

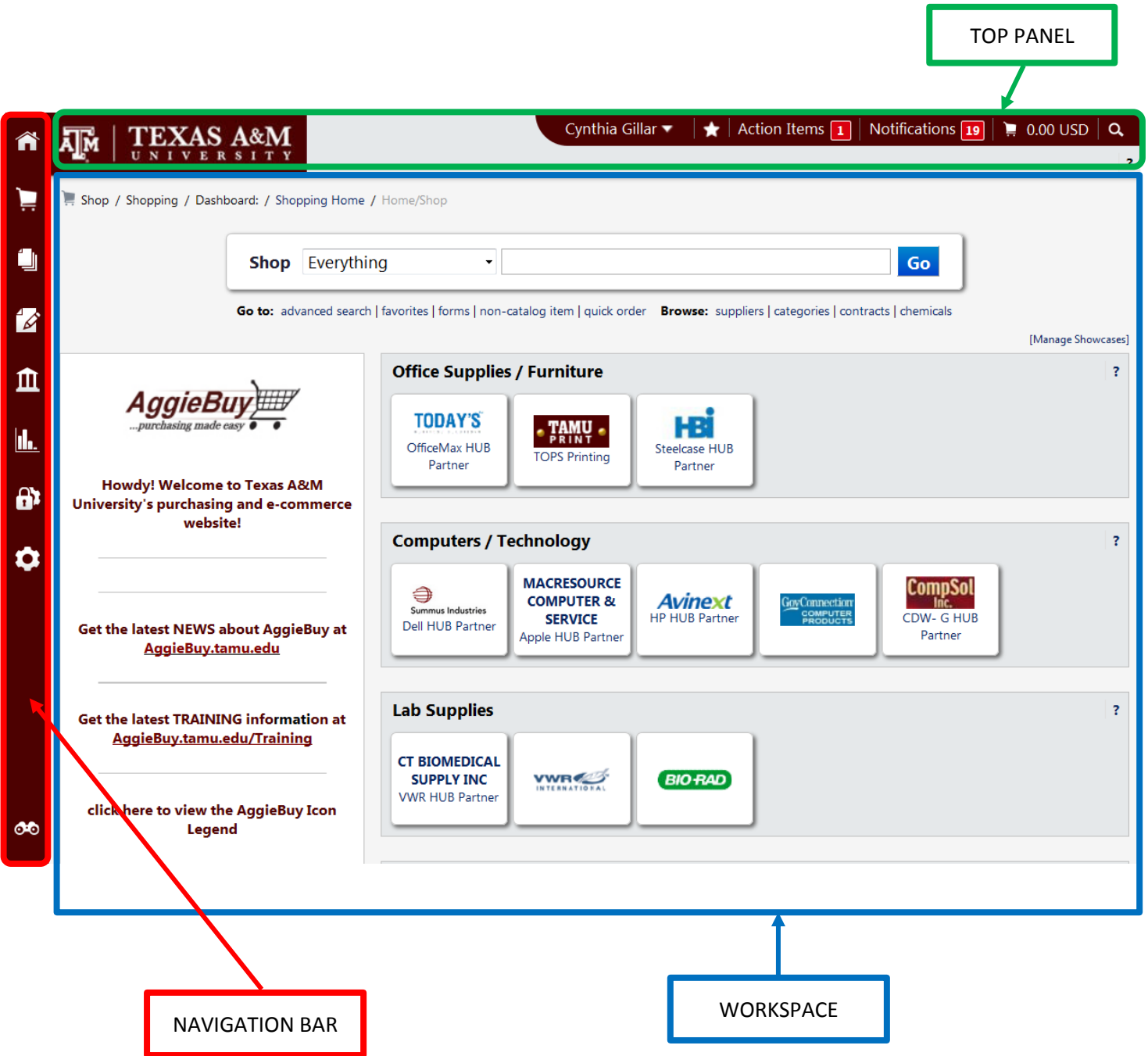
# Phoenix the New User Interface

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# How to Navigate in the New User Interface Phoenix

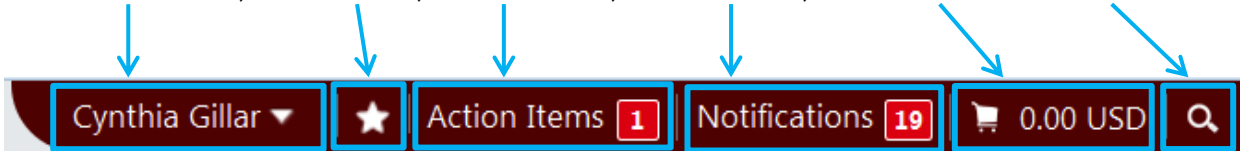
The new interface is comprised of three major areas, the Top Panel, Navigation Bar and the Workspace.



