FALCONS PURCH

New User Experience

As a part of ongoing efforts to improve users' overall experience, the Falcons Purch software (Jaggaer) is being updated to make the site more modern, streamlined, and simplified. Users will be able to easily locate information and processes have become more intuitive. The new user experience will take effect on November 12, 2021.

Falcons Purch

NEW USER EXPERIENCE

WHAT'S CHANGING?

The look and feel of the site is changing, but not how requisitions and payment requests are entered or processed. The new experience has additional shopping features and new icons. It also has greater visibility to account numbers, attachments, approvals all on one screen without having to click on multiple tabs to see pertinent information about the order. The new experience includes design changes to shopping, assigning carts, editing pending documents, making comments, and approving.

Training Classes

Select the link below to email a request to attend one of the virtual training classes offered by the Purchasing department.

November 15, 2021 @ 1:00 p.m.
**November 16, 2021 @ 10:00 a.m.**
November 23, 2021 @ 4:00 p.m.

New User Guides/Instructions

New guides and training documents will replace the current guides on the Purchasing Website after the modifications have been made permanent in our Falcons Purch site.

Activate the New User Experience

Users can toggle to the new user experience today. Login to Falcon's Purch and on the bottom right-hand corner select the New Shopping experience.
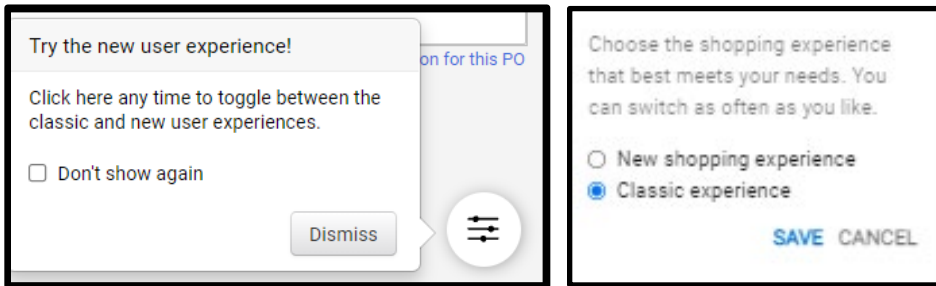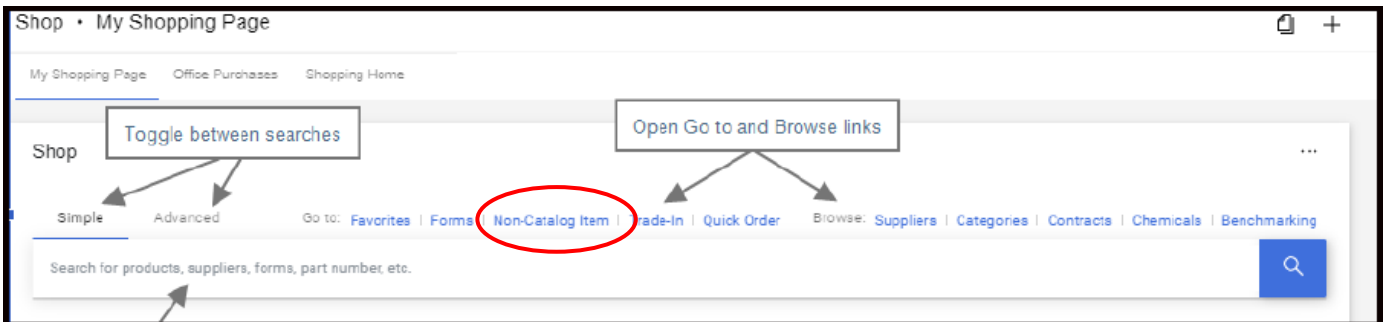
New Shopping Experience

Shopping features are similar in both the classic and new layouts, the difference simply lies in the way the shopping items are presented. Throughout the document users can see the comparison between the new experience and the classic experience.
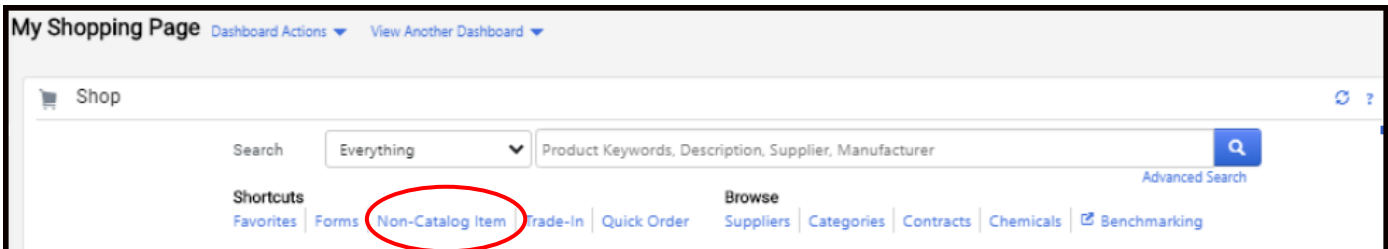
Search

