YO-MART Navigation

The Phoenix 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 tasks.

Here's a view of the Yo-Mart Shopping Page:

There are three main areas of the Phoenix UI:
1. the main workspace
2. the side navigation menu
3. the top banner

This document will provide an overview of each 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 is not meant to provide information on how to use these features. For information on using Yo-mart, please see our training manuals.

1. Main Workspace Overview

   The main workspace is where you will view and manage the active Yo-Mart 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 and 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 the navigation path to the page. A drop-down icon beside a page name indicates that you can select it to access another page.
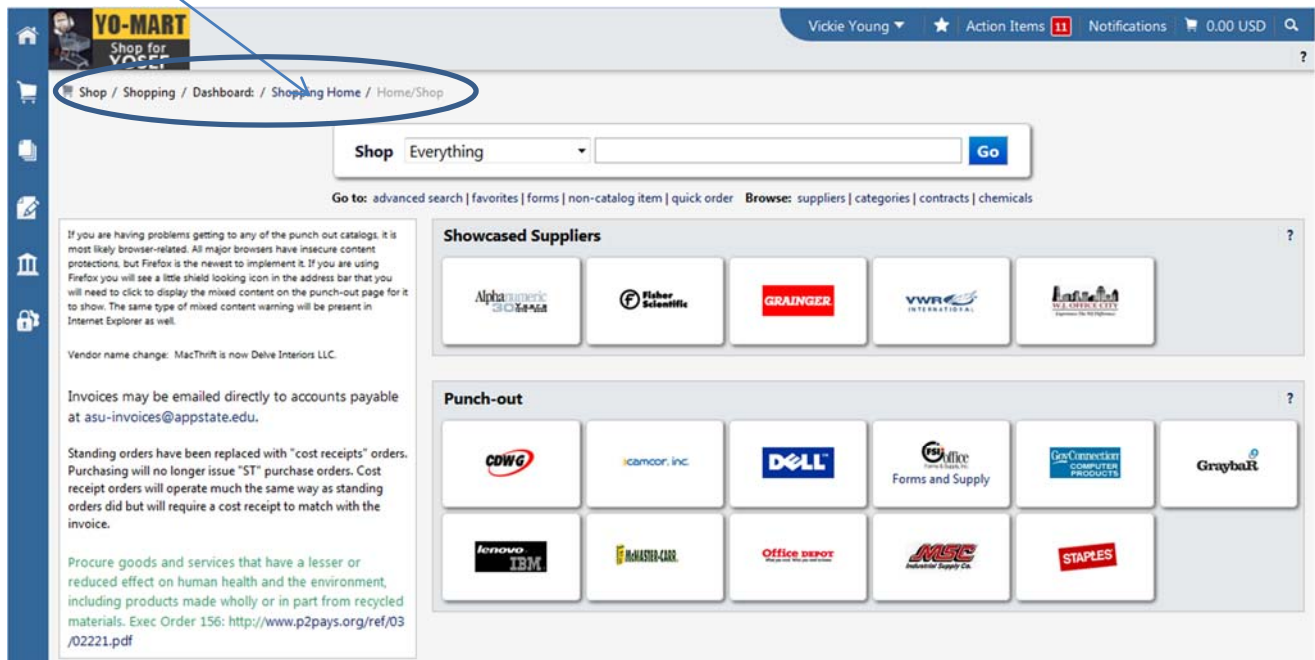

