MarketPlace 12.2 Upgrade Guide

New Features Snapshot

Feature name/description	Impacted Users	Brief Description of Feature
Customization of Product Showcase	Requisitioners	Administrators can now customize Supplier Showcase
Improving shopping around Empty Search Results & Shopper Feedback	Requisitioners	Searching methodology has been improved
Shopper Feedback from Empty Search Results	Requisitioners/ Administrators	Users can now send a message to the system admins if they are searching for a item and get no results
Free Shipping Option	Requisitioners/ Administrators	System Admins can now specify vendors that provide free shipping
View-Only Permissions for Supplier Profiles	All Users	All users can now view supplier (vendor) profiles
Improved Navigation between Approval Documents	Approvers	After approving a document, users will be brought to the next document in their queue
New Date Options in Document Search	All users	New Date options have been added in document search
Document Attachment Icon	All users	Documents with attachments will now display a paper clip icon
Identifying Documents with Errors	Requisitioners/ Administrators	Users can now search for documents with errors
Self-Help Tools Available for Users	All Users	All users will be able to access the Self-Help tools
Ability to Not Mix Form Types in Cart	Requisitioners	The Supplier Update form and the New Supplier Request form can no longer be added to a cart with other items or forms

IMPROVING SHOPPING EXPERIENCE AROUND EMPTY SEARCH RESULTS

One common challenge that shoppers face is when searching for goods or services and no product search results display. The root cause for empty search results can vary significantly, but is typically related to the supplier, form, or item selection available to the shopper. Some of these issues can be remedied easily by adding supplier keywords, forms attached to suppliers, or adding additional hosted catalogs. There are also some application improvements that would benefit this common search issue, and this is what we have focused on for the 12.2 release. This feature is ON (enabled) by default and cannot be turned-off.

Improvements to managing empty search results include:

- **Improved Part Number (SKU) searches**. A common search through advanced search is a part number or SKU search. If no search results are available when this type of search is performed, the system will look for previous orders of this part number using Document Search. For example, a user may search for a part number that is usually ordered through a punch-out but is not available in a catalog. If document search locates previous orders, a view previous orders link is displayed. NOTE: The user will only be able to view orders that they normally have access to through document search (their orders, orders for their department, etc).
- **Simple Search**. The keyword search using Simple Search is the most common and recommended way that end-users search in MarketPlace. This is an "all of these words" search meaning all of the words entered must be present in order for a match to display in product search results. If no search results are available, the search engine will expand this to use "any of the words." This new feature will provide more options for shoppers.
- **Advanced Search**. Advanced search is often used when a shopper is searching for more specific criteria, such as a specific supplier, manufacturer number, etc. When advanced search is used and multiple criteria fields are populated, and if no search results are available, the system will automatically "open up the search." It will remove the additional criteria and only search for keywords and/or part numbers in an effort to locate the item the user is looking for.
- **Shopper Feedback**. In some cases, even after the new features above are added, the user will still not be able to find the item or service they need. In this case, a new option is made available that allows shoppers to communicate their "need" or feedback to the system administrator. Details on this feature are listed below.

SHOPPER FEEDBACK FROM EMPTY SEARCH RESULTS

In some cases, the user will not be able to find the item or service they need, and the product search results are empty. In this case, a new option is made available that allows shoppers to communicate their "need" or feedback to the system administrator. This feedback tool will help administrators determine what suppliers, items, or forms should be added to better improve the shopping experience for their end users. This feature is ON (enabled) by default.

Key points of Feature:

- Administrators can view and export this feedback from the new Product Search Feedback tab in Catalog Management, although there is no email notification that feedback has been made.
- The Product Search Feedback tab includes the user, the date and time of the submittal, and the message.
- Administrators can respond to the user by clicking the user's name to go to the user's profile and then selecting the email.

FREE SHIPPING OPTION

Many suppliers provide free shipping when ordering goods from MarketPlace. A new feature is available that allows users to clearly identify when free shipping is available from the supplier. This information is visible within the product search results *of hosted catalogs* and the shopping cart. The "Free Shipping" option is set up at the supplier level and can be attached to a dollar threshold. For example, free shipping may be available with a supplier for any orders over $35.

Key points of Feature:

- This feature is OFF (disabled) by default and is optional for use.
- The Free Shipping option is set up at the supplier level, and can be attached to a certain dollar threshold.
- This option is independent of the Estimated Shipping & Handling option at the fulfillment center level.
- The "Free Shipping" indicator will only be used when *all* of the items in a vendor catalog have free shipping.

VIEW - ONLY PERMISSIONS FOR SUPPLIER PROFILES

Currently in MarketPlace, only certain users can view the full supplier profile. A new feature has been added that enables _all_ users to view supplier profile information, but does not allow them to edit the profile.

Key points of Feature:

This feature has been turned ON (enabled) for all users.

IMPROVED NAVIGATION BETWEEN APPROVAL DOCUMENTS

Previously, when accessing a document for approval, the approver was required to access the documents one at a time from the approvals page. With this new feature, the approver can open a requisition, purchase order, or sales order for approval, and navigate between the documents that are in the folder. On the document there is a next and previous link (similar to the document search navigation).

As part of the navigation, the user also sees the current approval queue displayed underneath the next and previous links. If the approver is assigned to multiple approval queues they can tell which approval queue they are working in.

