What's Changing?

A guide to the new shopping experience

New screen layouts and navigation

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What’s Changing?

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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**

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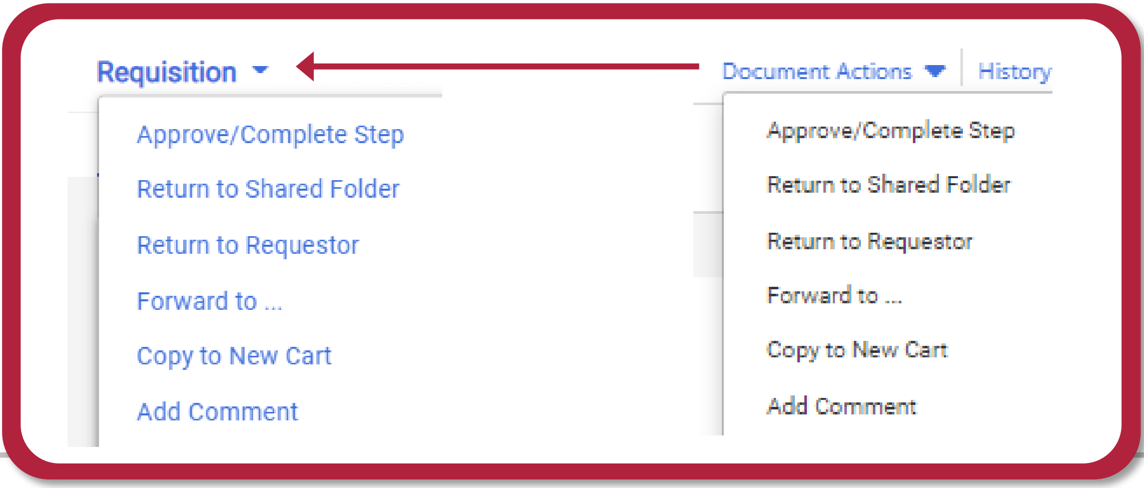
Some basics…

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

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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

Navigation and View

Collapse section

or 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 Hide Show or hide sidebar

Comparisons

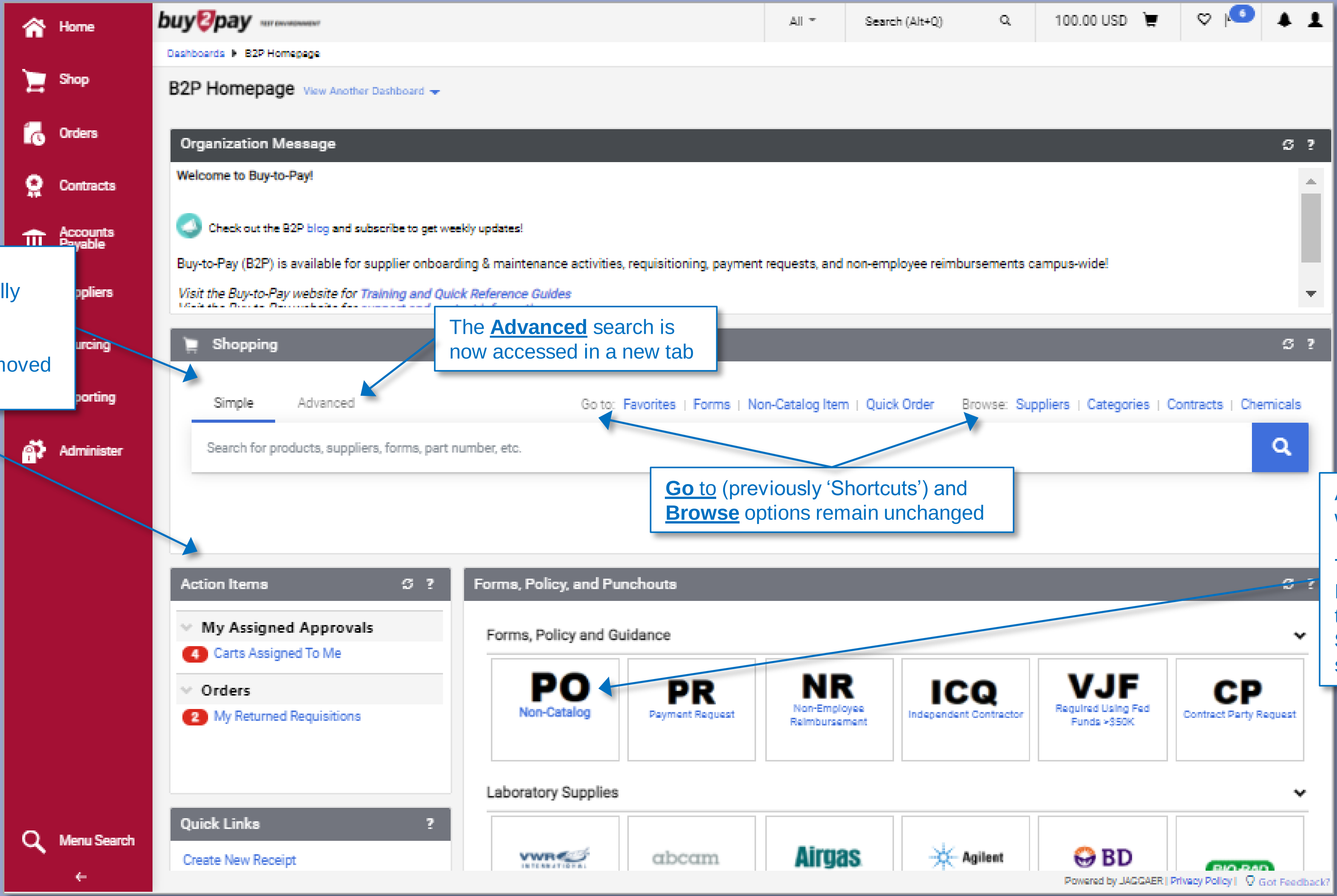
COMPARE or Click to add an item to the Compare list