## 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 and Search.

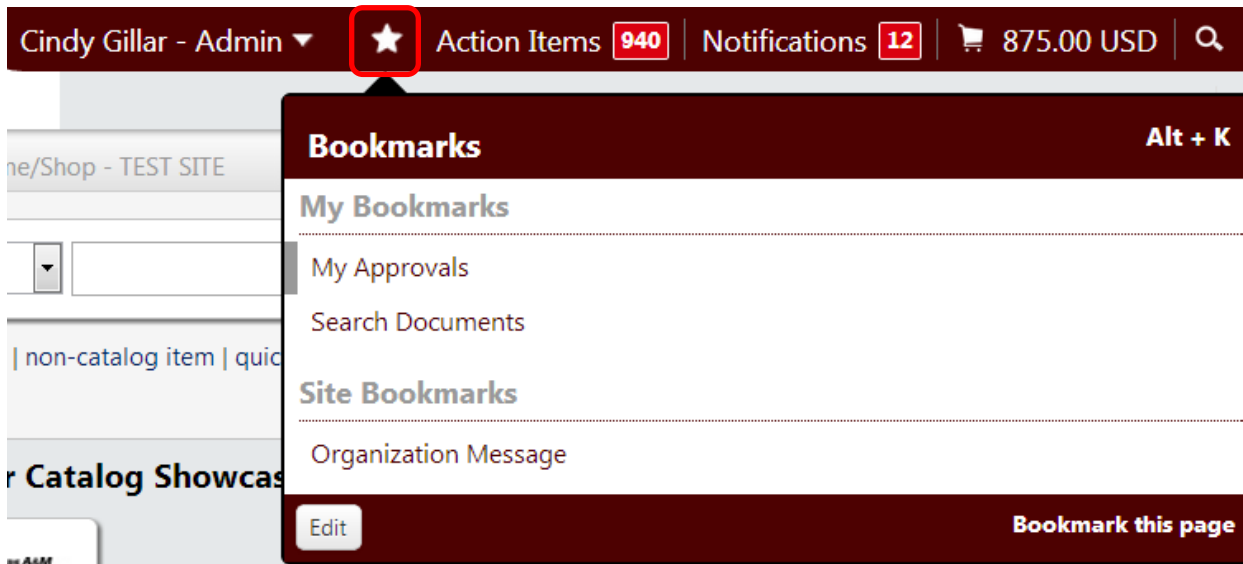


When you click on your name you will see a drop-down menu that contains View My Profile, Set My Home Page, Logout, a list of items that you have recently worked on, and the quantity of the various items. To set your “Home Page” [see page 14](#).

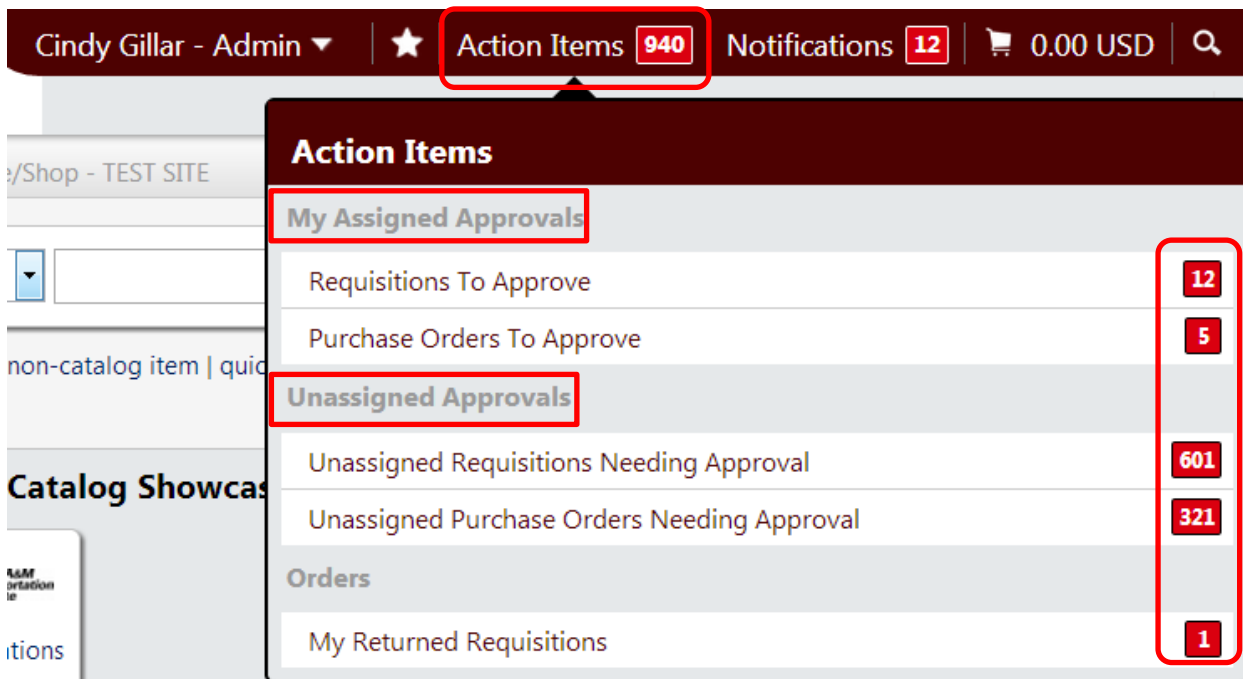
A screenshot of the AggieBuy website. The top navigation bar is visible, showing the user name 'Cynthia Gillar' and various icons. A dropdown menu is open under the user name, listing options: 'View My Profile', 'Set My Home Page', 'Logout', 'My Recently Completed Requisitions' (with a red badge '6'), and 'My Recently Completed Purchase Orders' (with a red badge '6'). A red arrow points from the text above to the 'View My Profile' option. A green callout box contains the following text: '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.' The main content area shows various partner logos under categories like 'Office Supplies / Furniture', 'Computers / Technology', and 'Lab Supplies'.

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.