In addition to the next and previous link, there has also been a new option added to the available actions called Approve/Complete & Show Next. This option allows approvers to approve the current document they are on and immediately be taken to the next document in their approval queue. This allows the user to conveniently access their approval documents without having to navigate back to the approval page and select their next available document. This action is only available from the document and will be the default action if the document is assigned to you.

Key points of Feature:

- This feature is ON (enabled) by default and cannot be turned-off.
- The approver will have the ability to navigate to any of the other documents in that queue (workflow folder). This applies to shared folders, dynamic workflow folders, and the "My Approvals" queue which is anything assigned to you.
- In addition to the next and previous link a drop-down box is available for the approver to choose which document to access.
- Approve/Complete & Show Next is the default action in the actions drop down if the document is assigned to you. Approve/Complete & Show Next will only be available from the document itself and is not an available action from the approvals page. In order to use this action you must have clicked to open the document.
- The display of the approval folder works for dynamic approvals, shared workflow folders, and advanced dynamic workflow folders. For dynamic workflow folders you will see the actual name and value. For example, if you have the approver for index 123456, you will see "Folder Index Code: Value 123456".

NEW DATE OPTIONS IN DOCUMENT SEARCH

Based on customer feedback, additional date options have been added to Document Search. These new options allow more flexibility when using specific date ranges to search for documents. The new date options are as follows:

- **Last History Date**: This refers to the date the last entry was made on the history tab (audit trail) of the document. This can be used to track things such as when a matching activity occurred on a PO or when a PO was sent to the supplier.
- **Before the Last X Days**: This option allows users to search for documents that are older than a certain number of days. For example, if you want to find all PO's that are older than ten days by allowing users to search by a specific number of days, it gives users the ability to create their own relative date range and save their search to be run again.
- **After the Last X Days**: This option allows users to search for documents based on future dates. For example, you can now search for a document that has an accounting date that is newer than

10 days. This means that the document has an accounting date that is at least 10 days from now or greater. It uses a start date of 10 days from the current date.

- **Before X Date**: This date option allows users to search for documents that are older than a specific date. For example, if you wanted to look for all PO's that were older than June 1st, you could do so using this relative date range.
- **After X Date**: This date option allows users to search for documents that are newer than a specific date. For example, if you wanted to search for requisitions that had an accounting date newer than June 1st you could do so using this relative date range.
- **Last X Days**: This option allows users to search for documents that have a date in the last X days. For example, you could use this to look for all requisitions that completed workflow in the last 10 days.
- **Next X Days**: This option allows users to search for documents that have a future date in the next X days. For example, a user can use this to search for all reqs that have an accounting date in the next 15 days.

Key points of Feature:

- This feature is ON (enabled) by default and cannot be turned-off.
- The new date options allow for more flexibility when searching for documents.
- Each date option is available on all of the document types in document search: Requisitions, Purchase Orders, Receipts, & Sales Orders.
- Document Searches can be saved using these new date options so that they can be run again in the future.
- For more information about document search date options see Document Search > Advanced Search in the Requisitioner's Handbook.

DOCUMENT ATTACHMENT IDENTIFICATION (ICON)

Currently in the Document Search results a user must click in to a document to determine if there are attachments.

With 12.2, a paperclip icon appears beside the document number on the results page to indicate there are attachments associated with the document. Clicking on the icon will open the document and take the user directly to the attachments tab. The icon is available for all requisitions, purchase orders and invoices that have attachments.

Key points of Feature:

- This feature is ON (enabled) by default and cannot be turned-off.
- The paperclip icon displays next to the document number in the document search results. The icon also displays next to the document number when performing an all documents search.
- The icon displays for requisitions and purchase orders with attachments.

- The system considers links as attachments. If the document contains a link, that link is displayed on the attachments tab. Therefore the document will have the attachment icon in the search results. Clicking the icon will take the user directly to the attachments tab for the document.

SELF -HELP TOOLS AVAILABLE FOR USERS

In MarketPlace, there are a series of self-help tools made available to administrators. Those tools include access to the on-line help system, handbooks, product release library etc. These tools are currently accessible to only users with the Administrator permission. With 12.2 non-administrator users will have access to the self-help tools.

The **new Help tab** is located under the home/shop tab and is visible to anyone who has the new permission Access Self Help Tools. When on the Help tab, users will see only the self-help tools and not the other administrator tools available on the admin tab. This is beneficial to users, allowing them to find answers to application questions themselves.

Key points of Feature:

- This feature is Off by default and must be turned on
- In order to see the new help tab, users must have the Access Self Help Tools permission. This permission is located under the administration tab and can be turned on at the user as well as the role level.
- The options on the Help tab are not configurable.

ABILITY TO NOT MIX FORM TYPES IN CART

This feature allows UMDNJ to specify a form type to not mix with other form types in the cart. This is useful to an organization when they want to allow a specific form type to be added to a cart by itself and not allow other forms or catalog items to be added. In our case, we have not allowed other forms or items to be added when using the New Supplier Request Form or the Supplier Update Form.

Key points of Feature:

- This feature is OFF by default.
- This setting is enabled from Forms administration -> form types sub-tab. Once the form type is open, the Do Not Mix setting can be enabled. By enabling this setting, any line items created with forms associated with the form type will not be allowed to mix with other forms, catalog, or punch-out items. A warning message will display for end-users who attempt to "mix" a cart.