PantherExpress System Dashboards

There are five dashboards in the PantherExpress system: The Home, Shopping, Invoices, Approval, and Contracts dashboards. *Depending on your user rights in the system, you will be able to see all or some of the dashboards.* Each of the PantherExpress dashboards has a specific purpose. Each dashboard has been color-coded to allow the end-user to quickly and easily see which dashboard is being used. The shopping dashboard is color-coded blue, the invoices dashboard is color-coded green, the approvers dashboard is color-coded yellow, and the contracts dashboard is black.

**The Home Dashboard.**

All system users will be able to view the home dashboard. The home dashboard is meant to be the information center of the software and the launching point to shop, check your invoices, and if you are an approver, view all your pending approvals.

At the time this training material is being developed, the home dashboard in the PantherExpress system shows a COVID-19 update information area at the top of the page. This is intended to guide system users to all relevant information related to the COVID-19 response by the University. The COVID-19 information area will be removed at the appropriate time.

Scroll down the Home dashboard, on the left-hand side, you’ll see the organizational message area. The organizational message area is intended to inform the system users of any campus or university information related to purchasing.
The Shopping Dashboard

The shopping dashboard takes you to purchasing related functionality in the PantherExpress system. At the very top of the shopping dashboard you will see the shop area. The shop area allows you to search the hosted catalogs that are in the PantherExpress system. In the shop area you will also see shortcuts to favorites, forms, non-catalog item, and quick orders. You are also able to browse suppliers and categories.

On the Left-hand side of the screen you’ll see the showcases area. This area displays the Specialty forms, Standard forms, our internal suppliers, and the various punch outs that are available in the system. You can click on any of the icons in this area to open the appropriate form or launch the appropriate punch out for your purchasing.

On the right-hand side of the shopping dashboard you’ll see the My Draft Carts area. The My Draft Carts area will show all of your draft shopping carts. Draft shopping carts consist of orders that you did not complete, and orders that may have been returned to you by an approver. The My Draft Carts area was added to make it easier for you to determine if you have an outstanding order that needs completed, or if an approver has returned a requisition for you to make changes. You can click on any of the draft carts in the window to access the cart to complete the order.
or delete the cart. **It is important to delete or remove draft shopping carts that are no longer needed. This helps to prevent problems with placing unwanted orders or mistakenly adding additional suppliers or items.**

Scrolling down the page, on the right-hand side of the shopping dashboard, you will find the **My Requisition Window**. The **My Requisitions Window** is intended to show you all your current requisitions entered in the system. This will provide you with a quick and easy way to determine if your requisition has been completed, or if your requisition is still pending in the Pantherxpress workflow. If your requisition is pending you can click on the requisition number and go to the workflow to see where your order is in the approval process.

Further down, on the right-hand side of the shopping dashboard, you will find the **My Purchase Orders window**. **My Purchase Orders window** will display purchase orders created by you in the last 90 days. The **My Purchase Orders window** is intended to show you status on your most recently placed purchase orders. This will allow you to determine if your purchase order has been sent to the supplier or if the purchase order is awaiting approval in the workflow.
Further down the right-hand side of the shopping dashboard, you’ll also find the **Update My PO Requests**. The **Update My PO Requests** will show you all of your update my PO form requests that you placed for the current fiscal year. This will allow you to quickly and easily find the status of your update requests placed in the system. You’ll be able to tell if the request has been completed or if your request is still under review.

The last window you’ll find on the right-hand side of the shopping dashboard is the **Purchase Order Search** window. If you cannot find the purchase order or requisition information that you need on the shopping dashboard, the purchase order search is intended to allow you to quickly and easily search the system for the information needed. You can search for purchase orders or any other document type in the Panthers for a system.

### The Invoices Dashboard

The invoices dashboard provides you with information specific to the invoices associated with the purchase orders that you’ve placed in the system. If you are a department buyer, you’ll be able to see the invoice information associated with your orders. At the very top left-hand of the invoice dashboard, you will find the **Create Invoice** window. This area allows you to quickly create an invoice for any of the contract related specialty forms that you may have placed in the system.

![Invoice Dashboard]

In the top right-hand corner of the invoices dashboard you will see the **Invoice Search** window. The **Invoice Search** window will allow you to search for invoices associated with any of your purchase orders.

In the middle of the dashboard you’ll find the **Paid Invoices** window. This window shows all of your **Paid Invoices** for the current fiscal year to date. If you have permissions to view all invoices in your department the **Paid Invoices** window will display all the invoices that have been paid in your department fiscal year to date.

**The Payable** Invoice window shows your invoices currently in payable state in the PantherExpress system. Payable means the invoice has been sent to Oracle for payment, but the actual payment has not been sent to the supplier. When the payment is sent to the supplier, an update will be made to list the invoice as paid. At that time, the invoice will no longer appear in the **Payable Invoice** window.
At the bottom of the invoices dashboard, you will find the **My Bookmarks** and **Purchase Orders with No Invoices** windows. The **My Bookmarks** window displays any bookmark that you’ve saved in PantherExpress. The screenshot that’s included with this tutorial shows the bookmarks that I currently have saved. What is displayed on your screen will be different than what is shown in the screenshot shown.

**The Purchase Orders with No Invoices window** displays any purchase order that you placed for the current fiscal year that has not been invoiced by the supplier. Note: if you have purchases from the Dietrich School Stockroom or from the Pitt IT Information Technology Software Store, those purchase orders will show up in this window. Orders for the DSS and the Information Technology Software Store are paid via a journal entry. There are no invoices associated with these transactions.

**The Approvers Dashboard**

The Approvers Dashboard was designed to provide a PantherExpress approver all the information associated with their approval responsibilities in one location. On the left-hand side of the dashboard you’ll find the **Action Items** window. This window will display requisition approvals, purchase order approvals, and if you have the correct permissions, you’ll see invoice approvals, and change request approvals. The **Action Items** window is a quick and easy way to view the approvals that you can access. Clicking on any of the links in this area will take you to the associated pending approval folders.
In the center of the approvers dashboard you’ll see the Approvals window. This area provides you with an easy way to view approvals you may have had or approval sitting in any of the various folders that you have access to. From the drop downs in this window, you can filter on requisition purchase order invoice or form request approvals. It also allows you to view only your approvals, and if you have access to additional Department of approvals, it will allow you to sort on all the approvals you have the ability to see. You can group the approvals by folder, or you can leave the approvals just listed in numeric order.

On the right-hand side of the approvals dashboard you’ll see the Quick Links window. This window is designed to provide approvers with frequently used resources. One of the most frequent requests we receive is access to the department approval form or the department buyer form. Approvers can go to the quick links window and click on
any of the links listed to take them to the needed resources. There’s a direct link to the department approval form, the department buyer user form, there’s also a link to the How to Become a PantherExpress User webpage on the PantherExpress website. You will also see a link to the auto closing for invoice PO’s tutorial. These resources are the most frequently requested by system users.

Navigating the Dashboards
At the top of each dashboard, you will find the View Another Dashboard dropdown menu. This dropdown allows you to quickly navigate to one of the other dashboards without the need to return to the Home Dashboard. This provides an easy way to navigate between the dashboards.