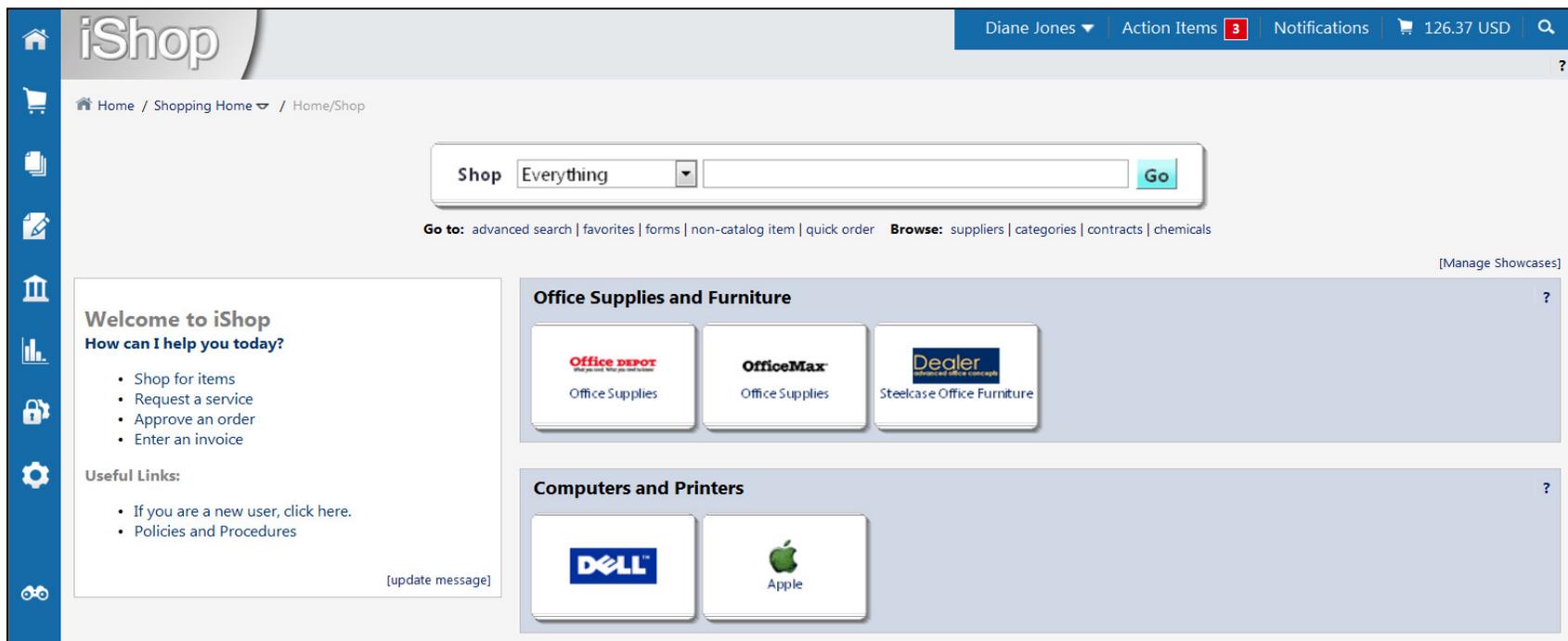


# Activating Phoenix Interface

# INTRODUCTION



The SelectSite user interface is designed to provide a clean, intuitive user experience. The site is easy to navigate and provides several features to help you locate and manage your tasks. The purpose of this document is to provide basic SelectSite navigation information. **Important Note:** Your site may or may not contain all of the menu and search options shown in this document. Options displayed will depend on the SelectSite modules used by your organization, your role within the organization and your specific user permissions.



# ACTIVATING PHOENIX INTERFACE (CONTINUED)



## Steps for Activating Phoenix Interface

- **Activating the Phoenix Interface on the User Level**
  1. Access the **Personal Settings** tab in the user profile.
  2. In the **User Interface Style** drop-down box, select **Phoenix**.
  3. Click **Save**.

The screenshot displays the 'User Settings' interface. At the top, there are two buttons: 'Copy Personal Favorites' and 'Add Comment'. Below these are several tabs: 'User Settings', 'Purchasing', 'Permissions', 'Supplier Mgt', 'Folder Summary', and 'History'. The 'User Settings' tab is active, and within it, the 'Personal Settings' sub-tab is selected. Other sub-tabs include 'User Identification', 'Roles', 'Access', 'Email Preferences', and 'Navigation Setup'. The main content area contains a list of settings with corresponding dropdown menus or checkboxes:

- Select a Language: English
- Country: United States
- Currency: USD
- Time Zone: CDT/CST - Central Standard Time
- Color Theme: SciQuest Classic
- User Interface Style: Phoenix** (highlighted with a red box)
- Font Size: Medium
- Enable Accessibility Mode:
- Help on mouse over: Show help on mouse over and click
- Preferred email format: HTML
- Access Training Content Configuration:

A yellow 'Save' button is located at the bottom center of the settings panel.

# Classic vs. Phoenix

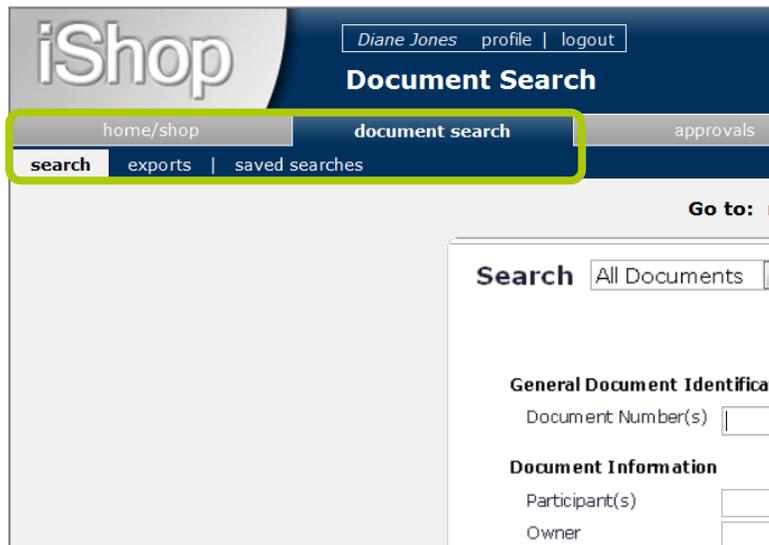
# CLASSIC VS. PHOENIX: GENERAL NAVIGATION



In the Classic user interface, navigation is performed by clicking on tab-driven navigation menus and sub-menus that are always present on the screen. In the Phoenix interface, tab navigation has been replaced by a clean, slide-out side menu that displays the available menu options.

