Phoenix User Interface Training Guide

Updated 11/2/2013
Beginning soon Procurement will enable a new interface within OSCAR call the “Phoenix “interface. This new interface will replace the original interface referred to as the “Classic”. The Phoenix user interface offers a streamlined approach to navigating. It enhances the user experience and makes interacting with OSCAR a lot easier.

Phoenix Interface
Topics discussed:

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

2. **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.

3. **New Express Checkout** – a new optional checkout process that is more intuitive and user-friendly. The new checkout process feels more like a standard e-commerce checkout process and is easier for shoppers.
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 In the Phoenix interface, tab navigation has been replaced by a clean, slide-out side menu that displays the available menu options.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.
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, favorite’s 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, and tasks related to documents, approvals, and more.
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.
Notifications

Certain action items and/or tasks in OSCAR will trigger notifications to specified users. These notifications are not viewable in the Classic interface and were only available by email. In the Phoenix interface, you can now view these notifications in the top banner of OSCAR right next to the “Action Items” notification. Similar to 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 within the OSCAR application. Users were 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.
- Notifications will be automatically deleted after 30 days.
- Unlike the notification of Action Items that do tend to disappear once an action item has been completed. Notifications will not disappear automatically and will have to be deleted manually.
Phoenix Notification Improvements

You can now receive communications through in-application notifications or email, with the ability to manage your profile and select how you would like to receive these messages.

To configure select “Email Preferences” in your My Profile.

Make your selection for the different ways on how to receive notifications.
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 a simpler navigation with a main user profile menu which groups similar tasks in a logical manner and Quick Links contain the most commonly used tasks.

Classic:
- User profile tasks are accessed from a series of navigation tabs and sub-tabs.
- Additional task buttons were displayed in the main page of the user profile.

Phoenix:
- All options are in a single user profile menu. Options are grouped by similar tasks.
User Profile (continued)

Classic:
- Users can 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.
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”.

![Classic Cart Preview](image1.png)
![Phoenix Cart Preview](image2.png)
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
Home Menu

In the Phoenix interface allows for quick navigation to your set home page. By default your homepage is set to the shopping page in OSCAR. You can now have the option to set your own home page. Please read the New Features section to learn how to set your home page.
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: 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.
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.

- Once you have entered all of your search criteria select Go. OSCAR will return your search results.
New Features
New Express Checkout

- A more intuitive and user friendly checkout process.
- Feels more like a standard e-commerce checkout process.
Bookmark your favorite “pages” within OSCAR

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

Click to add page to bookmark.  
Click icon to remove.  
Click and drag to re-order.
Menu Search

Pages are easier to find with the 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 are displayed and tell you how to navigate to the page.

Note: You can also use the Alt + M quick-key to access Menu Search
Home Page Selection

You can select a specific web page in OSCAR as your home page, allowing for users to quickly access their primary task.

To change your home page setting please see image below:

1. Click on drop down arrow
2. Click on Set My Home Page
3. Make Selection and Save