MARKETPLACE 12.1 RELEASE/UPGRADE NOTES

GENERAL ENHANCEMENTS

Document Search Functionality

Document Search provides system users with a simple way to search for documents, gather purchasing data for analysis, and quickly find the “right” information. This functionality, which was originally released in November 2011 (11.3), allows users to search for purchase requisitions, purchase orders, invoices, receipts, and sales orders.

New Features:

- **All document types can be searched,** including sales orders and receipts. Note: The document types available for search depend on your organization’s licenses and user permissions.
- **The History tab is no longer available,** and Document Search will be the primary way to search for documents in MarketPlace.
- **Miscellaneous improvements and enhancements**.
- **New Search options and post search filter options**.
- **Improved navigation between documents**.
- **More sophisticated options for exporting and scheduling document search exports.**
- **The ability to share saved document searches** amongst a department or select group of users.
- **Better user experience by remembering what type of search the user performed last**.

IMPORTANT NOTE: By Monday, March 26th, 2012, we anticipate that all historical data in MarketPlace will be available for searching.

Miscellaneous features for Document Search in 12.1:

Multiple inputs are allowed for advanced searching. For example, you can enter multiple PO numbers, requisition numbers, etc. The document number fields (*Document Number, Requisition Number, Purchase Order Number, Receipt Number,* and *Sales Order Number*) all allow for multiple inputs. You can key in multiple numbers in any of those fields and it will search for all of those values. When multiple numbers are keyed in, the system performs an “OR” search. For example if you keyed in P0400145, P0400146, and P0400147, it would search for all of those PO’s and return them.

Searching by Active AND Inactive suppliers. From Advanced Search, the supplier search field allows you to search for both active and inactive suppliers. By default, when typing in the supplier name, a list of matching active suppliers displays. To view inactive suppliers also, click the magnifying glass to the right of the field.

Searching for documents from multiple suppliers. From Advanced Search, the supplier search field allows you to select multiple suppliers. Note: You cannot search for multiple suppliers from the simple search.

Searching for documents from multiple system users. There are a number of user fields available through Advanced Search. These include *participant, owner, prepared for, prepared by, approved by,* and *received by*. In each of these user search fields, you can enter multiple users. When multiple user names are entered, an “or” search is performed, meaning it will return results with any of the users listed. As you begin typing in a user’s information, it will pre-populate with values matching your entry.

New Search Options and Post – Search Filters

As a result of customer feedback over the last few months, we have added additional search options and additional filtering options post search. These new ways to search include:

- **Total Amount** – The total is available on the advanced search pages for each document type, including all documents. When searching by the total, you may select from three options: *is greater than, is less than*, or *is between*. The total amount is not available as a post-search filter.

- **Commodity Code** – Commodity code is searchable in both the simple search and the advanced search. When searching for documents by the commodity code, the system will search the commodity code value on the actually document. If you use commodity code mapping, and the mapped value is what is on the document, then the mapped value will be the value you will search by. When using simple search, key in the commodity code you wish to search by and perform the search. On the advanced search pages, you can enter the commodity code value or search for your commodity code value by clicking on the magnifying glass next to the field. Commodity code is not available as a post search filter.

- **Form Name** – Form name is available and searchable in both the simple search and on the advanced search pages. The form name is an exact match, meaning it must be typed in exactly as it is in the system. Form name is not available as a post-search filter.

- **Form Type** – Form type is available on the advanced search pages. It is not searchable from the simple search screen. In order to search by the form type, you would select the form type (e.g. *Services*) from the form type drop down menu on the advanced search pages. You may also select multiple form types if you wish to search by multiple ones. (E.g. *Services, Change Order Form*). Form Type is also available as a post-search filter. This allows you to filter your results by specific form types.

- **User Information** – Searching by user information is now available in the simple search. You may key in a user’s username, first name, last name, or email address and it will return documents which include that user’s information. Particular post-search filters are available for users. (e.g. *Prepared By, Prepared For, Approved By*)

- **Product Flags** – Product Flags (e.g. *Recycled, Toxin, and Hazardous*) are now available on the advanced search pages. This allows users to select a product flag or multiple product flags prior to searching. By doing this, users will be able to see the documents that contain one or more items that are flagged with the product flag or flags they selected. Product Flags are also available as a post-search filter. This allows users to filter their search results based on the product flag for the items within the documents.

- **Workflow Step** – The current workflow step is searchable on the advanced search pages. Users can search by one or more workflow step to find documents currently in the step(s) selected. This type of search can only be performed for a requisition. The Workflow Step is also available as a post-search filter. This allows users to narrow down their search results based on particular workflow steps.

- **Participant** – Participant is a field on the advanced search pages. Participant means any user that has touched the particular document. For example, if a user makes a comment on a requisition, he or she is now a participant for that requisition. You may search for participants by their username, first name, last name, or their email address. If you key in the user information into the simple search, it also treats it like the participant field. Participant is not available as a post-search filter. Specific user types are, however, available as post-search filters. (e.g. *Prepared By, Prepared For, Approved By*)

- **Transaction date** – Transaction date is now available on the advanced search pages for Requisitions and Purchase Orders. This allows users to search for documents based on the Transaction date. When you select the Transaction date, whatever relative date range you select will apply to the Transaction date. For example, you could select Transaction date and a relative range of last 30 days when doing an Invoice search. This will return all invoices where the Transaction date is within the last 30 days.

Navigating Documents Within Your New Search Results

When you are viewing a document, you now have the ability to navigate to other documents within your Document Search results. After clicking on a document number and opening up the document, you can scroll through each document within your results. You will stay on the document in edit mode without ever having to return to your Document Search results. In addition to scrolling, you can also select from a drop down menu on the far right and pick another document you wish to view.