Main Workspace – Another View

The image below shows the Advanced Document Search active in the main workspace.
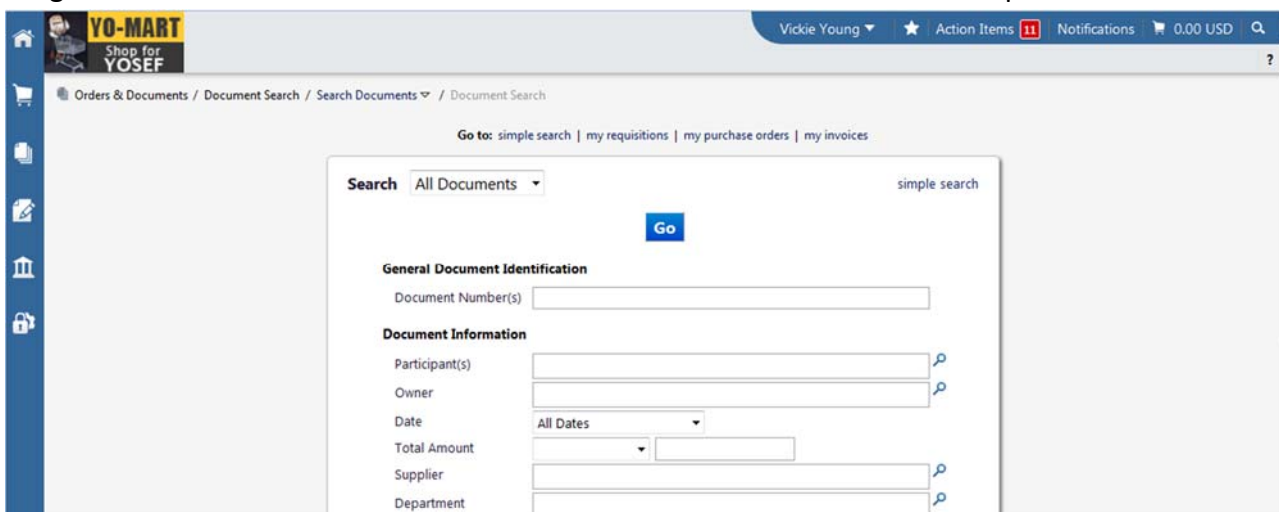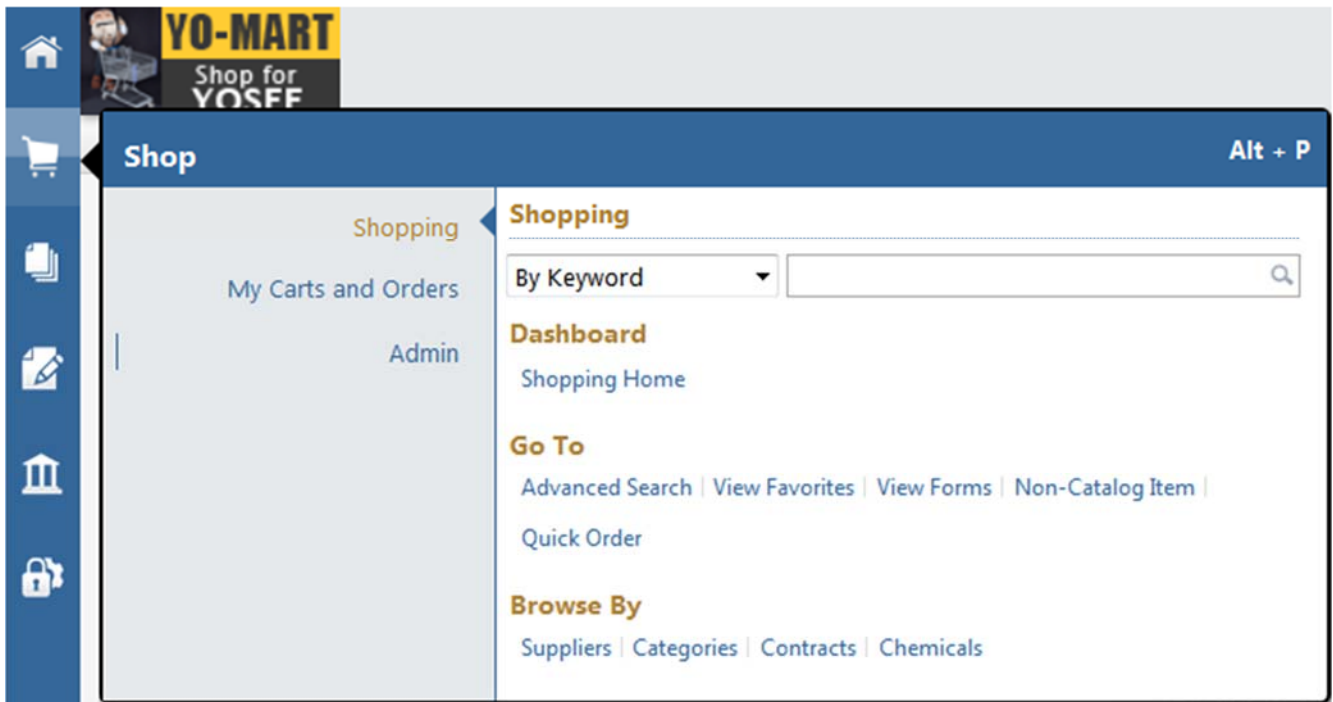
2. Side Navigation Bar Overview

