropriate configurations to the filter, select the **Apply** button. The search results are refined to reflect the filter. The filter displays above the search results. Click the (X) to remove the filter.

5. Repeat the steps above to add additional filters. The search results are updated to reflect the new filters.

Last Updated Changes

With classic search, a field for Last Update by Vendor is displayed in search results. With the new experience, the Last Modified column displays by default, and displays the date/time of the most recent change, whether by Vendor or customer user. In addition, new/updated filters (and column options) are available for:

- Vendor Modification - displayed as **Profile Last Updated by Vendor** in classic search. This field represents the last date/time the Vendor made a modification to their profile data.

- Internal Modification - a new field that represents the last date/time a customer user made a modification the Vendor's profile data.

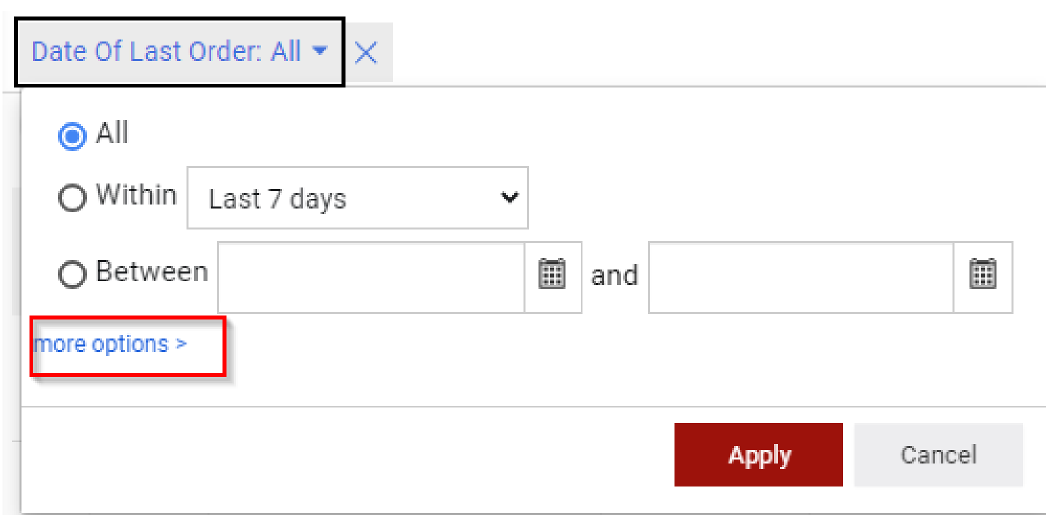
Filter Options

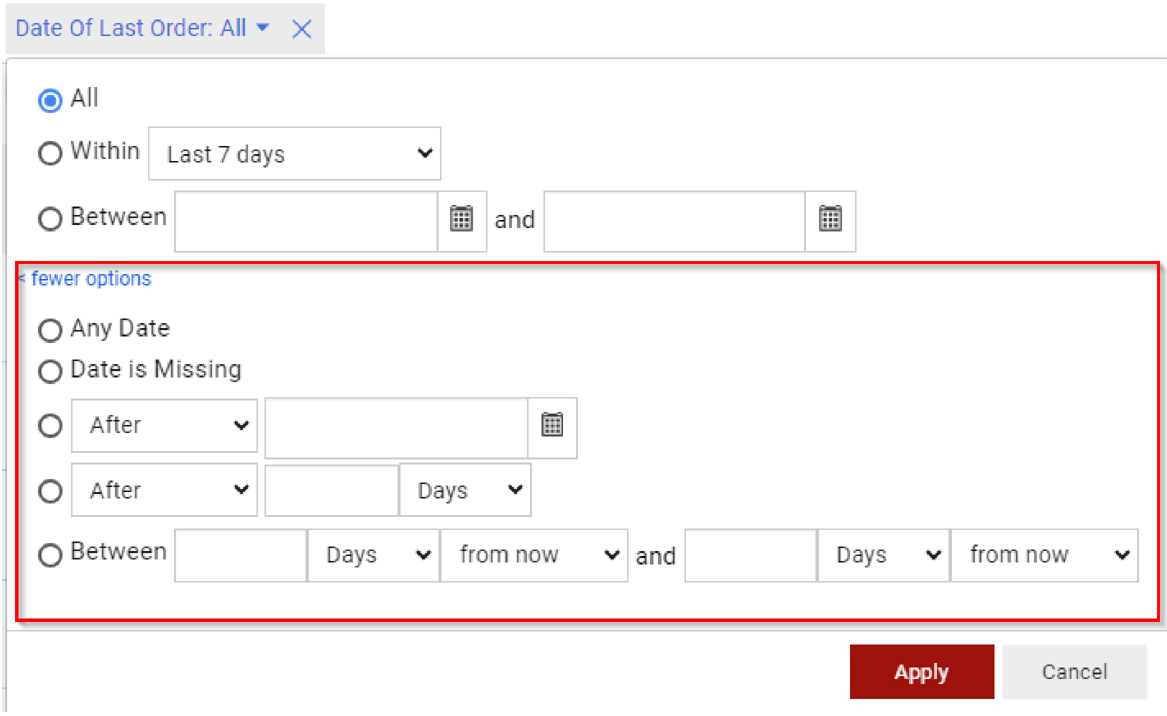
All filter options from the classic **Advanced Search** page are available in the new search experience. Some labels have changed and some may be in different sections of the filter input. Some new filters have been added:

