The New My Exchange – Frequently Asked Questions

05/2017

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Introduction

This Frequently Asked Questions document addresses questions you may have regarding the new My Exchange.

What education is available to me?

In addition to this document, there are comprehensive Help topics, quick how-to videos, and numerous eLearning offerings. Want to see?

- Help can be accessed by clicking **Help** in the upper-right corner of any product page
- How-to videos can be accessed via the News section on the GHX Community* and the Help Welcome page
- The *2017: New My Exchange* learning path, which includes the courses listed below, is available on the Education Portal*:
  - What is My Exchange?
  - Navigating My Exchange
  - Reviewing Transaction Data
  - Searching and Customizing Work Lists
  - Flagging and Resolving
  - Reading Analytics and Reports
  - Managing Notifications
  - Commenting in My Exchange
    - ✓ More to come!
- You access the Education Portal via the GHX Community* (you must be a Community* member and registered user to enter the Education Portal)

*Click here to view an FAQ on accessing the GHX Community.

Getting Started

What's new?

There's lots new in My Exchange, but most importantly, My Exchange has added transparency and data access. Having insight into the entire document flow will give your organization greater opportunities to "self-serve" and expand your GHX ROI.

What browsers are supported?

Internet Explorer 10 & 11	**Important**: If you currently use Order Center and added ghx.com to your IE compatibility list, you will need to remove it from the list – check out the steps in *"How do I change my IE compatibility?"*
Chrome	Latest two versions
Firefox	Latest two versions
Safari	Latest two versions
Edge	Latest two versions

How do I change my IE compatibility?

The new My Exchange is a modern user interface. If you added ghx.com to your IE Compatibility settings, you need to remove it so that My Exchange displays correctly.

1. In Internet Explorer, access the Compatibility View Settings.
2. Select ghx.com in the list and click **Remove**.
3. If the display looks odd, you may need to close and re-open your browser.

Note: Compatibility display issues have been fixed in legacy Exchange, so you don't need to change them back to see legacy applications correctly.

How do I log in?

To access the new My Exchange for the *first* time, if you're an existing customer, access the legacy application and follow the prompts to transfer your user credentials to the new system. You will receive a validation email with a link. From there, you will create a password and finalize your credentials.

Note: If you log into legacy My Exchange after your user credentials are active in the new My Exchange, you will need to enter your 'legacy' user name and password, so be sure to remember them!

Once your user credentials are active, you will access the new My Exchange via the new 'single sign-on' portal at http://login.ghx.com. Enter your GHX user credentials (Email Address & Password) and click **Login**.

Note: You may continue to see the "setting up access" information in the legacy My Exchange. However, once you are active in the new system, you can ignore this messaging.

What is "my" GHX?

The concept of "my" GHX is for you to think of the 'single sign-on' portal landing page as the place you access your GHX products.

How do I get started?

Once you've logged into http://login.ghx.com, you'll choose Invoices, Orders, Notifications or Transactions under My Exchange. My Exchange will open to the view you selected.

How do I reset my GHX password?

If you've forgotten your password, simply click the *Forgot Password?* link on the login page and follow the prompts.

If you want to reset your password while logged into the system:

1. Click the solution selector icon.
2. Select **Single Sign On Home**.
3. Click on your user name on the right side of the portal header and select **Profile**.
4. Complete the fields. The system won't let you make the change if your password doesn't meet the security requirements.

How do I access my other Single Sign On products?

If you want to access your other Single Sign On products:

1. Click the solution selector icon.
2. Choose the desired product name* and the product will open, or choose **Single Sign On** and choose the desired product* from the Single Sign On home page.

I'm a CCXpert customer… how do I access it from My Exchange?*

Until the single sign on integration occurs, you will continue to access CCXpert through legacy My Exchange. Once CCXpert is integrated (coming soon!) you will be able to access it from the GHX single sign-on portal and there will be interactive hyperlinks between Orders and CCXpert.

Communication

How can I contact a trading partner regarding a transaction?

There are two ways to contact a trading partner:

- Traditional email (emailing capabilities are now available from any transaction or view – not just from Quick Clicks.)
- Social collaboration feature* (users can leave comments, reply to comments and add new comments for colleagues and/or trading partners)
  *This is an optional feature. If your organization or a trading partner has turned off this feature, you won't have the option to comment.

