

PURCHASING INFORMATION INQUIRY (PO INFO) *NEW* FEATURES

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New Grid Features

There are several links available for the user tools called Purchasing Information Inquiry (PO Info) grid where several new and helpful features have been added. Read below for instructions on how to utilize each one. Please note that if you ignore these changes, you can use PO Info just like you always have. You are not required to utilize any of the following changes to PO Info.

The new grid features are available when performing the following searches:

- Search Purchase Orders/Requisitions: Find, view and print your released purchase orders or requisitions by Department, Project, and/or date range.
- Vendor Inquiry: Get address, phone information, status, commodities, cross-references, payment summaries, vendor characteristics and orders.
 - By known Vendor Number
 - By Vendor Name element or Vendor Address fragment
- Purchasing Information Inquiry - WISDM Transaction Detail
- Specific Purchase Order Lookup: View details about a known purchase order number, including payment information.
- Remaining Encumbrance Status Tool (REST): View details about a known purchase order number, including the encumbrance balance, status (open or closed), and expenses from WISDM.


Positive approval field added to Order Search Results

The search result for orders contains one new field for positive approval, and is titled "Pos. Appr." The value of "Y" indicates that the order has been designated for positive approval. Accounts Payable will ask departments to approve each invoice referencing an order that has been designated for positive approval.

<input checked="" type="checkbox"/>		Req#	Vendor#	Vendor	Date	Amount	Type	End Date	Pos. Appr.
<input type="checkbox"/>	Order Detail	B736013	31840	INSIGHT PUBLIC SECTOR	07/01/2013	\$1,411.16	MC	09/11/2014	N
<input type="checkbox"/>	Order Detail	B893082	116045	ORACLE AMERICA INC	07/01/2013	\$5,788.11	SC	06/30/2014	N
<input type="checkbox"/>	Order Detail	B862982	94088	INSIGHT PUBLIC SECTOR	06/20/2013	\$1,411.16	MC	05/13/2014	N
<input type="checkbox"/>	Order Detail	406K210	95948	SVA CONSULTING LLC	08/06/2012	\$930.00	PC		N
<input type="checkbox"/>	Order Detail	B624680	31840	INSIGHT PUBLIC SECTOR	07/19/2012	\$1,374.19	MC	09/11/2013	N
<input type="checkbox"/>	Order Detail	B156881	94088	INSIGHT PUBLIC SECTOR	05/22/2012	0	CH	05/13/2013	N

Click & Drag

The result grids now allow you to click and drag columns to change their order of appearance. For example:

- In the order results grid below, hover over the column you would like to move. You should see an arrow symbol :  Click and drag the column to the left or right and release where you would like it to appear.

Drag a column header and drop it here to group by that column

<input checked="" type="checkbox"/>		Req#	Vendor#	Vendor	Date	Amount	Type	End Date	Pos. Appr.
<input type="checkbox"/>	Order Detail	B023063	78458	BARTON SOLVENTS INC	01/08/2014	Drag to reorder	CA	01/08/2014	P
<input type="checkbox"/>	Order Detail	511K755	140097	L&M CORRUGATED CONTAINER CORP	01/06/2014	\$10,780.00	PC		N
<input type="checkbox"/>	Order Detail	510K801	138783	ALLIANT ENERGY	01/03/2014	\$1.00	BA	06/30/2014	N
<input type="checkbox"/>	Order Detail	510K786	7661	MADISON GAS ELECTRIC CO	01/03/2014	\$1.00	BA	06/30/2014	N
<input type="checkbox"/>	Order Detail	B058166	82031	AIRGAS REFRIGERANTS INC	12/20/2013	\$1.00	BA	03/14/2015	P
<input type="checkbox"/>	Order Detail	B823793	139404	RICOH USA INC	12/20/2013	\$1.00	MC	06/30/2014	N
<input type="checkbox"/>	Order Detail	B023063	78458	BARTON SOLVENTS INC	12/19/2013	\$1.00	BA	02/28/2015	P
<input type="checkbox"/>	Order Detail	B025292	123710	SHI INTERNATIONAL CORP	12/19/2013	\$1.00	XA	02/28/2015	N
<input type="checkbox"/>	Order Detail	B058096	13011	UNISOURCE WORLDWIDE	12/19/2013	\$1.00	BA	03/31/2015	P
<input type="checkbox"/>	Order Detail	B024415	78458	BARTON SOLVENTS INC	12/19/2013	\$1.00	XC	02/28/2015	P