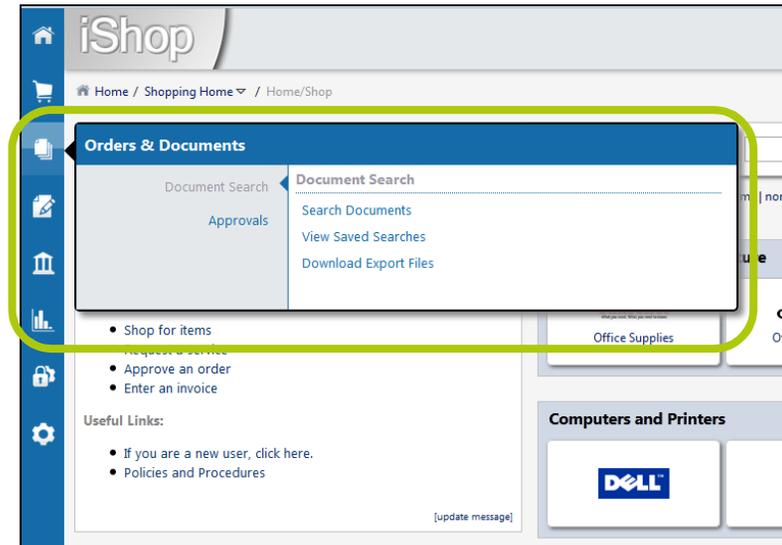
## Classic

- The Classic interface is navigated via a tab-driven menu that is always present across the top of the page. Sub-menu items located in sub-navigation tabs.



## Phoenix

- The Phoenix interface features a slide-out menu. Menu items stay out of the way until they are needed for a cleaner, less cluttered site.



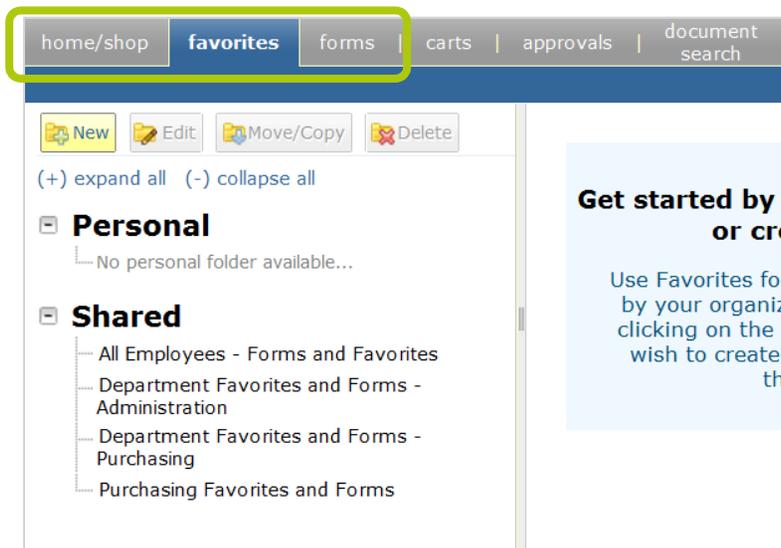
# CLASSIC VS. PHOENIX MENU ITEM GROUPINGS



In the Classic interface, related menu options are often located in separate menu tabs. In the Phoenix interface, the menu has been reorganized in a more logical manner to make locating pages easier. A brand new feature in the Phoenix interface is a **Menu Search** option to help find pages that are not frequently used.

## Classic

- Classic interface often separates related pages on to separate tabs. For example, the shopping page, favorites page and forms page are located in individual tabs.

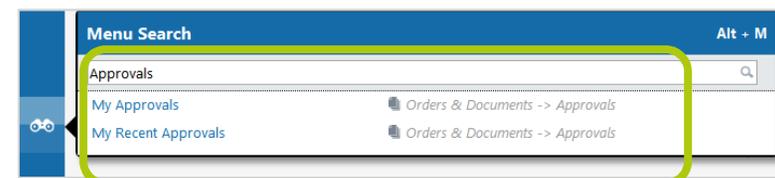


## Phoenix

- Menu options are grouped by related tasks, making them easier to locate. Examples of grouped menu options include shopping tasks (shown below), administrator tasks, tasks related to documents and approvals, and more.



- Pages are easier to find with a **Menu Search** option. A keyword search returns a list of pages containing that keyword. Search results are clickable to take you directly to the page. Breadcrumbs display that tell you how to navigate to the page. **Note:** You can also use the **Alt + M** quick-key to access Menu Search.



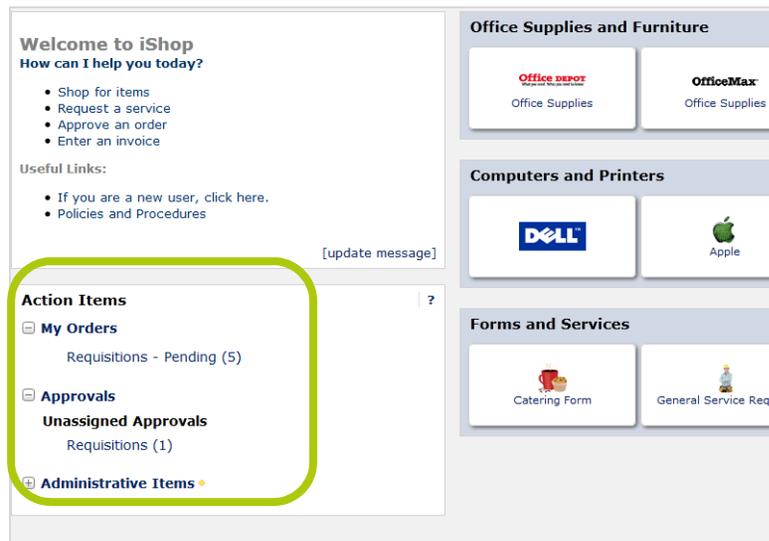
# CLASSIC VS. PHOENIX ACTION ITEMS



In the Classic interface, action items are located on the shopping page. If you are in another area of the application, you are required to return to that page to view them. In the Phoenix interface, action items are located in the top banner area, making them accessible from anywhere in the application.