For example, if you have performed an All Documents search for a particular supplier, your search results will contain multiple document types. If you have opened up a PO but do not want to scroll through the next few requisitions, you can simply select the next PO number you wish to view from the drop down. All of this is done from the document and you never have to return to your results and select the next one.

NOTE: If you wish to return to your search results, there is a link on the document that allows you to do so. This prevents you from having to click the browser's back button multiple times in order to get back to your results.

Document Search Exports

Document Search allows you to perform a search across all applicable document types (*Requisition, Purchase Order, Invoice, Receipt,* & *Sales Order*). Prior to 12.1, you could export data for a specific type of document. Now, a user can export by "All Documents."

For example, if you do an all documents search on a PO number you will get returned to you all of the documents related to that PO. That could be requisitions, invoices, as well as receipts. You can now export this group of documents in a single file.

- The All Documents Export is a **SCREEN** export only. The other export file types are not supported with this export.

- The column headers in the export will be the exact same as the column headers on the Document Search All Documents search results screen.

- Exports will only be allowed for results of 50,000 or less. For searches that return more than 50,000 matches, the export option will not be available. When running a Document Search, it will now tell you at the top of the screen how many total results there are. For example, if you have run a search that has 70,000 results, the message will say "Showing 1 – 10,000 of 70,000 total results." Within Document Search, you will only have visibility into 10,000 results. But if you run an export, you will get up to 50,000 results. If your result set is over 50,000 the export button will be grayed out, preventing you from running an export that is too large.

Key points of Feature:

- The All Documents Export is a **SCREEN** export only. The other export file types are not supported with this export.

- The column headers in the export will be the exact same as the column headers on the Document Search All Documents search results screen.

- Exports will only be allowed for results of 50,000 or less. For searches that return more than 50,000 matches, the export option will not be available. When running a Document Search, it will now tell you at the top of the screen how many total results there are. For example, if you have run a search that has 70,000 results, the message will say "Showing 1 – 10,000 of 70,000 total results." Within Document Search, you will only have visibility into 10,000 results. But if you run an export, you will get up to 50,000 results. If your result set is over 50,000 the export button will be grayed out, preventing you from running an export that is too large.

- Any saved searches from 11.3 related to Document Search will be migrated over. They will exist in a folder called "My Saved Searches". Users will not lose any saved searches from 11.3.

- Any saved queries from the history tab will be migrated over into the new format. Personal saved queries will exist in a folder called "My Saved Queries". Any shared queries from the history tab will exist in a folder called "My Shared Queries".

Sharing Saved Document

Sharing is a concept in MarketPlace that is used for favorites and forms, and can now be used with document search. Sharing allows organizations to share information to the appropriate people, whether that is a select group of users, a department, a business unit, a role, etc. For example, if a department head asks how many POs their department had last month, you can create the search for them and share it with them. This gives them the ability to run it at any time and get their data on demand.

In addition to creating folders to organize their favorites, users may also create shortcuts to specific searches. Creating a shortcut for a search will cause the search to appear underneath the search box on the initial Document Search screen. This allows users to quickly access the search without having to click on the saved searches tab and open up individual folders. Users can create these shortcuts with both their own searches as well as the shared searches.

Important: All previous saved searches will be brought over into this new format. If you had saved queries from the history tab they will brought over and will be available under **Document Search _ Saved Searches.** This will allow users to modify, reorganize or delete any of the saved queries they had in the past. In addition, users who Document Search saved searches from 11.3 will also have their saved searches brought over into this new format.

Key points of Feature:

- Any user will have the ability to save and manage their personal saved searches. In order to share saved searches with others they will need to have the **administer personal favorites** permission. This will allow users to share searches with others.
- Saved Document Searches use relative date information (instead of static dates like history searches use). For example, you can save a search for the last 7 days.
- Saved searches are accessed through the Document Search tab and are saved by the name and the description.
- Users may create their own folders to organize and manage their saved searches. For example, a user may want to create a folder for their PO Searches, and another folder for the PR searches.

Remembering My Last Document Search

Users often run the same type of search frequently. For example, someone in AP may search by invoice, whereas a shopper may search by supplier. Document Search now will remember where you initiated your last search from. After running a search, the next time you click the Document Search tab you will immediately be taken to the same page from which you last ran a search.

For example, if a buyer in purchasing is always looking up requisitions from the Document Search advanced search page, the next time they click Document Search; it will take them to the requisition advanced search page. This saves the user several clicks by taking them to the last page they ran a search from. If they wish to go to another page there are links available to take them to other document types and/or to the simple or advanced search pages.

Key points of Feature:

- The system will always remember your last Document Search and take you there when clicking on the Document Search tab.
- The system does not remember the parameters you last keyed in. It will only remember the page you last initiated a search from.
- Should you wish to go to a different page than where you last were, links are available to take you to any of the Document Search pages.

REPORTING ENHANCEMENTS

New Report: Organization Spend Overview

A new report is available to MarketPlace customers that allows them to easily address questions around organization spend. We define organization spend as the breakdown of your spending across catalog, punch-out, and non-catalog suppliers. Currently, much of this information is available to our customers, but requires an extract, which can be cumbersome for those users who want to access the information simply and quickly.

Key points of Feature:

- This report is printable and exportable.

- User can now view their supplier spend by the same date filters as Document Search (including Fiscal Year).

- The report has a graphical representation of Catalog vs. Non Catalog supplier spend.

- This report replaces the current Dashboard report (Reports->Purchases->Dashboard). The Dashboard report will continue to be available for customers for the 12.1 release, but starting with the 12.2 release (July 2012), will no longer be available.