Count : 990 \$52,719,860.99

Grid Preferences: Default

[Return to Purchasing Inquiry Menu](#)

- In this example, the "Amount" column was moved so that it appears next to "Req#" column.

Drag a column header and drop it here to group by that column

<input checked="" type="checkbox"/>		Req#	Amount	Vendor#	Vendor	Date	Type	End Date	Pos. Appr.
<input type="checkbox"/>	Order Detail	B023063	(\$1.00)	78458	BARTON SOLVENTS INC	01/08/2014	CA	01/08/2014	P
<input type="checkbox"/>	Order Detail	511K755	\$10,780.00	140097	L&M CORRUGATED CONTAINER CORP	01/06/2014	PC		N
<input type="checkbox"/>	Order Detail	510K801	\$1.00	138783	ALLIANT ENERGY	01/03/2014	BA	06/30/2014	N
<input type="checkbox"/>	Order Detail	510K786	\$1.00	7661	MADISON GAS ELECTRIC CO	01/03/2014	BA	06/30/2014	N
<input type="checkbox"/>	Order Detail	B058166	\$1.00	82031	AIRGAS REFRIGERANTS INC	12/20/2013	BA	03/14/2015	P
<input type="checkbox"/>	Order Detail	B823793	\$1.00	139404	RICOH USA INC	12/20/2013	MC	06/30/2014	N
<input type="checkbox"/>	Order Detail	B023063	\$1.00	78458	BARTON SOLVENTS INC	12/19/2013	BA	02/28/2015	P
<input type="checkbox"/>	Order Detail	B025292	\$1.00	123710	SHI INTERNATIONAL CORP	12/19/2013	XA	02/28/2015	N
<input type="checkbox"/>	Order Detail	B058096	\$1.00	13011	UNISOURCE WORLDWIDE	12/19/2013	BA	03/31/2015	P
<input type="checkbox"/>	Order Detail	B024415	\$1.00	78458	BARTON SOLVENTS INC	12/19/2013	XC	02/28/2015	P

Count : 990 \$52,719,860.99

Grid Preferences: Default

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Hide Columns

This feature allows you to temporarily hide any columns that you do not care to see. For example:

1. In the results of “Vendor Inquiry: By Vendor Name element or Vendor Address fragment,” right-click on any column title, hover over the “Columns” category, and uncheck any columns you do not want to see. In this example, we searched on the word ‘Microsoft’, and then we have chosen to hide the “Country” column.

UNIVERSITY OF WISCONSIN-MADISON UW HOME MY UW UW SEARCH

Purchasing Information Inquiry - Vendor Inquiry

Drag a column header and drop it here to group by that column

	Vendor#	Vendor	Address	City	State	Zip	Country
Vendor Detail	5950	MICROSOFT TECHNET	PO BOX 5540	PLEASANTON	CA	94566	
Vendor Detail	101074	MICROSOFT VISUAL C++ SUBSCRIPTION	PO BOX 5479	PLEASANTON	CA	94566	
Vendor Detail	102311	MICROSOFT DEVELOPER NETWORK	PO BOX 5540	PLEASANTON	CA	94566	
Vendor Detail	23476	MICROSOFT DEVELOPER NETWORK	PO BOX 51813	BOULDER	CO	80322	
Vendor Detail	30158	MICROSOFT	1800 NELSON RD CSC2	LONGMONT	CO	80501	
Vendor Detail	85085	MICROSOFT	PO BOX 55890	BOULDER	CO	80321	
Vendor Detail	14412	MICROSOFT DEVELOPER NETWORK	PO BOX 10680	DES MOINES	IA	50381	
Vendor Detail	34155	MICROSOFT MAGAZINE	PO BOX 1161	SKOKIE	IL	60076	
Vendor Detail	76213	MICROSOFT CORPORATION	3025 HIGHLAND PKWY STE 300	DOWNERS GROVE	IL	60515	
Vendor Detail	12522	MICROSOFT FULFILL	PO BOX 4100	CRAWFORDSVI	IN	47933	