The home page of the new shopping experience displays a search field and purchasing showcases.
In the search field, enter key words for the items to purchase, then click the search icon. Users can search for contracted items in the shopping search bar. Simple and Advanced tabs along the top of the search field allows users to toggle between simple and advanced search pages. The Go to and Browse shortcut links provide quick access frequently used features such as the link for the Non-Catalog Item. This link is now above the search bar instead of below it.

New Experience

Classic Experience

Recommended Search

In the new shopping experience, the product search field offers up to 10 recommended items based on a user's personal and shared favorites, and items that have been added to requisitions in the last 30 days. If there are no recommended items, or you don't want to use one of the recommended items, click the Search icon to generate a search.

Search Results

Items that match the search criteria are displayed on the search results page. On this page users can:

- Search for additional items using the search field at the top of the page.
- Apply multiple search filters in the left sidebar to narrow search results.
- Choose different sorting preferences from the BEST MATCH menu.
- Click on an item to display product details.
- Compare products.
- Add items to their Favorites.

New Experience
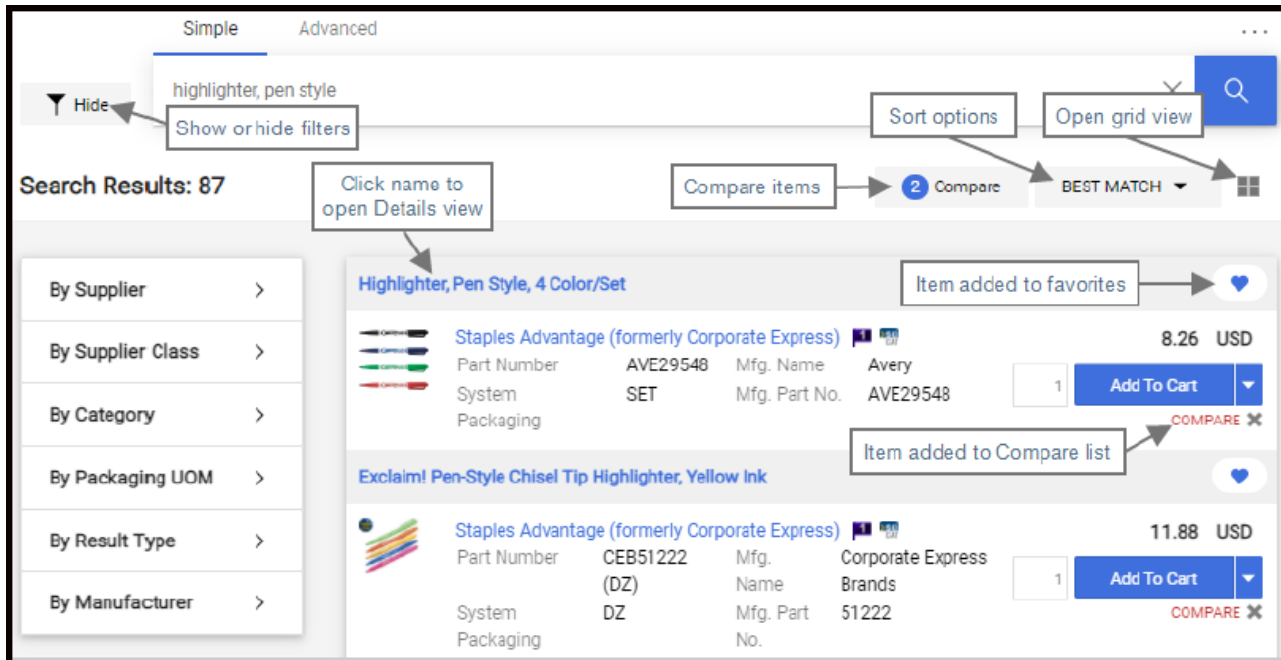
An Add To Cart button allows users to add an item or form directly to the cart. An Add and Checkout option on the drop-down menu will take users directly to the Checkout/Requisition.