COMPARE or Item has been added to the Compare list

2 Compare Click to generate a comparison

Compare No items have been selected for comparison

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

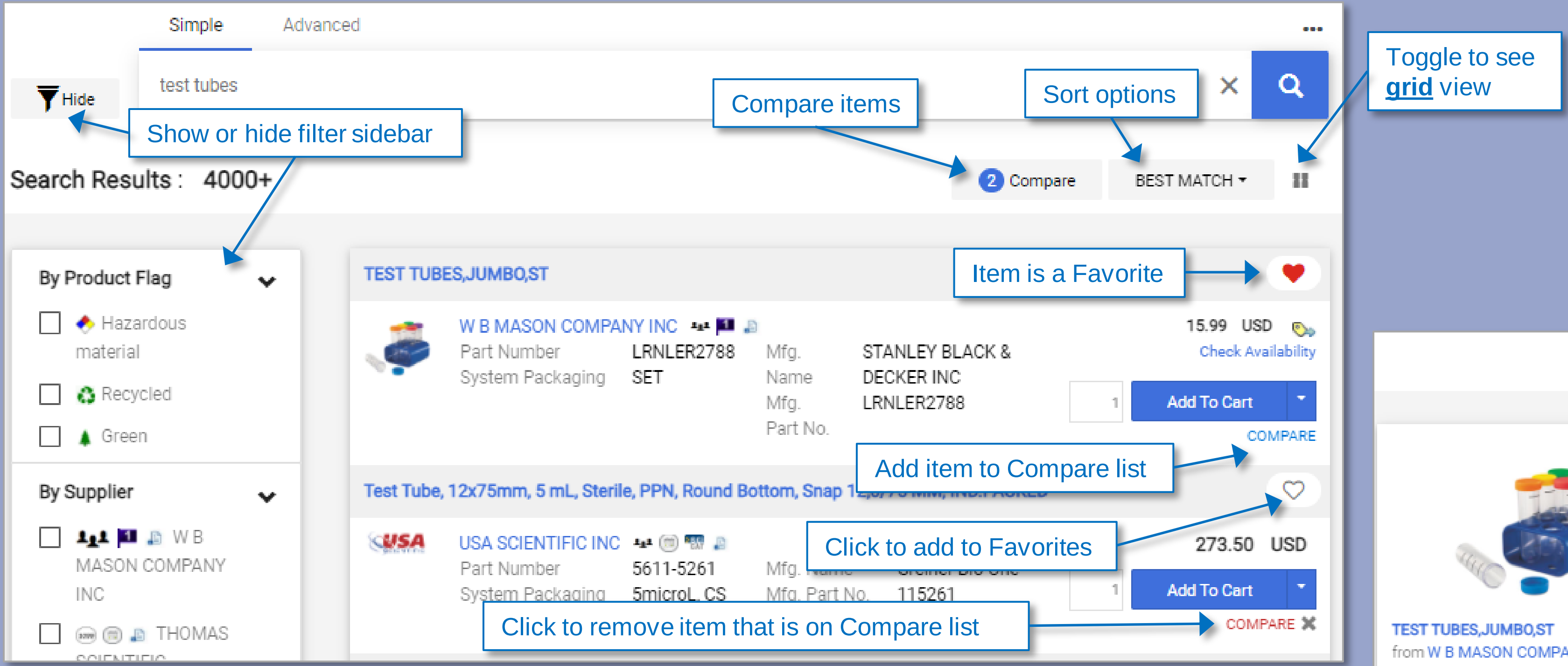
A new **PO (non-Catalog)** widget has been added.

This will open the same 'Add Non-Catalog Item' as with the existing links in the **Shopping** and **Quick Links** sections

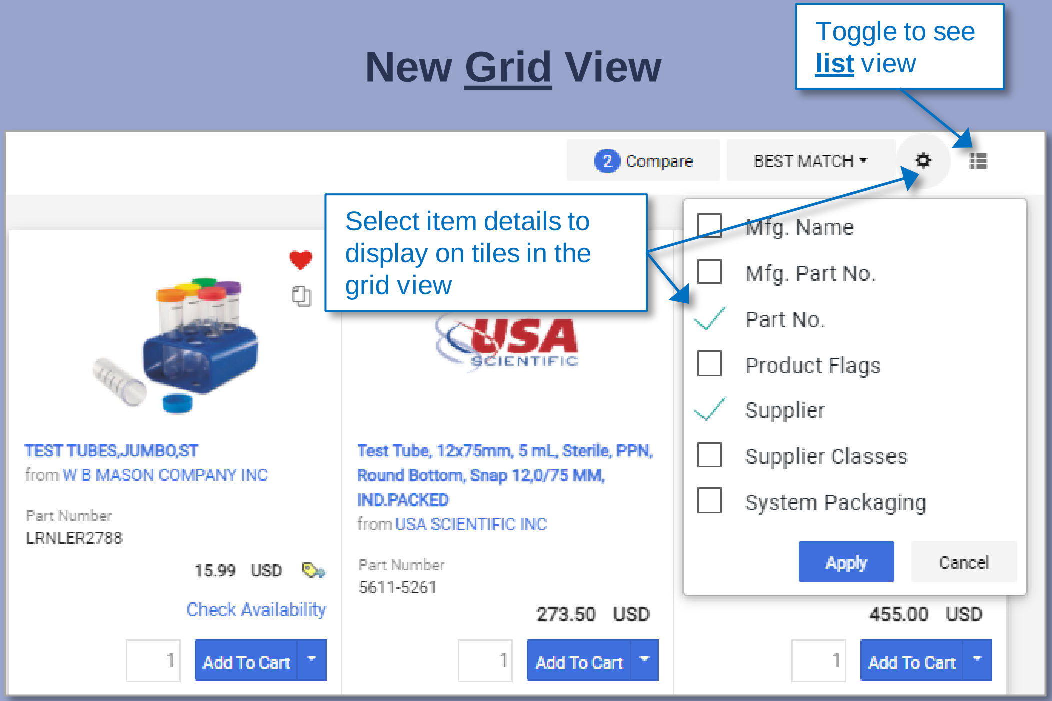
Searching the Catalog

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

New List View



New Grid View



Non-Catalog Item

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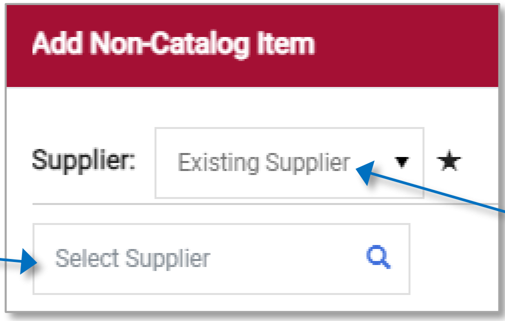
Step 1: Open the **Add Non-Catalog Item** window by clicking links in the **Shopping** and **Quick Links** sections or through the new **PO (Non-Catalog)** widget.