Cindy Gillar - Admin | ★ | Action Items 940 | Notifications 12 | 0.00 USD

### Notifications

Shopping, Carts & Requisitions

A Requisition Has Been Submitted For Your Ap... 1051142 - 1,686,080.00 USD Submitted By Randy Linder - ...	Oct 25 ×
A Requisition Has Been Submitted For Your Ap... 1051077 - 1,034,640.00 USD Submitted By Randy Linder - ...	Oct 25 ×
A Requisition Has Been Submitted For Your Ap... 1051032 - 11,496.00 USD Submitted By Randy Linder - Ad...	Oct 25 ×

9 more notifications...

[Click here to see all notifications](#)

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](#).

Cindy Gillar - Admin | ★ | Action Items 940 | Notifications 12 | 96.37 USD

### My Cart

CAG-TBS-Color Paper

<b>TODAY'S</b> FRWX 5 ASST COLORS 24# REAM Quantity: 3 Price: 59.01 USD	View My Cart Checkout
<b>TODAY'S</b> MP COLOR 8X11,24#,LIME Quantity: 2 Price: 11.14 USD	“View My Cart” will go to the first shopping cart screen.
<b>TODAY'S</b> MP COLOR 8X11,24#,BLUE Quantity: 2 Price: 26.22 USD	

96.37 USD

NOTE: This gives you a quick view of your active cart's contents.

“Checkout” will go to the second “Final Review” shopping cart screen.

New to Phoenix is what SciQuest refers to as a “bread crumb trail”, which shows the page currently being viewed in the workspace.

AggieBuy TEST Site

Cindy Gillar - Admin | Action Items 940 | Notifications 12 | 96.37 USD

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 1051489 - Draft Requisition

Continue Shopping

Almost ready to go! The list below needs to be addressed before the cart can be submitted.

- Required field: Order Category

Shopping Cart for Cindy Gillar - Admin

7 Item(s) for a total of 96.37 USD

Save | Proceed to Checkout

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.

Cindy Gillar - Admin | ★ | Action Items 940 | Notifications 12 | 96.37 USD

### Quick Search

Alt + Q

All | Cindy

**Document**

- 166191 - Invoice
- XT0003041 - Purchase Order
- 995487 - Requisition
- 996806 - Requisition
- 152852 - Invoice
- XT0003003 - Purchase Order
- 966278 - Requisition
- 444384 - Requisition
- 945645 - Requisition
- 700393 - Requisition

**Users**

- Cindy Stewart (902003303)
- Cindy Richmond (crichmond)
- Cindy Glover (920000792)
- Cindy Gillar - Admin (cgillar)
- Additional results found. Go to advanced search...

