New “Phoenix” User Interface
Transition Guide
November 4, 2013

eBuy Help: (814)-865-7562 or eBuy@psu.edu
Introduction

On November 4, 2013, Penn State will introduce a new user interface. The new interface, referred to as the Phoenix User Interface or Phoenix UI, will replace the original, referred to as the Classic User Interface or Classic UI. The Phoenix UI offers a streamlined approach to navigating, enhancing the user experience and make interacting with the application easier.
Rolling out the new Phoenix UI

- While it is not required for users to switch to the new Phoenix UI in November, Purchasing Services recommends that users enable the new user interface and become familiar with the application before the switchover.
- All users will be switched to the new Phoenix UI in March of 2014. The Classic UI will no longer be available after the March deadline.
- (Please note: The Phoenix UI will not work with the following Internet Browsers...IE7 or for IE8 and IE9 in compatibility mode. If you are using one of these browsers and attempt to switch to the Phoenix UI, a message will be displayed indicating that the browser or browser setting is not supported. The user will need to update their IE browser or browser settings.)
Purpose

The purpose of this transition guide is to provide information about enabling the Phoenix UI in eBuy, as well as provide information so that you can begin to use it.

This guide contains four sections:
1. Phoenix UI Feature Preview.
2. Activating the Phoenix UI – provides information for activating the interface within your user profile.
3. Classic vs. Phoenix – provides a side-by-side comparison of the key changes between the old and new interfaces.
4. Phoenix UI 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.
Section 1: Phoenix UI Feature Preview
Feature Preview

Bookmark your favorite “pages” in eBuy.

- 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 + K.
- Bookmarks can be added, removed and re-ordered.

Easily access commonly used pages from one customizable list.
**Bookmarks**

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

Home Page Selection

Users can select the “page” that displays in eBuy as their home page, allowing them to quickly access their primary task.

- This option is set at a per-user basis in the banner at the top of the page.
- New hotkey combination to access home page: Alt + 1

Easily select your most important page as your home page.
Home Page Selection

Each user can set a Home Page
Feature Preview

Notifications

• Users can receive communications through in-application notifications and/or email.
• Users can select “how” they would like to receive communications (as shown below).
• Users can also choose not to receive communications.
Notifications
Feature Preview
Menu Search (Binoculars on bottom left of screen)

- With the new Phoenix UI, the Menu Search (Binoculars icon) is a common way to locate a task on the eBuy site.
  - Start typing and the search tool will “auto-complete” for you.
  - Search results will filter immediately based on search terms
  - Hot Key accessible by typing Alt + M

Easily find important menu items in navigation.
Menu Search (Binoculars)
Feature Preview

Shopping Cart Preview

- 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 trash can 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.
- Ability to go straight to checkout.

Easily navigate to checkout when it’s not necessary to access your cart.
Shopping Cart Preview

Welcome to eBuy. Purchasing without the paperwork!

Software at Penn State
Penn State’s source for software volume licensing.

Standing Order Letter for 2013/2014
Click here for a copy of the 13/14 SO Letter

General eBuy Training for 2013
Click here for a copy of the Training Schedule

Showcased Suppliers

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emsco Scientific Enterprises</td>
<td>Corning Glass &amp; Plasticware</td>
</tr>
</tbody>
</table>

eBuy+ Forms

<table>
<thead>
<tr>
<th>Form Name</th>
<th>Description</th>
</tr>
</thead>
</table>

My Cart

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Quantity</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEAKER GRIF LF PP PK-12 30ML...</td>
<td>1</td>
<td>43.95 USD</td>
</tr>
<tr>
<td>BEAKER GRIF PTFE CHEMWARE...</td>
<td>1</td>
<td>22.06 USD</td>
</tr>
<tr>
<td>VWR BEAKER POLYPROP 400M...</td>
<td>1</td>
<td>36.98 USD</td>
</tr>
<tr>
<td>VWR BEAKER POLY 50ML PK12...</td>
<td>1</td>
<td>21.74 USD</td>
</tr>
</tbody>
</table>

124.73 USD

Freshman Lab Supplies

View My Cart

Checkout

Purchasing Services
Feature Preview

Optional Express Checkout

A more intuitive and user friendly checkout process will be available (as an option). You can switch to the express checkout by clicking on the “Go to Express Checkout” link.
Optional Express Checkout