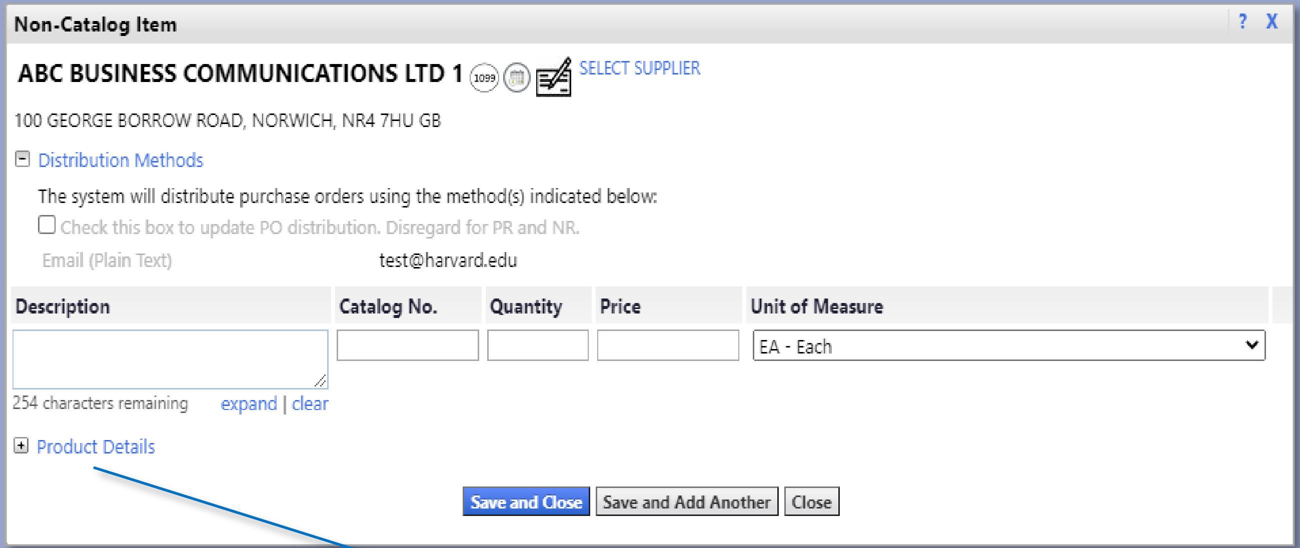
Step 2: Enter the supplier in the **Select Supplier** field or click the magnifying glass to open the Supplier Search window.

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

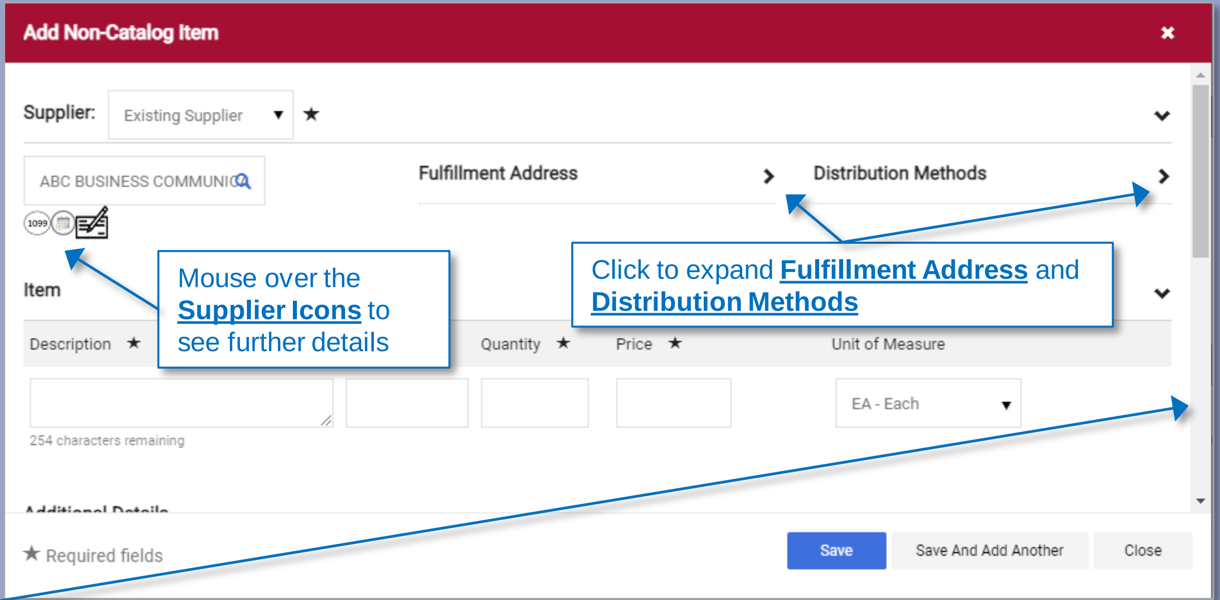


Do not use the **Existing Supplier** field to search for a supplier

Original experience



New Shopping experience



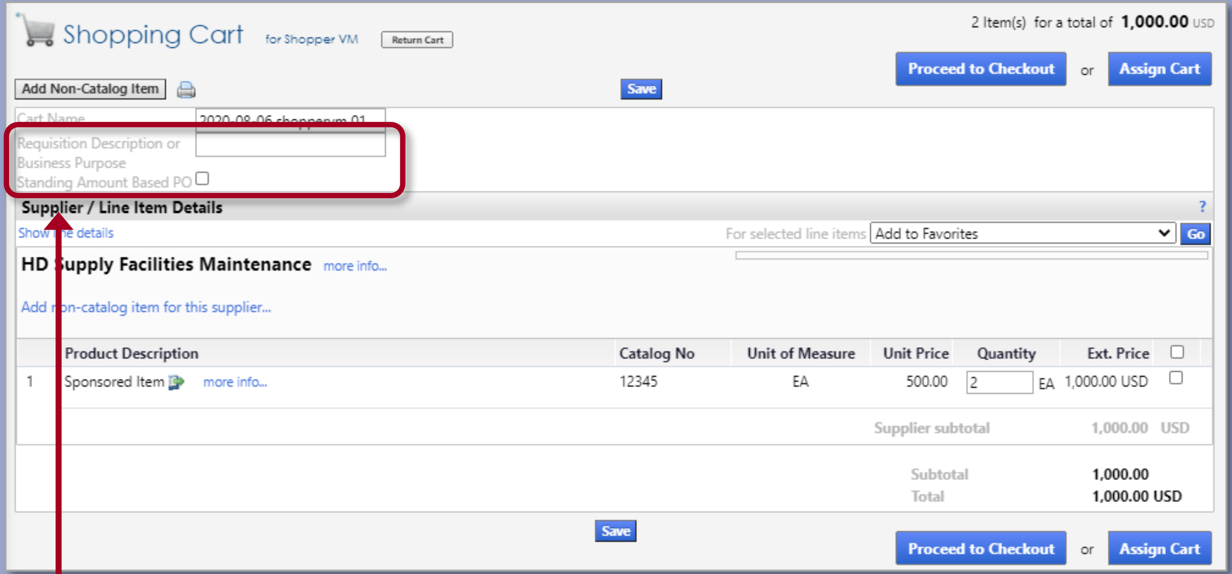
Mouse over the **Supplier Icons** to see further details