Count : 35

Grid Preferences: Default Delete Grid Preferences Save Grid Preferences Show Filters Hide Filters

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2. If you decide you want to see certain columns again, hover over any column. Repeat the process and re-check those columns.

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Purchasing Information Inquiry - Vendor Inquiry

Drag a column header and drop it here to group by that column

	Vendor#	Vendor	Address	City	State	Zip	Country
Vendor Detail	5950	MICROSOFT TECHNET	PO BOX 5540	PLEASANTON	CA	94566	
Vendor Detail	101074	MICROSOFT VISUAL C++ SUBSCRIPTION	PO BOX 5479	PLEASANTON	CA	94566	
Vendor Detail	102311	MICROSOFT DEVELOPER NETWORK	PO BOX 5540	PLEASANTON	CA	94566	
Vendor Detail	23476	MICROSOFT DEVELOPER NETWORK	PO BOX 51813	BOULDER	CO	80322	
Vendor Detail	30158	MICROSOFT	1800 NELSON RD CSC2	LONGMONT	CO	80501	
Vendor Detail	85085	MICROSOFT	PO BOX 55890	BOULDER	CO	80321	
Vendor Detail	14412	MICROSOFT DEVELOPER NETWORK	PO BOX 10680	DES MOINES	IA	50381	
Vendor Detail	34155	MICROSOFT MAGAZINE	PO BOX 1161	SKOKIE	IL	60076	
Vendor Detail	76213	MICROSOFT CORPORATION	3025 HIGHLAND PKWY STE 300	DOWNERS GROVE	IL	60515	
Vendor Detail	12522	MICROSOFT FULFILL	PO BOX 4100	CRAWFORDSVI	IN	47933	

Count : 35

Grid Preferences: Default Delete Grid Preferences Save Grid Preferences Show Filters Hide Filters

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Sort Columns (Ascending and Descending)

Sometimes it is helpful to sort columns by ascending or descending order, especially when reviewing monetary values such as in the “Amount” column. For example:

1. In the Purchasing Information Inquiry – Orders screen grid, right-click the title of the column you would like to sort and select “Sort Ascending” or “Sort Descending.”

Drag a column header and drop it here to group by that column

	Req#	Vendor#	Vendor	Date	Amount	Type	End Date	Pos. Appr.
Order Detail	B823896	95948	SVA CONSULTING LLC	01/31/2013			01/31/2014	N
Order Detail	435K665	129535	RICOH BUSINESS SOLUTIONS-INV SEE #139404	01/25/2013			02/28/2014	N
Order Detail	B823885	13011	UNISOURCE WORLDWIDE	01/24/2013			03/31/2014	P
Order Detail	B823863	82031	AIRGAS REFRIGERANTS INC	01/24/2013			03/14/2014	P
Order Detail	B799794	129535	RICOH BUSINESS SOLUTIONS-INV SEE #139404	01/22/2013			02/28/2014	N
Order Detail	B823804	10122	PITNEY BOWES INC	01/18/2013			03/31/2014	N
Order Detail	B801474	4500	GENERAL COMMUNICATIONS INC	01/18/2013	\$1.00	BA	02/28/2014	P
Order Detail	B801636	2176	GREAT NORTHERN CORPORATION	01/17/2013	\$1.00	XC	02/28/2014	N
Order Detail	437K861	104342	AB DATA LTD	01/17/2013	\$1.00	XC	06/30/2013	N
Order Detail	B801533	78458	BARTON SOLVENTS INC	01/17/2013	\$1.00	XC	02/28/2014	P

Count : 97 \$1,202,474.65

Grid Preferences: Default Delete Grid Preferences Save Grid Preferences Show Filters Hide Filters

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2. When the column is sorted, the column title shows an “up arrow” icon next to the title name.