Where is my Address Book?

We strongly believe that the primary focus of My Exchange is having order and transaction data transparency with excellent exception management, while encouraging trading partner collaboration through inline messaging. Based on extensive voice of customer and usage analysis, GHX has chosen to sunset the legacy Address Book functionality in My Exchange provider for the new My Exchange. Buyers who use this feature and wish to preserve the data, should access their Address Book in the legacy system (available through the summer of 2017), then manually copy and paste any required information into a personal file.

Can I get system status updates?

Yes, getting My Exchange system updates is simply a matter of clicking the System Status icon and providing your communication style preferences.

Searching

If a recent transaction processed in the legacy system, will it show in a search of the new My Exchange?

Yes, but note that we've been listening to, and continue to listen to, our customers while developing the new My Exchange. You may notice inconsistencies because we were making changes based on your feedback. For searches of transaction data that occurred prior to 2017, please continue to use the legacy system.

How do I search for a PO or an invoice?

Searching for:	Where?	Steps:
A PO or PO docs	Orders page	1. Type the **PO#** into the Search For: field. 2. Click the **Search** icon. Results will include your PO summary and access to all transactions associated with the PO. Or 1. Click the **Advanced Search** link to search by a specific timeframe. 2. Define your search criteria. 3. Scroll down and click **Apply Search**. 4. Click the expand/collapse icon to expand or collapse the table. 5. Click **Save as Work List** to save this advanced search as a work list.
A PO or PO docs *(cont.)*	Transactions page	1. Click the **Advanced Search** link to search by a specific timeframe. 2. Define your search criteria. 3. Scroll down and click **Apply Search**. 4. Click the expand/collapse icon to expand or collapse the table. 5. Click **Save as Work List** to save this advanced search as a work list. Results will include all transactions associated to the order. To narrow results to the PO only, specify Purchase Order in the Transaction Type search criteria.
An invoice or Invoices docs	Invoices page	1. Type the **Invoice#** into the Search For: field. 2. Click the **Search** icon. Results will include links to both Invoices and Orders views. 1. Click the **Advanced Search** link to search by a specific timeframe. 2. Define your search criteria. 3. Scroll down and click **Apply Search**. 4. Click the expand/collapse icon to expand or collapse the table. 5. Click **Save as Work List** to save this advanced search as a work list.
PO, invoice or other doc types	Transactions page	1. Click the **Advanced Search** link to search by a specific timeframe. 2. Define your search criteria. 3. Scroll down and click **Apply Search**. 4. Click the expand/collapse icon to expand or collapse the table. 5. Click **Save as Work List** to save this advanced search as a work list. Results will include all invoice transactions associated with the invoice number entered.

What is a work list?

You can save an advanced search that satisfies data needs that you have repeatedly as a work list. Work lists can be private or public, or you can choose to promote a private work list to public.

> **Note**: If you intend to use Public work lists, GHX recommends that you develop a naming convention so that the list's purpose is clear simply by reading the list name.

See the Help topics for the steps.

As a buyer/provider, I already use Orders work lists – how can I use them in the new system?

Work lists in the legacy system cannot be exported, so if there is a list that is essential for you, be sure to note all of the filters so that you can set up an identical list in the new My Exchange. Plus, now you can set up work lists in the Invoices and Transactions views as well.

How do I export and send My Exchange data?

Exporting capabilities are expansive. See the Help topics for the steps.

How do I bulk download report results?

When you'd like to bulk download report results, click the Bulk Download icon. This is particularly helpful with (supplier) G-Fax or (provider) MetaTrade PDF-based order transactions.

Orders

What are the order statuses and what do they mean?

See the Help topics for the statuses and definitions.

How do I manage exceptions?

Flagging:
In the Orders view, you can flag orders and order line exceptions. Setting flags communicates ownership and/or issue resolution. A yellow flag indicates that someone in your organization has taken ownership of the issue – for example a buyer is responding to a rejected PO or a supplier is working on a part number exception. A green flag indicates the issue has been resolved. Be sure to include comments (stored with the exception) so that others understand how you handled the exception. Quick Click comments can be referenced/audited in the Exception Management reports. See the Help topics for the steps.