Click to expand **Fulfillment Address** and **Distribution Methods**

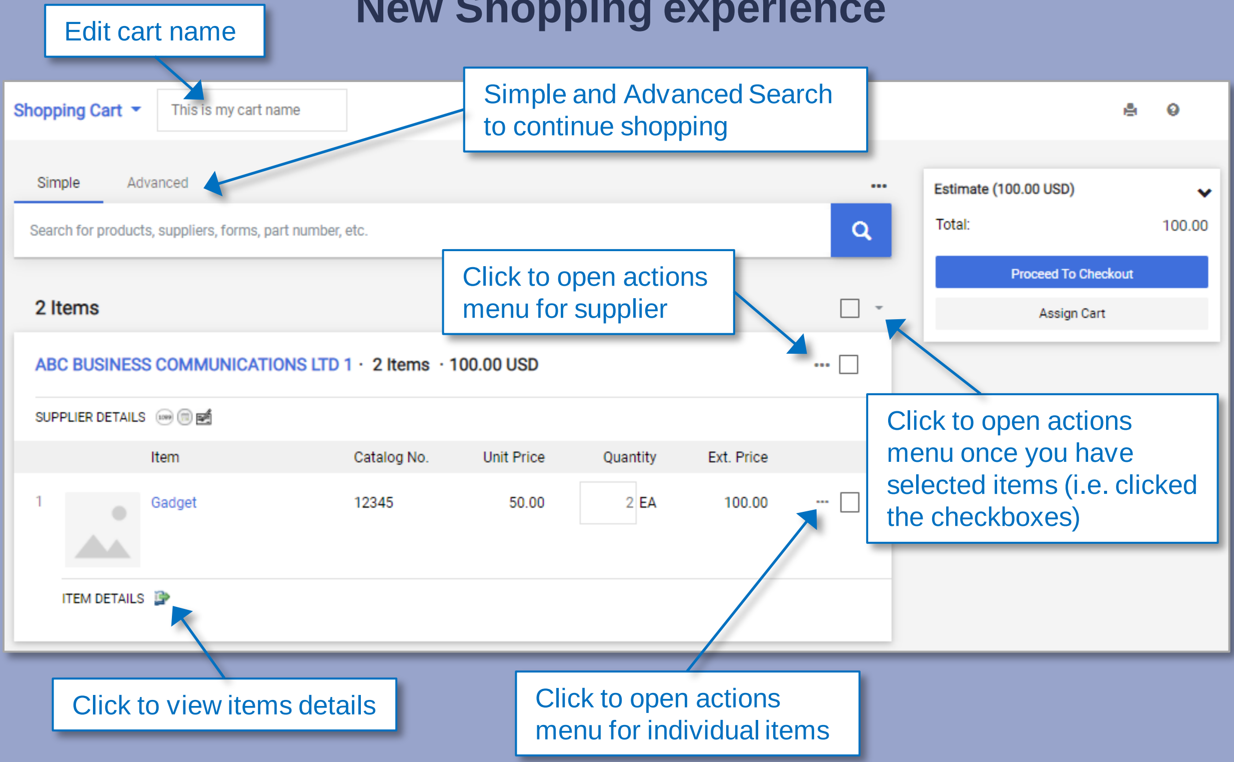
Scroll down to see the **Additional Details** and **Add Internal Attachments** sections that were previously found under **Product Details**

Cart

Original experience



New Shopping experience



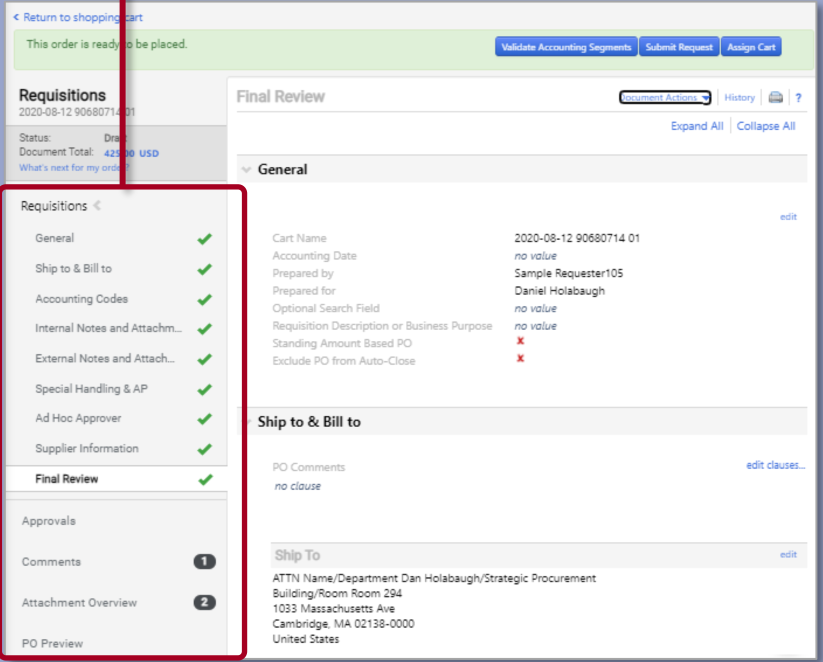
Please note: The **<u>Requisition Description or Business Purpose</u>** field and the **<u>Standing Amount Based PO</u>** checkbox are no longer available on *the shopping cart*. Click 'Proceed to Checkout' to update those fields.