Drag a column header and drop it here to group by that column

	Req#	Vendor#	Vendor	Date	Amount	Type	End Date	Pos. Appr.
Order Detail	B156881	94088	INSIGHT PUBLIC SECTOR	05/22/2012			05/13/2013	N
Order Detail	304K544	13021	UNIVERSITY BOOK STORE	01/25/2012	0	CH	06/30/2012	P
Order Detail	B823896	95948	SVA CONSULTING LLC	01/31/2013	\$1.00	SC	03/11/2014	N
Order Detail	B823885	13011	UNISOURCE WORLDWIDE	01/24/2013	\$1.00	BA	03/31/2014	P
Order Detail	B823863	82031	AIRGAS REFRIGERANTS INC	01/24/2013	\$1.00	BA	03/14/2014	P
Order Detail	B801474	4500	GENERAL COMMUNICATIONS INC	01/18/2013	\$1.00	BA	02/28/2014	P
Order Detail	B801636	2176	GREAT NORTHERN CORPORATION	01/17/2013	\$1.00	XC	02/28/2014	N
Order Detail	437K861	104342	AB DATA LTD	01/17/2013	\$1.00	XC	06/30/2013	N
Order Detail	B801533	78458	BARTON SOLVENTS INC	01/17/2013	\$1.00	XC	02/28/2014	P
Order Detail	B801592	75964	H DERKSEN & SONS CO INC	01/17/2013	\$1.00	BA	02/28/2014	P

Count : 97 \$1,202,474.65

Grid Preferences: Default Delete Grid Preferences Save Grid Preferences Show Filters Hide Filters

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3. Right-click in the column title and select the “Clear Sorting” option.

Drag a column header and drop it here to group by that column

	Req#	Vendor#	Vendor	Date	Amount	Type	End Date	Pos. Appr.
Order Detail	B156881	94088	INSIGHT PUBLIC SECTOR	05/22/2012				N
Order Detail	304K544	13021	UNIVERSITY BOOK STORE	01/25/2012				P
Order Detail	B823896	95948	SVA CONSULTING LLC	01/31/2013	\$1			N
Order Detail	B823885	13011	UNISOURCE WORLDWIDE	01/24/2013	\$1			P
Order Detail	B823863	82031	AIRGAS REFRIGERANTS INC	01/24/2013	\$1			P
Order Detail	B801474	4500	GENERAL COMMUNICATIONS INC	01/18/2013	\$1			P
Order Detail	B801636	2176	GREAT NORTHERN CORPORATION	01/17/2013	\$1.00	XC	02/28/2014	N
Order Detail	437K861	104342	AB DATA LTD	01/17/2013	\$1.00	XC	06/30/2013	N
Order Detail	B801533	78458	BARTON SOLVENTS INC	01/17/2013	\$1.00	XC	02/28/2014	P
Order Detail	B801592	75964	H DERKSEN & SONS CO INC	01/17/2013	\$1.00	BA	02/28/2014	P

Count : 97 \$1,202,474.65

Grid Preferences: Default Delete Grid Preferences Save Grid Preferences Show Filters Hide Filters

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- If the column is sorted in descending order, a “down arrow” icon is shown next to the column title.