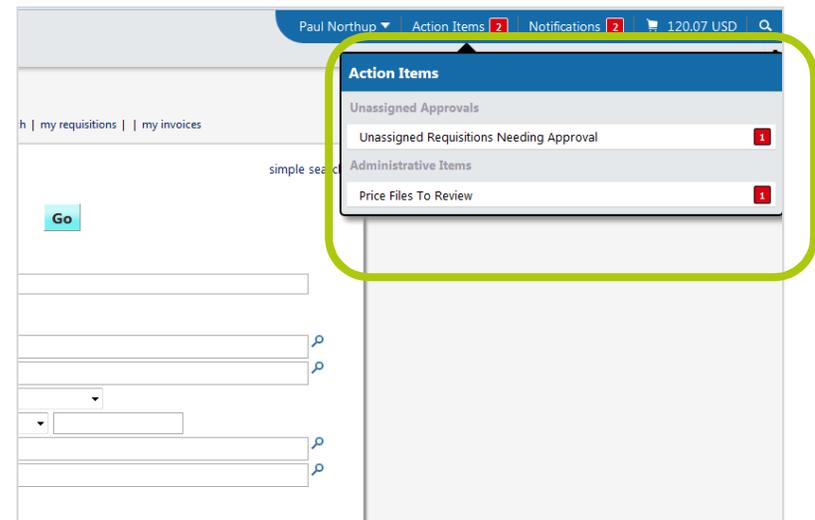
## Classic

- Action items are located on the shopping page.



## Phoenix

- Action items are located in the top banner making them accessible from all areas of the site.



- As with Classic interface, clicking on the action item takes you to the appropriate area of the application to complete the action.

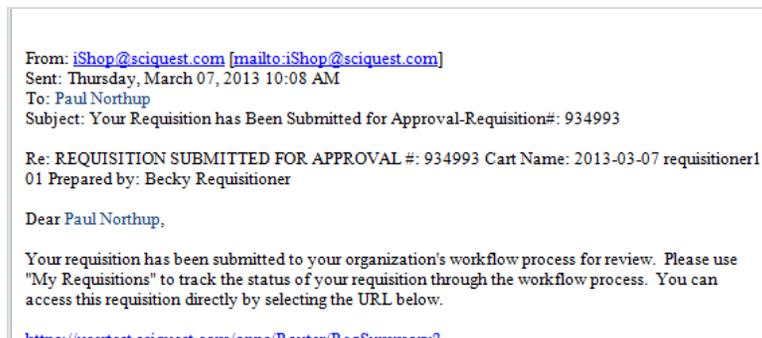
# CLASSIC VS. PHOENIX NOTIFICATIONS



Certain action items and/or tasks in SelectSite, such as a submitted requisition or a document awaiting approval, will trigger notifications to specified users. These notifications are not viewable in the Classic interface and are available only by email. In the Phoenix interface, you can view these notifications in the top banner. As with action items, notifications can be accessed from anywhere in the application. **Note:** Not all notification types are available in the current Phoenix interface.

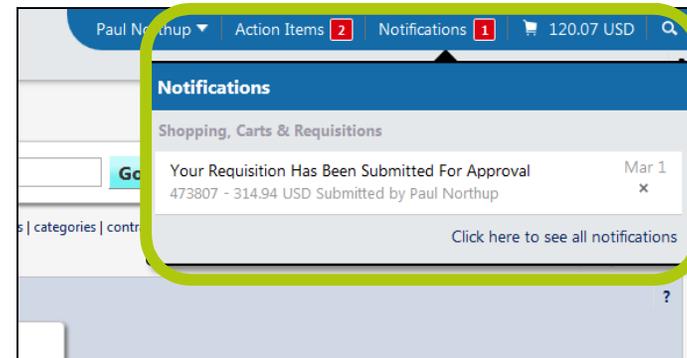
## Classic

- Notifications are not viewable in the application. You are notified by email only.



## Phoenix

- Notifications are located in the top banner making them accessible from all areas of the site.



- Notifications are clickable and take you to the appropriate area of the application (i.e. the requisition)
- Newer notifications are highlighted.
- You will continue to receive email notifications.

# FEATURE PREVIEW

Improvements to Notifications in the new user interface

- Users can receive communications through in-application notifications or email. This concept, introduced in 13.1, has expanded.
  - Additional in-application notifications will be available with 13.2
  - Users can select “how” they would like to receive communications (as shown to the right)
- **Modules:**
  - ALL (only available in new user interface)

Email Preferences	
* Generates an application notification in addition to an email	
<b>Administration &amp; Integration</b>	
* PR Workflow Step error notice	Notification
PR Export Failure Notification	Email
PO Workflow Step error notice	Email
Invoice Export failure notification	Email
<b>Shopping, Carts &amp; Requisitions</b>	
Prepared By - Cart Assigned Notice	None
Prepared By - PR line item(s) rejected	None
Prepared By - PR rejected/returned	Email
PO / PR status request notices	Email
* Cart Assigned Notice	Email & Notification
Receive PR and PO notifications for Carts Assigned to Me	Email
* PR submitted into Workflow	Email & Notification
* PR pending Workflow approval	Email & Notification
PR Workflow Notification available	Email

Customize how you receive information

# CLASSIC VS. PHOENIX USER PROFILE



In the Classic interface, user profile information and options are located in a series of navigation tabs and sub-tabs. In the Phoenix interface, the user profile contains simpler navigation. A main user profile menu groups similar tasks in a logical manner and Quick Links contain most commonly used tasks.

## Classic

- User profile tasks are accessed from a series of navigation tabs and sub-tabs.