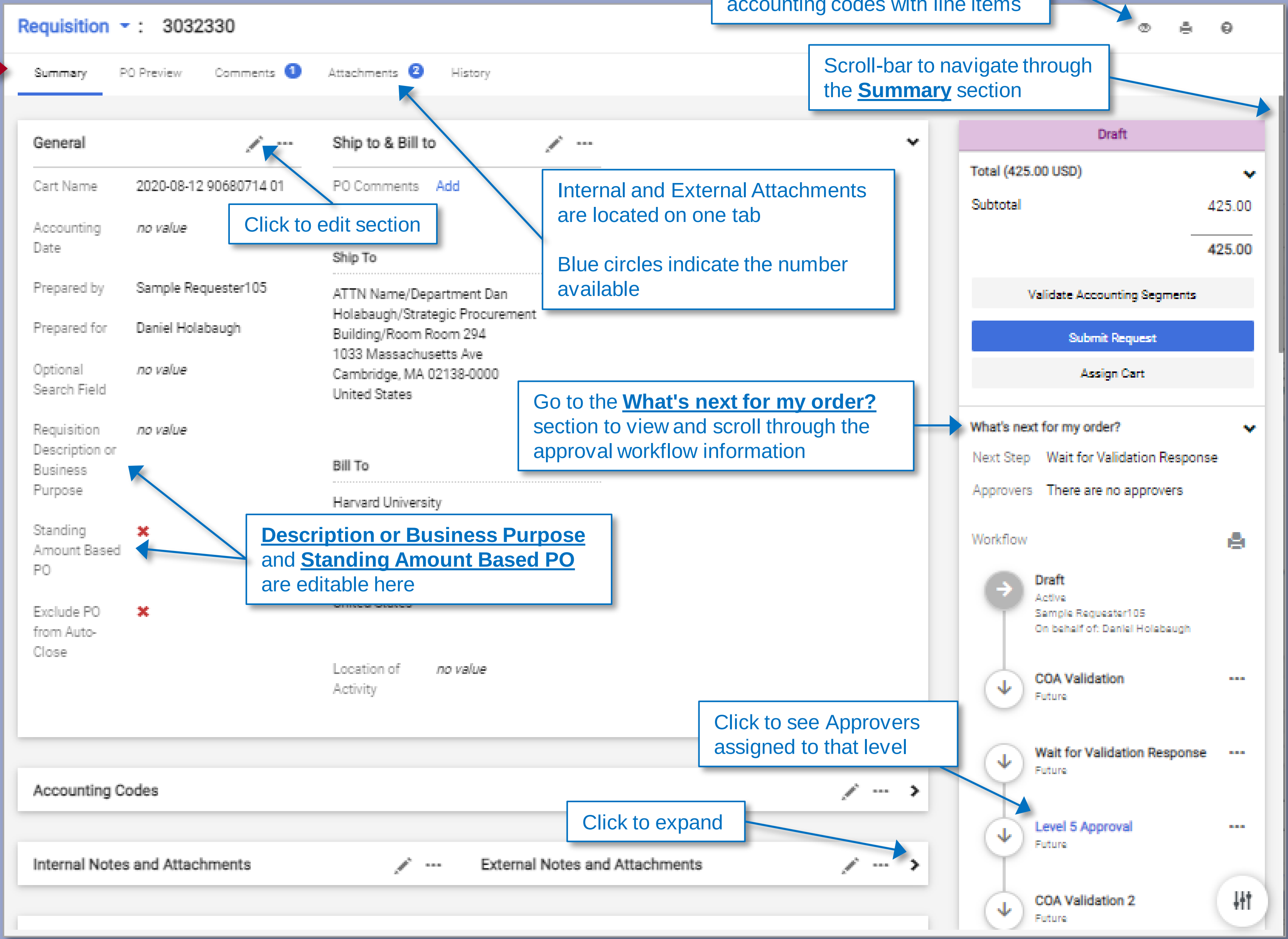
Jaggaer, the B2P vendor, is working to add them back in.

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

Click to edit 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 see Approvers assigned to that level

Click to expand

Checkout Process: COA at Header Level

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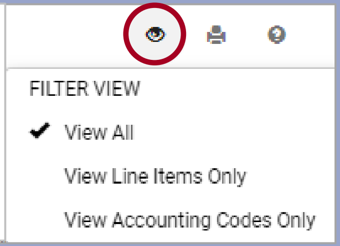
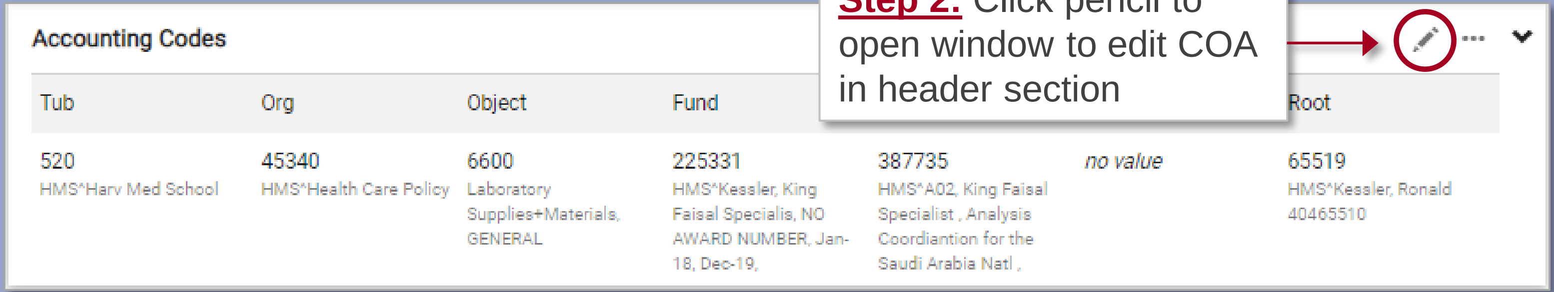
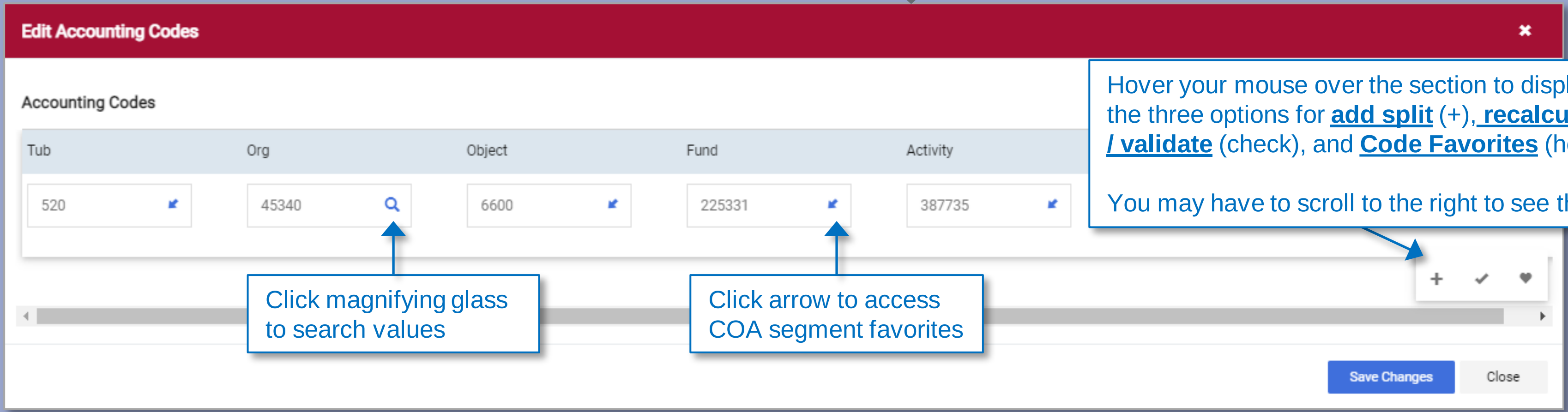
Step 1: Click the eye icon to filter the view of the Summary tab to show Accounting Codes and line items.