Drag a column header and drop it here to group by that column

	Req#	Vendor#	Vendor	Date	Amount	Type	End Date	Pos. Appr.
Order Detail	397K611	112695	SCIQUEST INC	07/01/2012	\$619,497.00	Sort Ascending		P
Order Detail	397K655	112695	SCIQUEST INC	07/01/2012	\$217,525.00	Sort Descending		P
Order Detail	392K556	129176	HIGHER ONE PAYMENTS INC	06/20/2012	\$170,657.69	Clear Sorting		N
Order Detail	417K196	127127	HURON CONSULTING SERVICES LLC	10/01/2012	\$50,000.00	Group By		P
Order Detail	414K746	14231	STORAGE & HANDLING SYSTEMS INC	09/25/2012	\$32,527.00	Ungroup		N
Order Detail	417K196	127127	HURON CONSULTING SERVICES LLC	12/04/2012	\$25,000.00	Columns		P
Order Detail	377K694	137838	ARSENAL SECURITY GROUP	04/03/2012	\$16,500.00	Filter		P
Order Detail	B624094	95948	SVA CONSULTING LLC	09/13/2012	\$16,329.60		09/26/2013	N
Order Detail	384K753	129535	RICOH BUSINESS SOLUTIONS-INV SEE #139404	07/01/2012	\$9,652.00			N
Order Detail	392K932	98238	MIDWEST SEALCOAT	06/21/2012	\$8,352.00			N

Count : 97 \$1,202,474.65

Grid Preferences: Default Delete Grid Preferences Save Grid Preferences Show Filters Hide Filters

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Grouping Data

If you would like to separate out your data by a certain item (e.g., Project, Fund, Vendor#, Expense Amt, etc.), you can do so by utilizing the “Group By” option. This will also allow you to see specific subtotals based on your desired groupings ([see the section below called “Sub-Totaling”](#)). For example:

- In the Purchasing Information Inquiry – Orders grid screen, right-click on the title of the column you would like to group by and select “Group By”. In this example, the “Project” title has been grouped.

Drag a column header and drop it here to group by that column

FY	Fund	Project	Dept	Prog	Acct	Organization	Voucher#	Invoice#	Expense Amt	Tran Dt.	Posted Dt.
2013	150	PRJ56HX			2370	COMP CANCER CTR**PREV ONCOL	01525170	SH011769	\$331.14	20120802	20120803
2013	150	PRJ56HX			2370	COMP CANCER CTR**PREV ONCOL	01541805	SH012775	\$333.79	20120906	20120907
2013	150	PRJ56HX			2370	COMP CANCER CTR**PREV ONCOL	01555461	SH013735	\$567.90	20121005	20121008
2013	150	PRJ56HX			2370	COMP CANCER CTR**PREV ONCOL	01575243	SH014573	\$410.22	20121106	20121107
2013	233	233HT12	533422	4	2370	COMP CANCER CTR**PREV ONCOL	01594400	SH015819	\$203.34	20121206	20121207
2013	233	PRJ27IV	533422	4	2370	COMP CANCER CTR**PREV ONCOL	01594400	SH015819	\$116.19	20121206	20121207
2013	136	1362095	533422	4	2370	COMP CANCER CTR**PREV ONCOL	01594400	SH015819	\$58.10	20121206	20121207
2013	144	PRJ2308	533422	5	2370	COMP CANCER CTR**PREV ONCOL	01594400	SH015819	\$203.34	20121206	20121207

Count : 36 \$5,593.82

Grid Preferences: Default Delete Grid Preferences Save Grid Preferences Show Filters Hide Filters

[Return to Purchasing Inquiry Menu](#)

- To ungroup your data, right-click on the title of the column you would like to ungroup and select “Ungroup” or click on the “X” in the control grid button.

The screenshot shows a data grid with columns: FY, Fund, Project, Dept, Prog, Acct, Organization, Voucher#, Invoice#, Expense Amt, Tran Dt., and Posted Dt. A context menu is open over the 'Project' column header, with options: Sort Ascending, Sort Descending, Clear Sorting, Group By, Ungroup, Columns, and Filter. The 'Ungroup' option is highlighted. Below the grid, there are buttons for 'Delete Grid Preferences', 'Save Grid Preferences', 'Show Filters', and 'Hide Filters'. A link 'Return to Purchasing Inquiry Menu' is visible at the bottom.

