

FALCONS PURCH



November 1,
2021

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.](#)

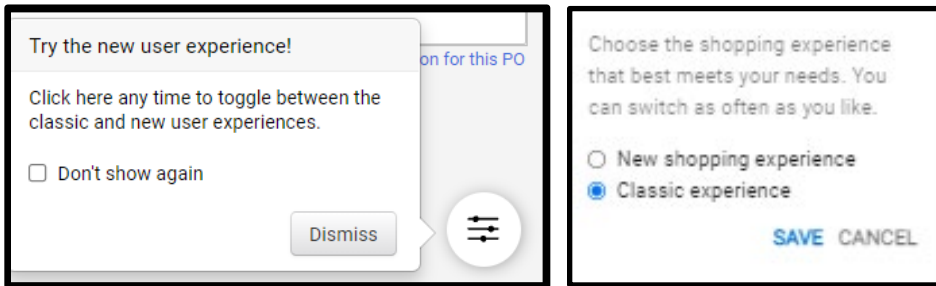
[November 23, 2021 @ 4:00 p.m.](#)

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.



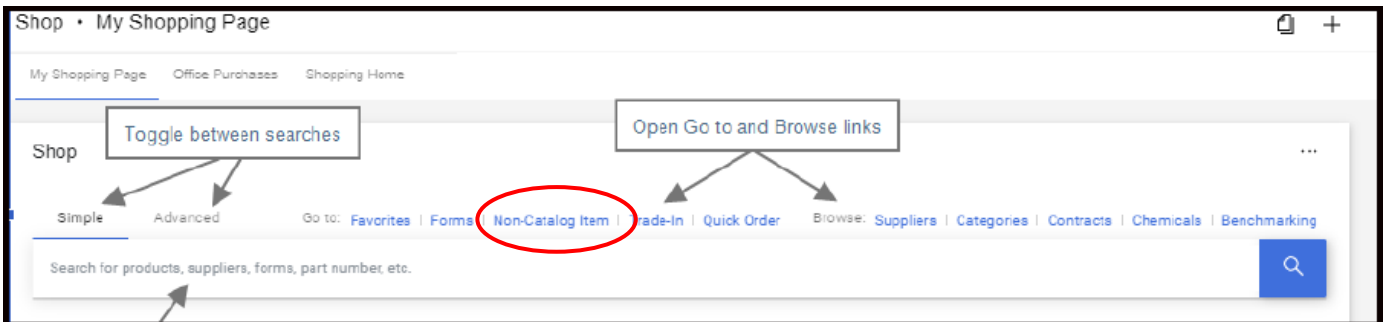
New Shopping Experience

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.