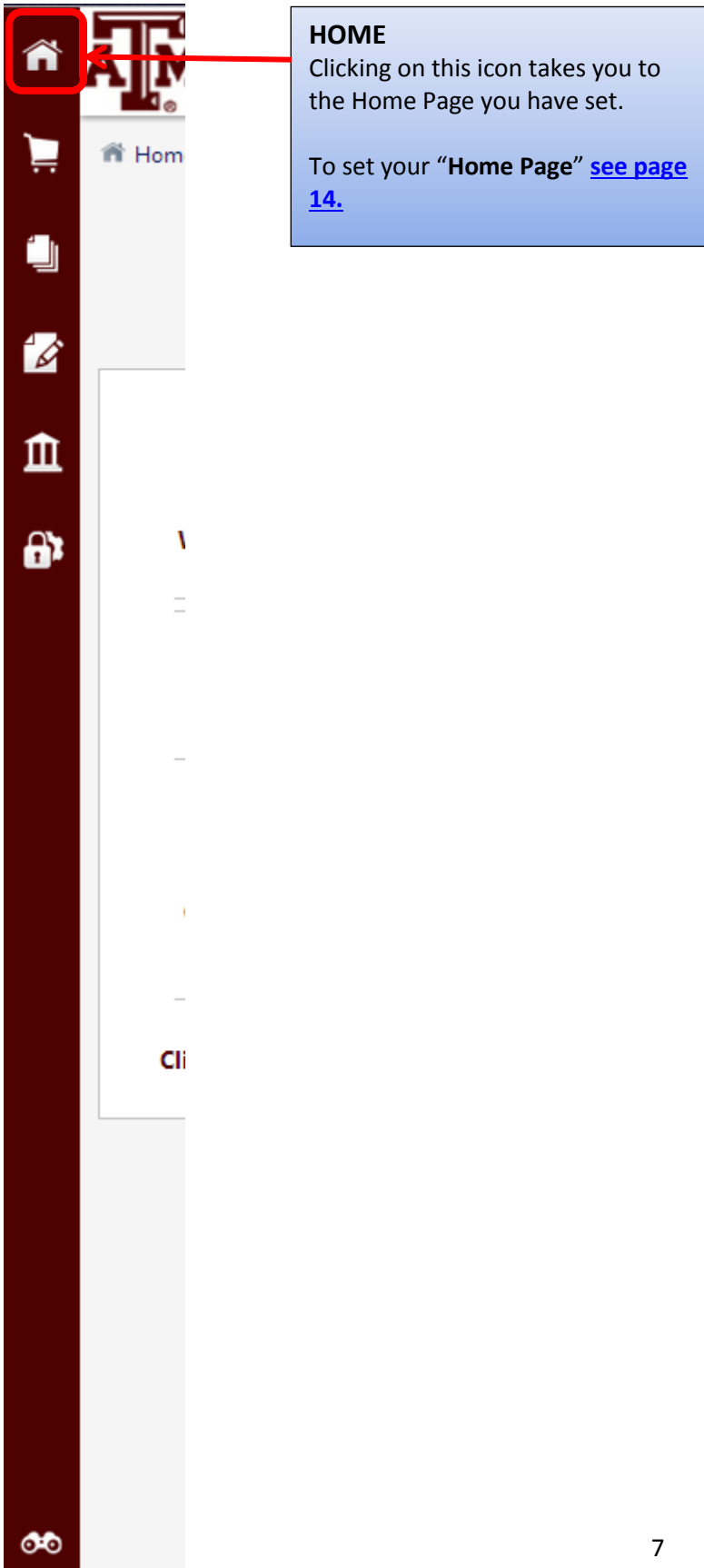
**Supplier Profile**

- CINDY'S PAINT AND BODY

**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.





# Shop Icon



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**.

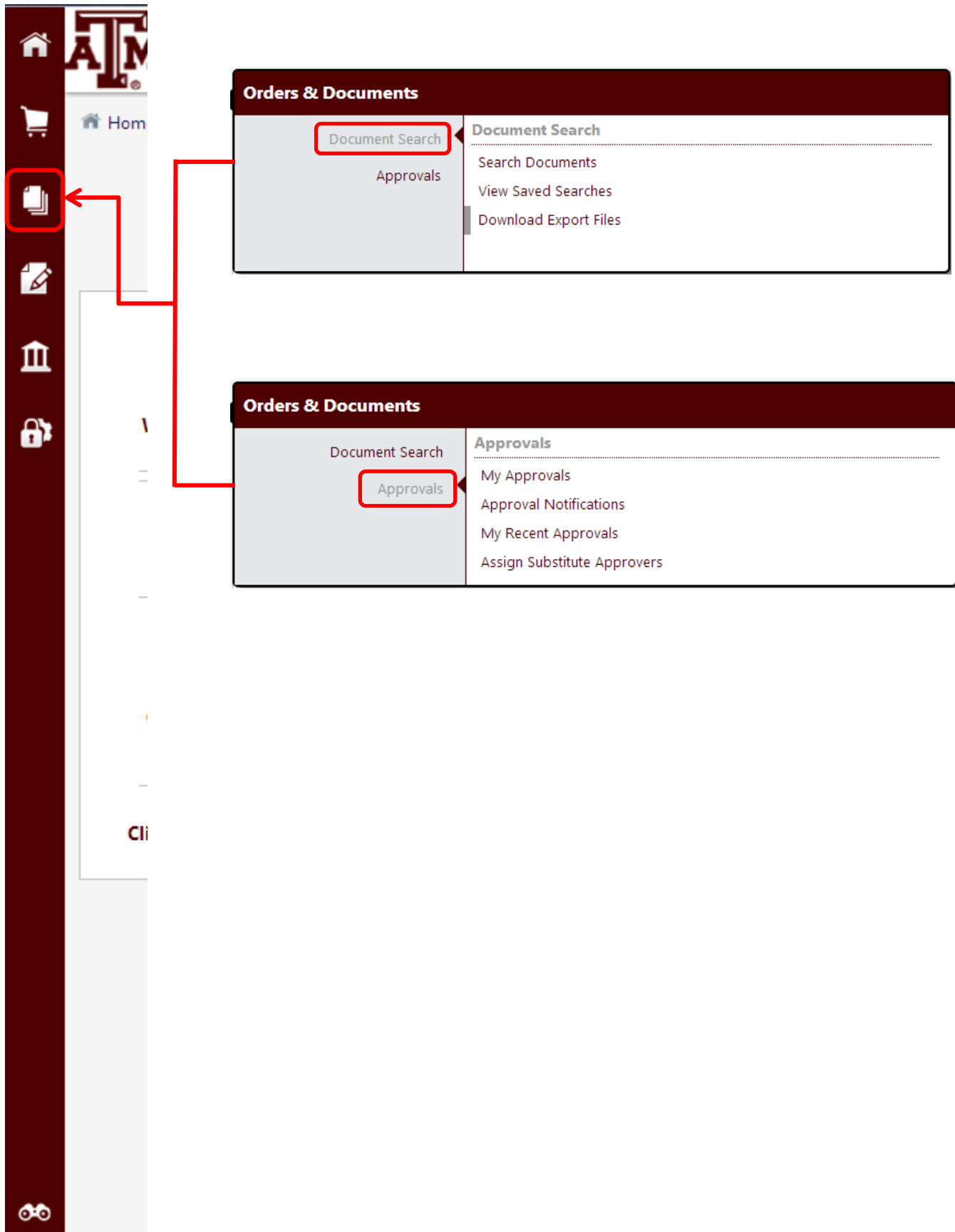
This screenshot shows the top of the Shop interface. The left sidebar has 'Shopping' highlighted with a red box. The main content area has a search bar with 'By Keyword' selected and a search icon. Below the search bar are sections for 'Dashboard' (Shopping Home), 'Go To' (Advanced Search, View Favorites, View Forms, Non-Catalog Item, Quick Order), and 'Browse By' (Suppliers, Categories, Contracts, Chemicals). The 'Alt + P' quick-key is highlighted in the top right corner with a red box. A red arrow points from the 'Shopping' menu item to the search bar.

This screenshot shows the 'My Carts and Orders' section of the Shop interface. The left sidebar has 'My Carts and Orders' highlighted with a red box. The main content area lists options: 'Open My Active Shopping Cart', 'View Draft Shopping Carts', and 'View My Orders (Last 90 Days)'. The 'Alt + P' quick-key is visible in the top right corner.

