A guide to the new shopping experience

New screen layouts and navigation
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What’s Changing?

All users will see new screen layouts and navigation for Searching the Catalog, Shopping Carts, Checkout Process, Requisitions, and POs.

Things that DO NOT change:

- Document Search
- PR and NR Forms
- Approval Folders
- Supplier Icons
- Receipts screens and process - although the PO will have the new look & feel, the screens for creating a receipt are unchanged
- Other B2P modules: Supplier Portal, Sourcing, TCM
Some basics…

Click to **edit** information in a panel

Click to display **additional options** available for individual items or section

During the Checkout Process, click to filter the sections in the **Summary** tab to view the accounting codes and line items

The menu options previously found under **Document Actions** are now found by clicking the document type name in the top-left

- Click to **add** an item to Favorites
- Item is a user’s **personal** Favorite
- Item is a **shared** Favorite

Use the scroll bar on the **far right** of your screen to navigate through the requisition and PO
Icons

**General**
- Shared cart
- The recommended item has been added to a requisition in the last 30 days
- Item requires sourcing
- Item is associated with a contract
- Click to view further information about an item
- Click to view help information

**Comparisons**
- Click to add an item to the Compare list
- Item has been added to the Compare list
- Click to generate a comparison
- No items have been selected for comparison

**Navigation and View**
- Collapse section
- Expand section
- Show shopping search results in a grid view
- Show shopping search results in a list view
- Choose which item details to display on tiles in the grid view
- Show or hide sidebar
Homepage

- **Shopping panel** has been resized and now extends fully across the homepage.
- **Action Items** section has moved down to accommodate.
- The **Advanced** search is now accessed in a new tab.
- **Go to** (previously 'Shortcuts') and **Browse** options remain unchanged.
- A new **PO (non-Catalog)** widget has been added. This will open the same 'Add Non-Catalog Item' as with the existing links in the **Shopping** and **Quick Links** sections.
Searching the Catalog

The search results can now be displayed in **list view** or **grid view**.

**New List View**

- Show or hide filter sidebar
- Compare items
- Sort options

**New Grid View**

- Toggle to see **grid view**
- Select item details to display on tiles in the grid view

**New List View**

- Toggle to see **list view**

- Item is a Favorite
- Add item to Compare list
- Click to add to Favorites
- Click to remove item that is on Compare list
**Non-Catalog Item**

**Step 1:** Open the Add Non-Catalog Item window by clicking links in the Shopping and Quick Links sections or through the new PO (Non-Catalog) widget.

**Step 2:** Enter the supplier in the Select Supplier field or click the magnifying glass to open the Supplier Search window.

**Step 3:** Once you have selected a supplier, there are a few changes that are highlighted below.

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**Original experience**

- **Non-Catalog Item**
  - ABC BUSINESS COMMUNICATIONS LTD
  - 100 GEORGE BORROW ROAD, NORWICH, NOR THU GB
  - Distribution Methods:
    - The system will distribute purchase orders using the method(s) indicated below:
    - Check this box to update PO distribution: Direct for PO and RR.
    - Email (Plain Text): test@harvard.edu
  - Product Details
  - Additional Details
  - Add Internal Attachments

**New Shopping experience**

- **Add Non-Catalog Item**
  - Supplier: Existing Supplier
  - Fulfillment Address
  - Distribution Methods
  - Scroll down to see the Additional Details and Add Internal Attachments sections that were previously found under Product Details
  - Mouse over the Supplier Icons to see further details
  - Click to expand Fulfillment Address and Distribution Methods
  - Do not use the Existing Supplier field to search for a supplier
Please note: The **Requisition Description or Business Purpose** field and the **Standing Amount Based PO** checkbox are no longer available on the shopping cart. Click ‘Proceed to Checkout’ to update those fields.

Jaggaer, the B2P vendor, is working to add them back in.
Checkout Process

Items previously in the left-hand menu are now found across the top in tabs.

Subsections previously under Requisition (i.e. the items you viewed in the Final Review tab) are now located on the Summary tab. You can scroll through using the scroll-bar on the far right.

Click the eye icon to filter your view to line items only or accounting codes with line items.

Scroll-bar to navigate through the Summary section.

Internal and External Attachments are located on one tab. Blue circles indicate the number available.

Go to the What’s next for my order? section to view and scroll through the approval workflow information.

Description or Business Purpose and Standing Amount Based PO are editable here.