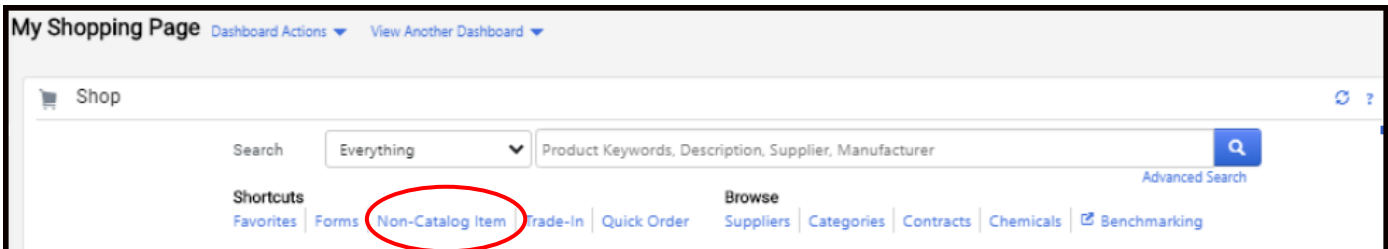
Search

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

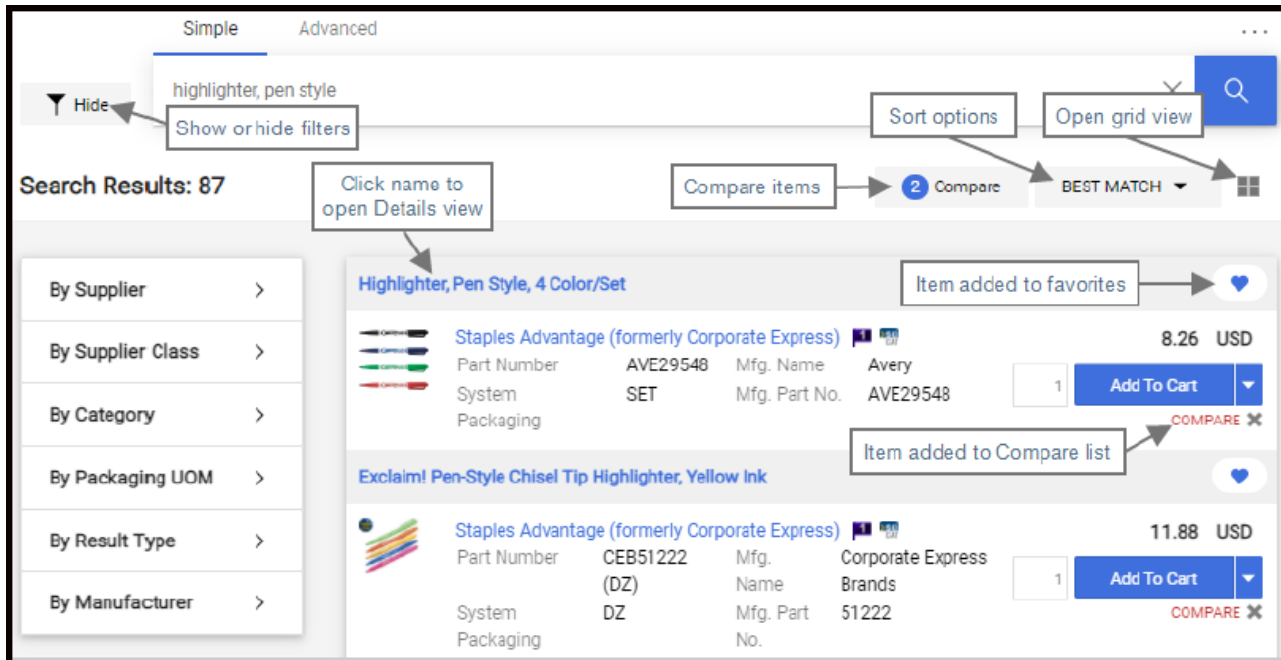
In the new shopping experience, the product search field offers up to 10 recommended items based on a user's personal and shared favorites, and items that have been added to requisitions in the last 30 days. If there are no recommended items, or you don't want to use one of the recommended items, click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

The screenshot shows a modern shopping cart interface. At the top, it displays 'Shopping Cart • 3181250' and a button to 'Proceed To Checkout'. Below this is a search bar with a 'Search to jump back to shopping' callout. The main area shows '2 Items' from 'Staples Advantage (formerly Corporate Express)'. A table lists items with columns for Item, Catalog No., Size/Packaging, Unit Price, Quantity, and Ext. Price. A callout points to the 'Actions menu for all selected items' and another to the 'Actions menu for individual items'. A 'Details' sidebar on the right shows 'Estimated totals' including Subtotal (16.52 USD), Tax1 (0.00), Tax2 (0.00), Shipping (0.00), and Handling (0.00). Other callouts include 'Empty, create or share a cart', 'Show or hide sidebar, print, assign cart, checkout', and 'Click to view item details'.