Reporting:

You can use the information in the Quick Clicks, Analytics bar and pie graphs as well as the reports to identify recurring exceptions and make global changes in your system(s) so that the issues no longer occur. Common pain points, such as part number or price exceptions, can be easily identified so that you can take appropriate actions within your organization or with your trading partner. See the Help topics for the steps.

As a supplier, do I have visibility to contract price exceptions?

Yes, with the new My Exchange, you now have a Contract Price Quick Click; so you can see what your providers are seeing.

Transactions

How do I verify a transaction's status?

The Transactions page displays real-time information. Look at the Transaction Status column to see the eCommerce document's status. For more information about statuses, see the Help topics.

How can I view an image of a document?

You can see the 'raw' document from the Transaction Details screen. This image can also be exported to a PDF.

How does GHX help to keep PHI secure?

It masks properly* formatted Protected Health Information (PHI) in the raw PO documents.

> **Note**: Do not put PHI in comment fields or anywhere it doesn't belong. GHX can only help you keep your data secure if you do your part.

Can I view a transaction as it progresses through My Exchange?

Transaction and status visibility are now available across the order cycle (PO, POA, ASN, Invoice) from the Orders and Transactions views.

To access PO, POA, ASN, and Invoice transactions from Orders, click the associated Document Ref # links within your Orders & Pending Exceptions report results. You can also access via Purchase Order Details (line level) from the Orders view.

In Transactions, the Transaction Details screen includes a lifecycle bar below the Transaction Summary that allows for viewing various states of the transaction. Defaults are Received (Inbound Document) and Sent (Outbound Document). You even have visibility into all Exchange traffic, including contracting and distribution channels, dynamic PO transactions (such as parked orders or POs impacted by Order Intelligence or OnDemand AP business rules) and PO history, catalog, etc.

Invoices

How can I do a quick search for an invoice?

Type the Invoice # into the **Search for Invoice #** Quick Click field.

Can I email, export and/or print a hard copy of Invoice views?

From the Invoices view, you can email or export to PDF or CSV from the Invoice Summary action icons. 

Where can I find the Freight and Special Charges Report?

Providers select the report from the Invoices>Reports menu. The report offers a "by supplier" Summary view and a Detail view with deeper visibility into invoice numbers and date/time received.

Preferences

As a buyer, how do I configure my order tracking and filtering preferences?

Providers and distributors acting as a 'buyer' can configure these preferences by:

1. Load Orders.
2. Select **Preferences** from the User menu in the header.
3. Enter your **Buyer ID*** and click **Add**.
   To include filtering for your entire Purchasing team, enter their Buyer IDs as well.
4. The My Exchange price tolerance default is $0.01. To see all price exceptions, including those $0.01 and lower, change the default to $0.
5. Click **Save**.

   Adding Buyer ID information is a valuable asset for customizing your view to see the transactions that are important to you. The value(s) entered for this preference will be used in both the Orders Quick Clicks and Advanced Search>My Orders.

As a buyer, can I hide MetaTrade orders from my Unconfirmed POs Quick Click results?

Providers and distributors acting as a 'buyer' can configure this preference by:

1. Select **Preferences** from the User menu in the header.
2. Select the *Hide Fax and e-Mail orders from the Delayed Delivery POs and Unconfirmed POs reports* preference.
3. Click **Save**.

Can I hide resolved (green flagged) exceptions from my Pending Exceptions Quick Click results?

Both provider and supplier organizations can hide resolved exceptions.

1. Select **Preferences** from the User menu in the header.
2. Select the *Filter resolved flagged order lines from my Pending Exceptions* reporting preference.
3. Click **Save**.

As a distributor, can I view orders from both the seller and buyer perspective?

1. Select **Preferences** from the User menu in the header.
2. Choose **Seller** or **Buyer** from the *Display my order-based reporting by* preference.
3. Click **Save**.

You can now access your Dashboard, Orders (Quick Clicks), Reports and Analytics for the preference you selected. As a "Buyer", you have visibility to orders you are placing. You also have access to additional reports within your Report library including Usage, Price Parity, and the Purchase report. As a "Seller", you have visibility to orders you are fulfilling.