Cart

The shopping cart contains items (or forms) a user has selected to purchase or submit for approval. Users can add or remove items, change commodity codes, adjust quantities, and view an estimated total purchase amount.

New Experience

Classic Experience

Proceed to Checkout

The checkout action creates the purchase requisition. The purchase requisition allows someone with the requester role to add chart fields, comments, attachments, make edits and place the order. Tabs at the top of the page contain additional information about the document. Items are listed in the bottom section.

Document actions are available in the *top left corner* of the page. Click the drop-down menu <u>next to the requisition number</u> to see a list of actions that can be taken for the document.

New Experience
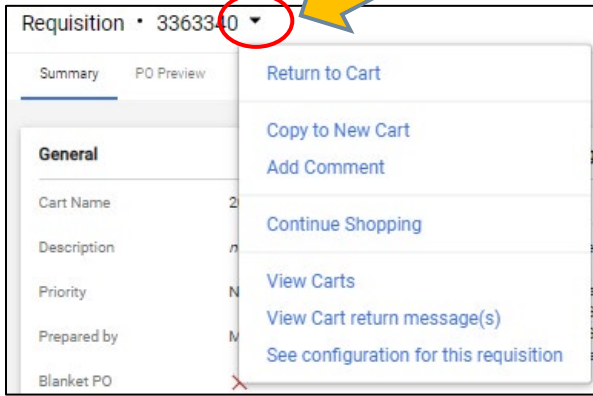
Other actions are available in the top right corner of the page:

- ▤ Show or hide the right sidebar.
- ◉ Select an option from the Filter View drop-down menu to view individual sections on the page. For example, view header details only, view line items only, or view billing details only.

New Experience
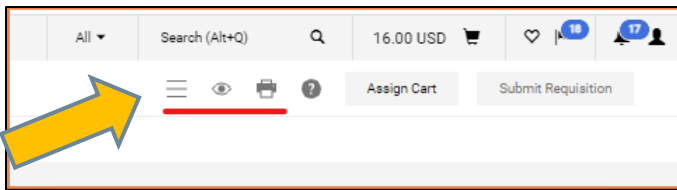
Classic Experience
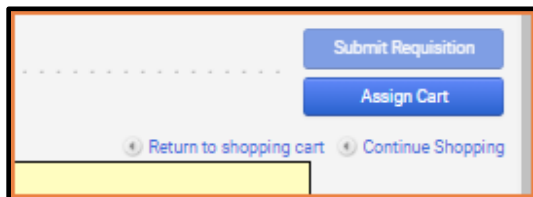
In the Line Items section, the actions menu for all selected items is the drop-down menu at the top right corner of the section. On individual items, click the action icon to see actions that can be applied to that item only.

Click tabs to view and [✏] edit information within them. Click the edit icon to modify information in a section.

New Experience

Accounting Codes ✏ ···

Business Unit GL	Speedchart	Fund	Dept	Project/Grant	Activity	Function	PC Business Unit	Account	Program	Budget Reference
BGSUN BGSUN	101111OPER INTERNATIONAL STD SRVCS-OPER	10000 BGSU - Bowling Green Campus	101111 Intml Programs & Partnerships	no value	no value	5000 Student Services	no value	53100 Supplies	6110 Departmental Program #6110	Culligan November 2021 invoice

Classic Experience

edit

Business Unit GL	Speedchart	Fund	Dept	Project/Grant	Activity	Function	PC Business Unit	Account	Program	Budget Reference
BGSUN BGSUN	101111OPER INTERNATIONAL STD SRVCS-OPER	10000 BGSU - Bowling Green Campus	101111 Intml Programs & Partnerships	no value	no value	5000 Student Services	no value	53100 Supplies	6110 Departmental Program #6110	Culligan November 2021 invoice

The right sidebar shows document totals and workflow. The document status and any messages are displayed near the top of the section. Users can view approval workflow information in the **What's next for my order?** section.