- All **date-related filters**, including the new "Date of Last Order", include the ability to filter with additional options such as "Date is Missing".

  1. After selecting a date filter, click the more options> link

  2. You can then choose to search for Vendors where any date exists for the selected filter, the date is missing, or other specific criteria.

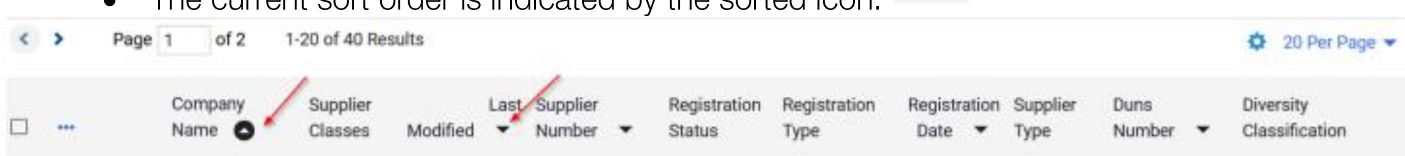




- Date related filters consider date and time. With classic search, only date was considered.

Sort Search Results

- Sort search results by any of the columns indicated with a Sort icon.
- The current sort order is indicated by the sorted icon.



Configuring Search Results Columns

You can choose the columns that display in the search results and the order in which they display.

1. On the **Search Results** page, click the located on the right, above the Vendor list. The **Configure Column Display** screen displays. A list of all available columns is displayed on the left, and a list of selected columns displays on the right, where you can sort the order in which they display on the search results page.

2. Follow the steps below to add columns:

   a. Locate the column(s) in the list. You can scroll through the list or enter a value in the search field to search for a column.

   b. Click the checkbox for each column you would like to add. The columns are automatically added to the bottom of the selected columns list on the right. See the next step for information about sorting the list.

3. Manage the selected columns list.

   a. To sort an item in the list, you can drag the columns to the selected location or use the ↑ ↓ arrows to move the columns up and down.

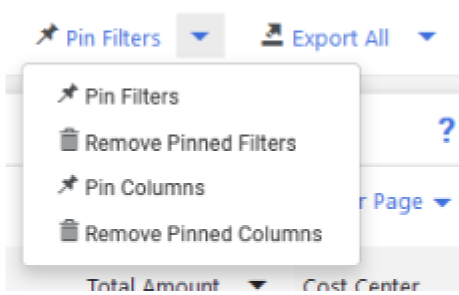
   b. To delete a column from the selected list, click the icon.

4. Click **Apply**.

Important: By default, the updated selected and sorted columns only display for the life of the current search. If you would like to keep the column configuration for all searches of this type going forward, select the **Pin columns as my defaults** checkbox in the column selector.

<u>Pinning Columns and Filters</u>

By default, any filters or column changes that you apply to search results will only last for the life of the current search. However, you can "pin" the search results filtering, and column set up so that it will be the default each time you perform a search. Choose the **Pin Filters** and **Pin Columns** options from the dropdown:



<u>Taking Action from Search Results</u>

You can choose to take appropriate actions (**per user permissions**) for the Vendor using the action ellipses at the beginning of each search result or at the header row for multiple results. The actions for each Vendor and process for completing those actions are unchanged. In the classic search, the **Available Actions** dropdown contained action items for the Vendor list.

- To take action on a single row:

  1. Click the ellipses at the beginning of the row. The appropriate actions for the Vendor will display as hover text.

  2. Select the appropriate option and follow the instructions.

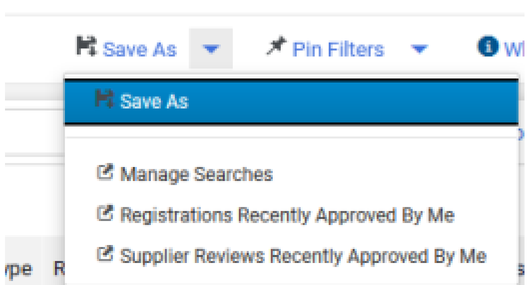
- To take action on multiple rows:

1. Click the ellipses at the beginning of the header row.
2. Click Show Multiple Selection. Check boxes are now displayed in the header row and for each row.
3. Select the appropriate boxes. If the header row checkbox is selected, all results on the page are selected.
4. Once selections are made, click the ellipses in the header row again. The appropriate actions for the Vendor will display as hover text.
5. Select the appropriate option and follow the instructions.

