

Product Vision Statement

MyExchange (x) – (MEX)

Statement

MyExchange (x) will be the next-generation, unparalleled order visibility and management solution that will allow for maximum efficiency and control to ensure order velocity through the Exchange. MyExchange (x) will provide:

- Clear visibility into order status
- Tools to manage and maintain order flow and velocity
- Order collaboration between Providers and Suppliers
- Enablement to achieve the “Perfect Order”

Objective

MyExchange (x) will execute the vision by meeting the following objectives:

1. Provide a user-centric interface that is specifically tailored to Provider or Supplier roles, goals and objectives. (Supports: efficiency, visibility)
2. Provide features and tools to ensure order velocity and completion. (Supports: velocity, control)
3. Provide reporting tools that enlighten Providers and Suppliers with critical information to improve their order process. (Supports: visibility, control)
4. Provide transparency into order data. (Supports: control)

Problem Statement

Primary visibility into purchase order flow through the Exchange is done through two different customer-facing product suites, **MyExchange Provider (MEP)** and **MyExchange Supplier (MES)**.

Both product suites include legacy products that have evolved over time, providing enhanced functionality, but not an enhanced user experience. These legacy products are burdened with inconsistent workflows, look-and-feel and data presentation.

Product Requirements Document

MyExchange Provider (MEP)

Problem Statement

The core products within the MyExchange Provider solution suite include:

1. Order Center
 - a. View orders
 - b. View status (reconciliation to response documents)
 - c. Reports
2. AP Center
 - a. Receive and view invoices
 - b. View status (reconciliation to response documents)

Optional MEP products include:

3. Contract Center
 - a. Price exception
 - b. **View contracts?**
 - c. **Reconciliation to contracts?**

MEP received a branding/theme update in 2012 with the addition of a “Copy PO Number” feature. While this was well received at the time, the other legacy products inside of MEP still present a misalignment between workflows and data presentation.

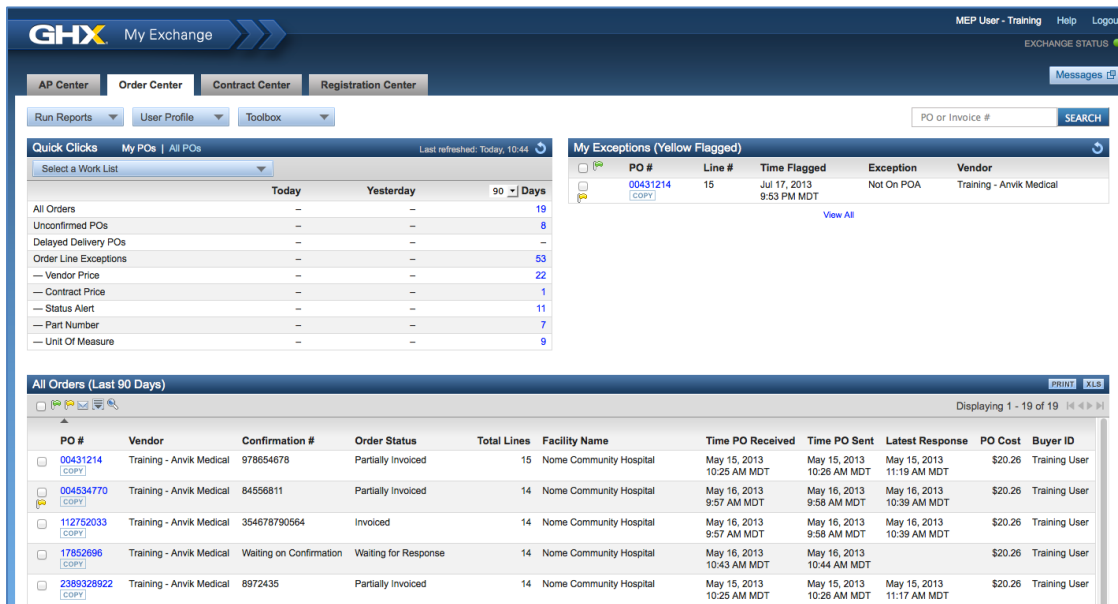


Fig. 1 – MEP Order Center after branding/theme update

Solution Goals

The solution shall coalesce disparate product UIs into an extensible, and generally singular UI, thereby bringing efficiency to most common Provider tasks. The organization of the UI shall align with the priority of Provider tasks and goals.

The following top tasks describe priorities for the next-generation MEP:

1. **Status of my orders:**
 - a. View status of my orders, with emphasis
2. **Diagnostic help on order issues:**
 - a. Provide diagnostic information for order exceptions, prescriptive suggestions to resolve order issues, or automatically fix issues where possible*
3. **Manage and resolve invoice discrepancies:**
 - a. May include sending “cost messages” and contact vendors*
4. **Communicate with Suppliers:**
 - a. Ability to communicate with a Supplier on an individual order.
 - b. Providers don’t know who to contact when an order fails or is held up.
 - c. Access to Supplier contact information*
5. **View order history:**
 - a. Ability to view individual order activity, including communication (order message) history.
6. **Reporting:**
 - a. Trending/analytics on exceptions
7. **Display:**
 - a. Reduce complexity in display by presenting only necessary order information, allow for progressive display of additional order information.

* Additional research is needed to define or validate.

User Personas

1. Provider Buyer
2. Provider Purchasing Manager
3. Provider Materials Manager

User Stories

1. As a (Provider), I would like to monitor my orders in a central location, so I can improve my efficiency by not monitoring multiple sources.