This screenshot shows the 'Admin' section of the Shop interface. The left sidebar has 'Admin' highlighted with a red box. The main content area lists options: 'View Draft Carts From Other Users' and 'Manage Groups For Shared Carts'. The 'Alt + P' quick-key is visible in the top right corner. A red arrow points from the 'Manage Groups For Shared Carts' link to a note box below.

Only Department Allocators will see  
this link.

## Orders & Documents Icon



# Catalogs and Contracts Icon & Accounts Payable Icon

The image shows a vertical sidebar on the left with several icons. The top icon is a house, followed by a shopping cart, a document, a document with a pencil, a classical building, and a padlock. Below these is a search bar and a 'Client' label. The 'Catalogs and Contracts' dropdown menu is open, showing a 'View Contracts' button and a search field. The 'Accounts Payable' dropdown menu is also open, showing an 'Invoices & Receipts' button and a list of options: 'AP Dashboard', 'View Draft Invoices', 'Search For Invoices', and 'Search For Receipts'. Red boxes highlight the document with pencil icon in the sidebar, the 'View Contracts' button, the classical building icon, and the 'Invoices & Receipts' button. Red arrows point from the 'View Contracts' button to the document with pencil icon and from the 'Invoices & Receipts' button to the classical building icon.

# Site Administration Icon & Search Icon

NOTE:  
All AggieBuy roles will see the Supplier Management link on the fly-out but only AggieBuy Admin will see the other two.

The screenshot shows a vertical sidebar on the left with several icons. A red box highlights the lock icon. Three red arrows point from this lock icon to three separate screenshots of the 'Site Administration' menu fly-out. Each screenshot shows a different option highlighted with a red box: 'Manage Users' in the first, 'Supplier Management' in the second, and 'Manage Imports And Exports' in the third. A red arrow also points from the top note box to the 'Supplier Management' option in the second screenshot.

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**.

The screenshot shows the 'Menu Search' interface. A red box highlights the binoculars icon in the sidebar. A red arrow points from this icon to the search bar. Another red box highlights the 'Alt + M' keyboard shortcut in the top right corner of the search bar. A red arrow points from the bottom note box to this shortcut.

# 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.

Navigate to the page you want to Bookmark. Click on the “Star” icon.

Click on “Bookmark this page”

Cindy Gillar - Admin ▾ ☆ Action Items 934 | Notifications 4 | 972.08 USD | 🔍

**My Bookmarks** Alt + K

Search Documents

Edit

**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**.

Once you get more than one page bookmarked you can change the order they are in or delete them from your bookmarks.

Cindy Gillar - Admin ▾ ☆ Action Items 934 | Notifications 4 | 972.08 USD | 🔍

**My Bookmarks** Alt + K

Search Documents

My Approvals

AP Dashboard

Edit

Click "Edit"

Cindy Gillar - Admin ▾ ☆ Action Items 934 | Notifications 4 | 972.08 USD | 🔍

**My Bookmarks** Alt + K

- ⊖ Search Documents ☰
- ⊖ My Approvals ☰
- ⊖ AP Dashboard ☰

Done

Click "Done" when finished.

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.

# 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 allow users to set their own home page.

## Quick-Steps

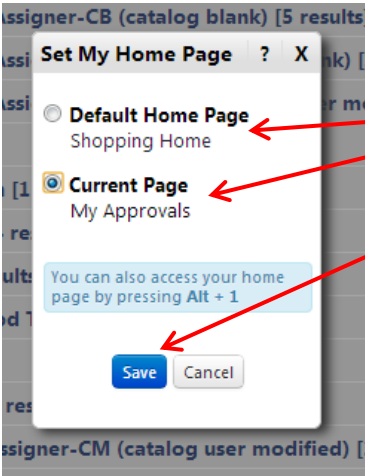
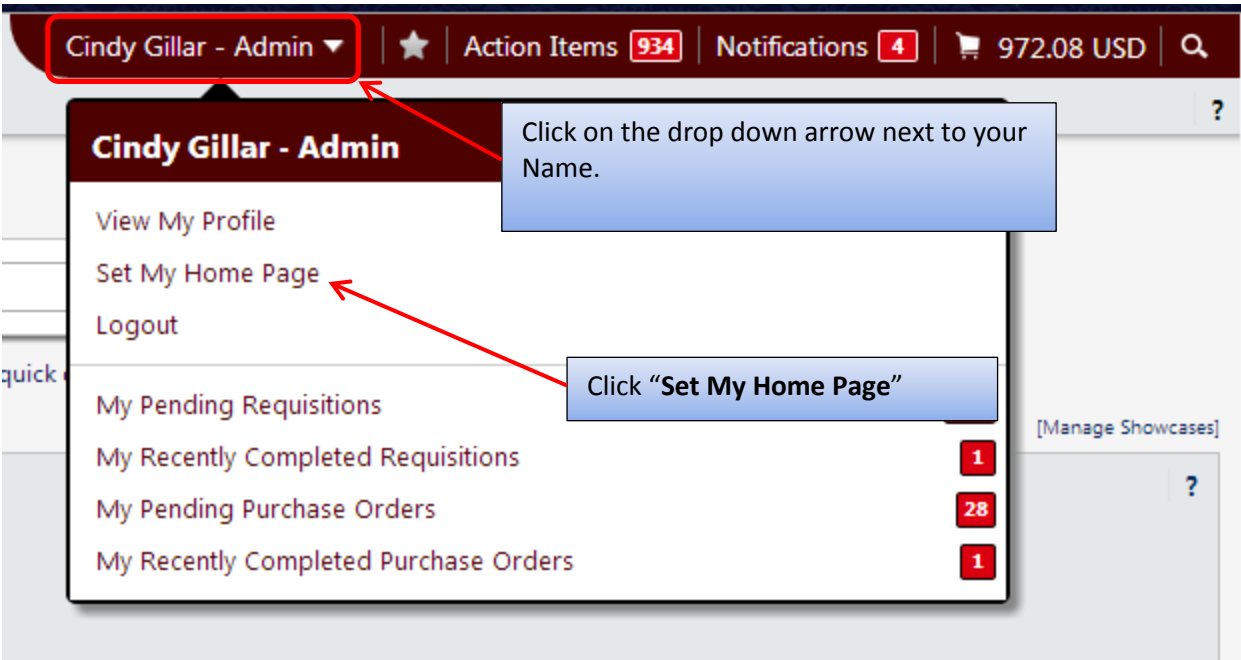
### Set your Home Page