Classic Experience

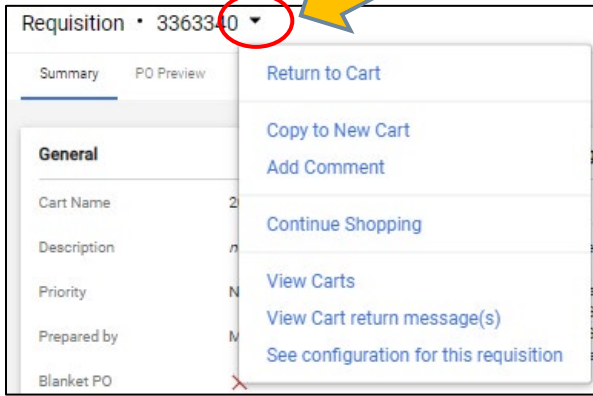
The screenshot shows a classic shopping cart interface. At the top, it says 'Shopping Cart for Brynn Wilson' and has a 'Continue Shopping' button. Below this is a form to 'Name this cart' (2021-03-07 bwilson 01) and a 'Share my cart with others' checkbox. A 'Proceed to Checkout' or 'Assign Cart' button is visible. The main area shows 'Staples Advantage (formerly Corporate Express)' with a 'Product Description' section for 'Highlighter, Pen Style, 4 Color/Set'. A table shows the item details: Unit Price (8.26), Quantity (1), and Total (8.26). There are also 'Tax1', 'Tax2', 'Shipping', and 'Handling' amounts listed as 0.00. A 'More Actions' dropdown is present.

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 next to the requisition number to see a list of actions that can be taken for the document.

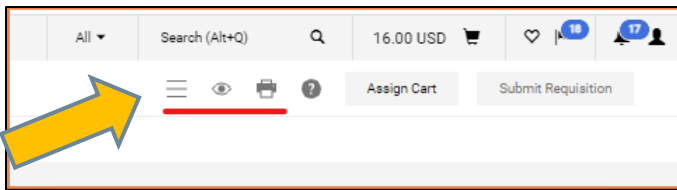
New Experience



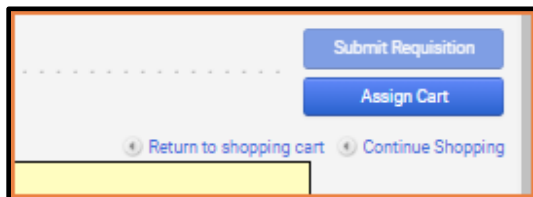
Other actions are available in the top right corner of the page:

-  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 Internl Programs & Partnerships	no value	no value	5000 Student Services	no value	53100 Supplies	6110 Departmental Program #6110	Culligan November 2021 invoice

Classic Experience

Business Unit GL	Speedchart	Fund	Dept	Project/Grant	Activity	Function	PC Business Unit	Account	Program	Budget Reference
BGSUN BGSUN	101111OPER INTERNATIONAL STD SRVCS- OPER	BGSU 10000 Bowling Green Campus	101111 Internl 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

Subtotal 16.00

What's next for my order?

Next Step: Combo Edit Response

Approvers: There are no approvers

Workflow 📄 🖨️

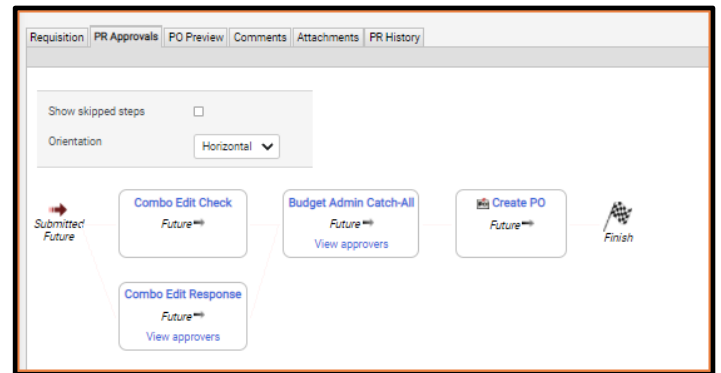
Show skipped steps

- 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
Lorna Przeslawski
LORNAP@bgsu.edu
+1 419-372-9280

Melanie Kalb

Classic Experience



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.