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 Home Icon will return you to the homepage from anywhere in the application.
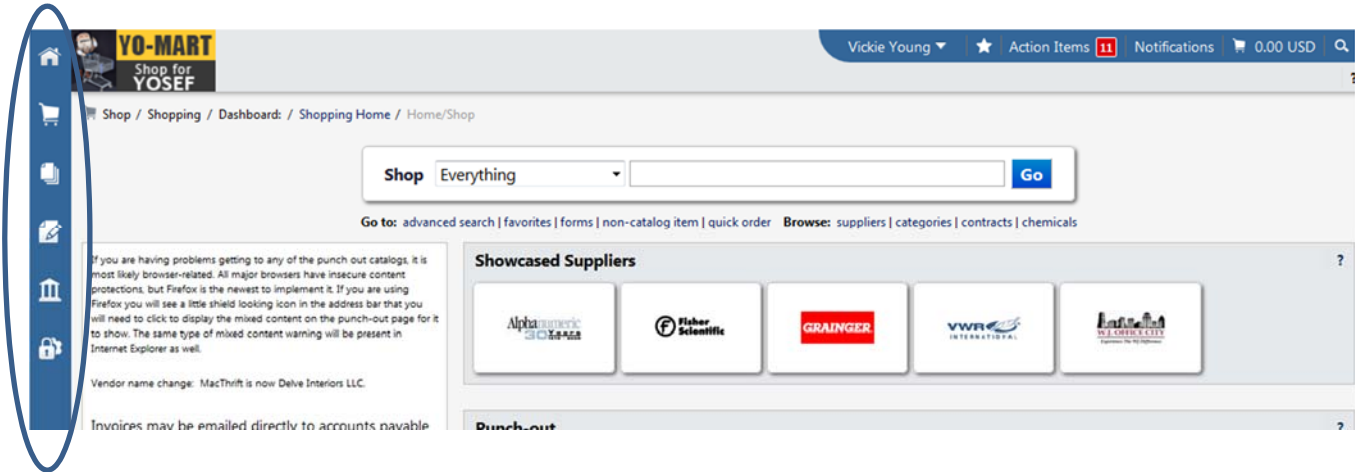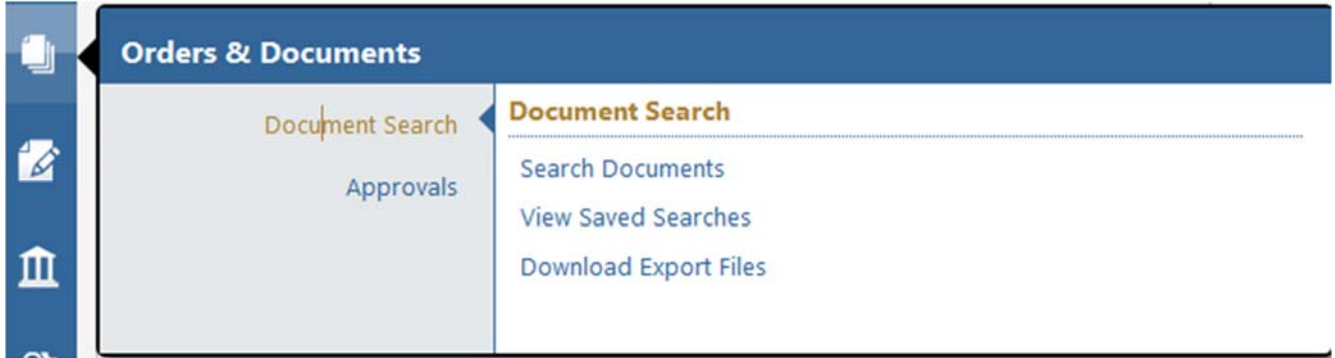

Side Navigation Bar Shop Menu

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.

Side Navigation Bar Orders & Documents Menu

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.

Side Navigation Bar Catalogs and Contracts

Tasks related to the setup and management of hosted catalog content and contracts are located here.

Side Navigation Bar Accounts Payable Menu

The Accounts Payable menu contains all tasks related to Settlement Manager.

Side Navigation Bar Site Administration

# Side Navigation Bar Site Configuration

These two menus contain administrator tasks. These menus are visible only to select users.

👓 Side Navigation Bar Menu Search Option

Located in the *bottom left corner* is a menu search. 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. In addition, 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.

Here is an example of results from a search on "approvals."
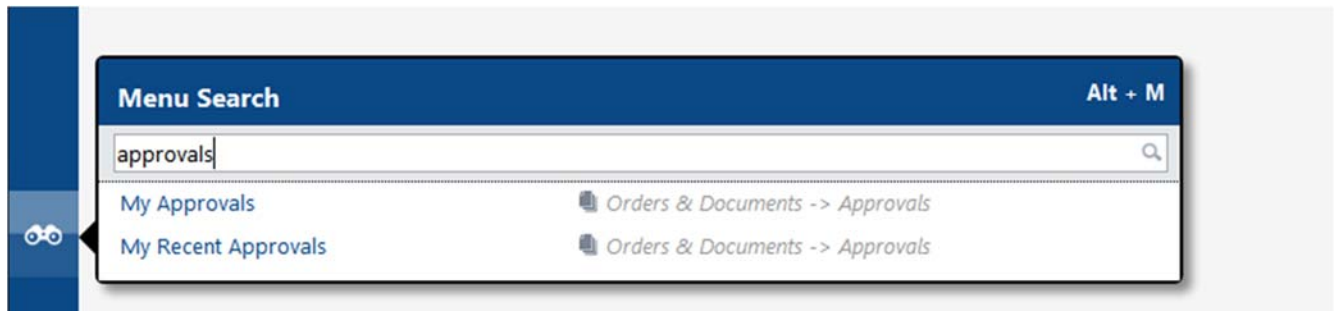
3. ## The Top Banner Overview