As a supplier, can I hide G-Fax orders from my Unconfirmed POs Quick Click results?

1. Select **Preferences** from the User menu in the header.
2. Select the *Hide G-Fax channel orders from the Unconfirmed POs report* preference.
3. Click **Save**.

Notifications

The Notifications application is an entirely new GHX offering. You can create notifications for business processes applicable to your organization and subscriptions.

Can My Exchange notify me when an order status is something about which I need to know (such as Delayed Delivery)?

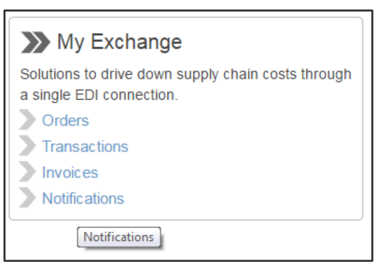
Yes, you can create custom alerts and notifications for you and your colleagues. The Orders view also supports daily notification emails that are specific to Unconfirmed and Delayed Delivery POs.

For suppliers, My Exchange has *Daily Parked in Order Intelligence PO* notification.

1. Select **Preferences** from the User menu in the header.
2. Select the desired notification subscriptions.
3. Choose a delivery time (your time zone comes from your user profile setting.)
4. Click **Save**.

How do I get started?

Choose **Notifications** under My Exchange in the portal. My Exchange will open to page you selected.

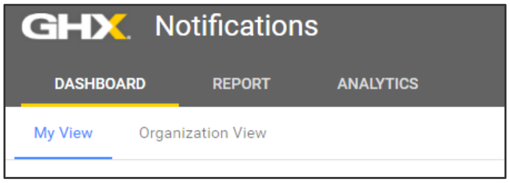


How do I set up a new notification?

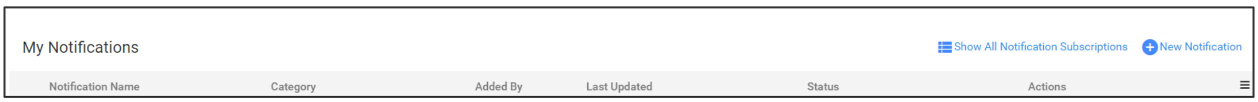
Setting up notifications will greatly increase your ability to use My Exchange to the fullest. See the Help topics for the steps.

How can I see my notification subscriptions?

1. On the Notifications dashboard, click **My View**.

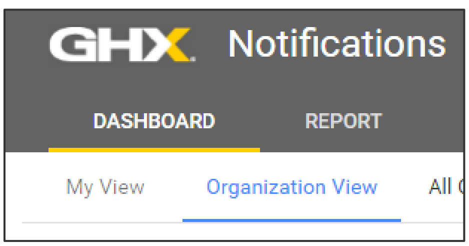


2. Scroll down to the section titled My Notifications.
3. Your dashboard will also display any notifications you "pinned" to your home page for easy view and access.
4. To see a comprehensive list of notifications you are subscribed to (those pinned and un-pinned from your home page), select the "Show All Notification Subscriptions" link.



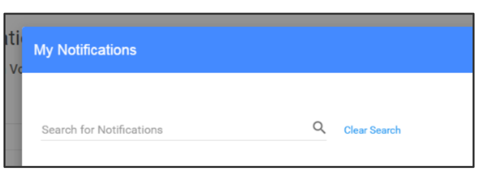
How can I see my organization's notification subscriptions?

Same as above, just select **Organization View** instead of **My View**.



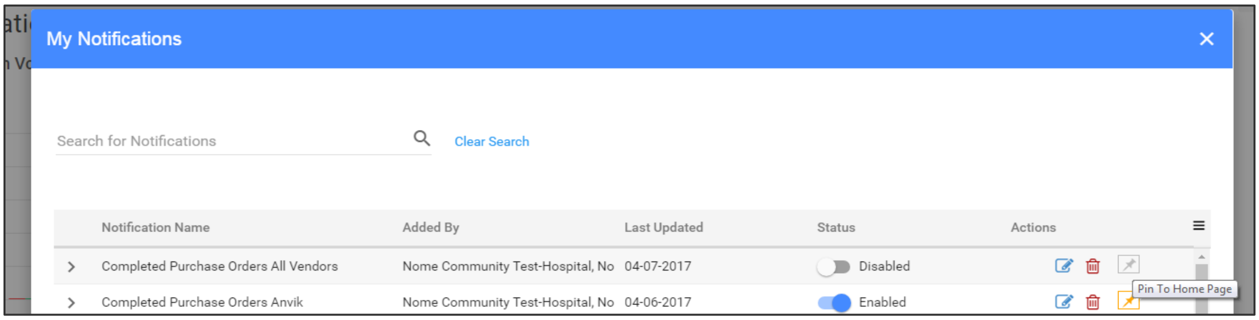
How do I search for a notification?