**Order Review**

- ✔ Shipping
- ✔ Billing
- ✔ Account Codes
- ❌ Lines

**Order Summary**

| Subtotal | 124.73 USD |

**VWR INTERNATIONAL**

Address 1
128 Chemistry Building, University Park, PA 16802 US

<table>
<thead>
<tr>
<th>Item</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Total Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>VWR BEAKER POLYPROP 400ML PK6</td>
<td>36.98 USD</td>
<td>1 PK</td>
<td>36.98 USD</td>
</tr>
<tr>
<td>VWR BEAKER POLY 50ML PK12</td>
<td>21.74 USD</td>
<td>1 PK</td>
<td>21.74 USD</td>
</tr>
</tbody>
</table>

**PENNSTATE**

Purchasing Services
Optional Express Checkout (Continued)

...or if you prefer, you can switch back to the Advanced Checkout. Just scroll down and select the “Go To Advanced Checkout” link.
Section 2: Activating the Phoenix UI
Activating Phoenix

The Phoenix UI can be activated in your eBuy user profile. If you do enable the Phoenix UI, you will be able to switch back and forth with the Classic UI until it is no longer available in March 2014.

Steps for Activating the Phoenix UI:
1. Select the **profile** link next to your name or the **profile** tab.
2. Access the **Personal Settings** tab in the user profile.
3. In the **User Interface Style** drop-box, select Phoenix.
4. Click **Save**.
Section 3: Classic vs. Phoenix
Classic vs. Phoenix General Navigation

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

Classic:
The Classic UI is navigated via a tab-driven menu that is always present across the top of the page. Sub-menu items are located in Sub-navigations tabs.

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

**Classic:**
Classic UI 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), administrative tasks, tasks related to documents and approvals, and more.
Classic vs. Phoenix: Action Items

In the Classic UI, 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 UI, 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 the Classic UI, clicking on the action item takes you to the appropriate area of the application to complete the action.
Classic vs. Phoenix User Profile

In the Classic UI, user profile information and options are located in a series of navigation tabs and sub-tabs. In the Phoenix UI, 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.

**Phoenix:**
Users access their own profile by selecting the drop-down menu next to the user’s name and selecting View My Profile.
All options are in a single user profile menu. Options are grouped by similar tasks.
Classic vs. Phoenix Quick Search

Classic:
Quick Search is located at the top-right of the screen. Users must select the appropriate search category from the drop-box and then enter the desired search information.

Phoenix:
Quick Search is still accessible from all pages, but is hidden until you select the search icon. Searches are performed across All search categories unless the users’ narrows their search to one specific category.

You can also access the Quick Search using the quick-key Alt + Q.
Section 4: Phoenix UI Menu Options
Home Menu

The Phoenix UI allows for quick navigation to the user’s Home page via the Home Menu icon. As mentioned earlier, users have the option of selecting a preferred Home Page. Simply click on the icon to access your Home Page.
The **Shop Menu** contains options related to shopping tasks, including: search options, access to the catalog shopping home page, forms, favorites, and access to Active, Draft Carts, and past orders. This menu can be accessed from anywhere in the application by typing **Alt + P**. You can also position your mouse (hover) over the **Shop** icon to expose the list of sub-menus.
Shop Menu (Continued)

Position your mouse (hover) over the left list to expose/change your options on the right.
Orders & Documents Menu

In the Phoenix UI, orders related to Document Search and Approvals are located in the menu.
Orders & Documents Menu (Continued)

Users with additional access will see additional Icons (most additional icons are Administrative).
Questions and Access to Help

eBuy@psu.edu Please be advised that emails will be addressed as soon as possible.

eBuy Help Line (814-865-7562) Monday through Friday from 8:00 AM to 4:00 PM. Please be patient as our receptionist may require additional information to ensure that your call is routed to the Help Line or to an agent/purchasing assistant/payables. Help Line phone calls will be answered/returned as Help Line Staff are available.

Hot Key Review

Alt + 1 = Home Page (Easily select your most important page as your home page)
Alt + K = Bookmark Page (easily access commonly used pages from one customizable list)
Alt + M = Menu Search (easily find important menu items in navigation)
Alt + P = Shopping Menu (easily find options related to shopping tasks)
Alt + Q = Quick Search (easily search on all items within eBuy)