   The top banner contains access points to your user profile, your assigned actions 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.
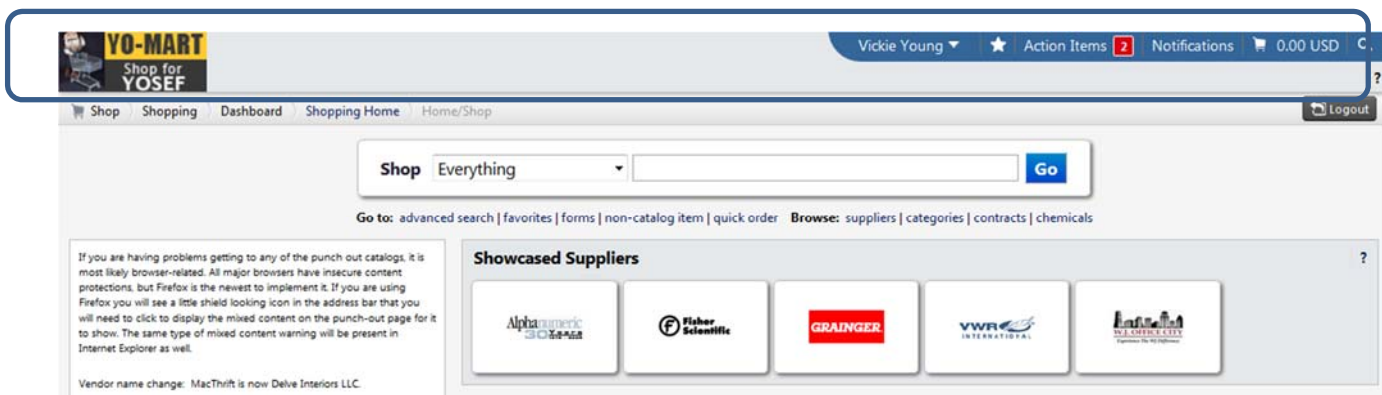
Click on the drop-down to the right of your name. Here you can view and/or edit your **profile**, set any page as your home page and logout of the application.
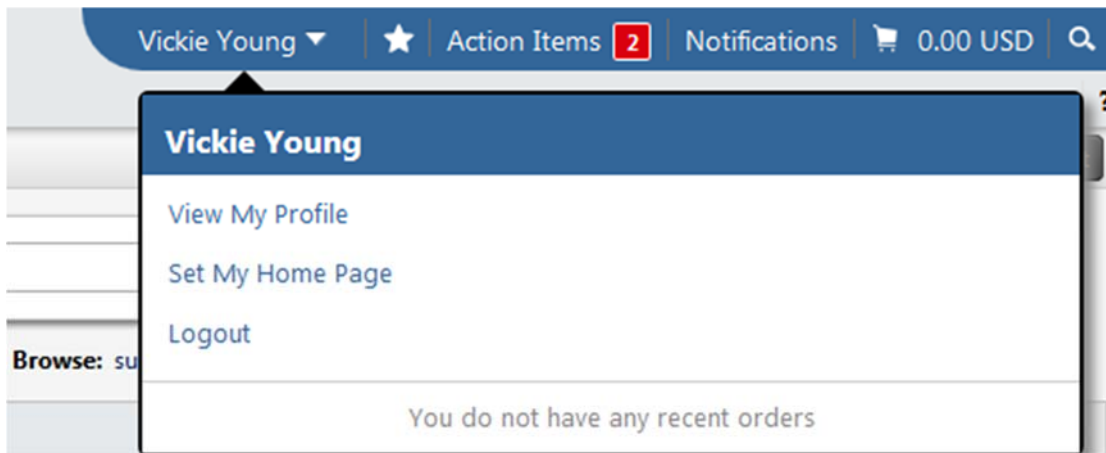
If you have pending action items, a number indicating the number of pending items displays in red to the right of the **Action Items** menu option. Click on the **Action Item** drop-down text to access the list of items.

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.

Depending on your profile set-up, certain actions items and/or tasks, such as a submitted requisition or a document needing approval, may trigger notifications. You can view these from the **Notifications** menu option in the top banner. Notifications available in the application will also be sent to you via email.

Notifications are clickable and take you to the appropriate area of the applications (i.e. the requisition).

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 symbol.

Clicking the View My Cart button takes you to the active cart.

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. You can also access Quick Search using the quick-access key combination **ALT + Q** from anywhere in the application.