New User Interface
Training Guide
June 2013

Updated 7/21/2013
Introduction

Beginning in June users will have the option to enable the new user interface. The new interface, referred to as the Phoenix interface, will replace the original, referred to as the Classic interface. The Phoenix UI offers a streamlined approach to navigating to enhance the user experience and make interacting with the application easier.

A View of Phoenix Interface
Rollout

- While it is not required for users to switch to the new Phoenix Interface in June 2013 users will have the option to enable the new user interface. Procurement Services recommends that users begin using the new Phoenix Interface before the required switch on December 19, 2013.

- All users will be switched to the new Phoenix Interface on December 19, 2013. The Classic interface will no longer be available after December 19, 2013.

- **Important Note:** Phoenix interface is not available for IE7 or for IE8 and IE9 in compatibility mode. If you are using one of these browsers and attempt to switch to the Phoenix interface, the following message will be displayed indicating that the browser or browser setting is not supported in the New Phoenix interface. The user will need to update their IE browser or browser settings.
Purpose

The purpose of this training guide is to provide information about enabling the Phoenix interface in the M-marketsite, as well as provide information so that you can begin to use it.

This document contains three sections:

1. Activating the Phoenix Interface – provides information for activating the interface within your user profile.

2. Classic vs. Phoenix – provides a side-by-side comparison of the key changes between the old and new interfaces.

3. Phoenix Interface Menu Options – provides information about the menu options available in the interface. The menu options have been reorganized into more logical groupings based on work tasks.
Activating Phoenix Interface
Activating Phoenix Interface

Overview
The Phoenix interface can be activated in your M-marketsite user profile. If you do enable the Phoenix interface, you will be able to switch back to Classic interface until it is no longer available on December 15, 2013.

Steps for Activating Phoenix Interface:

1. Access the **Personal Settings** tab in the user profile.
2. In the **User Interface Style** drop-down box, select **Phoenix**.
3. Click **Save**.
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 the M-marketsite, 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.
Phoenix Notification Improvements

You can now receive communications through in-application notifications or email, with the ability to select how you would like to receive the notices.

To configure select Email Preferences with in you My Profile

Make your select for the different notifications
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.
- 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.
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 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.
  - The Cart Name appears at the top right of the My Cart Preview
  - Clicking the View My Cart button takes you to the active cart from which you can “Proceed to Checkout”
  - You can click the Checkout button to go straight to checkout
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.
Phoenix Interface Menu Options
Phoenix Interface Menu Options: Home Menu

The Phoenix interface, allows for quick navigation to the shopping home page via Home menu.

Home shopping page can be quickly navigated to by clicking the Home 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: You can also use the quick-key Alt + P to access 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.
Phoenix Interface Menu Options: Orders & Documents Menu

In the Phoenix interface, orders related to Document Search and Approvals are located in the Orders & Documents menu.

- Document search tasks are accessed from the Document Search sub-menu.
New Features for Phoenix Interface Users
New Express Checkout

A more intuitive and user friendly checkout process

- Only available with the new Phoenix interface
- Use of the new express checkout is optional
Bookmark your favorite “pages” within the application

The Bookmarks feature allows you to:

- Bookmark menu items – allowing easy access to frequently performed tasks.
- Access bookmarks through an icon in the banner or by pressing Alt + K.
- Add, remove and reorder bookmarks

Use Edit button to remove or reorder Bookmarks

Click to remove

Click and drag to reorder

My Bookmarks

View Draft Shopping Carts

Search Documents

Done
Home Page Selection

You can select which “page” in the application is your home page, allowing you to quickly access your primary task.

Change your home page setting through a few easy changes to your profile (see below):

1. Click Dropdown
2. Select Set My Home Page
3. Make selection and Save