<u>Saving and Managing Searches</u>

If you need to run the same search on a regular basis, you can store the search using the Saved Search feature. You can create a saved search that stores search criteria and run it with just a click of a button. Recreating the search and entering the criteria is not necessary. Saved searches are created from the search results page.

- You can continue to save searches as provided in the classic search interface by selecting the Save As dropdown at the top of the page. The functionality and actions related to saving searches and accessing those searches has not changed from the classic search.
- The Manage Searches page provides a global view of all saved searches for your organization. You can choose to manage searches from the My Searches tab on the left. You can also select the Manage Searches option from the Save As button dropdown to navigate to the Manage Searches page.



- The process for creating folders and saving searches has not changed other than the navigation as explained above.

<u>Exporting Search Results - The Export Search Results function does not apply to eMACS Users.</u>

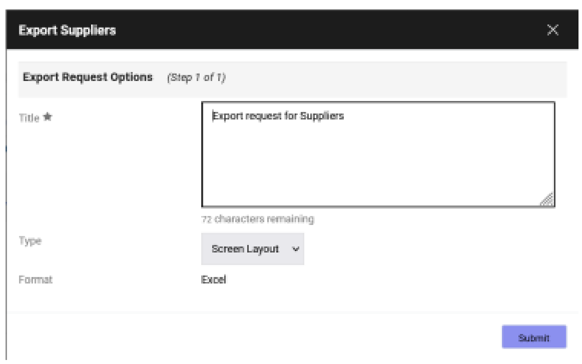
- The Export options are contained in the dropdown above search results. Options to Export All or Export Selected Rows are available. Use the multi-select ellipses on the left, if necessary, to enable the selection boxes for each row. You can then choose rows to export if appropriate, choosing the Export Selected Rows option. You can also choose to navigate to search exports and scheduled exports from the dropdown. These options are listed under the Available Actions dropdown in the classic search view.

- You have the option of exporting ALL Vendors or only selected Vendors when you do the export from the Search Results page.

  1. From search results, take one of the following actions.

  - To export all search results,
    a. click the Export All button located above the search results.
    b. Select the checkbox for each row you would like to include in the export.
    c. Click the dropdown icon beside the Export All button and choose Export Selected.

  2. In the overlay, enter a Title for the export request (up to 100 characters), or you can accept the default Title.

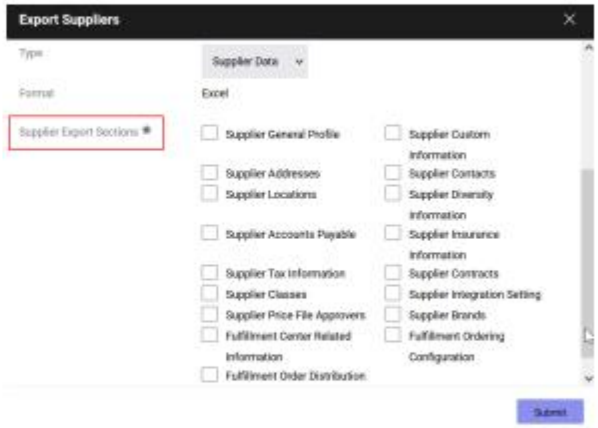


  3. Select the export Type. The same three export options are available from the overlay. In classic search, these options are available from the Available Actions dropdown. Note: The file Format is read only and is based on the type of export selected.

  - Screen Layout - This generates an Excel file with the information that is displayed on the search results page with no additional data.

  - TIN Matching - This generates a Text file with information that can be used for bulk TIN matching.

  - Vendor Data - When this option is selected, Vendor Export Sections are displayed. Choose what sections of the Vendor profile you want included in the export. The file is generated in Excel format. If the search set to export contains fewer than 1,000 Vendors, one or many of the Vendor sections can be included in the export. If the search set to export contains more than 1,000 Vendors, only one section can be exported at a time. This is a requirement in classic search as well.



4. Once you have selected options, click the **Submit** button. A confirmation message is displayed, and the file will be available on the **Manage Search Exports** page.

5. Select the **Submit** button. Your export request will be submitted, and the file will be available on the **Manage Search Exports** page.

