# Phoenix the New User Interface

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How to Navigate in the New User Interface Phoenix

You will be able to toggle back and forth from Classic View (the version you have now) to the Phoenix View until the latter part of March, 2014, when SciQuest plans to inactivate the Classic View. To choose the Phoenix View click on “profile”, then click on the “Personal Settings” tab. Select Phoenix from the User Interface Style drop down and click “Save”.

To return to the Classic View click on your name, “View My Profile” and the “Language, Time Zone and Display Settings” link under the “User Information and Settings”. Now select Classic from the User Interface Style drop down and click “Save”.
The new interface is comprised of three major areas, the Top Panel, Navigation Bar and the Workspace.
TOP PANEL

The Top Panel contains the Texas A&M University Logo and the Banner. The Banner contains several tabs/areas important to users.

- Your Name,
- Bookmarks,
- Action Items,
- Notifications,
- Your Cart and Search.

When you click on your name you will see a drop-down menu that contains View My Profile, Set My Home Page, Logout, a list of items that you have recently worked on, and the quantity of the various items. To set your "Home Page" see page 16.

NOTE: Your list might look different than what is shown here depending on your roles.

In Classic View most of these links are found under the “document search” tab.

When you click on one of these items it will take you to the related content in the familiar Classic format.
Bookmarks can be configured for quick access to your frequently used screens/pages. You may add, remove and/or reorder your Bookmarks at any time. To set up your “Bookmarks” see page 14.

Clicking the “Action Items” tab will give you a list of items that require you to take action, such as Requisition Approvals or Administrative items, and the quantity of each. When you click one of the listed items it will take you straight to the folder and the actual documents, when opened, will appear in the Classic format. Action Items are located in the lower left corner of the screen of the Classic format.
Next is Notifications. All users will see the Notifications tab but may not have actual content.

Next is your shopping cart. When you click on the “Shopping Cart” it will bring up a list of the items in your active cart. For more information on Previewing the cart see page 18.

NOTE: This gives you a quick view of your active cart’s contents.
New to Phoenix is what SciQuest refers to as a “bread crumb trail”, which shows the page currently being viewed in the workspace.

NOTE:
The down arrow indicates that there are sub-links under the link.
Examples of sub-links:
View Draft Shopping Carts
View My Orders (Last 90 Days)

NOTE:
The cart/draft requisition number now appears in the bread crumb trail.
The final tab on the Top Panel is a magnifying glass icon, which designates “Quick Search”. Quick Search allows you to search for documents (Requisitions, Purchase Orders, and Invoices) by their number or by a person’s or supplier’s name. The search defaults to “All” but you may narrow your search results by selecting one of the specific search categories from the drop down menu.

NOTE: Quick Search has a quick-key that you can use instead of clicking on the magnifying glass. The Quick Search quick-key is ALT+Q.
NAVIGATION BAR

When you hover over any of the icons a fly-out menu will appear. The only icon on this bar that does not have a fly-out menu is the Home icon.

HOME
Clicking on this icon takes you to the Home Page you have set.

To set your “Home Page” see page 16.
NOTE: This is the equivalent to “Shop Everything” search on the Classic homepage.

NOTE: Shop has a quick-key that you can use instead of clicking on the shopping cart. The Shop quick-key is ALT+P.

Only Department Allocators will see this link.
Catalogs and Contracts Icon & Accounts Payable Icon
The Menu Search feature will help you learn your way around Phoenix by returning a list of screens containing your search word. Clicking a search results will take you directly to the screen, which will include a bread crumb to further help you navigate.

NOTE:
Menu Search has a quick-key that you can use instead of clicking on the binoculars. The Menu Search quick-key is ALT+M.

NOTE:
All AggieBuy roles will see the Supplier Management link on the fly-out but only AggieBuy Admin will see the other two.
Creating Bookmarks for Commonly Used Pages
In Phoenix

Bookmarks can be configured for quick access to your frequently-used pages. You may add, remove and/or reorder your Bookmarks at any time.

The Bookmarks menu is located in the Top Banner and can be accessed by clicking on the star icon to the right of your name or by pressing Alt-K.

**Quick-Steps**

To bookmark a page

1. Navigate to the page you would like to Bookmark (*pg. 14*)
2. Open the Bookmarks menu by clicking on the Star (*pg. 14*)
3. Click “Bookmark” this page (*pg. 14*)

Only menu items are available to be added as bookmarks. If a user attempts to add a lower level page as a bookmark (such as a specific requisition), the system will automatically locate the menu item associated with that page (such as Document Search) to create the bookmark.
Once you get more than one page bookmarked you can change the order they are in or delete them from your bookmarks.

NOTE: Now when you click on the “Star” you will see your bookmark(s). “My Bookmarks” has a quick-key that you can use instead of clicking on the Star. The My Bookmarks quick-key is ALT+K.

To delete a bookmark click on the red circle with the negative sign.

To move a bookmark click and hold the three bars and drag them up or down. Release when bookmark is in your preferred place.

Click “Done” when finished.
How to Set My Home Page
In Phoenix

The home page is the page displayed to a user after logging in to the application, and in AggieBuy Classic the default home page is the Shopping screen. A new feature in the Phoenix interface allows users to set their own home page.