The screenshot shows the Classic user profile interface. At the top, there are navigation tabs: 'home/shop', 'profile', 'approvals', and 'carts'. Below these, a secondary set of tabs includes 'User Settings', 'Purchasing', 'Permissions', 'Supplies Mgr', 'Supplier Mgt', 'Folder Summary', and 'History'. A third set of sub-tabs is visible, including 'User Identification', 'Personal Settings', 'Roles', 'Access', 'Email Preferences', and 'Navigation Setup'. The main content area contains a form with fields for: Last Name (Jones), Phone Number, E-mail Address (diane7080@yahoo.com), Department (Information Technology), Badge Id, User Name (dianej7080), a security question (What is the middle name of your oldest child?), Answer, Confirm Answer, and Authentication Method (Local).

- Additional task buttons display in the main page of the user profile.



## Phoenix

- All options are in a single user profile menu. Options are grouped by similar tasks.

The screenshot shows the Phoenix user profile interface. It features a single menu titled 'My Profile' with the following grouped options:

- User Information and Settings**
  - User's Name, Phone Number, email, etc.
  - Custom Field and Accounting Code Defaults
  - Default Addresses
  - Language, Time Zone and Display Settings
  - Email Preferences
  - Change Password
- User Access and Security**
  - Assigned Roles
  - Access
  - User Purchasing and Approval Limit Values
  - Punchout Access
  - Product Views
- Permission Settings**
  - Shopping and Cart/Requisition Permissions
  - Orders Permissions
  - Approvals Permissions
  - Administrator Permissions
  - Accounts Payable Permissions
- User Administration and History**
  - View User's History
  - Add Profile Comment
  - Export User Information
  - [Inactivate User](#)

# CLASSIC VS. PHOENIX USER PROFILE (CONTINUED)



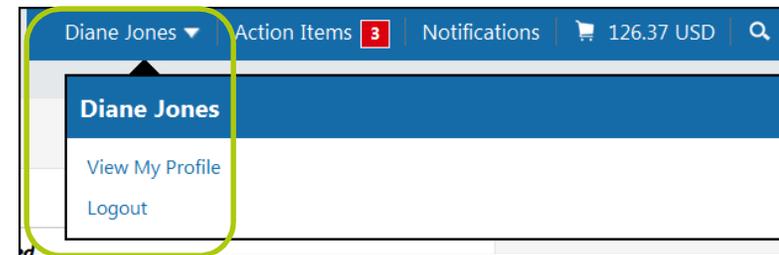
## Classic

- Users access their own profiles through the profile link.



## Phoenix

- Users access their own profiles by selecting the drop-down menu beside the user's name and selecting **View My Profile**.

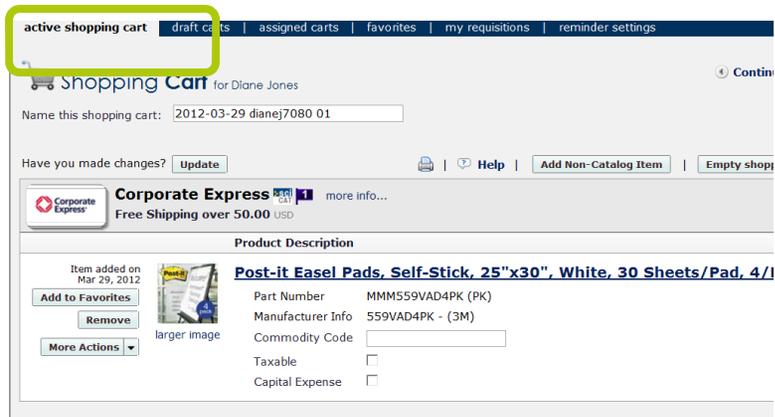


# CLASSIC VS. PHOENIX CART PREVIEW



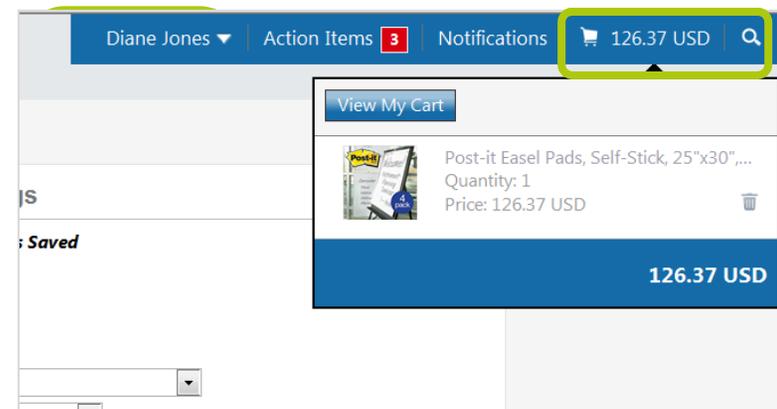
## Classic

- In order to view your current cart in the Classic interface, it is necessary to leave the page you are on and go to you the **active shopping cart** tab.



## Phoenix

- The Phoenix interface features a Cart Preview. By clicking on the shopping cart icon, you can get a quick view of the active cart from anywhere in the application.



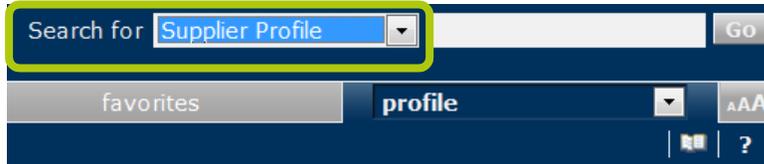
- Clicking the **View My Cart** button takes you to the active cart.

# CLASSIC VS. PHOENIX QUICK SEARCH



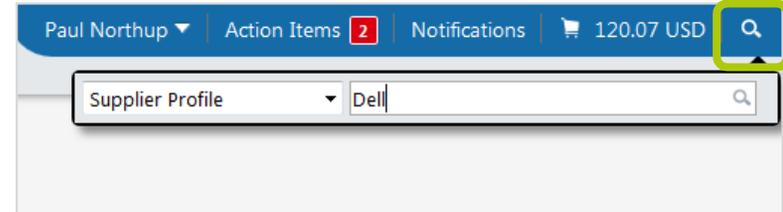
## Classic

- Quick Search is located at the top-right of the screen.



