

My Personalizations

Change the Default Sort Order

You can alphabetize the pull-down menu order from the PantherSoft default to either ascending or descending order.

1 Go to the **Main Menu** and select - **My Personalizations** ► **Personalize Navigation Personalizations**.

2 Find the **Drop down Menu Sort Order** menu and choose the sort order you prefer. Select either **Ascending** order (A to Z sort), **Descending** order (Z to A sort), or **None** (to restore the original order of the menu).



3 Once you have made your selection, go to the bottom of the page and click the **OK** button. This takes you to the **Save Confirm** page where you click the **Return** button to save your selection.

Turn Off Autocomplete

By default, PantherSoft has the ability to save form data and then recall that data when you start typing in a field again. This allows one to save time as the form may recall the data which was used in the past. Sometimes this feature can hamper filling out forms though, as unneeded data will then populate all the fields. To turn off the Autocomplete "predictive" data feature, you can update your settings in PantherSoft to turn this off.

Perform the following:

1 Go to the **Main Menu** and select - **My Personalizations** ► **Personalize Navigation Personalizations**.

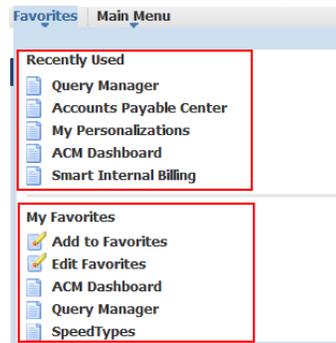
2 Find the **Autocomplete** menu and select **No**.

3 Once you have made your selection, go to the bottom of the page and click the **OK** button. This takes you to the **Save Confirm** page where you click the **Return** button to save your selection.

Favorites Menu

Recently Used / Favorites

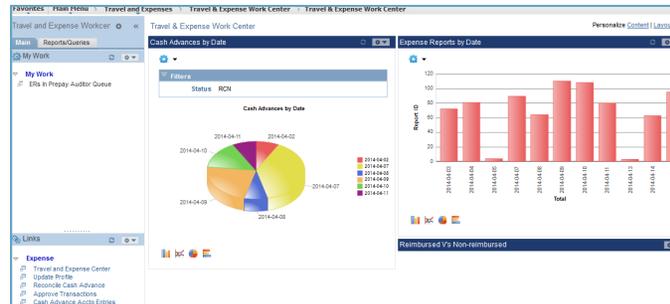
Much like a web browser's, PantherSoft tracks recently visited pages and can bookmark pages. This feature is found at the top of the **Favorites** menu. The pages are listed in the order last visited with the most recently visited page at the very top.



Add frequently navigated to pages to your Favorites for quick access. Once you **Add To Favorites**, the links for these pages are located at the bottom of the **Favorites** menu under **My Favorites**.

WorkCenter

WorkCenters are designed for specific operation roles — General Ledger, Accounts Payable, Buyers, etc. Users can do all the common tasks they do daily without navigating from the WorkCenter. It is a central place that can be personalized for all your major transaction components, processes, queries, reports and dashboards.



FIU PANTHERSOFT FINANCIAL SYSTEM

FEATURE GUIDE





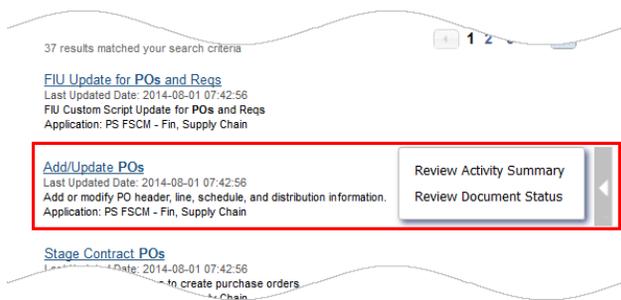
In January 2015, the FIU PantherSoft Financial System upgraded to version 9.2 introducing many improvements to the system. This guide reviews some of the “internet-like” navigation as well as other features.

Global Search

PantherSoft Global Search enables you to take actions directly from your search results based on context without navigating through the menu to find the pages and data that you are looking for. In this example search for, “POs.”

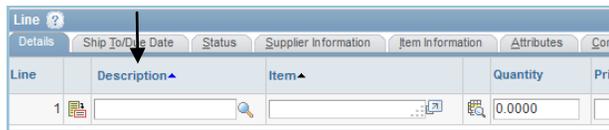


The findings show 37 results match the search criteria. You can click on Add/Update POs to jump directly to the Purchase Order search screen. Additional functionality can be accessed by hovering your mouse over the arrow on the right.



Drag & Drop Column Headers

Users can now personalize tables by dragging & dropping column headers into a order that suits them. Click the name of the column header and drag it to a new position. In the example below the Description field is being moved to the left.



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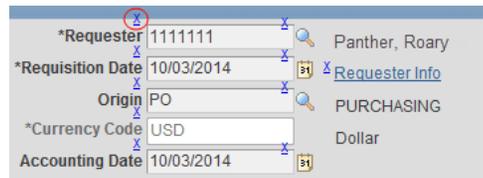
Change Tabbing Sequence

Many users use the Tab key to move between fields and buttons in a form instead of using the mouse. Adjusting the tab sequence can be done in a couple of ways.

The easiest way is using **My Personalizations** ► **Personalize Navigation Personalizations**. Here you can specify what elements you want to tab over—Calendar Buttons, Lookup Buttons, etc.

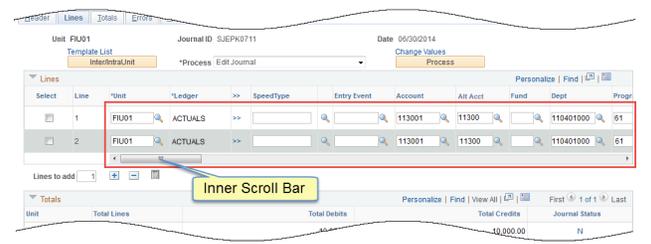
You can also create your own tab sequence on pages in PantherSoft. Navigate to the transactional pages you desire. Click on **Personalize Page** ► **Personalize Page** in the upper right-hand corner.

To define new tabbing order, select Clear Tabbing Order, then click the blue X's to include in desired sequence.



Inner Scroll

The nested inner scroll is perfect for viewing a long row of content such as a chartfield. This feature helps simplify the process of reviewing a long row of data with many fields.



Mouse-Over

The mouse-over function displays additional information about suppliers, contacts, customers or sponsors without cluttering the page or requiring navigation to another page. A dotted-line underneath the text earmarks mouse-over enabled fields.



Hover your mouse over the text. After several seconds, additional information (such as names, addresses, emails, and telephone numbers) will automatically pop up.

