Introduction to PantherExpress

Chapter 1
Introduction to PantherExpress

Section Objectives

At the end of this section, you should be able to:

- Log in to PantherExpress
- Navigate the PantherExpress Home Page
- Search for supplier products by various methods
- Set-up personal Ship-To locations
**PantherExpress Features**

The PantherExpress system is a web-based procurement process which links authorized University of Pittsburgh purchasers to contracted and non-contracted suppliers. The University uses this system to streamline the process of procuring and paying for goods and services.

- For many purchases, the department buyer will be able to select goods from an online catalog of selected suppliers, or the buyer punches out to a supplier’s customized University of Pittsburgh website.
- Purchaser creates a requisition to request the purchase of the selected goods.
- Requisitions are automatically and electronically routed for approval.
- Approved requisitions are then transmitted electronically to suppliers for fulfillment.
- Buying from non-contracted suppliers is available via the PantherExpress Standard Forms
- Procuring and paying for services is available via the PantherExpress Specialty Forms

**System features include:**

- Ease of use.
- Simplified approval process.
- Access to University contracted and non-contracted suppliers.
- University discounted contract pricing.
- Next day delivery and no freight charges on most items.
PantherExpress Features

Purchasing Policy

Please note the following purchasing policy:

All University units are required to use University contracted suppliers, when available, to purchase goods and services. A listing of these suppliers is provided at: http://www.cfo.pitt.edu/pexpress/purchases/contractedSuppliers.php

When contracted suppliers are not available for a particular commodity or service, University purchasers must follow the University’s competitive bidding requirements (see Policy 05-02-16), or directed or sole-source purchase justification requirements (see Policy 05-02-17).

When the contracted supplier and product are available on the PantherExpress System, all University units are required to use the PantherExpress System to execute the purchase transaction.
Logging in to PantherExpress

Logging In (Production)

To use the University of Pittsburgh’s Single Sign-On portal, go to www.my.pitt.edu. Use your University Computer Account user name and password to log onto the site. You must have a University Computing Account. If you work for UPMC, you need to use your sponsored account to log into my.pitt.edu.

To access PantherExpress in your office follow the directions below:

1. Open your Web browser
2. Go to: www.my.pitt.edu
3. Enter your user name in the Student, Faculty & Staff section
4. Enter your password in the Student, Faculty & Staff section
5. Click on “Log In” in the Student, Faculty & Staff section

You will be logged into the Portal home page. Scroll down the Home page, you will find the “PantherExpress” link in the right hand side of the Home page.

6. Click the “PantherExpress” link

NOTE: If you are running Internet Explorer, clicking on the link will open a new instance of the browser.
**Time-Out Settings in PantherExpress**

A PantherExpress session will expire after 30 minutes of inactivity. There are two timeout types, one while you are in the PantherExpress system, and one while you are in a punchout session.

**PantherExpress Session**

- Inactivity begins when you are no longer shopping from a hosted catalog, no longer viewing draft carts, or editing or viewing orders.

- You will receive notification that your session has expired, and to log in again.

- Click the notification link to log back in.

- You will be returned to the last page you were viewing when your session expired.

**Punchout Session**

- A punchout session will expire after 30 minutes.

- You may extend this time by clicking on “Reset Session”. The timer is located on the top of the punchout page.

- When your time has expired the timer will be at 00:00. You will also receive a notification that your session has timed out.

- Click OK to be transferred to the login screen.

- When you log back in, you will be taken to the Home page of PantherExpress.

- If you had any items in the shopping cart of the punchout, the items will no longer be in the cart when you return to the punchout.

   ❖ Grainger and Perkin Elmer have a time out built into their punchout. Sessions expire between 20 and 25 minutes. The SciQuest reset button has no bearing on this time out. Your session will time out whether or not you click on “Reset Session”.

