My Exchange
General Availability
Release Notes
Release Date: May 1st, 2017

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Release Overview

This release contains information about how the new My Exchange has created and enhanced the following:

Single Sign On and the New My Exchange Navigation

Enhancement Details:

Current State (Prior to this Release)	Legacy My Exchange provides access to Order, AP, Transaction, and Registration Centers, along with other GHX products to which you may subscribe. You may also subscribe to additional GHX products that require a separate URL, user name and password.
Problem Statement	Because GHX does have a single sign on portal or security, accessing existing or future GHX product lines require separate links and credentials. Having numerous access points into GHX product lines is confusing.
Solution Details	GHX is making strides toward a single sign on solution where you log in once to access all GHX products to which your organization subscribes. In addition to improved ease of use, the single sign on solution results in enhanced security. Single sign on implementation will occur in phases. The legacy My Exchange applications relating to orders, invoices, notifications, and transactions are included in this phase. They are interoperable and easy to navigate.
Customer Impact	You will benefit from the following: • Increased ease of use • Fewer URLs, user names and passwords to remember • Enhanced security
Recommended Action	Familiarize yourself with the new landing page and navigating to Orders, Invoices and Transactions.

Browser Compatibility and Support

Enhancement Details:

Current State (Prior to this Release)	Because legacy My Exchange applications were built years ago, the user interface is fairly static. Modern technology advancements have evolved into dynamic online user experiences with advanced technical requirements.
Problem Statement	Legacy My Exchange is technologically limited. Users require a modern Exchange experience that is fully optimized for modern browsers such as Internet Explorer 10 and 11, Google Chrome, Firefox, Edge and Safari.
Solution Details	The new My Exchange renders correctly on modern browsers such as IE 11, Edge, Google Chrome, Firefox and Safari, is highly dynamic and nearly free of technological constraints.
Customer Impact	Users are not limited to accessing My Exchange using only IE and software development potential is expansive.
Recommended Action	Use any modern browser to access My Exchange and look forward to proactive and timely software improvements!

My Exchange KPIs and Analytics

Enhancement Details:

Current State (Prior to this Release)	Legacy My Exchange does not track any trends or Key Performance Indicators (KPIs) such as Exchange traffic volumes or order exception rates.
Problem Statement	Visibility to overall Exchange utilization is extremely limited. It's very difficult to recognize trends.
Solution Details	The new My Exchange dashboards contain the following Key Performance Indicator (KPI) tickers and daily analytic visualizations that default to today's metrics: • PO Volume • Exception Rate • Invoice Volume • Transaction Volume Both the KPIs and analytics provide click-through accessibility to dynamic core application reporting and analytics pages.
Customer Impact	Strategic Exchange utilization information is at your fingertips, including: • PO exception rates • PO volume • Invoice volume • Transaction volume
Recommended Action	Familiarize yourself with the new My Exchange KPIs and analytics.

Enhanced, Order-Centric, Real-Time Reporting

Enhancement Details:

Current State (Prior to this Release)	Legacy Order Center Quick Clicks only provide visibility into orders and channels.
Problem Statement	Legacy Order Center does not provide visibility into orders by order types, such as consignment, rush or drop-ship.
Solution Details	The new My Exchange includes reporting on unique order types, such as consignment, rush, and drop-ship POs, in accordance with GHX EDI 850 maps and implementation best practices.
Customer Impact	Improved and expanded PO reporting which supports specific order management needs by order type.
Recommended Action	Familiarize yourself with the new “by type” orders reporting.

Advanced Search and Work List Management

Enhancement Details:

Current State (Prior to this Release)	Work list creation, management, and application to Quick Clicks are only available in legacy Order Center.
Problem Statement	Work lists are a powerful toolset but are currently limited to Order Center.
Solution Details	For a dynamic, customized experience, the toolset has been expanded to all the new My Exchange views. Advanced filtering and searching can be saved as shared views or work lists for orders, invoices and global transaction sets. Work lists can be private (specific to the user) or public (shared across organization users).
Customer Impact	Work more efficiently and save time by saving searches and creating customized views.
Recommended Action	Create work lists to save time and work more efficiently.

