Phoenix the New User Interface

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How to Navigate in the New User Interface Phoenix

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
- 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 14.

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 12.

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 16.

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 cart/draft requisition number now appears in the bread crumb trail.

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)
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 14.
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

Catalogs and Contracts

View Contracts
Search For Contracts

Accounts Payable

Invoices & Receipts

Invoices & Receipts
AP Dashboard
View Draft Invoices
Search For Invoices
Search For Receipts
NOTE: All AggieBuy roles will see the Supplier Management link on the fly-out but only AggieBuy Admin will see the other two.

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.
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. 12)
2. Open the Bookmarks menu by clicking on the Star (pg. 12)
3. Click “Bookmark” this page (pg. 12)

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. 14)
2. Click on the drop down next to your name (pg. 15)
3. Click “Set My Home Page” (pg. 15)
4. Select “Current Page” (pg. 15)
5. Click “Save” (pg. 15)

Change your Home Page back to the Default

1. Click on the drop down next to your name (pg. 15)
2. Click “Set My Home Page” (pg. 15)
3. Select “Default Home Page” (pg. 15)
4. Click “Save” (pg. 15)

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: 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.

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

NOTE: Set My Home Page has a quick-key that can be used. The Home Page quick-key is ALT+1.
When clicking on the cart you will now see the cart name and you can choose the screen you would like to start on.

**FIRST SHOPPING CART SCREEN**

- “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

![AggieBuy TEST Site](image-url)

**Summary**

- **Ordering Department**: 02-GOLD (02-GOLD)
- **Cart Name**: CA1 test
- **Prepared by**: Training Allocator14
- **Prepared for**: Training Allocator14
- **Cart Description/Purpose**: no value
- **Order Category**: 1 - Regular
- **Fund Type**: no value
- **Report Reference A**: no value
- **Report Reference B**: no value
- **Pre-Paid & Add**: no value
- **Funds to be Procured**: no value
- **Emergency (attach justification)**: no value
- **Special Source (attach justification)**: no value
- **Contract Number**: no value
- **Do Not Encumber**: no value
- **Start Date**: no value
- **End Date**: no value
- **Rush the FYnt Process**: no value
- **Special Payment Method**: Trade-in

**Ship To**

- **Ship Via**: Best Carrier-Best Way
- **Requested Delivery Date**: no value

**Bill To**

Texas A&M University  
Financial Management Operations  
ATHE Accountable  
770 Agronomy Road - 5302  
6000 TAMU  
College Station, TX 77843-6000  
United States

**User**

- **Buyer**: no value
- **Buyer Email**: no value
- **Buyer Phone Number**: no value

All done! The required information has been completed and this request is ready to be submitted.

Once you have reviewed the details, you may continue by clicking the button at the top of the page.

> View/edit by line item...
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.

When the word “search” is partially typed in the Menu Search will show everything with the letters “sear”. You can keep typing to narrow the list down or if you see what you are looking for you can click on it.

It also shows on which fly-out menu the page is located.

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
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. 19)
2. Click “View My Profile” (pg. 19)
3. Click “Email Preferences” (pg. 20)
4. Find the Notification you want changed
5. Click on the drop down next to the Notification (pg. 20)
6. Select the way you want to be notified (pg. 20)
7. Click “Save” (pg. 20)

To view Notifications

1. Click “Notifications” in the Top Panel (pg. 21)
2. Click on the Document to bring it up or you can delete the notification by clicking on the “x”. (pg. 21)
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