New Experience

Draft

❌ Correct these issues.
You are unable to proceed until addressed. ⌄

Required: Speedchart
Required: Fund
Required: Dept
Required: Account
Required: Commodity Code (Line 1)

Total (16.00 USD) ⌄

Subtotal 16.00
_____
16.00

What's next for my order? ⌄

Next Step   Combo Edit Response
Approvers   There are no approvers

Workflow   ⬈ 🖨

⚪ Show skipped steps

⦿ Draft
  Active
  Melanie Kalb

◇ Start - Parallel Steps

⚪ Combo Edit Check   ···
  Future

⚪ Combo Edit Response   ···
  Future

◇ End - Parallel Steps

⚪ **Budget Admin Catch-All**   ···
  Future

  Budget Admin Catch-All

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Classic Experience

| Requisition | **PR Approvals** | PO Preview | Comments | Attachments | PR History |

Show skipped steps ☐

Orientation   [Horizontal ⌄]

➡ Submitted Future

Combo Edit Check
Future ➡

Combo Edit Response
Future ➡
View approvers

Budget Admin Catch-All
Future ➡
View approvers

🖥 **Create PO**
Future ➡

🏁 Finish
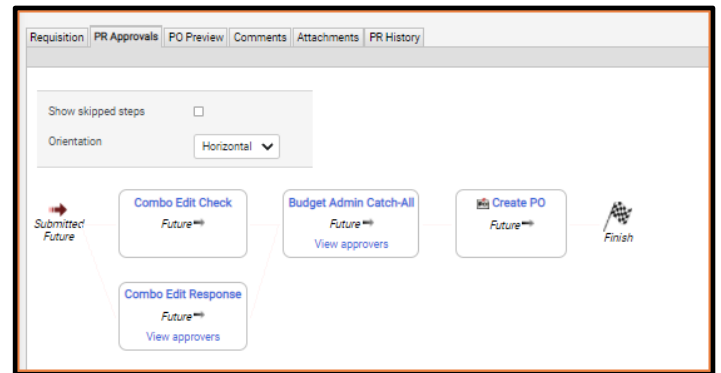
Submit the Requisition

Select one of the action buttons on the top right-hand side of the screen. Submit Requisition will submit the request to the assigned approver. Assign Cart will send the requisition to another user that will submit the requisition after edits or reviewing the information.

Assign Cart   Submit Requisition

New Experience

Classic Experience

Submitted Requisitions

Submitted Requisitions are displayed in a document configuration that is like the Checkout page.

New Experience

Classic Experience

Requisition	PR Approvals	Comments	Attachments	History

Summary	General	Shipping	Billing	Accounting Codes	Additional Notes	Supplier Info	Taxes/S&H

Hide header

Hide value descriptions

General

Status	✓ Completed (6/14/2020 1:11 PM)
Purchase Order	2171401 view	print
Submitted	6/14/2020 1:11 PM
Cart Name	2020-06-13 bwilson 01
Description	Shopping Cart
Prepared by	Brynn Wilson

PO Clauses

0001	Privacy Standards
101	Entire Agreement
121212	Inspections

view all clauses - (3)

| Tax Code | USA US Based |
| Budget Date | 3/8/2020 |

View/edit by line item...

Shipping

Ship To
Attn: Brynn Wilson
Department
3020 Carrington Mill Blvd
Suite 100
Morrisville, NC 27560
United States

Delivery Options
Expedite   ✗
Ship Via   Best Carrier-Best Way

View/edit by line item...

Billing

Bill To
Contact Line 1 Brynn Wilson
6501 Weston Parkway
Cary, NC 27513
United States

Credit Card Info
No credit card has been assigned.

Billing Options
Accounting Date   no value

View/edit by line item...

Accounting Codes

Location Number	Location Area 10
no value	no value

View/edit by line item...

Internal Notes and Attachments

Internal Note   no note
Internal Attachments

External Notes and Attachments

Note to all   no note
Suppliers
Attachments for all suppliers

Additional Notes

Additional Notes   no note

View/edit by line item...

Supplier / Line Item Details

Hide line details

For selected line items Add to Favorites ▾ Go

Katak Products ✓ ⭐ 🔳 GAT more info...		Contract	K-010-555 more info...

Icons

*** Click to display actions for items in a panel or page

🖉 Click to edit information

⌃ Collapse section

⌄ or ❯ Expand section

♡ Click to add an item to Favorites

💙 Item is a user's personal Favorite

🔗 Item is a shared Favorite

👥 Shared cart

🛒 The recommended item has been added to a requisition in the last 30 days

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

▦ 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

🚩 Item requires sourcing

🏅 Item is associated with a contract

[▼Show] [▼Hide] Show or hide the filters on carts

≡ Show or hide the right sidebar on documents

👁 Filter page view options - Select an item from the drop-down to view individual sections on the page. For example, view header details only or view line items only.

🖨 Print document or approvals, or workflow information

❓ Click to view help information