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 you 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*)

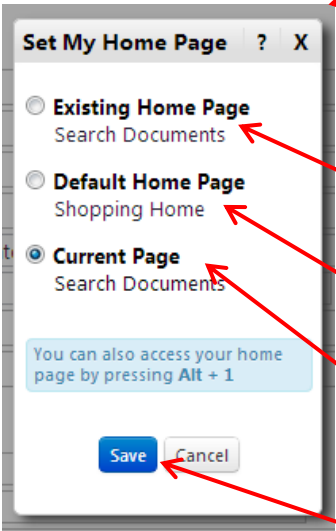
The screenshot shows the AggieBuy TEST Site interface. The top navigation bar includes the ATM logo, the site name "AggieBuy TEST Site", and user information: "Cindy Gillar - Admin", "Action Items 934", "Notifications 4", and "972.08 USD". The breadcrumb trail is "Orders & Documents / Approvals / My Approvals / My Approvals - Requisition". The main content area shows "Group Results By: Folders" and "Total Results Found: 943". The "Filtered By" section includes "Type: Requisition", "Date Range: All Dates", and "View Approvals For: Cindy Gillar - Admin". The "Refine Search Results" section includes "Type: Requisition" and "Date Range: All Dates". The "View Approvals For" section includes "My Approvals". The "Folders" section lists various requisition folders. A green callout box with a white border contains the text: "Navigate to the page/screen you want your home page to be. Here I have navigated to the Approvals page."



Select either Default Home Page, which will change/keep your Shopping home page, or Current Page. 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.

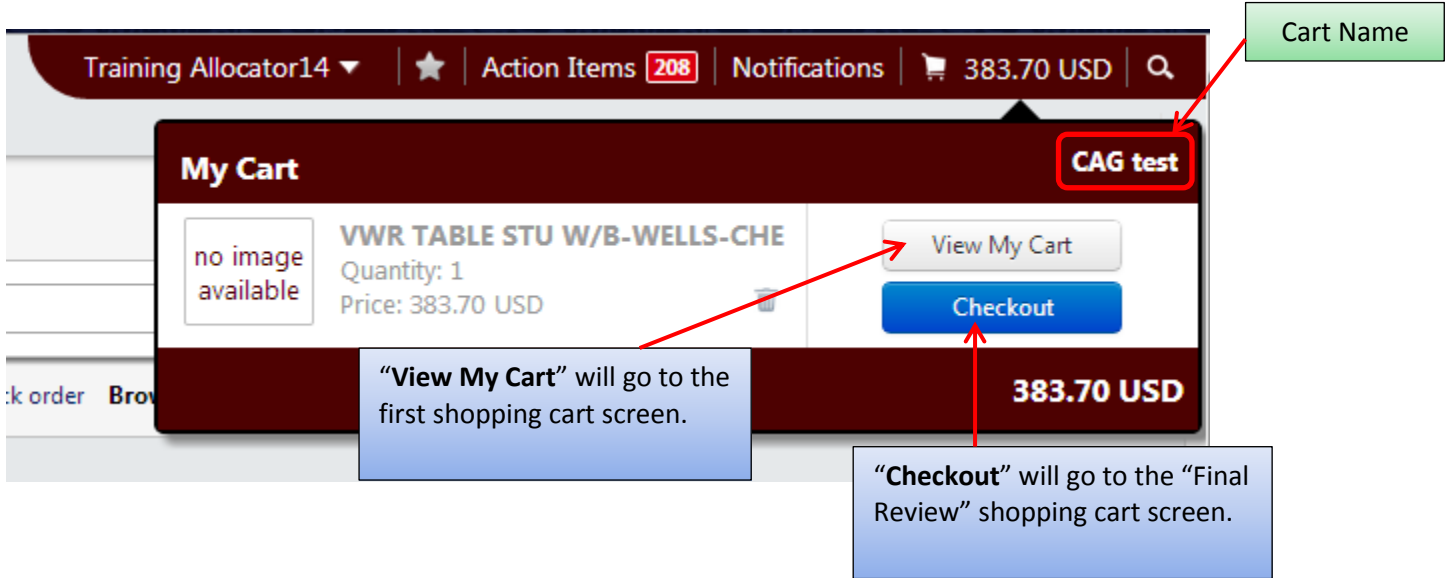


Select either:  
 Existing Home Page (the home page you selected and saved),  
 Default Home Page (the Shopping home page), or  
 Current Page (the page you are on now).  
 Then click "Save".



