Phoenix Interface
Site Navigation

SelectSite – March 2013
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.
There are three main areas of the SelectSite user interface: the main workspace, the side navigation menu and the top banner. This document contains a section for each main area. Each section provides an overview of the area as well as additional details about its navigation and use.

The goal of this document is to help you navigate and locate items within the interface and it is not meant to provide information about how to use these features. For information about using the SelectSite features please see the SelectSite documentation including:

- Requisitioner’s Handbook
- Administrator’s Handbook: Day-to-Day Tasks
- Administrator’s Handbook: Setup and Advanced Tasks
- Workflow and Approvals Handbook
- Accounts Payable Handbook
- Contract Manager Handbook
- Supplies Manager Handbook
The Main Workspace
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.
The image below shows the Advanced Document Search active in the main workspace.
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 **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.
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.
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.
The Accounts Payable menu contains all tasks related to AP Director and Settlement Manager.

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

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

Users can select their most common tasks and bookmark them for easy access.
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
HOME PAGE SELECTION

Improved feature for 13.2
FEATURE PREVIEW
Improvements to Cart Preview with new interface

• The Cart Preview, which was introduced in 13.1, provides a way for a user to quickly glance at what has been added to their cart. Improvements include:
  - Added Cart Name at top right of cart preview
  - Added ability to go straight to checkout

• Modules:
  - All (only available in new user interface)

Easily navigate to checkout when it’s not necessary to access cart
CART PREVIEW
Improved feature for 13.2