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

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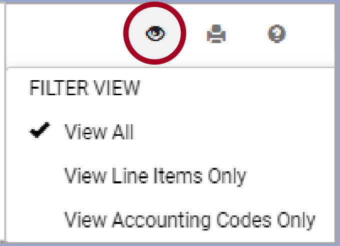
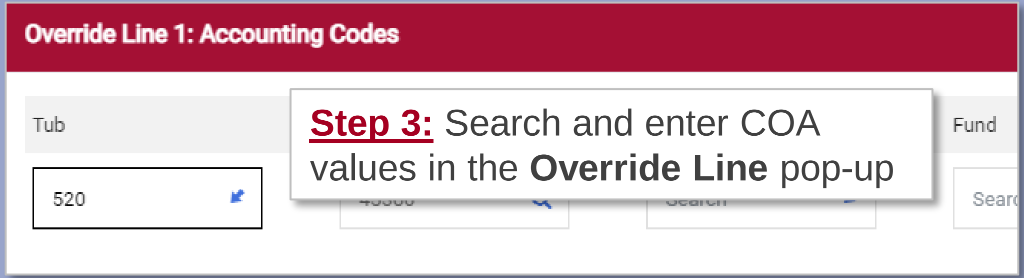
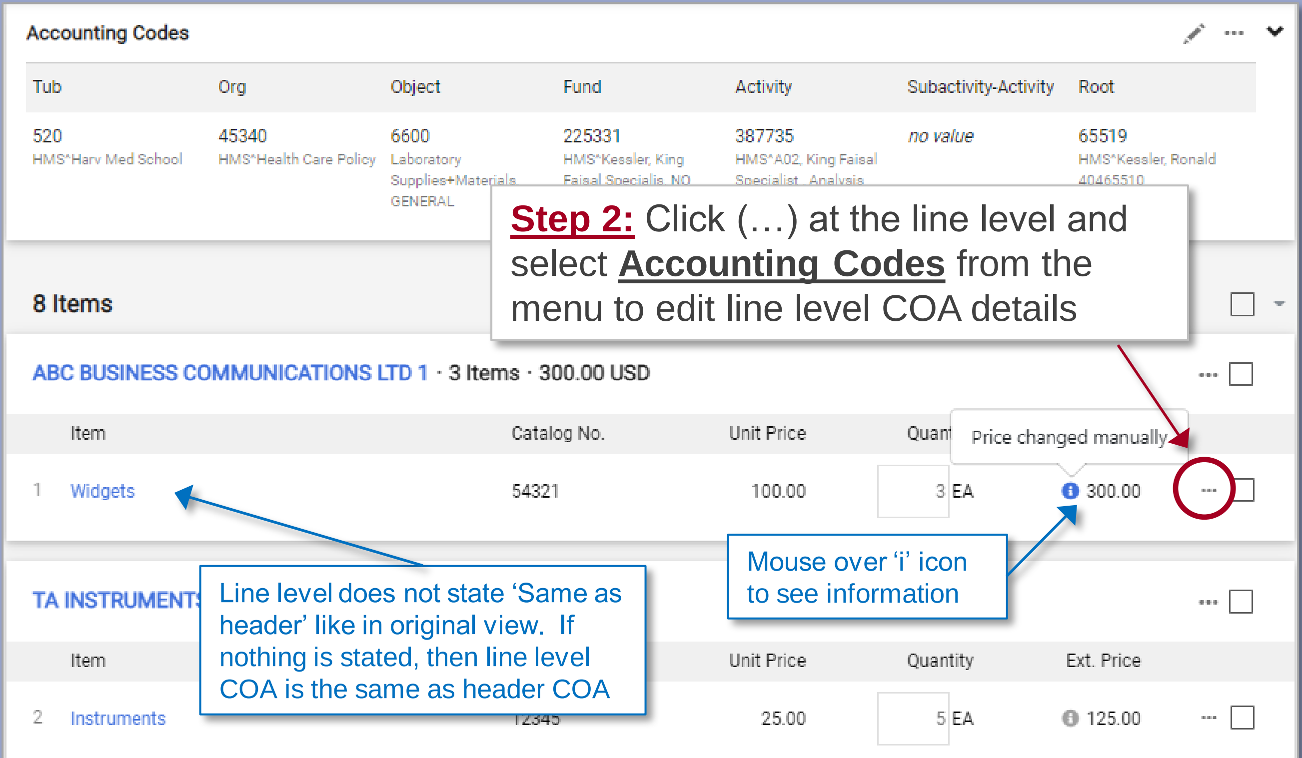
Step 1: Click the eye icon to filter the view of the Summary tab to show Accounting Codes and line items.