# Updated Cart Preview In Phoenix

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

ATM | AggieBuy TEST Site | Training Allocator14 | Action Items 208 | Notifications | 383.70 USD

Shop / My Carts and Orders / Open My Active Shopping Cart / Cart - 1004504 - Draft Requisition

Continue Shopping  
1 Item(s) for a total of 383.70 USD

Shopping Cart for Training Allocator14

Add Non-Catalog Item | Save

Proceed to Checkout

Cart Name: CAG test

Prepared by: Training Allocator14

Prepared for: Training Allocator14

Cart Description/Purpose: [ ]

Order Category: 1 - Regular

Fund Type: [ ]

Report Reference A: [ ]

Report Reference B: [ ]

Supplier / Line Item Details

Supplier: C T BIOMEDICAL SUPPLY INC

Contract Number: no value

PO Number: To Be Assigned

Pricing Code: [ ]


Quote number: [ ]

Line(s)	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1	VWR TABLE STU W/B-WELLS-CHE	89375-200	EA	383.70	1 EA	383.70 USD
<b>Supplier subtotal</b>						<b>383.70USD</b>

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

<b>Subtotal</b>	<b>383.70</b>
Shipping	0.00
Handling	0.00
<b>Total</b>	<b>383.70 USD</b>

# FINAL REVIEW SHOPPING CART SCREEN



## AggieBuy TEST Site

Training Allocator14
Action Items 208
Notifications
383.70 USD

Shop / My Carts and Orders / Open My Active Shopping Cart / Summary - 1004504 - Draft Requisition

General
Shipping
Billing
Accounting Codes
Internal Notes and Attachments
External Notes and Attachments
Final Review

Submit Order

[Return to shopping cart](#)
[Continue Shopping](#)

**✔ 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.

Requisition

PR Approvals

PO Preview

Comments

Attachments

History

Summary

General

Shipping

Billing

Accounting Codes

External Notes and Attachments

Supplier Info

Taxes/S&H

Hide header

Hide value descriptions

	General ?	Shipping ?	Billing ?
Ordering Department	02-GOLD (02-GOLD) <span style="float: right;"><a href="#">edit</a></span>	<b>Ship To</b> <span style="float: right;"><a href="#">edit</a></span>	<b>Bill To</b> <span style="float: right;"><a href="#">edit</a></span>
Cart Name	CAG test	<i>no address</i>	Texas A&M University
Prepared by	Training Allocator14		Financial Management Operations
Prepared for	Training Allocator14		ATTN: Accounts Payable
Cart Description/Purpose	<i>no value</i>	<b>Delivery Options</b> <span style="float: right;"><a href="#">edit</a></span>	750 Agronomy Road - Suite 3101
Order Category	1 - Regular	Ship Via <span style="float: right;">Best Carrier-Best Way</span>	6000 TAMU
Fund Type	<i>no value</i>	Requested Delivery Date <i>no value</i>	College Station, TX 77843-6000
Report Reference A	<i>no value</i>		United States
Report Reference B	<i>no value</i>		
Pre-Pay & Add	✘	<b>Buyer Information</b> <span style="float: right;"><a href="#">edit</a></span>	
Route to Procurement Services	✘	Buyer <span style="float: right;">Buyer Email</span> <span style="float: right;">Buyer Phone Number</span>	
Emergency (attach justification)	✘	<i>no value</i> <span style="float: right;"><i>no value</i></span> <span style="float: right;"><i>no value</i></span>	
Sole Source (attach justification)	✘		
Contract Number	<i>no value</i>		
Do Not Encumber	✘		
Start Date	<i>no value</i>		
End Date	<i>no value</i>		
Rush the Pymt Process	✘		
Special Payment Method	<i>no value</i>		
Trade-In	✘		

ⓘ User does not have the necessary permissions to view the custom fields associated with this section. [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.

**Menu Search** Alt + M

sear

- Search Documents *Orders & Documents -> Document Search*
- Search For Contracts *Catalogs and Contracts -> View Contracts*
- Search For Invoices *Accounts Payable -> Invoices & Receipts*
- Search For Receipts *Accounts Payable -> Invoices & Receipts*
- Search For Users *Site Administration -> Manage Users*
- Search For A Supplier *Site Administration -> Supplier Management*
- Advanced Search *Shop -> Shopping -> Go To:*
- View Saved Searches *Orders & Documents -> Document Search*

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](mailto:aggiebuy@tamu.edu)

**Menu Search** Alt + M

draft cart

- View Draft Shopping Carts *Shop -> My Carts and Orders*
- View Draft Carts From Other Users *Shop -> Admin*

