

MARKETPLACE 14.3 RELEASE/UPGRADE NOTES

EFFECTIVE NOVEMBER 2, 2014

New Features Snapshot

Feature name / Description	Impacted users	Brief Description of Feature
Ability to Rename Bookmarks	ALL users	Allows the ability to rename bookmarks, allowing you to change the name to something more meaningful if you so choose.
Ability to Upload Multiple Attachments	ALL users	Allows the ability to upload multiple documents, forms and non-catalog items
Ability to Move Attachments	ALL users	Allows the ability to move attachments on forms and purchasing documents.
Ability to create a Custom Document Search Export in a Single File	ALL users	Customize Document Search h Exports
Inactive Users Indicated when Creating a Comment on a Purchasing Document	ALL users	Users who are not active are marked as Inactive when selecting the participates in the comment.

General Enhancements

Ability to Rename Bookmarks

Bookmarking pages in MarketPlace allows you to easily access frequently-used areas of the application. By default, the bookmark name is the same as the page name. As of 14.3, we have added the ability to rename bookmarks, allowing you to change the name to something more meaningful if you so choose.

Impact

Users Affected: All Users.

Key points of Feature

- This feature is ON (enabled) by default and cannot be disabled.
- You can change the bookmark names by accessing the Bookmark menu and selecting the Edit button. Beside each bookmark is the edit icon.  When you click on this icon, the name field becomes editable. You can enter and save a new name for the bookmark.
- Once you have saved the name change, you can restore the default name by clicking the restore icon to the right of the edit icon.
- Users cannot edit system bookmark names. They can only edit their personal bookmarks.

Ability to Upload Multiple Attachments

Previously, when attaching files to documents and forms, it was necessary to add them one at a time. As of 14.3, you have the ability to add multiple attachments at one time. In addition to documents and forms, you can add multiple attachments to non-catalog items, which is a new capability in 14.3.

Impact

Users Affected: All Users.

Key points of Feature

- This feature is **ON** (enabled) by default and cannot be disabled.
- New Permissions related to this Feature: None
- The new Add Attachment button displays where attachments can be added. Clicking on the button open the Add Attachments window. To add multiple file attachments:
 - Click on the **Select Files** button. This will allows you to select files from your hard drive or server.
 - Select the files you wish to attach and then click the **Open** button.
 - The files will be attached. You can override the file names by typing over them in the text box.
 - **Note:** The original file name will display when the attachment is downloaded.
 - Click the **Save Changes** button to save the attachments.

- Attaching files in this manner requires the standard permissions for attachments. In addition, attached files must adhere to any file size restrictions set at the organization level.
- If the supplier related to the document, form or non-catalog item does not accept attachments, the Add Attachments button will not display.
- This action can be performed on both header level and line level attachments in purchasing documents.
- Users must have permissions to manage both internal and external attachments for header level in order to switch the attachment type at the header level. Users must have permissions to manage both internal and external attachments for line level in order to switch the attachment type at the line level.
- Attachments are managed on the Summary tab of the document.
- A **Remove** drop-down link displays to the right of each attachment. When you click on the link two options will display:
 - Select the **Remove** option to delete the attachment entirely.
 - Select the **Move Attachment** to... option to move the attachment to internal or external.
- When the type is changed, the attachment moves to display in the appropriate area (Internal Attachments or Attachments for Supplier).
- The Visibility column of the Attachment tab is updated to reflect Supplier or Internal.
- If the supplier does not accept attachments, the move option is not available for internal attachments.
- The move option will not be available for Supplies Manager Sales Orders.

Ability to Move Attachments

Organizations are able to include attachments on forms and purchasing documents such as purchase orders and invoices. Attachments can be external, meaning suppliers can view, or internal, meaning only organizations users can view. Previously, in order to change the type, the attachment had to be deleted and reattached as the appropriate type. As of 14.3, organizations have the ability change the attachment type, eliminating the need to perform those extra steps.

Impact

Users Affected: All Users.

Key points of Feature

- This feature is **ON** (enabled) by default and cannot be disabled.
- New Permissions related to this Feature: None
- This action can be performed on both header level and line level attachments in purchasing documents.
- Users must have permissions to manage both internal and external attachments for header level in order to switch the attachment type at the header level. Users must have permissions to manage both internal and external attachments for line level in order to switch the attachment type at the line level.
- Attachments are managed on the **Summary** tab of the document

- A **Remove** drop-down link displays to the right of each attachment. When you click on the link two options will display:
 - Select the **Remove** option to delete the attachment entirely.
 - Select the **Move Attachment to...** option to move the attachment to internal or external.
- When the type is changed, the attachment moves to display in the appropriate area (**Internal Attachments or Attachments for Supplier**).
- The **Visibility** column of the **Attachment** tab is updated to reflect Supplier or Internal.
- If the supplier does not accept attachments, the move option is not available for internal attachments.
- The move option will not be available for Supplies Manager Sales Orders.

Ability to create a Custom Document Search Export in a Single File

MarketPlace 14.2 added the ability to create a custom document search export. Custom export allows you to select the fields to be included in the export. Previously, when a custom export was run, the data was exported into one or more files, depending upon the fields and data included in the export. For example, a requisition export may have the requisition information in one file and the corresponding supplier information in another. As of 14.3, you have the option to configure the export the data to a single file.

Impact

Users Affected: All Users.

Key points of Feature

- This feature is ON (enabled) by default and cannot be disabled.
- New Permissions related to this Feature: None
- When configuring a custom export template, a new configuration option is available; **How do you want your custom export file?** The option is set to **Separate files** by default. You can select **All in one file** to export to a single file.
- **Important:** Choosing to export all data into a single file has the potential to create a very large file. You should carefully assess the need to have the data in a single file.
- For additional information about document search export and managing custom export templates, please see Document Search Export in the online help.

Inactive Users Indicated when Creating a Comment on a Purchasing Document

When comments are added to a purchasing documents, you have to option of notifying specific users associated with the document (prepared for user, prepared by user, etc.). A list of appropriate users displays and the user creating the comment can select one or more of them for notification. Previously, there was no indication that a displayed user has a status of Inactive. In 14.3, users who are not active are marked as **Inactive**.

Impact

Users Affected: All Users.

Key points of Feature

- This feature is **ON** (enabled) by default and cannot be disabled.
- New Permissions related to this Feature: None
- The feature is an indicator only. You can still select the user for notification.
- When **Add Comments** is selected on the **Comments** tab of the purchasing document, associated users display and can be selected for notification. **Inactive** users are italicized and **inactive** displays in parentheses to the right of the name.
- Inactive cannot be added through the **Add Email Recipient** feature.
- For additional information about adding comments to purchasing documents, please see **Adding a Comment to a PR, PO or Invoice** in the online help.