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

View with line level COA same as header COA

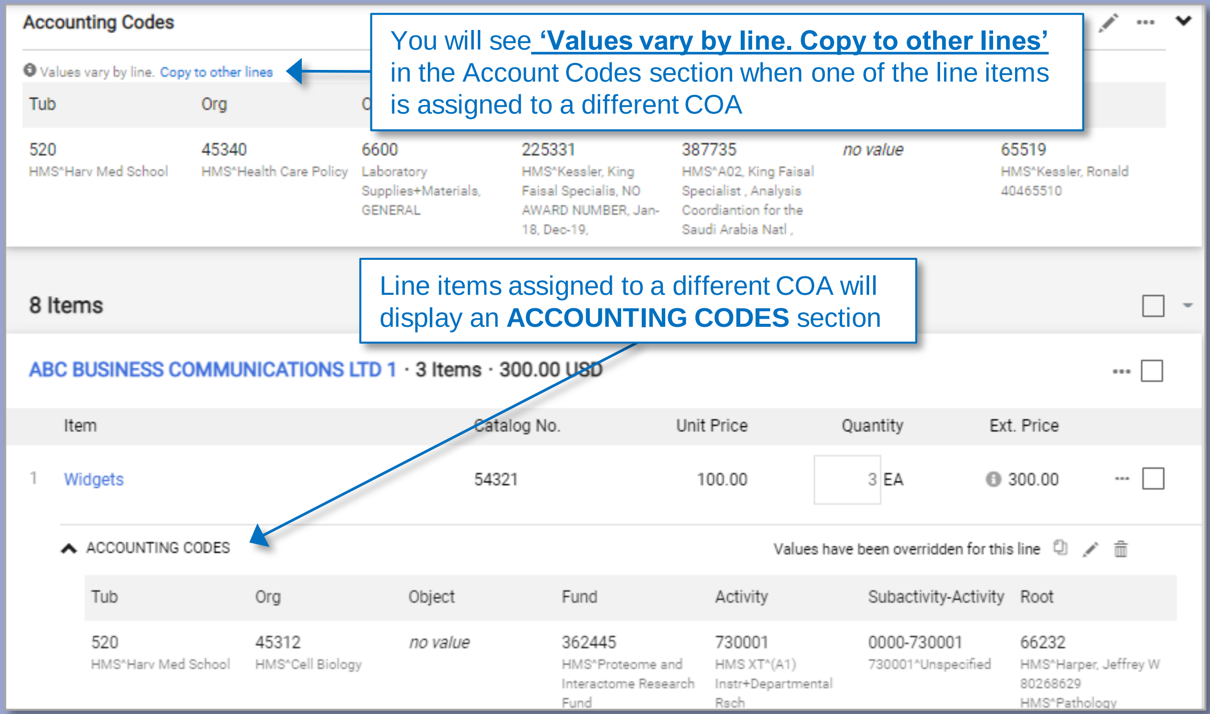


Step 2: Click (…) at the line level and select **Accounting Codes** from the menu to edit line level COA details

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

View with line level COA different from header COA



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

Checkout Process: Action Menus

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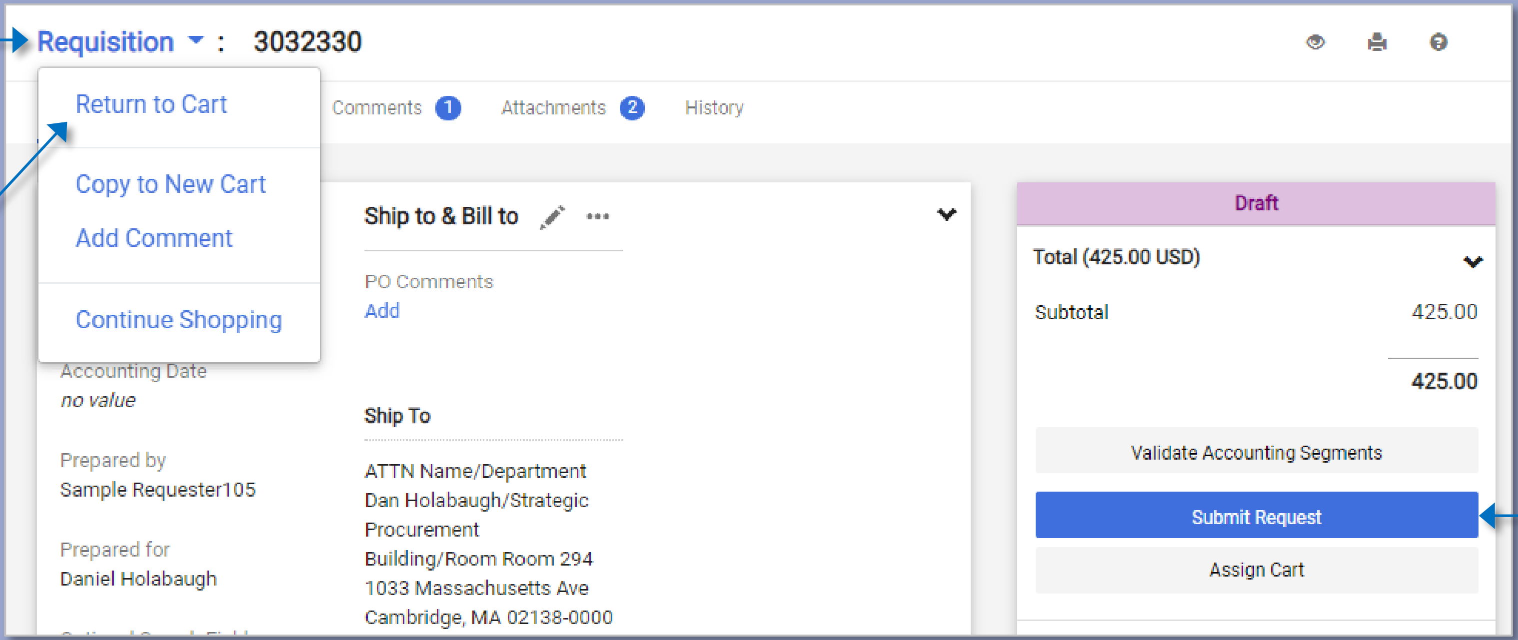
The menu options previously found under **Document Actions** are now found by clicking the document type name in the top-left