Click to edit section.

Click to expand.

Click to see Approvers assigned to that level.
Checkout Process: COA at Header Level

**Step 1:** Click the eye icon to filter the view of the Summary tab to show Accounting Codes and line items.

**Step 2:** Click pencil to open window to edit COA in header section.

Hover your mouse over the section to display the three options for **add split (+)**, **recalculate / validate** (check), and **Code Favorites** (heart).

You may have to scroll to the right to see these.

Click magnifying glass to search values.

Click arrow to access COA segment favorites.
Checkout Process: COA at Line Level

**Step 1:** Click the eye icon to filter the view of the Summary tab to show Accounting Codes and line items.

View with line level COA **same** as header COA

**Step 2:** Click (...) at the line level and select **Accounting Codes** from the menu to edit line level COA details.

**Step 3:** Search and enter COA values in the Override Line pop-up.

You will see ‘Values vary by line, Copy to other lines’ in the Account Codes section when one of the line items is assigned to a different COA.

Line items assigned to a different COA will display an **ACCOUNTING CODES** section.

Mouse over ‘i’ icon to see information

Line level does not state ‘Same as header’ like in original view. If nothing is stated, then line level COA is the same as header COA.
Checkout Process: Action Menus

The menu options previously found under **Document Actions** are now found by clicking the document type name in the top-left.

**Return to Cart** is also here.

**Submit Request** button is located here.

**Note:** it is only active on the Summary, Comments, and Attachments tabs. You will not be able to click if you are on the PO Preview or History tabs.

**Step 1:** Click a checkbox next to an item to select it. A green arrow will display.

**Step 2:** Click the drop-down menu arrow in the section heading to see list of available actions that can be taken for the selected item(s).
Submitted Requisitions

Items previously in the left-hand menu are now found across the top in tabs and in sections within the Summary tab. You can scroll through using the scroll-bar on the far right.

New Shopping experience

- Click to open related documents
- Go to the What’s next? section to view and scroll through the approval workflow information
- Scroll-bar to navigate through the Summary section
- Internal and External Attachments are located on one tab

Original experience

- Requisitions: 3011619
  - General
    - Status: Completed
      - 2/5/2021 3:47 PM
    - Submitted: 2/1/2021 11:01 AM
    - Cart Name: Test 1 - Non-Catalog new UI
    - Accounting Date: 2/1/2021
    - Prepared by: Sample Requester 105
  - Ship to & Bill to
    - Ship To:
      - ATTN Name/Department
      - Building/Room
      - 1038 Massachusetts Ave
      - Cambridge, MA 02139-0000
      - United States
    - Bill To:
      - Harvard University
      - Accounts Payable
      - Email invoices to AP_Invoices@harvard.edu
      - PO: 38013568
      - Cambridge, MA 02238
      - United States
  - Total (100.00 USD):
    - Subtotal:
      - 100.00

POs

Items previously in the left-hand menu are now found across the top in tabs and in sections within the **Summary** tab.

You can scroll through using the scroll-bar on the far right.

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**Original experience**

Purchase Order: 80000002441 Revision 0

**New Shopping experience**

Purchase Order: 80000002441

- **Status**
- **Summary**
- **Revisions**
- **Shipments**
- **Change Requests**
- **Receipts**
- **Invoices**
- **Comments**
- **Attachments**

**General**

- Accounting Date: 3/12/2020
- PO/Reference No.: 80000002441
- Priority: Normal
- Supplier Name: ABC BUSINESS COMMUNICATIONS LTD
- Address: 100 GEORGE BORROW ROAD, NORWICH, NR4 7HU GB
- Purchase Order Date: 3/12/2020
- Total: $100,000.00
- Requisition Number: 2918098
- Requisition Description of Business Purpose: no value
- Stand Amount Based PO: ✓

**Ship to & Bill to**

- Ship To: ATTN: Sample Requester101
  Department: Building/Room: 1033 Massachusetts Ave
  Cambridge, MA 02138 United States
- Bill To: Harvard University
  Accounts Payable
  P.O. Box 381586
  Cambridge, MA 02238 United States

**Total (100,000.00 USD)**

- Subtotal: $100,000.00
- Complete: $100,000.00

**Workflow**

- Submitted
- Assigned PO Number
- Completed

**What's next?**

- Click to open related documents
- Go to the **What's next?** section to view and scroll through the approval workflow information