After clicking the **Show All Notification Subscriptions** link, search for the notification in the search bar.



How do I create a notification pin?

1. Click the **Show All Notification Subscriptions** link.
2. Select the notification you want to pin to your homepage and select the **PIN** icon.
   If the icon is grey, it means the notification is available to be pinned to your homepage. If the icon is yellow, it means the notification is *already* pinned to your home page.
3. Once the icon has turned from grey to yellow, click the X at the top right corner to close.

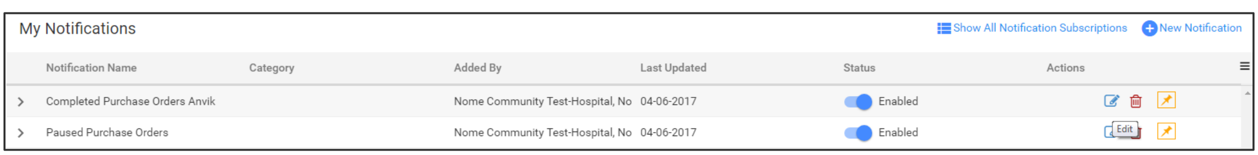


How do I un-pin a notification from my homepage?

1. Click the **Show All Notification Subscriptions** link.
2. Select the notification you want to un-pin by selecting the yellow PIN icon next to the notification.

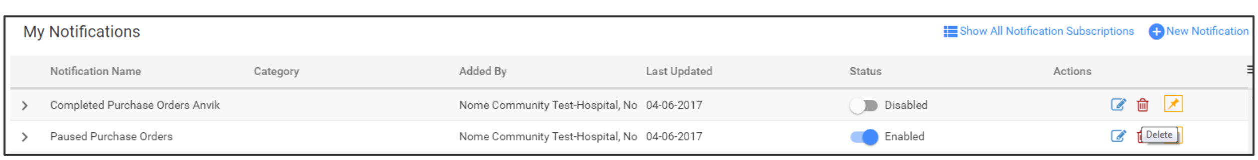
How do I edit a notification?

Select the **Edit** icon next to the notification you wish to edit.



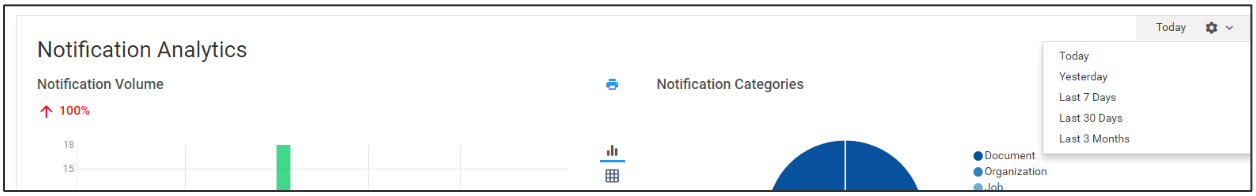
How do I delete a notification?

First, disable the notification you wish to delete, then select the delete icon next to the notification you wish to delete:



How do I change time period for the graphs on the Home page?

Select the time period "switcher" at the top right corner of the Notification Analytics section and choose the desired time period.



How do I refresh the data on my home page?

Select the refresh button to the right of the My View and Organization View selections on your home page

How far back can I run reports or analytics related to notifications?

You can run notification reports going back 92 days.

How do I export notification report results?

1. Run the notifications report.
2. Choose the desired medium and click the corresponding export icon in the upper-right corner.

Note: Click the Export to CSV icon to export to CSV in native Excel or click the Export to PDF icon to export to PDF in native Adobe. You can also email the report results or print them.