## Phoenix

- Quick Search is still accessible from all pages, but is hidden until you select the icon to display it.



- You can also use the quick-key **Alt + Q** to access the Quick Search menu.

# The Main Workspace

# MAIN WORKSPACE OVERVIEW



The main workspace is where you will view and manage the active SelectSite feature. For example, if you are working in your main shopping page the page will display in the main workspace as shown below. As you access other areas of the application, only the main workspace changes. The side navigation menu and top banner remain in place. At all times, the main workspace will display breadcrumbs that tell you what page you are on and the navigation path to the page. A drop-down icon  beside a page name indicates that you can select it to access another page.

**Breadcrumbs display active page and navigation path.**

Home / Shopping Home / Home/Shop

Shop Everything Go

Go to: advanced search | favorites | forms | non-catalog item | quick order Browse: suppliers | categories | contracts | chemicals

[Manage Showcases]

**Welcome to iShop**  
How can I help you today?

- Shop for items
- Request a service
- Approve an order
- Enter an invoice

Useful Links:

- If you are a new user, click here.
- Policies and Procedures

[update message]

**Office Supplies and Furniture**

- Office DEPOT Office Supplies
- OfficeMax Office Supplies
- Dealer Steelcase Office Furniture

**Computers and Printers**

- DELL
- Apple

# MAIN WORKSPACE ANOTHER VIEW

sciQuest.

- The image below shows the **Advanced Document Search** active in the main workspace.

The screenshot displays the iShop interface with the Advanced Document Search form active. The top navigation bar includes the iShop logo, user name 'Diane Jones', 'Action Items' with a red notification badge '1', 'Notifications', and a shopping cart icon with '10.79 USD'. The breadcrumb trail reads 'Orders & Documents / Document Search / Search Documents / Document Search'. Below the breadcrumb, there are links for 'Go to: simple search | my requisitions | | my invoices'. The search form is titled 'Search' and has a dropdown menu set to 'All Documents' and a 'simple search' link. A 'Go' button is centered above the form fields. The form is organized into three sections: 'General Document Identification' with a 'Document Number(s)' field; 'Document Information' with fields for 'Participant(s)', 'Owner', 'Date' (set to 'All Dates'), 'Total Amount', 'Supplier', and 'Department', each with a magnifying glass icon; and 'Item/Product Information' with fields for 'Catalog Number(SKU)', 'Product Description', and 'Product Flags' (including checkboxes for 'Controlled substance' and 'Energy Star').

# Side Navigation Bar

# SIDE NAVIGATION BAR OVERVIEW



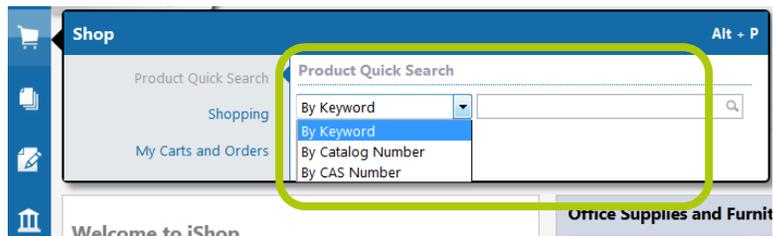
Most areas of the application are accessed from the side navigation bar. The side navigation bar contains the top-level menu items. When you roll over the main menu icons, slide-out sub-menus display. In general, menus are grouped by related tasks. For example, shopping tasks are grouped in the **Shop** menu, document search tasks are grouped in the **Orders & Documents** menu, etc. Clicking on the  icon will return you to the homepage from anywhere in the application.

The screenshot shows the iShop application interface. A vertical side navigation bar on the left is highlighted with a yellow border. It contains icons for Home, Shopping Home, Home/Shop, a search icon, a document icon, a lock icon, a gear icon, and a refresh icon. The main content area features a search bar with 'Shop Everything' and a 'Go' button. Below the search bar, there are sections for 'Office Supplies and Furniture' and 'Computers and Printers'. The 'Office Supplies and Furniture' section includes logos for Office DEPOT, OfficeMax, and Dealer. The 'Computers and Printers' section includes logos for DELL and Apple. The top right of the interface shows user information (Diane Jones), action items (3), notifications, and a shopping cart with a value of 126.37 USD.

# SIDE NAVIGATION BAR SHOP MENU



The **Shop** menu contains the menu options related to shopping tasks, including product quick search, access to the shopping page, forms and favorites and access to carts and orders.



- Accessed directly from the Shop menu, **Product Quick Search** allows you to do a simple item search by keyword, catalog number or CAS number. **Note:** The quick-key Alt + P also allows access to the product search.



- From the **Shopping** sub-menu, users can access the shopping page, forms and favorites. These options were located on separate navigation tabs in the Classic interface.



- The **My Carts and Orders** sub-menu contains options for viewing your active cart, draft shopping carts and your most recent orders.

# SIDE NAVIGATION BAR ORDERS & DOCUMENTS MENU



sciQuest.

Menu items related to Document Search and Approvals are located in the **Orders & Documents** menu.



- Document search tasks are accessed from the **Document Search** sub-menu.



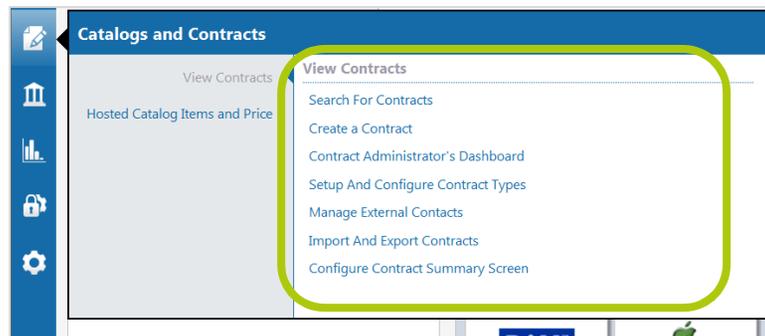
- All tasks related to approvals are available on the **Approvals** sub-menu.