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Logging In (Training)

To access PantherExpress training, follow the directions below:

1. Click on the PantherExpress training icon
2. Enter your assigned Username
   - dbt#
3. Enter Password
   - password
4. You should be at the PantherExpress Home Page
PantherExpress Home Page

1. **User Information** – In the upper right corner, information about the user is displayed. A link to the user’s profile & the log out link can be accessed here.

2. **Cart Summary** – The upper right corner displays a summary of the shopping cart. Click this shortcut to go directly to the cart page where cart details can be reviewed & updated.

3. **Navigation Tabs** – Located across the top of the application, allows you to go to different screens.

4. **Bookmarks** – Allow you to Add frequently used pages for quick access to those pages.

5. **PantherExpress News** – Bulletin board area that displays messages for the PantherExpress community.

6. **Action Items** – Contains items for notification as well as items requiring review and/or approval.

7. **Hosted Catalog / “Shop-at-the-Top” Search Area** – Contains options for searching for supplier items available from the Hosted Catalog Suppliers.
PantherExpress Home Page

8. **Supplier Showcase** – The Supplier Showcase is featured across the top of the home page. Each supplier in the showcase displays an icon which allows users to access a hosted catalog or punchout. The Supplier Showcase is intended to highlight suppliers you may not be familiar with in PantherExpress, diversity suppliers, new suppliers added to the system, and to make it easy for you to search for products.

9. **Standard Forms (Buyers ONLY)** – Standard forms are used to place non-catalog orders from both contracted suppliers and non-contracted supplier.

10. **Punchout Supplier** – Punchout allows you to access suppliers’ websites, search for products, and return them to the shopping cart in PantherExpress.
**PantherExpress Home Page**

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7. **Supplier Showcase** – The Supplier Showcase is featured across the top of the home page. Each supplier in the showcase displays an icon which allows users to access a hosted catalog or punchout. The Supplier Showcase is intended to highlight suppliers you may not be familiar with in PantherExpress, diversity suppliers, new suppliers added to the system, and to make it easy for you to search for products.

8. **Punchout Supplier** – Punchout allows you to access suppliers’ websites, search for products, and return them to the shopping cart in PantherExpress.
Search Methods

Search Methods

This is the Hosted Catalog / “Shop-at-the-Top” Search Area. In the text box, users can enter in a product description, catalog number, supplier name, SKU, etc. into this text field and the results will then be displayed.

If you would like to expand the search options, simply click on the “advanced search” link next to the button.

There are various ways in which you can search for items in PantherExpress. Depending on the information known about the required product, one or more of the following methods can be used.

- **Search by Description** – e.g., product description, supplier name, catalog number.
- **Browse by Supplier** – filter results to those from a specific supplier.
- **Browse by Category** – View all items from all suppliers for a specific commodity.
- **Quick Order** – If an exact catalog number is entered, Quick Order automatically adds the item to the cart without the user having to add the item manually.
- **Chemical Resource** – chemical products are found using chemical structures drawn by the user.
Search Methods

Try several methods to search for an overhead projector.

1. Navigate to the Home/Shop page.

2. First, perform a simple search.
3. Enter “overhead projector” in the text field at the “Shop-at-the-Top.”
4. Click on Go.
5. What are your results?
6. Next perform an advanced search for overhead projector in the Exact Phrase field located under the “Other Options” section.
7. How do your results differ?
**Search Methods**

8. Note the following:

   • *All of These Words* will only list products that include all the words entered in the search field.

   • *Any of These Words* will include products containing any of the words entered.

   • *Exact Phrase* will return results with products containing the exact words (including spaces & punctuation) in the order entered in the search field.

9. Search by a Supplier Name and Product Description

   • Smart Solutions Technology (can enter partial supplier name; is not case-sensitive)

   • *Exact Phrase* “overhead projector”

10. Did this narrow down your results?

11. Do a final search by searching on a specific Catalog number.

   • V1002

   ![Search example](image)

12. The more information you have about a product, especially a catalog no., the easier your search will be!

![Catalog search result](image)

**Note:**

• Since R&D Systems Inc (a catalog supplier) is in the Supplier Showcase, you can also search by clicking on R&D Systems’s icon and then searching by product description, catalog #, or by browsing categories.