New to Suppliers – Exception Management Workflow

Enhancement Details:

Current State (Prior to this Release)	Legacy Order Center only provides suppliers visibility to order exceptions by type and across trading partners.
Problem Statement	There is no workflow or way for suppliers to manage order or item exceptions.
Solution Details	All user types can *manage* order and line item exceptions with a My Exchange workflow. Users can take ownership of and resolve exceptions both internally and externally (with your trading partner.) • To take ownership of a PO or line item exception, select a yellow flag • To communicate PO or line item exception resolution, select a green flag • Advanced Search and Work Lists include flagging functionality • Flagging can be audited – including information about who set the flag and any entered comments • Users can set a preference to omit resolved (green flagged) exceptions from the Pending Exceptions report • Yellow and green flags can be reset to 'not flagged' via one of the Exception Management reports. The exception(s) will reappear in the Orders Quick Clicks results
Customer Impact	Supplier users now have a tool to help them track their exception management
Recommended Action	Review and use the exception management workflow functionality.

Raw Document and Business Transaction Merge Grants Better Order Visibility

Enhancement Details:

Current State (Prior to this Release)	Legacy Order Center provides order and exception visibility to customer Exchange traffic. However, there is no raw document visibility to order cycle transactions in Order Center.
Problem Statement	Providers don't have any visibility tools to reference when investigating or troubleshooting order cycle transactions (PO, POA, ASN, INVOICE). Supplier users can't find and review transactions while using Order Center.
Solution Details	Raw transactions for orders and other business transaction documents are easily accessed in the new My Exchange PO details and PO history screens. Order cycle transactions can be emailed, downloaded, and exported directly from the Transaction Details screen, vastly improving ease of use.
Customer Impact	Easily gain access to the raw data for orders and other transactions that go through the Exchange.
Recommended Action	On the Orders page, select the All Orders or Pending Exceptions filters and click the link in the PO # column to view raw documents.

Recurring Order Exceptions Visibility

Enhancement Details:

Current State (Prior to this Release)	Legacy My Exchange does not report on recurring order exceptions.
Problem Statement	Users would like visibility into recurring exceptions in My Exchange so that they can identify and resolve them.
Solution Details	The new My Exchange provides visibility into recurring order exceptions by designated time frame, trading partner and exception type.
Customer Impact	With visibility into recurring exceptions, users can more efficiently resolve exceptions internally and externally (with their partners) to improve order fulfillment and drive down inaccuracies, cost and reconciliation time.
Recommended Action	Review and use the new Recurring Exceptions report in My Exchange.

Shipping Report

Enhancement Details:

Current State (Prior to this Release)	Legacy Supplier Order Center does not provide a Shipping Report.
Problem Statement	Users need easily accessed visibility to ASNs and proof of delivery via carrier tracking numbers.
Solution Details	The Shipping Report (via the Orders view) and the ASN transaction view make explicit visibility into shipments and proof of delivery (including a tracking number punch-out to carriers' web sites*) easy. **Known to our system*
Customer Impact	Regardless of organization type, all GHX customers now have access to the Shipping Report and ASN information.
Recommended Action	If your organization processes Advanced Shipment Notifications (EDI 856), be sure to familiarize yourself with the new Shipping Report.

Comprehensive Analytics

Enhancement Details:

Current State (Prior to this Release)	Legacy My Exchange doesn't have a way to show trend analytics to customers.
Problem Statement	Legacy My Exchange doesn't have data visualizations and can't show trend analytics for order and invoice volumes, order exception types, or total (global) Exchange Transaction sets, so it can't support extensive visibility to and understanding of customer Exchange utilization.
Solution Details	The new My Exchange provides order volume, invoice volume, order exception and transaction analytics. Users can look at their Exchange traffic trends by these criteria: • Overall • Specific trading partner • GHX channel • Other controls Providers who subscribe to CCXpert also have a new analytics page with metrics specific to contract validated PO lines, high and low trading partners with contract vs. non-contract spend, and contract validated vs. non validated purchasing trends by Buyers (Buyer ID). Suppliers who subscribe to G-Fax, there is also a new analytic page that provides metrics specific to volume trends, conversion rates, and Fax Exemption categories.
Customer Impact	Strategic information regarding your Exchange utilization and partner specific details is now at your fingertips.
Recommended Action	Review and use My Exchange Order Volume, Order Exceptions, Invoices and Transactions analytics. If applicable, review and use the Contract Performance or G-Fax analytics. **Caveat: Longer time spans (such as Last 30 Days and Last Quarter) may contain data deficiencies.*