Filtering Data

Sometimes it is helpful to filter out unnecessary data from your grid list. There are several different ways to do so, but the steps are primarily the same. For example:

- In the Purchasing Information Inquiry – WISDM Transaction Detail for Requisition XXXXXXXX grid screen, right-click on the title of the column you would like to filter. Hover over “Filter” and add your specifications. In the following example, we filter out any items GreaterThan 1.00 and LessThanOrEqualTo 50.00 in the “Expense Amt” column.

The screenshot shows a data grid with columns: FY, Fund, Project, Dept, Prog, Acct, Organization, Voucher#, Invoice#, Expense Amt, Tran Dt., and Posted Dt. A context menu is open over the 'Expense Amt' column header, with options: Sort Ascending, Sort Descending, Clear Sorting, Group By, Ungroup, Columns, and Filter. The 'Filter' option is highlighted. A sub-menu is open for the 'Filter' option, showing: 'Clear Filter', 'Show rows with value that', 'GreaterThan' (selected), '1.00', 'And', 'LessThanOrEqualTo' (selected), '50.00', and 'Filter'. Below the grid, there are buttons for 'Delete Grid Preferences', 'Save Grid Preferences', and 'Show'. A link 'Return to Purchasing Inquiry Menu' is visible at the bottom.

- The user may also use the “Show Filters” and “Hide Filters” buttons. Click on the “Show Filters” button. Enter criteria in the input fields, click on the “filter icon,” and select the type of filter from the dropdown menu.

Drag a column header and drop it here to group by that column

FY	Fund	Project	Dept	Prog	Acct	Organization	Voucher#	Invoice#	Expense Amt	Tran Dt.	Posted Dt.
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01525170	SH011769	\$331.1		
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01541805	SH012775	\$333.7		
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01555461	SH013735	\$567.9		
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01575243	SH014573	\$410.2		
2013	233	233HT12	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01594400	SH015819	\$203.3		
2013	233	PRJ27IV	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01594400	SH015819	\$116.1		
2013	136	1362095	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01594400	SH015819	\$58.10	20121206	20121207
Count : 36									\$5,593.82		

Grid Preferences: Default Delete Grid Preferences Save Grid Preferences Show Filters Hide Filters

[Return to Purchasing Inquiry Menu](#)

Sum of Transactions

Review a total sum for the “Expense Amt” column within the grid screen:

- This example shows the total sum of the column.

[Click here to export this data to a CSV file](#)

Project ▾ ×

FY	Fund	Project	Dept	Prog	Acct	Organization	Voucher#	Invoice#	Expense Amt	Tran Dt.	Posted Dt.
2013	233	PRJ27IV	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01736295	SH025026	\$203.17	20130621	20130624
Count : 8									\$790.17		
Project: PRJ56HX											
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01525170	SH011769	\$331.14	20120802	20120803
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01541805	SH012775	\$333.79	20120906	20120907
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01555461	SH013735	\$567.90	20121005	20121008
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01575243	SH014573	\$410.22	20121106	20121107
Count : 4									\$1,643.05		
Project: PRJ62Q3											
Count : 36									Sum Totals → \$5,593.82		

Grid Preferences: Default Delete Grid Preferences Save Grid Preferences Show Filters Hide Filters

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Sub-Totaling

Review sums with the Group By feature:

1. This example shows a subtotal of data grouped by the "Project" heading in the "Expense Amt" column.

[Click here to export this data to a CSV file](#)

Project											
FY	Fund	Project	Dept	Prog	Acct	Organization	Voucher#	Invoice#	Expense Amt	Tran Dt.	Posted Dt.
2013	233	PRJ27IV	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01736295	SH025026	\$203.17	20130621	20130624
Count : 8									Subtotals	\$790.17	
Project: PRJ56HX											
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01525170	SH011769	\$331.14	20120802	20120803
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01541805	SH012775	\$333.79	20120906	20120907
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01555461	SH013735	\$567.90	20121005	20121008
2013	150	PRJ56HX	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01575243	SH014573	\$410.22	20121106	20121107
Count : 4									Subtotals	\$1,643.05	
Project: PRJ62QB											
Count : 36										\$5,593.82	

Grid Preferences:

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Saving Grid Preferences

You may have a certain grid layout that you would like to use again without having to recreate it. This is now very easy with the new preference saving feature.