# SIDE NAVIGATION BAR CATALOGS AND CONTRACTS

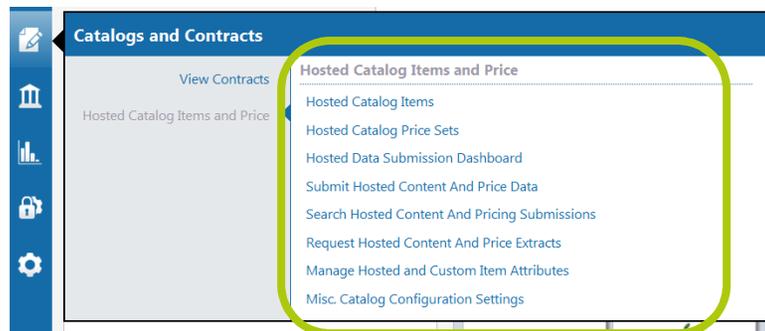


sciQuest.

Tasks related to the setup and management of hosted catalog content and contracts are located in the **Catalogs and Contracts** menu.



- The **View Contracts** sub-menu contains all options for contract management.



- Hosted catalog content, pricing and configuration tasks are accessed from the **Hosted Catalog Item and Price** menu.

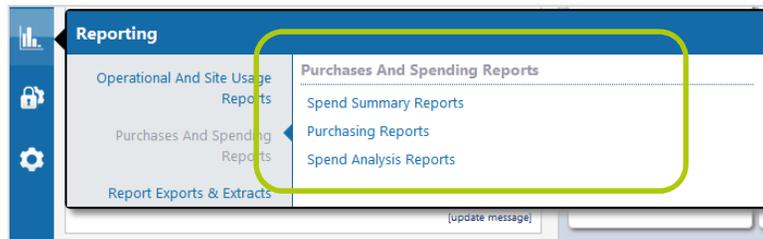
# SIDE NAVIGATION BAR REPORTING



Reports are accessed from the **Reporting** menu. The sub-menus are organized by report type and there is a separate sub-menu for downloading report extracts and exports.



- Access cycle time, invoice, site usage and catalog summary reports from the **Operational and Site Usage Reports** sub-menu.



- Access spend summary, purchasing and spend analysis reports from the **Purchasing and Spending Reports** sub-menu.

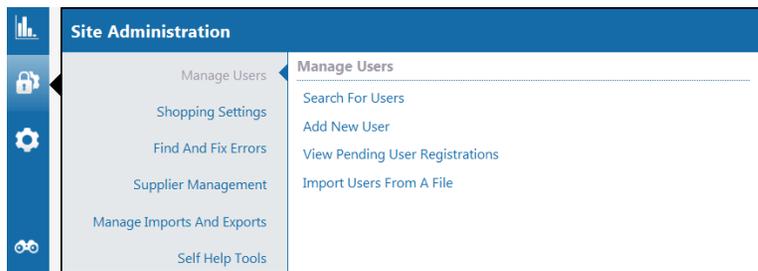


- Access your exports and extracts from the **Report Exports & Extracts** sub-menu.

# SIDE NAVIGATION BAR ADMINISTRATOR MENUS



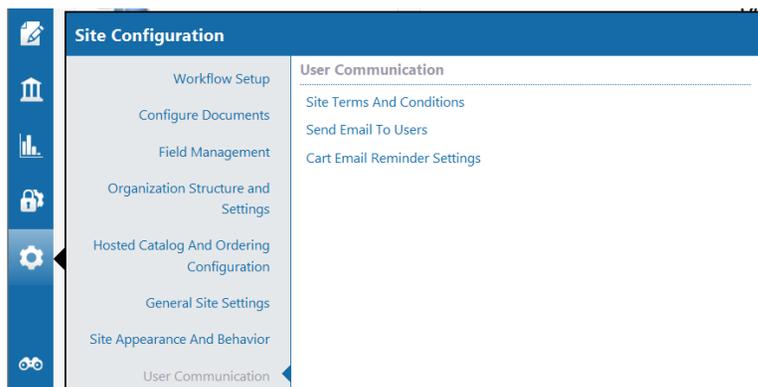
Most administrative functions have been grouped together in two menu options: Site Administration and Site Configuration. From these menus you will access administrator tasks that were previously accessed from separate navigation tabs throughout the application.



- **Site Administration Menu**



The most commonly used **Site Administration** options are user management and supplier management. Other sub-menu options available are shopping settings, find and fix errors, managing imports and accessing self-help tools.



- **Site Configuration Menu**



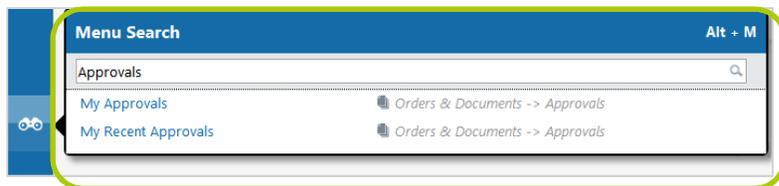
The **Site Configuration** menu contains all tasks related to configuring the site. This includes workflow setup, document configuration, field management, organization setup, hosted catalog configuration, general site settings, site appearance and behavior and user communication.

# SIDE NAVIGATION BAR MENU SEARCH OPTION



sciQuest.

If you are unsure of the location of a specific menu, you can use the **Menu Search** feature . Menu Search is a keyword search that returns a list of pages containing that keyword. Search results are clickable to take you directly to the page.



- You can search on menu keywords to locate that menu in the application. In addition to menu option link, the search results display breadcrumbs that show you the path to the menu item.
- In addition to accessing the Menu Search from the side navigation bar, you can use the quick-access key combination **Alt + M** anywhere in the application.

# The Top Banner

# THE TOP BANNER OVERVIEW



The top banner contains access points to your user profile, your assigned action items and available notifications. In addition, you can access a quick view of your active shopping cart and perform a quick search of the site.