Quick-Steps

Set your Home Page

1. Navigate to the page you would like as your Home Page (pg. 16)
2. Click on the drop down next to your name (pg. 17)
3. Click “Set My Home Page” (pg. 17)
4. Select “Current Page” (pg. 17)
5. Click “Save” (pg. 17)

Change your Home Page back to the Default

1. Click on the drop down next to your name (pg. 17)
2. Click “Set My Home Page” (pg. 17)
3. Select “Default Home Page” (pg. 17)
4. Click “Save” (pg. 17)

Navigate to the page/screen you want your home page to be.
Here I have navigated to the Approvals page.
Click on the drop down arrow next to your Name.

Click “Set My Home Page”

Select either Default Home Page, which will change/keep your Shopping home page, or Current Page. Then click “Save”.

Select either:

- Existing Home Page (the home page you selected and saved),
- Default Home Page (the Shopping home page), or
- Current Page (the page you are on now).

Then click “Save”.

NOTE: Set My Home Page has a quick-key that can be used. The Home Page quick-key is ALT+1.

NOTE: After you changed your home page preference the Set My Home Page will give you three choices. You will always have the choice to go back to the default page.
When clicking on the cart you will now see the cart name and you can choose the screen you would like to start on.

“View My Cart” will go to the first shopping cart screen.

“Checkout” will go to the “Final Review” shopping cart screen.
FINAL REVIEW SHOPPING CART SCREEN
Menu Search
In Phoenix

Menu Search has been improved and can help you learn to navigate Phoenix. Like some of the other searches it will show you suggestions as you type.

Keywords can be set-up by AggieBuy Administration. If you have a keyword you would like associated with an AggieBuy page to make it easier for you to look up send in a request to aggiebuy@tamu.edu

It also shows on which fly-out menu the page is located.
How to Configure Notification Delivery Options
In Phoenix

As part of the new Phoenix user interface some email Notifications are also available as application Notifications, which are accessed within AggieBuy in the Notifications section of the top banner. Many Notifications can be configured to be received by both email and within the application.

Quick-Steps

To Configure Notification Delivery Options

1. Click on the drop down next to your name (pg. 21)
2. Click “View My Profile” (pg. 21)
3. Click “Email Preferences” (pg. 22)
4. Find the Notification you want changed
5. Click on the drop down next to the Notification (pg. 22)
6. Select the way you want to be notified (pg. 22)
7. Click “Save” (pg. 22)

To view Notifications

1. Click “Notifications” in the Top Panel (pg. 23)
2. Click on the Document to bring it up or you can delete the notification by clicking on the “x”. (pg. 23)
### Email Preferences

<table>
<thead>
<tr>
<th>Administration &amp; Integration</th>
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<tbody>
<tr>
<td>Search Result Export Confirmation</td>
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<tr>
<td>PR Export Failure Notification</td>
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<tr>
<td>Invoice Export Failure Notice</td>
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<table>
<thead>
<tr>
<th>Shopping, Carts &amp; Requisitions</th>
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<th></th>
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<tr>
<td>Prepared By - Cart Assigned Notice</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>Prepared By - PR line item(s) rejected</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>Prepared By - PR rejected/returned</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>Cart Assigned Notice</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>Receive PR and PO notifications for Cart Assigned</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>Cart Shared Notice</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>PR submitted into Workflow</td>
<td>None (Default)</td>
<td>None (Default)</td>
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<td>None (Default)</td>
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<tr>
<td>PR pending Workflow approval</td>
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<td>PR Workflow Notification available</td>
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<td>None (Default)</td>
<td>None (Default)</td>
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<tr>
<td>PR Workflow complete / PO created</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
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<tr>
<td>PR line item(s) rejected</td>
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<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
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<tr>
<td>Cart/PR rejected/returned</td>
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<td>Receive PR and PO notifications for shared carts</td>
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<table>
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<tbody>
<tr>
<td>Prepared By - PO Workflow complete</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
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<tr>
<td>Prepared By - PO sent to Supplier</td>
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<td>None (Default)</td>
<td>None (Default)</td>
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<tr>
<td>Prepared By - PO line item(s) rejected</td>
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<tr>
<td>Prepared By - PO rejected</td>
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<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>PO submitted into Workflow</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>PO pending Workflow approval</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>PO Workflow Notification available</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>PO Workflow complete</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>PO sent to supplier</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
<tr>
<td>PO Line Item Ship Notice</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
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</table>

<table>
<thead>
<tr>
<th>Contract Manager</th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract Budget/Tier Notification</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
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</tr>
<tr>
<td>Contract Date Notifications</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
<td>None (Default)</td>
</tr>
</tbody>
</table>

**NOTE:**

**Notification** - will only show up when you are in AggieBuy

**Email** - the system will email you the notification

**Email & Notification** - you will receive a notification within AggieBuy and an Email.

**None** - you will not receive any type of notification.

Here it shows you the system Default, which is usually “None”.

Click the drop down arrow. Now you can select which option you would like. Just remember if you choose Notification only you have to log into AggieBuy to see the notification.

Then Click “Save”
You can see that there are two Notifications. Click on “Notifications”.

Click on the document information. This will bring the document up and will delete the Notification.

Clicking on the “x” will delete the notification.

Click “Click here to see all notifications”. This will take you to the Notifications page.

On the Notifications page you can view the document, delete the notifications one by one or Clear All Notifications.
Phoenix Quick-Key Legend

Alt + 1  Home Page
Alt + K  My Bookmarks
Alt + M  Menu Search
Alt + P  Shop
Alt + Q  Quick Search