2. As a (Provider), I would like to easily identify those orders which are held, so I can keep orders flowing.
3. As a (Provider), I would like to easily access and view relevant order information, so I can reduce complexity and “information overload” in my daily tasks.
4. As a (Provider), I would like to easily and efficiently take corrective action on POs that are held, so I can keep orders flowing.

Product Requirements Document

MyExchange Supplier (MES)

Problem Statement

The core products within the MyExchange Supplier solution suite include:

1. Order Center
 - a. View order flow
 - b. View status (reconciliation to response documents)
 - c. Email alerts on orders they haven't responded to
2. RegCenter
 - a. Manage trading partner relationships

Optional MES products include:

3. Transaction Center
 - a. View all inbound and outbound (source) documents
 - b. Advanced search of documents
4. Order Intelligence
 - a. View and manage order exceptions
 - b. Create and manage rules to park orders
 - c. Create and manage rules to automatically correct POs

While these products possess a breadth of features and functionality, their different user interfaces present a misalignment between workflows, look-and-feel, and data presentation (Fig. 2).

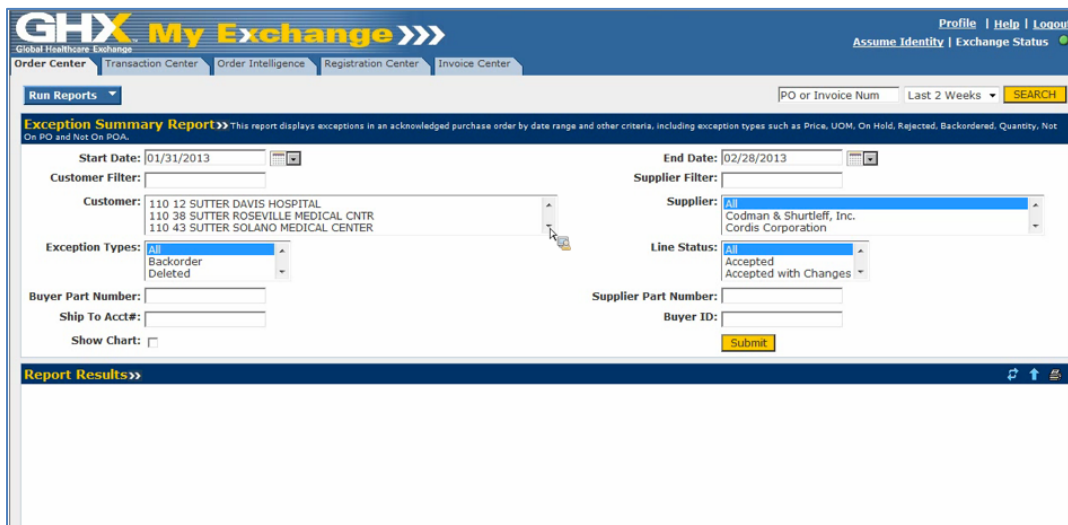


Fig. 2 – MES Order Center

Solution Goals

The solution shall coalesce disparate product UIs into an extensible, and generally singular UI, thereby bringing efficiency to most common Supplier tasks. The organization of the UI shall align with the priority of Supplier tasks and goals.

The following top tasks describe priorities for the next-generation MES:

1. **Status across all orders:**
 - a. View status on the flow of all purchase orders with an emphasis on orders that are currently held up from moving through the Exchange.
 - b. Suppliers may generally use outside systems (ERP, MMIS) to edit purchase orders, and not edit them in MES*
 - c. Ability to export order flow data*
 - d. Immediate access to edit held orders (i.e.: order status → manage exception)
 - e. Master data is missing or wrong (Sold To/Ship To/Bill To, UOM, Part #, Price)
2. **Communicate with Providers:**
 - a. Ability to communicate with a Provider on an individual order.
 - b. Suppliers don't know who to contact when an order fails or is held up.
 - c. Access to Provider contact information*
3. **View order history:**
 - a. Ability to view individual order activity, including communication (order message) history.
4. **Manage order flow:**
 - a. Ability to create and delegate work lists of orders (by exception, Provider, etc.)
5. **Reporting:**
 - a. Trending/analytics on the flow of their orders through the Exchange.
 - b. Monthly report on top 10 exceptions
6. **Advanced Search:**
 - a. Ability to quickly locate individual orders.
7. **Master data missing or wrong:**
8. **Display:**
 - a. Efficiency in display with ability to “drill in” to see more information. (i.e.: progressive display). “Simple” versus “Detailed” view*
 - b. View by order channel (fax, EDI, auto versus manual GFax)
 - c. Customization of what data is displayed

* Additional research is needed to define or validate.

User Personas

1. Supplier EDI Analyst
2. Supplier Customer Service Reps

User Stories

1. As a (Supplier), I would like to easily access and view relevant (or necessary) order information, so I can reduce complexity and “information overload” in my daily tasks.
2. As a (Supplier), I would like to monitor my orders in a central system, so I can improve my efficiency by not monitoring multiple systems.
3. As a (Supplier), I would like to easily view the status across all orders with an emphasis on those orders that are currently held from moving through the Exchange, so I can understand which orders are not being processed.
4. As a (Supplier), I would like to easily identify those orders which are held, so I can keep orders flowing.
5. As a (Supplier), I would like to manage held orders where status is displayed, so I can improve my efficiency by not having to go to another system.

UX Concept Response to Product Requirements

MyExchange Supplier

Proposed Solution

[Summary of proposed solution]

Document Revision History

Date	Version	Description of Changes	Author
13 Aug XXXX	0.5	Initial draft	Glenn Alban