New Experience

Assign Cart

Additional requisition actions

Click tabs to add or view information

Click any edit icon to change information

Action menu for selected item(s) below

Action menu for item

Click Approval Workflow step to see approvers

Requisition • 3363340

Summary | PD Preview | Comments | Attachments | History

General

Cart Name: 2021-10-19 MKALB 01
 Description: no value
 Priority: Normal
 Prepared By: Melanie Kalb
 Blanket PO:
 Business Unit: BGSUN
 999UN

Shipping

Ship To
 ATTN: Melanie Kalb
 Bldg: test
 Room: test
 Bowling Green State University
 Bowling Green, OH 43403
 United States

Bill To
 Accounts Payable
 1851 N. Research Dr
 http://www.bgsu.edu/finance-and-administration/controller.html
 Bowling Green, OH 43403
 United States

Delivery Options
 Expedite:

Change Order Information
 Is this a Speed Chart Change? No

Accounting Codes

Business Unit GL	Speedchart	Fund	Dept	Project/Grant	Activity	Function	PC Business Unit	Account	Program	Budget Reference
BGSUN	301000OPER	10000	301000	no value	no value	6000	no value	\$3100	no value	no value
999UN	Business Oper	9999 - 99	Business Operations			Institutional Support		Office Supplies		

Internal Notes and Attachments

Internal Note: no value
 Internal Attachments: [Add](#)

External Notes and Attachments

Note to all Suppliers: no value
 Attachments for all suppliers: [Add](#)

12 Items

Wadsworth Service Inc - 12 Items - 179.40 USD

SUPPLIER DETAILS

Contract: no value PO Number: To Be Assigned

Draft

Total (179.40 USD)
 Subtotal: 179.40
 179.40

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 Approval (Future)
- Purchasing Review (Future)
- Create PO (Future)
- Finish (Future)

Classic Experience

✓ General
✓ Shipping
✓ Billing
✓ Accounting Codes
✓ Internal Notes and Attachments
✓ External Notes and Attachments
✓ Final Review

[Submit Requisition](#)
[Assign Cart](#)

[Return to shopping cart](#)
[Continue Shopping](#)

✓ All done! The required information has been completed and this request is ready to be submitted.
 Once you have reviewed the details, you may continue by clicking the button at the top of the page.

Requisition

PR Approvals

PO Preview

Comments

Attachments

PR History

Summary

Shipping

Billing

Accounting Codes

Supplier Info

General

Shipping

Billing

Cart Name 2021-10-14 MKALB 01 edit	Ship To ATTN: Melanie Kalb Bldg: Huntington Building Room: Front Desk Bowling Green State University Bowling Green, OH 43403 United States	Bill To Accounts Payable 1851 N. Research Dr http://www.bgsu.edu/finance-and-administration/controller.html Bowling Green, OH 43403 United States
Description <i>no value</i>	Delivery Options Expedite * Ship Via * Best Carrier-Best Way Shipping Acct # <i>no value</i> Requested Delivery Date <i>no value</i>	No credit card has been assigned.
Priority Normal		Billing Options Accounting Date <i>no value</i> edit
Prepared by Melanie Kalb		
Prepared for Melanie Kalb		
Blanket PO *		
Business Unit BGSUN Bowling Green State University		

[View/edit by line item...](#)

[Hide value descriptions](#)

Business Unit	Speedchart	Fund	Dept	Project/Grant	Activity	Function	PC Business Unit	Account	Program	Budget Reference
BGSUN	301000OPER	10000	301000	<i>no value</i>	<i>no value</i>	6000	<i>no value</i>	33100	<i>no value</i>	<i>no value</i>
BGSUN	Business Ops-OPER	BGSU - Bowling Green Campus	Business Operations			Institutional Support		Supplies		

i User does not have the necessary permissions to view the custom fields associated with this section.

