Reference Materials

Chapter 11
**Various Legends in PantherExpress**

Listed below are two different tables. Each table is individually labeled with the name of the page that contains the icons listed below. Beside each icon is a brief summary of what the icon means.

### REQUISITIONS PAGE LEGEND

<table>
<thead>
<tr>
<th>LEGEND</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Checkmark] Requisition Approved</td>
</tr>
<tr>
<td>![Checkmark with exclamation] Requisition Pending Approval</td>
</tr>
<tr>
<td>![Cross] Requisition Rejected</td>
</tr>
<tr>
<td>![Left Arrow] Requisition Withdrawn</td>
</tr>
<tr>
<td>![Cross with exclamation] Pending, but line item(s) Rejected</td>
</tr>
<tr>
<td>![Checkmark with exclamation] Approved, but line item(s) Rejected</td>
</tr>
</tbody>
</table>

### PURCHASE ORDER PAGE LEGEND

<table>
<thead>
<tr>
<th>Legend</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Exclamation] Status Requires Attention</td>
</tr>
<tr>
<td>![Checkmark] Approved Purchase Order</td>
</tr>
<tr>
<td>![Checkmark with exclamation] Purchase Order Pending Approval</td>
</tr>
<tr>
<td>![Cross] Rejected Purchase Order</td>
</tr>
<tr>
<td>![Cross with exclamation] Pending, but line item(s) Rejected</td>
</tr>
<tr>
<td>![Checkmark with exclamation] Approved, but line item(s) Rejected</td>
</tr>
</tbody>
</table>

In the Hosted Catalog Search, sometimes there will be symbols that are displayed in the item description. In order to see what these icons mean, hover your mouse over the icon:
Example of a Printed PO

Status - PO P00001031

<table>
<thead>
<tr>
<th>General Information</th>
<th>Document Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO/Reference No.</td>
<td>P0001031</td>
</tr>
<tr>
<td>Supplier Name</td>
<td>GARCIA MARKETING INC</td>
</tr>
<tr>
<td>Purchase Order Date</td>
<td>11/15/2013</td>
</tr>
<tr>
<td>Total</td>
<td>249.42 USD</td>
</tr>
</tbody>
</table>

**Requester Information**

<table>
<thead>
<tr>
<th>Requester Name</th>
<th>Owner</th>
<th>Department</th>
<th>Requester Phone</th>
<th>Requester Email</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Department Buyer (Med-Computational Biology)</td>
<td>+1 (412) 555-2428</td>
<td><a href="mailto:dumbypb@gmail.com">dumbypb@gmail.com</a></td>
</tr>
</tbody>
</table>

**Line Item Status**

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Catalog</th>
<th>Size</th>
<th>Unit Price</th>
<th>Quantity</th>
<th>Ext.Price</th>
<th>Supplier Receiving</th>
<th>Matching</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Battery for Apple PowerBook G4</td>
<td>E174EH</td>
<td>EA</td>
<td>101.95 USD</td>
<td>1EA</td>
<td>101.95 USD</td>
<td>Sent To</td>
<td>No Matches</td>
</tr>
<tr>
<td>2 Wireless Headphone</td>
<td>70744</td>
<td>EA</td>
<td>127.45 USD</td>
<td>1EA</td>
<td>127.45 USD</td>
<td>Sent To</td>
<td>No Matches</td>
</tr>
</tbody>
</table>

Once submitted, the request may be subject to workflow approvals. Please see the PR Approvals link above for more information. Subtotal 229.42 USD

<table>
<thead>
<tr>
<th>Line Item Status</th>
<th>Shipping</th>
<th>Handling</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Battery for Apple PowerBook G4</td>
<td>0.00</td>
<td>0.00</td>
<td>101.95 USD</td>
</tr>
<tr>
<td>2 Wireless Headphone</td>
<td>0.00</td>
<td>0.00</td>
<td>127.45 USD</td>
</tr>
</tbody>
</table>

Total: 249.42 USD
**Favorites**

Favorites can be used to identify items that are frequently ordered. By setting up Favorites, less time is spent searching for items that will be ordered again in the future.

- The Favorites navigation menu is used to create Favorite folders and items.
- Items can be moved and copied between folders.
- Favorite folders can be edited and deleted.
- The Favorites feature is applicable **only to Hosted Catalog suppliers**. You are not able to place items returned from a supplier’s punchout into a Favorites folder.
- If a supplier updates prices for catalog items, the prices for those items will also update in Favorites.
- Many Punchout suppliers have their own Favorites feature on their individual websites.
Create a Favorites Folder

Create a Favorites folder called Computer Supplies. Add a wireless headphone and a battery from Garcia Marketing to the folder. Select these items from the Favorites folder and put them in a cart.

1. Navigate to the Favorites screen.

PantherExpress

Shop → Go To → View Favorites

2. Click on New
3. Click on the first choice: Top Level Personal Folder.
Add Items to a Favorites Folder

4. Enter the Folder Name.
   • Your Name Computer Supplies

5. Click on Save.


7. Search for the following item from Garcia Marketing.
   • Wireless Headphone (cat. #J70744)

8. Click on the add favorite link under the “Add to Cart” button.

9. A pop-up window will appear where you can edit the “Item Nickname” and select which folder the item should be added to:

   Add To Favorites
   Step 1: Edit Item Details
   Item Nickname
   WIRELESS HEADPHONE
   from GARCIA MARKETING INC, Catalog No. J70744
   Add Description

   Step 2: Select Destination Folder
   Personal
   Jenna’s Computer Supplies
   Shared
   No shared folder available...

10. Select the appropriate folder and click on Submit.
Add Items to a Favorites Folder

11. Respond to the successfully added message by clicking on Close.

12. Following the above steps, add a second lab item to your Favorites folder.

- Battery for Apple Powerbook, Garcia Marketing. (catalog # E17408)
Select Items from a Favorites Folder

Create a new cart by selecting the two items in your Favorites folder.

1. Go to Favorites by clicking on the shop icon, followed by “Go To” and “View Favorites”.

2. If it doesn’t automatically display, click on your Favorites folder to display the contents.

3. Select the Wireless Headphones and Battery for Apple Powerbook by clicking on Add to Cart for each item.

4. Note the message under each item.

5. Click on the cart icon in the upper right hand corner of the screen followed by “View My Cart” and “Proceed to Checkout”.

6. Complete the order by adding Ship-to and Account information.
   - Salk-1128
   - 02.49010.6010

7. Submit the requisition.

Note: Once a Favorites Folder is created, you can add items to the Favorites folder at the same time you are adding the item to your cart. Once you find the item, click on the add favorite link, and then Add to Cart.
Remove Items from a Favorites Folder

- Items can be deleted from a Favorites folder.

- To delete an entire folder, and all the items in the folder, simply highlight the appropriate folder and click on the Delete button.

- A confirmation will appear, click on OK to complete the deletion of the folder.

1. Go to “View Favorites”.

2. Click on the folder name.

3. Click on the delete link under the “Add to Cart” button for the items you wish to remove from the folder.

4. You will then be prompted to confirm the deletion of the item.

5. Simply click the OK button to confirm deletion.
Move or Copy an Item Between Folders

1. Go to “View Favorites”.

2. Click on the folder that has the items you would like to move or copy.

3. Click on the move/copy link for the item(s) you are moving or copying.

4. Choose the folder that you would like to move/copy the selected item to and then click on either the move or copy button.

5. A confirmation will appear, click the Close button to return to the application.