**iShop** Diane Jones ▾ Action Items **3** Notifications 126.37 USD

Home / Shopping Home ▾ / Home/Shop

Shop Everything

**Go to:** advanced search | favorites | forms | non-catalog item | quick order **Browse:** suppliers | categories | contracts | chemicals

[Manage Showcases]

**Welcome to iShop**  
How can I help you today?

- Shop for items
- Request a service
- Approve an order
- Enter an invoice

**Useful Links:**

- If you are a new user, click here.
- Policies and Procedures

[update message]

**Office Supplies and Furniture** ?

- Office Supplies
- Office Supplies
- Steelcase Office Furniture

**Computers and Printers** ?

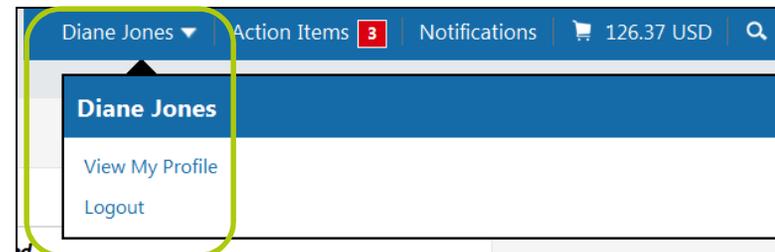
- 
-

# THE TOP BANNER USER MENU



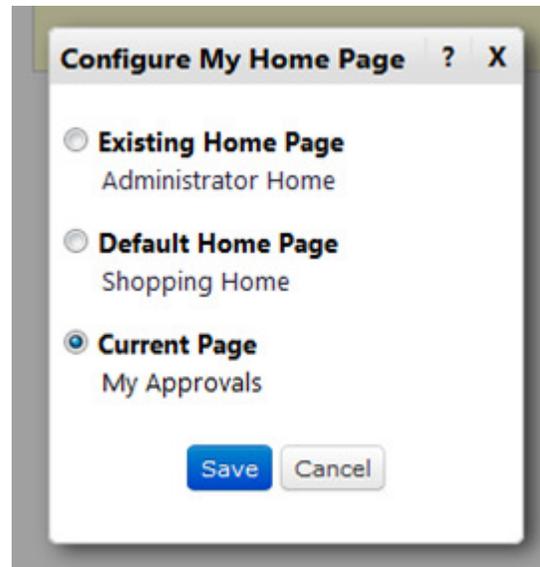
The user profile contains key information about a user, including contact information, permissions, ship-to and bill-to addresses, payment options, etc. Users with appropriate permissions can access and make updates to their user profiles from the User menu. In addition, users can log out of the application from the **Logout** option in the user menu.

- Click the drop-down to the right of your name to access the user menu.
- If you have permission to access your profile, you will see the **View My Profile** menu item. Click on the item to be taken to your user profile.
- Click on the **Logout** menu item to log out of the application.



# HOME PAGE SELECTION

Improved feature for 13.2



# FEATURE PREVIEW

Home Page Selection with new interface

- Users can select which “page” in the application is their home page, allowing them to quickly access their primary task.
- Configuration set at a per-user basis in the banner at the top of the page.
- **Modules:**
  - ALL (only available in new user interface)

**Easily select your most important page as your home page**

# Ability to Set My Home Page

The **home page** is the **page** displayed to a user after logging in to the application. A new feature is available in the Phoenix interface to allow users to set their own **home page**. Previously, the **home page** was determined by the organization and users were not able to select a different **page**. **Note:** This feature replaces the Classic interface method for customizing navigation tabs.

## Impact

- Modules Affected: **ALL**
- End User Impact: Low
- Admin User Impact: Low
- Integration Impact: None

## Key points of Feature

- This feature is **ON** (enabled) by default and is optional for use.
- New Permissions related to this Feature: None
- Users must have the **Customize Navigation** permission to be able to set their homepage.
- This feature is only available in the new Phoenix interface.
- To set a **page** as the homepage, the user should navigate to the appropriate **page** and open the **User Menu** by clicking on the user's name in the top banner. Clicking on the **Set My Home Page** link allows the user to set the current **page** as the **home page**. Additional options are available including display of the user's current **home page** and the ability to revert back to the default **home page**.
- Only menu items are available to be set as a user's **home page**. If a user attempts to set a lower level **page** as their **home page** (such as a specific requisition), the system will automatically locate the menu item associated with that **page** (such as Document Search) to set their homepage.
- For additional information about configuring the **home page**, please see [Configuring Your Homepage](#).

# BOOKMARKS

Users can select their most common tasks and bookmark them for easy access

The screenshot displays the DNTech Marketplace interface. At the top, the user is identified as Rachel McAuley, with links for Action Items, Notifications, and a shopping cart showing 0.00 USD. The main navigation bar includes 'Marketplace' and a search bar set to 'Everything'. A 'My Bookmarks' dropdown menu is open, listing 'Shopping Home Page', 'Search Documents', 'View Saved Searches', and 'My Approvals'. Below the menu, there are sections for 'Showcased Suppliers' (including Verizon Wireless, Smith's, Sigma-Aldrich, Fisher Scientific, Krackeler Scientific, Inc., Weston Stockroom, and Qiagen) and 'Showcased Services' (General Services, Computer Supplies & Accessories, Business Cards). A 'Punch-out' section features Dell and Apple logos. A sidebar on the left contains navigation icons and a welcome message for DNTech eBuy, including training information and a procurement refresher course scheduled for Tuesday, July 14th at 11:00 ET.

# FEATURE PREVIEW

Bookmark your favorite “pages” in the application

- Users can bookmark all menu items – allowing them to easily access the tasks they frequently perform.
- Bookmarks can be accessed through an icon in the banner or by pressing **Alt + B**.
- Bookmarks can be added, removed and re-ordered.
- **Modules:**
  - ALL (only available in new user interface)

Easily access commonly used pages from one customizable list

# Managing Page Bookmarks

This feature allows you to create and access **bookmarks** for commonly used pages. This is useful for accessing pages quickly without having to use the menu search or navigate through the site.

## Step-by-Step

The goal of this exercise is to manage page **bookmarks**.

### To access the **Bookmarks** menu:

- Click on the **Bookmark**  icon in the top banner OR
- Use the quick-key access combination **Alt + K**

### To save a page as a **bookmark**:

1. Navigate to the page you would like to **bookmark**.
2. Click on the **Bookmark**  icon in the top banner. The **My Bookmarks** menu will display.
3. Click **Bookmark this page**. The page will be saved as a **bookmark**.

### To access a page from a **bookmark**:

1. Access the **Bookmarks** menu.
2. A list of your **bookmarks** will display. Locate the **bookmark** for the page you want to access and click on it. You will be taken to the appropriate page.

