# Phoenix User Interface – Training Guide

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1. Introduction:
In March 2013 the Gateway site was upgraded to version 13.1. The upgrade included an option to change your user interface style. The new interface, referred to as Phoenix, will replace the original, referred to as Classic. Phoenix offers a streamlined approach to navigating and using Gateway to enhance the user experience and make interacting with the system easier.

A view of the Phoenix Interface:
2. Departmental Rollout Recommendations

- While using Phoenix is not required, we do recommend you select a subset of users in your department to being using and learning the new interface.

- We anticipate that by early 2014 we will transition the campus to Phoenix. The plan is for the classic interface to no longer be available with the 14.1 release in March 2014.

- Keep in mind, as a department, this transition can be made at any time by changing the interface in your personal profile. We recommend rollout of the interface at a time most appropriate for your department based on resources and workload constraints.

- Important Note: Phoenix interface is not available in the following browsers IE7, IE8, and IE9 in compatibility mode. If you are using one of these browsers and attempt to switch to the Phoenix interface, you will be reverted to the Classic interface, and receive a message stating your browser is not supported. You will need to update your IE browser.
Section 2 – Classic vs. Phoenix

3. Activating Phoenix Interface
   - Access the Personal Settings tab in your user profile
   - In the User Interface Style drop down box, select Phoenix
   - Click Save
Section 2 – Classic vs. Phoenix

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 In Phoenix, tab navigation has been replaced by a clean, slide-out side menu that displays the available menu options.

Classic
   - Classic 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
   - Phoenix Interface features a slide out menu. Menu items stay out of the way until they are needed, for a cleaner, less cluttered site.
Section 2 – Classic vs. Phoenix

2. Classic vs. Phoenix – Menu Item Groupings
   - In Classic, related menu options are often located in separate menu tabs. In Phoenix, 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 often separates pages on to separate tabs. For example, the shopping page, favorites page, and forms page are located in individual tabs.

Phoenix
   - Phoenix Interface features a slide out menu. Menu items stay out of the way until they are needed, for a cleaner, less cluttered site. Suggest in lieu: Phoenix Interface places Shopping, Favorites and Forms in the slide-out Shop Menu.
Section 2 – Classic vs. Phoenix

- 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.

3. Classic vs. Phoenix – Action Items
In Classic, action items are located on the shopping page. If you are in another area of the application, you are required to return to the Shopping page to view them. In Phoenix, 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, clicking on the action item takes you to the appropriate area of the application to complete the action.
Section 2 – Classic vs. Phoenix

4. Classic vs. Phoenix – Notifications
   - Certain action items and/or tasks in Gateway, such as a submitted requisition or a document awaiting approval, will trigger notification to specified users. These notifications are not viewable in Classic, and are available only by email. In Phoenix, 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.

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From: support@sciquest.com
To: Christine Griffin
Cc: 
Subject: PO Fax Non-Delivery Notification UCSB PO# GW00000005953 Sciquest Ref # 28617130 - GLAXOSMITHKLINE PHARMACEUTICALS

Re: PO Fax Non-Delivery Notification UCSB PO# GW00000005953 Sciquest Ref # 28617130 - GLAXOSMITHKLINE PHARMACEUTICALS

Dear Christine Griffin,

This email is to inform you that the following purchase order was not delivered to the supplier listed below. Please review the explanation and confirm the order distribution fax number and resend the order as appropriate.

PO No.: GW00000005953
PO Total: 2,210.70 USD
PO Priority: 1:Normal
Supplier Name: GLAXOSMITHKLINE PHARMACEUTICALS Order Distribution Fax No.: +1 (877) 406-8430 Failure message: The dialed number rang, but did not answer.

Click the link below to log in and access the PO Distribution Maintenance page.


If, after validating the fax number, you need additional information, please contact your systems administrator or SciQuest Support.

Support Team Contact Information:
help@gateway.procurement.ucsb.edu

Thank you,
SciQuest Customer Support
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 within the site (i.e. to the requisition).
- Newer notifications are highlighted.
- You will continue to receive email notifications.
Section 2 – Classic vs. Phoenix

5. Classic vs. Phoenix – User Profile

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

![User Profile in Classic](image1)

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

![User Profile in Classic](image2)

- Users access their own profiles through the profile link.
Section 2 – Classic vs. Phoenix

Phoenix

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

- Users access their own profiles by selecting the drop-down menu besides the user’s name and selecting View My Profile.
Section 2 – Classic vs. Phoenix

6. Classic vs. Phoenix – Cart Preview

    Classic

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

    ![Classic Cart Preview](image1)

    Phoenix

    - Phoenix 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.

    ![Phoenix Cart Preview](image2)
7. 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.
1. Phoenix Interface – Menu Options: Shop

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 a separate navigation tab in Classic.
The My Carts and Orders sub-menu contains options for viewing your active cart, draft shopping carts and your most recent orders.
2. **Phoenix Interface – Menu Options: Orders and Documents**

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

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

- All task related to the approvals are available on the Approvals sub-menu.
3. Phoenix Interface – Menu Options: Accounts Payable

The Accounts Payable menu contains all tasks related to AP Director and Settlement Manager.

- From the Invoices and Receipts sub-menu you can access the AP Dashboard and other tasks related to invoices and receipts.

- Users with AP administration or receiving permissions will be able to access the AP Administration menu. From this menu, you can configure the AP Settings and matching rules and tolerances.