

# MARKETPLACE 12.3 RELEASE/UPGRADE NOTES

## New Features Snapshot

Feature name/description	Impacted Users	Brief Description of Feature
Additional Product Showcase customizations	Requisitioners Administrators	Administrators will now customize main shopping page to allow hosted catalogs, punch-out icons, and forms (now all called stickers) to be grouped by commodity rather than by sticker type.
Email notifications for Product Search feedback	Administrators	Continue enhancement from 12.2 upgrade to send an email to administrators if requisitioners send Product Search feedback.
New approval interface and process	Approvers	Approvers can now list all approvals; approvers can also now filter approvals by various criteria.
Document attachment as filter criteria for document search	Requisitioners Approvers	All users can now filter documents after a document search based on whether or not they have attachments.

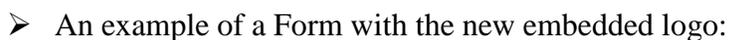
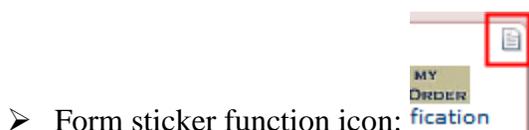
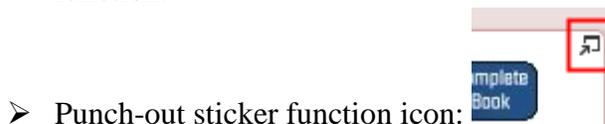
# GENERAL ENHANCEMENTS

## ADDITIONAL PRODUCT SHOWCASE CUSTOMIZATIONS

Additional improvements in the Product Showcase have been completed in 12.3, providing a better experience for shoppers. The most significant change is that the **Showcased Services** section has now been incorporated into the new framework, providing the ability to mix vendor hosted catalogs, vendor punch-out sites, and form/service stickers into custom showcase categories.

### Key points of Feature:

- This feature is **ON** (enabled) by default and can only be modified by system administrators.
- Existing **Showcased Services** (forms) links have been converted from a text format to a 'sticker' format to be consistent with supplier stickers. In addition, forms can now contain logos to assist with identifying the sticker/form.
- With this new flexibility, form stickers and hosted or punch-out supplier stickers can be added to any showcase and can be included within the same showcase. In our case, for example, a custom showcase called **Office & Computer, Furniture, Books** has a punch-out sticker for OfficeMax and a form sticker for OfficeMax restricted items.
- When selecting a form for the sticker, the form can be previewed by clicking on the form name.
- A new option called **Show sticker function icons** has been added and will display a small icon in the corner of punch-out and form type stickers as an indicator of the sticker function.



## EMAIL NOTIFICATIONS FOR PRODUCT SEARCH FEEDBACK

We began using the new Product Search Feedback feature delivered in 12.2, which allows users to send feedback to the system administrators when a search yields no results. In this update, a notification will be emailed when feedback has been submitted.

### Key points of Feature:

- This feature is **ON** (enabled) by default and cannot be turned-off, but is optional for use.
- An email notification is sent each time product search feedback is submitted.

## NEW APPROVAL INTERFACE AND PROCESS

In MarketPlace, approvals occur for purchase requisitions, changes to purchase orders, and sales orders. The goal of the approval changes for 12.3 is to make this process more intuitive. The changes include a new interface and quicker processing time for viewing approvals and moving to the next step in workflow.

### Key points of Feature:

- This feature is **ON** (enabled) by default and cannot be turned off. *However*, users can replicate the existing interface by selecting “Group Results By: Folders” and minimizing the Filtered By panel if desired (see below for more details).
- The approval folders (queues) have not changed. Approvers will still only be able to see and approve documents for the queues to which they have been assigned. If you have not been assigned to an approval folder, this change will not affect you.
- Administrators who oversee all approval folders will have access to view all of those folders in the new interface. They will also have the capability to view other user folders just like they can today.

### Details on the new approval interface:

**List View vs. Folder View:** There are two different view options for the new approvals interface. The **Folder** view is similar to the presentation today. The document number view, or **List** view, is great for users working with a large number of folders or admins with access to all folders. The column headers for each view are exactly the same. The main difference in the two views is the grouping by folder. The default view will be by folder. Approvers can change their default view to list by selecting List view.

**Aging Information:** Approvers will now see **aging information** pertaining to each document directly on the approval screen. Aging information is the specific number of days the document has been sitting in the approval folder. For example, if a requisition has been sitting in a department approval step for 10 days the interface will say **10 Days in Folder** followed by the name of the specific folder.

**Approval Actions:** There is a button available next to each document in the new approval interface. The default action for this button is **Assign**. This allows approvers to click the button and easily assign the document to themselves. Whenever the document is already assigned, the default action will be **Approve**.

**Filters:** Approvers will now be able to use filters to assist in finding the documents they are looking for. The filter functionality will allow users to narrow down the approval documents displayed. Examples include Supplier, Folder, Workflow Step, Unassigned, Assigned, and Department.

**Approvals Tab:** Individual tabs for approvals (IE, requisitions or sales orders) have been replaced with a single **My Approvals** tab. The default option for approvers will be requisitions unless they have access to approve only sales orders.

**Outbox:** Individual tabs for requisition outbox and sales order outbox have been replaced by a single **Outbox** tab. This tab presents the approvers with a list of everything they have either approved or rejected. Previously, there were separate outboxes available for each document type. The new outbox screen is a searchable single outbox for all document types.

**Manage Substitutions:** Approvers will now have a separate tab to manage their substitutions. The new **Manage Substitutions** tab presents users with all of the folders to which they have access. From this tab they can assign a substitute to individual folders or all folders.

For more information about approval process enhancements, please refer to the *[MarketPlace 12.3 Approvals Guide](#)*.

## **DOCUMENT ATTACHMENT AS FILTER CRITERIA FOR DOCUMENT SEARCH**

In 12.3 users will have the ability to search for documents that have attachments. A document status “With Attachments” has been added. The criteria can be set from the Advanced Search or as post-search filter criteria. When this status is selected, only documents with attachments will be returned in the search.

### **Key points of Feature:**

- This feature is **ON** (enabled) by default.
- The rules around what documents the users have access to have not changed. This simply makes it easier to identify documents with attachments.