- **Exporting Results from a Saved Search** - the functionality for exporting from a **Saved Search** has not changed from classic search. When you export a saved search, dates will be relative to the time you request the export vs. the date you saved the search. For example, if you select to export a saved search that searches for the last 30 days, it will return results dated 30 days from the date of the export. When you have a saved search:

  1. Go to **User Profile** > **Manage Searches** or select the **Manage Searches** link on the search results page and access a saved search. Take one of the following actions:

     - To export all items in the saved search, click the **Export All** button.

     - To select a subset of items in the saved search:

       a) Click on the search name to open the search in the search results page.

       b) Click the ellipses in the header row to reveal the row selection checkboxes.

       c) Select the checkbox for each row you would like to include in the export.

       d) Click the dropdown icon beside the **Export All** button and choose **Export Selected Rows**.

2. Proceed with completing the options in the overlay as explained above.

- **Scheduled Search Exports** - The functionality for scheduling search exports has not changed from classic search.

    - The **Manage Search Exports > Export Schedules** page allows users to schedule regular exports based on a saved search. You can navigate directly to the **Export Schedules** page by selecting **Manage Scheduled Exports** from the **Export All** dropdown. All search export schedules are managed on this page. Use the **Click to Filter** option and select **Vendor** from the **Search Type** dropdown to view only the schedules for Vendor search.

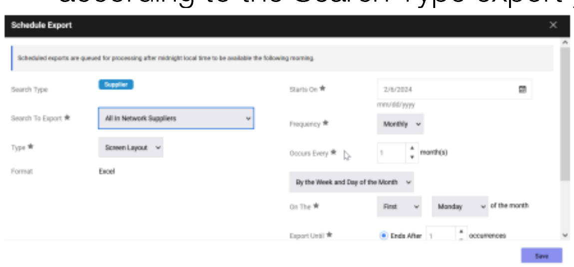
    - When a scheduled export is created, it will be scheduled to run based on the date range and the day/date that it was created. A scheduled export can be configured as a user's personal saved searches or shared searches to which they have access.

    - You can save search exports on a one-time or recurring basis.

        1. Go to **User Profile > Manage Scheduled Exports** or select **Export All > Manage Scheduled Exports** on a search results page.

        2. Click on the **Export Schedules** tab.

        3. Click **Create Schedule for...** and select the appropriate type of export. A **Schedule Export** overlay displays. **Note:** options will display according to the Search Type export you have selected.



        4. Select the **Search to Export** from the available saved searches (your personal saved searches and shared organization searches).

        5. Select the **Type** of export. Options display depending on the search you have selected.

        6. The **Format** selections will display based on the **Type** selected. This field may be read only if the **Type** is not available in multiple formats.

        7. Select a **Starts On** date - when the first export should run.

8. Select the Frequency for the export - Daily, Weekly or Monthly.

9. Select how often the export should occur, for the selected Frequency. Additional options display based on this selection.

10. Select the Export Until options - after a number of occurrences or by a specific dated.

11. Click Save.

- Downloading Search Exports - The process for downloading search exports has not changed.

    1. Navigate to Manage Search Exports page (User Profile > Manage Search Exports or select the Manage Search Exports option from the Export All dropdown on the search results page).

    2. If there are several exports, you may want to filter them to locate the export you want to download. Select the Click to filter link.

        a) Search Type – Select to filter exports by type of export. The default is All.

        b) Status - Select to filter exports by status. The default is All.

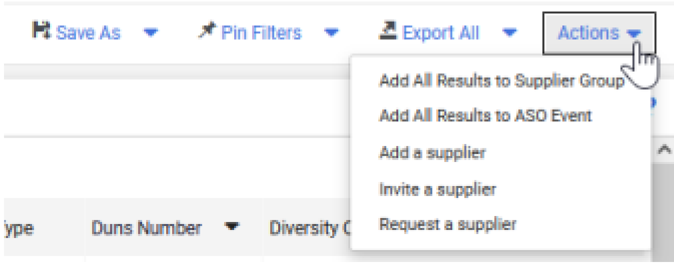
        c) Show Company Exports – By default, only your requested exports are shown. Select Yes to see all exports requested by all users in your organization. If you have permission only to view your own exports, this check box will not be available.

    3. Click the Title for the export you want to download or open. Select to Open or Save the file.

    4. When you have downloaded the file, you can choose to remove it from the exports. Select the Delete button under the Action column for the appropriate export file.

Actions

An Actions button at the top displays Vendor profile management options according to the organization configuration and user's permissions. These are listed in the classic search under Available Actions dropdown.



- Note: The availability of the Action items is based on the role and permissions associated with the eMACS User. Only those actions approved for the user will display in this section.