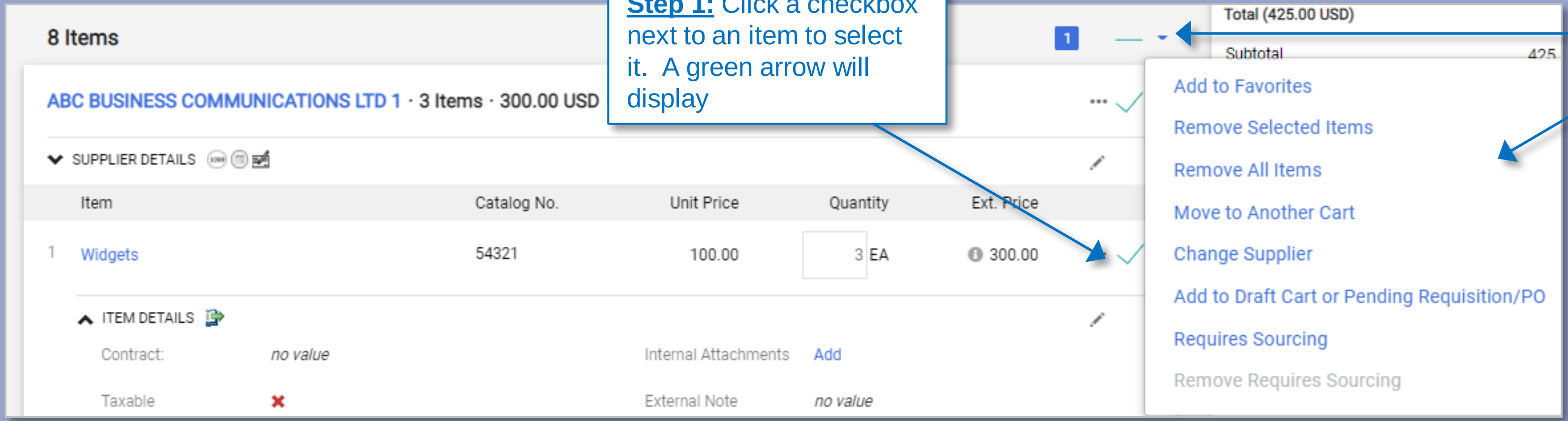
Return to Cart is also here



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



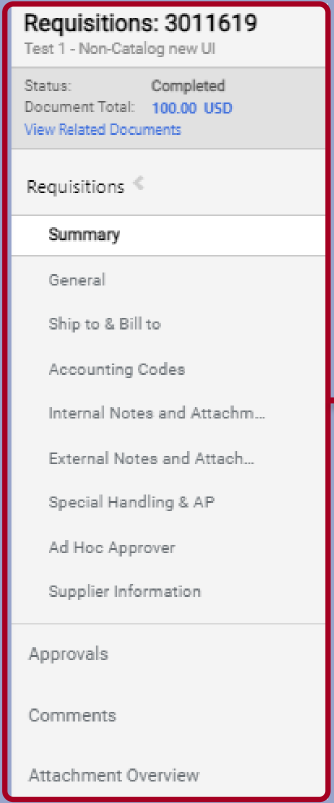
Step 2: Click the drop-down menu arrow in the section heading to see list of available actions that can be taken for the selected item(s)

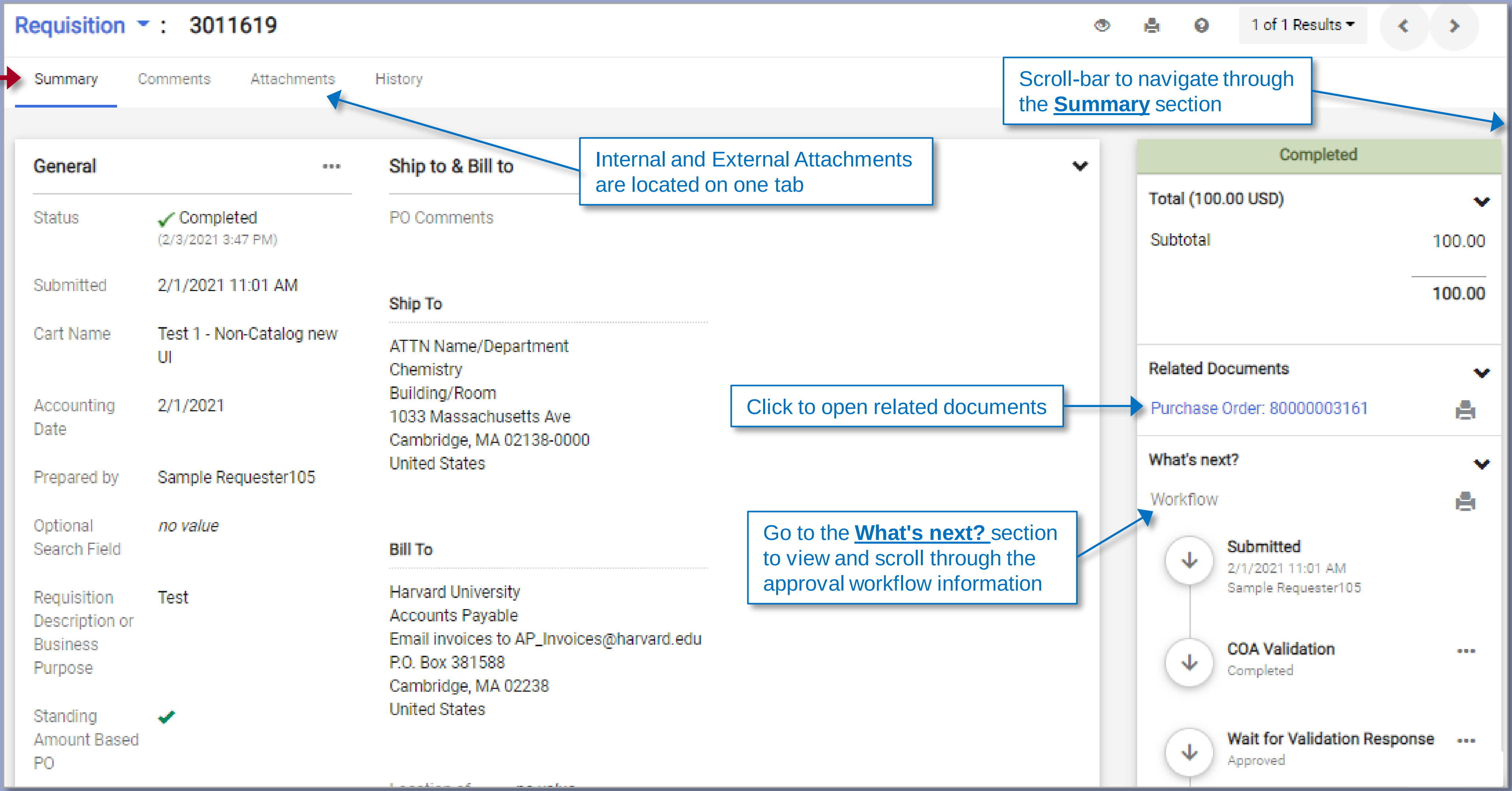
Submitted Requisitions

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

Original experience

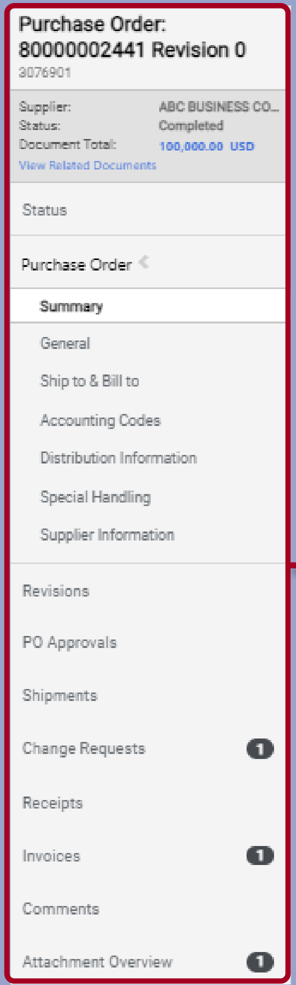




POs

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.

Original experience



New Shopping experience