## 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.

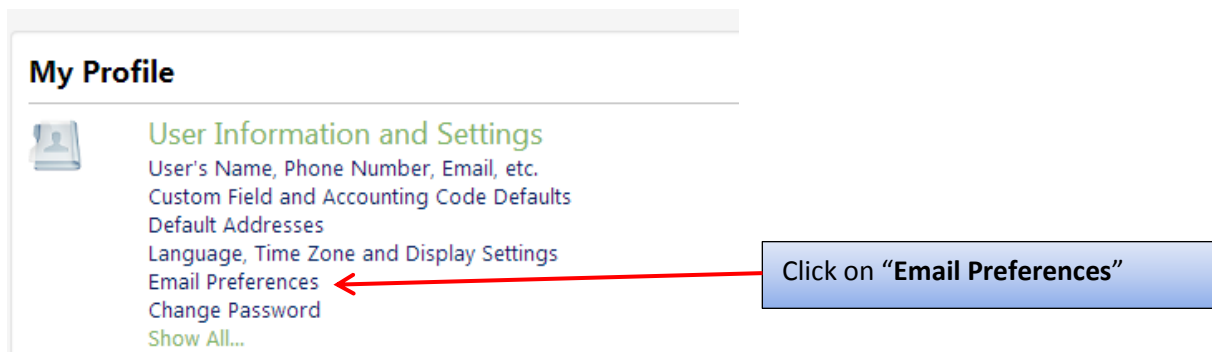
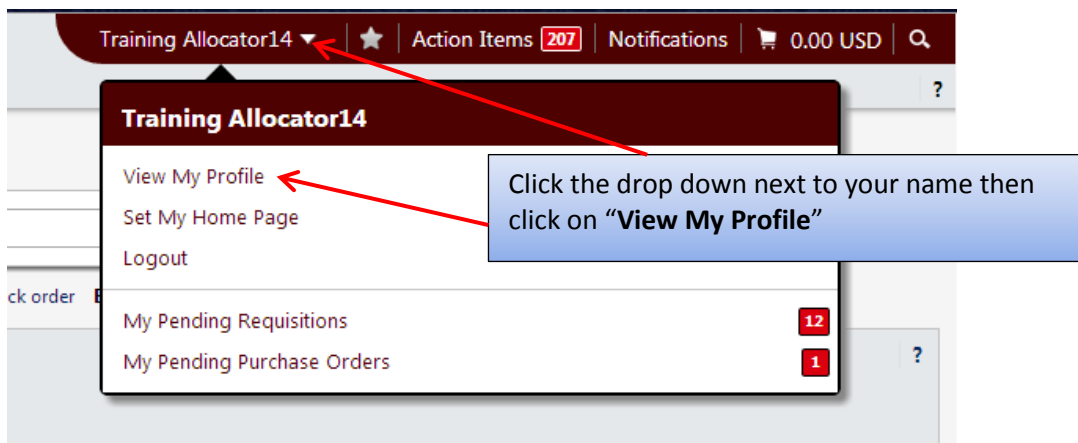
### Quick-Steps

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.

**Email Preferences**

The application notifications are not yet enabled for all items. ?

**Administration & Integration**

Search Result Export Confirmation	None (Default) ▾
PR Export Failure Notification	None (Default) ▾
Invoice Export failure notification	None (Default) ▾

**Shopping, Carts & Requisitions**

Prepared By - Cart Assigned Notice	None (Default) ▾
Prepared By - PR line item(s) rejected	None (Default) ▾
Prepared By - PR rejected/returned	None (Default) ▾
Cart Assigned Notice	None (Default) ▾
Receive PR and PO notifications for Carts Assigned to Me	None (Default) ▾
Cart Shared Notice	None (Default) ▾
PR submitted into Workflow	None (Default) ▾
PR pending Workflow approval	None (Default) ▾
PR Workflow Notification available	None (Default) ▾
PR Workflow complete / PO created	None (Default) ▾
PR line item(s) rejected	Email & Notification (Default) ▾
Cart/PR rejected/returned	Email & Notification (Default) ▾
Receive PR and PO notifications for shared carts I am a participant of	None

**Purchase Orders**

Prepared By - PO Workflow complete	Notification
Prepared By - PO sent to Supplier	Email & Notification
Prepared By - PO line item(s) rejected	Email & Notification (Default)
Prepared By - PO rejected	None (Default) ▾
PO submitted into Workflow	None (Default) ▾
PO pending Workflow approval	None (Default) ▾
PO Workflow Notification available	None (Default) ▾
PO Workflow complete	None (Default) ▾
PO sent to supplier	None (Default) ▾
PO Line Item Ship Notice	None (Default) ▾

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"

**Contract Manager**

Contract Budget/Tier Notification	None (Default) ▾
Contract Date Notifications	None (Default) ▾

Save

You can see that there are two Notifications. Click on "Notifications".

Training Allocator14 | ★ | Action Items 208 | Notifications 2

### Notifications

Shopping, Carts & Requisitions

A Requisition Has Been Submitted For Your Appr... 1003948 - 477.00 USD Submitted By Training Allocator14	Jul 17 ×
Your Requisition Has Been Submitted For Approval 1003948 - 477.00 USD Submitted By Training Allocator14	Jul 17 ×

Click **"Click here to see all notifications"**. This will take you to the Notifications page.

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

Clicking on the **"x"** will delete the notification.

AggieBuy TEST Site

Notifications / View All Notifications / Notifications

Notifications will be automatically removed after 30 days

Filter Notifications ?

Status: New  
Type: All

Actions ?

Edit Notification Preferences  
Clear Notifications

Results per page: 20 | Notifications Found 2 | Page 1 of 1

<b>A Requisition Has Been Submitted For Your Approval</b> 1003948 - 477.00 USD Submitted By Training Allocator14	Shopping, Carts & Requisitions	7/17/2013 1:55 PM	×
<b>Your Requisition Has Been Submitted For Approval</b> 1003948 - 477.00 USD Submitted By Training Allocator14	Shopping, Carts & Requisitions	7/17/2013 1:55 PM	×

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