• If a featured supplier is a Punchout Supplier, clicking on the supplier’s icon will take you to their website.
Search Methods

Browse by Supplier

13. Select the Browse by Supplier option
   - Select Smart Solution Technologies

14. Click on view (incl. sub-categories) for Printing & Photographic & Audio & Visual Equipment

15. Scroll through the results

16. Filter your results by a specific Category

17. Locate the “By Category” filter on the left hand side under the Refine and Filter Search area. Click on the link to filter the search results

18. Click on the “show all” link in the filter area, this will display all of the various subcategories

19. Click on the “more…” link; click on the “Projection screens or displays” link
**Search Methods**

**Browse by Category**

*Note:* To further assist in the filtering process, you will see a filter icon. This icon will be present for all results, i.e. supplier category, packaging result type, or manufacturer name, when applicable. The filtering icon is available when you can further filter your results. When clicked, a popup box will appear to allow you to make your filtering selection. This icon denotes that the category cannot be filtered any further.
**Search Methods**

**Browse by Category**

20. Click on *Browse by Category*; Select *Electronics*.

21. Click on *View (incl. sub-categories)* for Printing & Photographic & Audio & Visual Equipment

22. Filter by Supplier by selecting the supplier name from the *Refine and Filter Search* area.

23. View your results.
Search Methods

Search Tips

- The most direct method for searching is via a catalog number. If you have up-to-date supplier catalogs, locate the product in the paper catalog to get the catalog number before searching for it in PantherExpress.

- Select Browse by Category or Browse by Supplier to locate a product when you don’t have a catalog number.

- Searching by descriptive text or catalog numbers, or Browsing by Category or Supplier will only show you results from Hosted Catalog vendors. This search does not include the Punchout suppliers.

- To search for products from a Punchout supplier, you must first punchout to that supplier’s website.

- The Chemicals search feature can be used to search for commercially available chemical products using chemical structures. Please refer to the Shopper’s Quick Reference Guide for instructions on using this feature.
Setting up Ship-to Locations

Ship-To locations can be set up as part of the user’s personal profile. Set up a ship-to location.

1. Navigate to the Addresses screen.

   PantherExpress

   N → View My Profile→ Default User Settings→ Default Addresses

2. Click on Select Addresses for Profile.

3. Enter your standard building abbreviation in the “Nick Name” field.

   ![Address Search]

4. Click on Search.

5. Click on the radio button to select the address.

6. Add the room number to the address and click on the Default checkbox if this address will serve as the default ship-to.

   ![Edit Selected Address]

7. Also, you can change the Nickname to something more descriptive, e.g. Salk-Susan’s office. This is important, especially if you have multiple ship-to addresses within the same building.

8. Click on Save. The address will be added to the list of available Shipping addresses.
Lab 1: Setting up Ship-to Locations

1. Set-up a second ship-to location.
   - It will be for 440 Salk Hall.
   - Edit the name field to read Salk-Dr. Miller’s lab.
Lab 1 Solutions: Setting up Ship-To Locations

1. Navigate to the Addresses screen
   PantherExpress
   N → View My Profile → Default User Settings → Default Addresses

2. Click on Select Addresses for Profile.

3. Enter the standard building abbreviation
   - Salk

4. Click on Search

5. Click on the radio button to select the address
Lab 1 Solutions: Setting up Ship-To Locations

6. Add the room number to the address
   - 440

7. Edit the address name by calling it Salk – Dr. Miller’s lab.

8. Click on Save.

9. The new address will be added to list of available Shipping Addresses.
Introduction to PantherExpress – Helpful Hints

PantherExpress Helpful Hints

- There are no group accounts for accessing the PantherExpress system. Each user needs to have his/her own account.
- A PantherExpress User Profile Form needs to be submitted, and required training needs to be completed in order to gain access to the PantherExpress system.