Internal Notes and Attachments

External Notes and Attachments

Internal Note <i>no note</i> edit	Note to all Suppliers Attachments for all suppliers
Internal Attachments Add Attachments	Attachments Add Attachments
Size	Date

[View/edit by line item...](#)

Supplier / Line Item Details

[Hide line details](#)

Metzgers Inc ★ [more info...](#)

MAIN [edit](#)

207 Arco Dr, Toledo, Ohio 43607 United States

[Add non-catalog item for this supplier...](#)

For selected line items [Add to Favorites](#) [Go](#)

Contract	<i>no value</i>	edit
PO Number	To Be Assigned	
Quote number	<i>no value</i>	

[View/edit by line item...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Test more info...	test	EA	14.95	1 EA	14.95 USD

Commodity Code

10000000
FP Goods

Internal Note

no note

Internal Attachments

Submitted Requisitions

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

New Experience

Requisition • 3181250

1 of 12 Results

Summary Taxes/S&H Comments Attachments History

General	Shipping	Billing
Status ✓ Completed (7/19/2021 5:58 PM)	Ship To Attn: Brynn Wilson Department 3020 Carrington Mill Blvd Suite 100 Morrisville, NC 27560 United States	Bill To Contact Line 1 Brynn Wilson 6501 Weston Parkway Cary, NC 27513 United States
Purchase Order 2695634 view print	Delivery Options Expedite ✗	Credit Card Info No credit card has been assigned.
Submitted 7/19/2021 5:57 PM	Ship Via Best Carrier-Best Way	
Cart Name 2021-07-19 bwilson 01		
Description no value		
Prepared by Brynn Wilson		
PO Clauses 3 View details		
Tax Code no value		

Accounting Codes ... >

Internal Notes and **External Notes and...** ... **Additional Notes** ... >

2 Items

Staples Advantage (formerly Corporate Express) • 2 Items • 16.52 USD

Completed

Total (16.52 USD)	
Subtotal	16.52
Tax1	0.00
Tax2	0.00
Shipping	0.00
Handling	0.00
	16.52

Related Documents

[Purchase Order: 2695634](#)

What's next?

Workflow

Show skipped steps

✓ **Submitted**
7/19/2021 5:57 PM
Brynn Wilson

✓ **Order Consolidation** ...
Approved
Brynn Wilson

✓ **Spend Collection-Check Robot** ...
Completed

Click to open related documents

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 ?		Shipping ?			Billing ?						
Status	✓ Completed (6/14/2020 1:11 PM)	Ship To Attn: Brynn Wilson Department 3020 Carrington Mill Blvd Suite 100 Morrisville, NC 27560 United States			Bill To Contact Line 1 Brynn Wilson 6501 Weston Parkway Cary, NC 27513 United States						
Purchase Order	2171401 view print	Delivery Options Expedite ✘ Ship Via Best Carrier-Best Way			Credit Card Info No credit card has been assigned.						
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				View/edit by line item...						
Budget Date	3/8/2020				View/edit by line item...						
View/edit by line item...											
Accounting Codes ?											
Location Number					Location Area 10						
<i>no value</i>					<i>no value</i>						
View/edit by line item...											
Internal Notes and Attachments ?			External Notes and Attachments ?			Additional Notes ?					
Internal Note <i>no note</i>			Note to all <i>no note</i>			Additional Notes <i>no note</i>					
Internal Attachments			Suppliers Attachments for all suppliers								
View/edit by line item...											
Supplier / Line Item Details ?											
Hide line details											
For selected line items										<input type="button" value="Add to Favorites"/>	<input type="button" value="Go"/>
Katak Products 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


 Click to generate a comparison

 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 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