**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.

Click & Drag
The result grids now allow you to click and drag columns to change their order of appearance. For example:
1. 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.

2. In this example, the “Amount” column was moved so that it appears next to “Req#” column.
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.

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

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.”

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

3. Right-click in the column title and select the “Clear Sorting” option.
4. If the column is sorted in descending order, a “down arrow” icon is shown next to the column title.

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:

1. 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.
2. 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.

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:

1. In the Purchasing Information Inquiry – WISDM Transaction Detail for Requisition XXXXXXX 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.
2. 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.

Sum of Transactions
Review a total sum for the “Expense Amt” column within the grid screen:
1. This example shows the total sum of the column.

![Image showing grid with filters and expense amount calculation](image_url)
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.

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

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

4. 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:
1. In the grid reallocation screen, locate the “Grid Preferences” field. From the dropdown, select the saved grid that you would like to view.