Social Collaboration

Enhancement Details:

Current State (Prior to this Release)	Legacy My Exchange is a visibility toolset. The only cross partner communications supported in the current My Exchange is via email.
Problem Statement	Users can't leave comments for their trading partners, nor support rapid issue awareness and resolution.
Solution Details	In the new My Exchange, comments can be added to order cycle transactions in the Orders and Invoices applications. Users can choose to have comments visible internally (to your organization) and/or externally (to your trading partner) in Quick Clicks report results and in the PO, Invoice, or ASN views. Customers who wish to opt-out of this new functionality can request GHX disable the social collaboration feature. Opting out of the feature means that users cannot add comments in My Exchange, nor can their trading partners leave comments for them.
Customer Impact	With social collaboration, My Exchange users can more easily coordinate with their trading partners to escalate issues, solve problems, and achieve the "perfect" order.
Recommended Action	Use Comments in Orders and/or invoices in conjunction with your existing business processes and My Exchange email functionality to mitigate order cycle challenges such as: • Working rejected POs • Communicating obsolete/new product line and SKUs • Managing consignment, rush or drop-ship POs • Addressing Pricing exceptions • Clarifying Backorder expected ship dates • Collaborating and the real-time contact information sharing

Ship-to Error Management

Enhancement Details:

Current State (Prior to this Release)	Legacy My Exchange Transaction Center only provides visibility to transactions that have reached an error state on the Exchange.
Problem Statement	Suppliers and providers can't tell when transactions fail due to unregistered ship to account numbers.
Solution Details	When transactions fail because the mandatory Ship To Account # can't be validated, users see explanatory hover-over text in the Transactions reporting results. For "Unregistered Account" errors, the associated Transaction Details screen has a self-service "Register Account" link. This fast tracks account registration per the failed document. Additionally, now all providers have access to the Transactions application.
Customer Impact	Increased efficiency and ease of use through self-service account registration.
Recommended Action	Review terminated transactions in My Exchange Transactions. Where applicable, use the Register Account screen to begin account boarding with your trading partner.

Notifications

Enhancement Details:

Current State (Prior to this Release)	The only way for customers to monitor traffic is through legacy My Exchange document posting visibility and via communications generated and sent by GHX Customer Care.
Problem Statement	Legacy My Exchange users can't create notifications related to organizational business processes or individual user needs. There is no viable way to support rapid issue awareness and resolution.
Solution Details	With the new My Exchange, users can create notifications related to their organization's business processes with GHX. Customers can create notifications for these three use case categories: • Document Status (monitor the movement or end state of a document) • Document Correlation (monitor receipt of return documents for sent orders) • Document Volume and Trend (monitor if traffic volumes are outside of set parameters) Additionally, users can now see business process notifications that GHX has subscribed them to. In Notifications, users can also run reports and analytics related to the notifications for their organization.
Customer Impact	With Notifications, My Exchange users decide which issues are important to them and how they want GHX to communicate about those issues. Tailored notifications facilitate faster issue identification and resolution.
Recommended Action	In addition to your existing business processes and GHX Customer Care emails, use Notifications to create monitors for business processes critical to your business. For example: • Notify me if my Purchase Order Acknowledgements failed at GHX (Document Status) • Notify me when my invoices are sent successfully to my trading partner (Document Status) • Notify me when I have not sent any Advanced Shipment Notices successfully to any of my trading partners by 12:00 PM (Document Volume and Trend) • Notify me if I have received more than X Purchase Orders by 10:00 AM (Document Volume and Trend) • Notify me if Purchase Orders successfully sent to my vendor, but I have not received the Purchase Order Acknowledgement (Document Correlation)