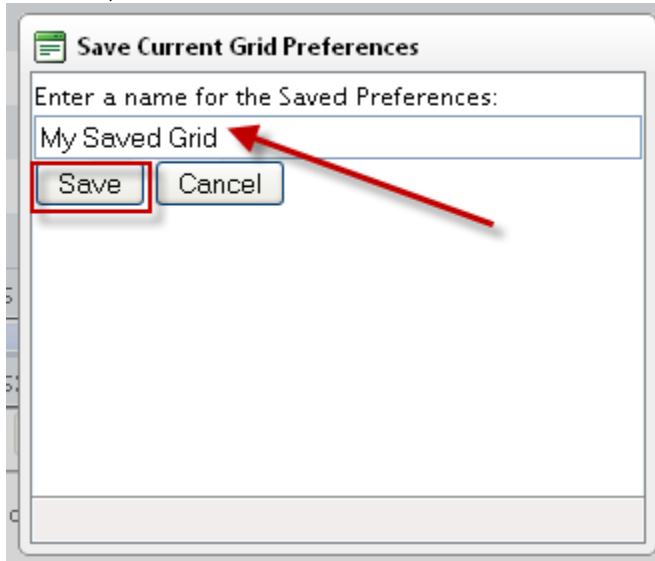
1. In the Purchasing Information Inquiry – WISDM TRANSACTION Detail for Requisition XXXXXXX grid screen, make the changes you would like to see in the grid (e.g., Grouped By "Project" and the Expense Amt" column is filtered). Once the changes are made to the grid, click "Save Current Grid Preferences" button.

Project											
FY	Fund	Project	Dept	Prog	Acct	Organization	Voucher#	Invoice#	Expense Amt	Tran Dt.	Posted Dt.
2013	233	PRJ27IV	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01699001	SH021979	\$27.45	20130501	20130502
Count : 2									\$96.06		
Project: PRJ27IV											
2013	233	PRJ27IV	533422	4	2370	COMP CANCER CTR*PREV ONCOL	01621281	SH017818	\$27.46	20130123	20130124
Count : 2									\$54.91		
Project: PRJ62QB											
2013	144	PRJ62QB	533422	5	2370	COMP CANCER CTR*PREV ONCOL	01621281	SH017818	\$48.03	20130123	20130124
2013	144	PRJ62QB	533422	5	2370	COMP CANCER CTR*PREV ONCOL	01699001	SH021979	\$48.04	20130501	20130502
Count : 2									\$96.07		
Count : 10									\$343.97		

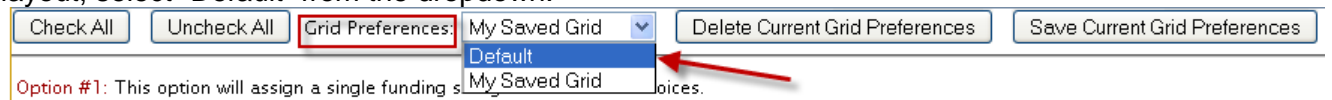
Grid Preferences:

[Return to Purchasing Inquiry Menu](#)

- You will be prompted to enter a name for your new grid. Do not use punctuation in your title. When finished, click "Save."



- Your saved grid will now appear in the dropdown next to "Grid Preferences." To revert to your original layout, select "Default" from the dropdown.



- To delete a saved grid, select the grid from the dropdown next to "Grid Preferences." Click the button titled "Delete Current Bid Preferences." You will be asked to confirm your deletion. Click "OK."



Visiting a Saved Grid

Once you save a grid within a certain customer account, you can revisit it anytime:

- In the grid reallocation screen, locate the "Grid Preferences" field. From the dropdown, select the saved grid that you would like to view.