### To remove a **bookmark** or reorder the sequence of **bookmarks**:

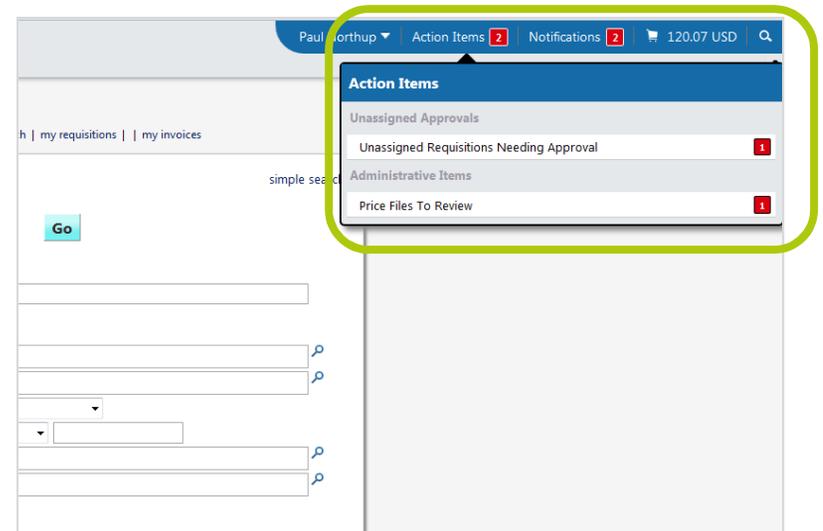
1. Access the **Bookmarks** menu.
2. Click **Edit**.
  - To remove a **bookmark** click the  icon to the left of the **bookmark** name.
  - To move a **bookmark** order click and drag the  icon to the right of the **bookmark** name to the appropriate location in the list.

# THE TOP BANNER ACTION ITEMS



**Action Items** are items that require some sort of action from the active user, such as price file review, registration approval, requisition approval, etc. Action items are accessed from the **Action Items** menu option in the top banner.

- If you have pending action items, a number indicating the number of pending items displays in red to the right of the **Action Item** menu option.
- Click on the **Action Item** drop-down text to access the list of items.
- The action items are sorted by action type.
- Items in the list are clickable. When you click on the item you are taken to the appropriate area of the application to complete the action.
- Action items are located in the top banner, which allows them to be accessible from all areas of the site.

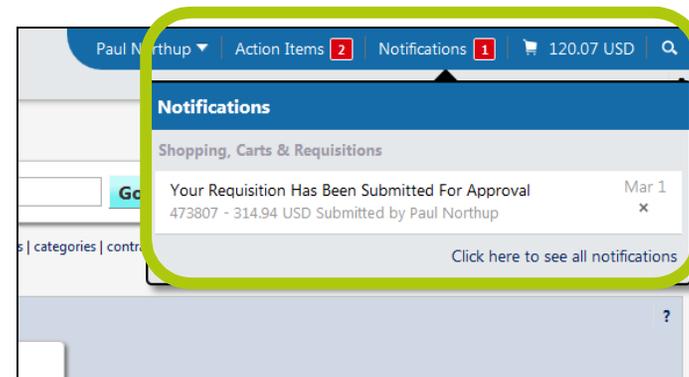


# THE TOP BANNER NOTIFICATIONS



Certain action items and/or tasks in SelectSite, such as a submitted requisition or a document awaiting approval, will trigger notifications to specified users. You can view these notifications from the **Notifications** menu option in the top banner. **Note:** Not all notification types are currently available to display in the menu. For any notification types that are not available in the application, you will receive email notifications only.

- Notifications available in the application will also be sent to you via email.
- If you have pending notifications, a number indicating the number of pending items displays in red to the right of the **Notifications** menu option.
- Notifications are sorted by notification type and newer notifications are highlighted.
- Notifications are clickable and take you to the appropriate area of the application (i.e. the requisition).
- Notifications are located in the top banner making them accessible from all areas of the site.

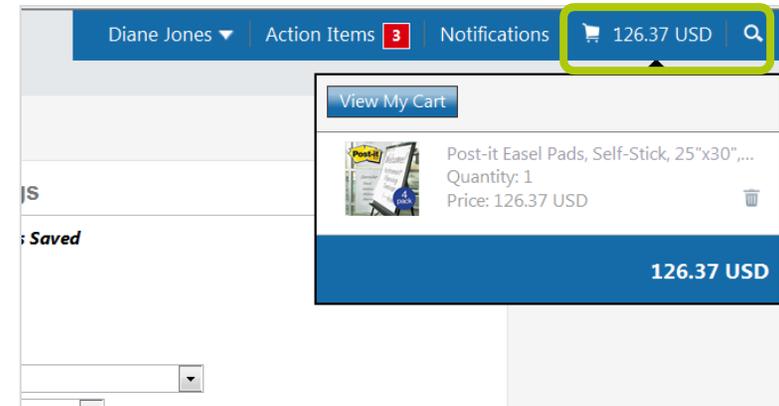


# THE TOP BANNER CART PREVIEW



Cart Preview allows you to get a quick view of the active shopping cart without having to access the cart in the application. From the Cart Preview you can review the item list, delete an item from the cart and access the active cart.

- The Cart Preview allows you to see a quick view of the items in your active shopping cart.
- Click on the shopping cart icon and the item list will display.
- The item image, name, quantity and price will display for the item.
- You can remove an item from the active cart by clicking on the  icon.
- Clicking the **View My Cart** button takes you to the active cart.
- Cart Preview is on the top banner, which makes it accessible from anywhere in the application.



# THE TOP BANNER QUICK SEARCH



The Quick Search feature allows a variety of searches, such as supplier profile, document, user profile, etc., to be performed from anywhere in the application. Available searches depend on the user's permissions.

- Quick Search is accessible from all areas of the application.
- Click the  icon to display the Quick Search fields.
- You select the search type from the drop-down menu. Only search types for which you have permissions are available.
- An All option is available in Quick Search that allows you to search for the keywords among all users, tasks, suppliers and other items available for search.
- You can also access Quick Search using the quick-access key combination **Alt + Q** from anywhere in the application.

