



# FINET quick reference booklet

Features set release

# FINET quick reference booklet

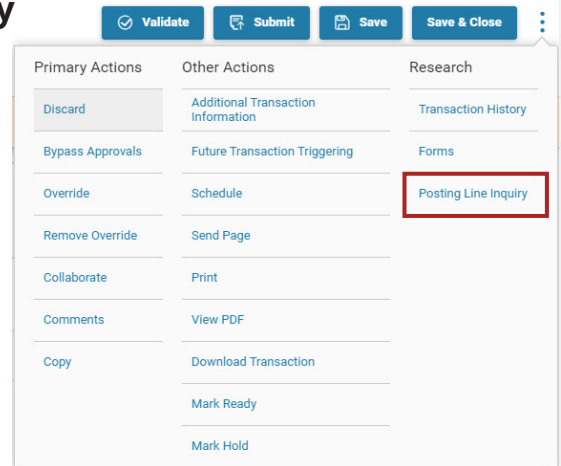
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## Posting Line Inquiry changes

### New navigation points to the Posting Line Inquiry

In the transaction menu of all financial transactions, a new choice of Posting Line Inquiry now exists under Research. The same choice is also available under the Other Actions listing in the record menu of the Financial Transaction Catalog. In both cases, the user is taken to the Posting Line Inquiry (**PLINQ**) page with the system filtering for the selected transaction version.



### Required search field edit on Posting Line Inquiry

There are 3 required Search fields on the Posting Line Inquiry (**PLINQ**) page:

- Transaction Code
- Transactions Department
- Transaction ID

Previously when all were blank, three separate errors (one for each field) were issued. Now, only a single error is issued stating all three fields are required.

## Financial worklist

**Fiscal Year** and **Total Number of Vendors** have been added. As these data points do not exist on every type of transaction, for transactions which do not have Fiscal Year, the system will display a dash and transactions which do not have a vendor line, the system will display 0.

Financial Worklist ← Back

**Filters**

Worklist (Selection will update the search results immediately)

All  Code  ID

Create Date  Creator ID  Submitter ID

Department  Unit  Amount

Show More Apply Reset

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Grid Actions View per Page: 50 100


1 - 5 of 5 Records Page 1 of 1

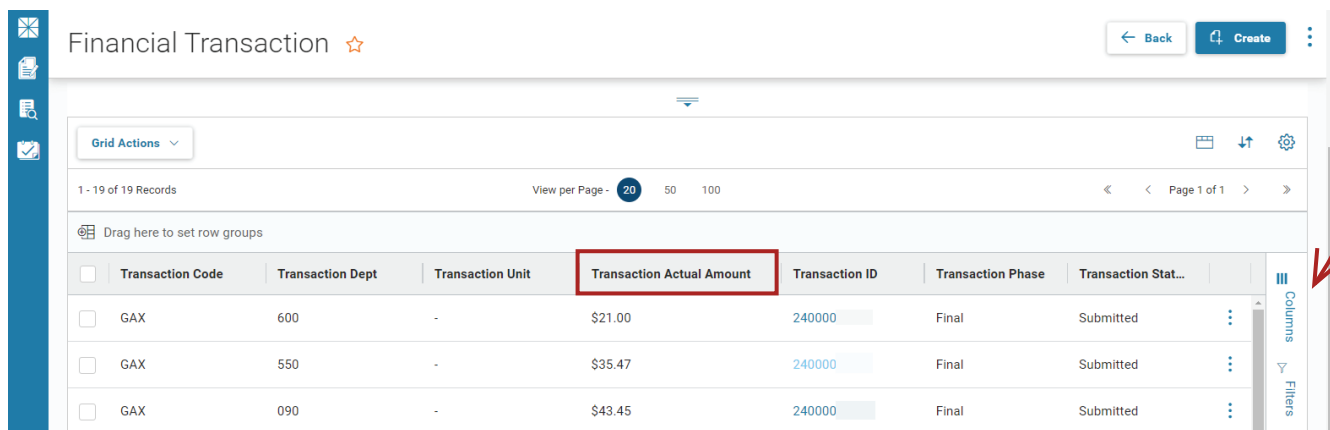
Code	Dept	Unit	ID	Amount	Submitter ID	Reason	Message	Fiscal Year	Total Vendor Line Count
VCC	150	-	2400000172	\$0.00	kolements	Apply approval	Document requires approval. Please review and approve or reject.	-	0
VCC	150	-	2400000173	\$0.00	kolements	Apply approval	Document requires approval. Please review and approve or reject.	-	0
VCC	150	FCMI	24M1000105	\$0.00	tiffanyturner	Apply approval	Document requires approval. Please review and approve or reject.	-	0
VCC	150	-	24M1000103	\$0.00	cbosen	Apply approval	Document requires approval. Please review and approve or reject.	-	0
VCC	150	DISB	24EV000268	\$0.00	amcnally	Apply approval	Document requires approval. Please review and approve or reject.	-	0

## Advanced Grid functionality

The Advanced Grid library now has the capability to resize sections such as Row Groups, Values, and Columns inside the Advanced Grid tool, once it is enabled from the standard grid on a page by the user. Doing this allows the user to maximize any section vertically, while the other sections auto-adjust to the remaining available space inside the Advanced Grid user interface of the page.

An amount field has been added to the search and grid sections. This enhancement enables transactions to be easily queried, filtered, and sorted based on the amount specified in the header of the referenced transaction.

Select the **Advanced Grid** (  ) button. The page view will change with more options on the right-hand side.





Financial Transaction ☆

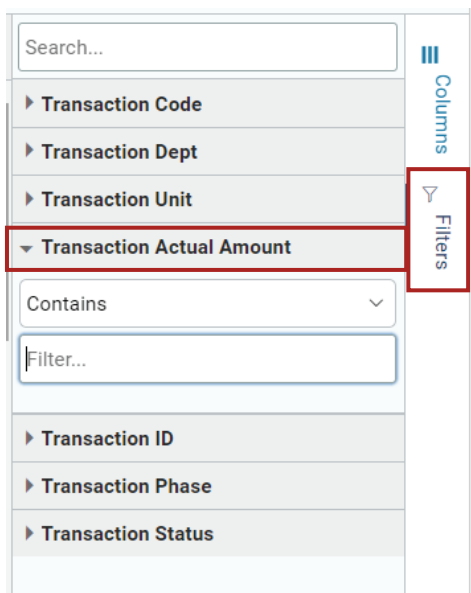
Grid Actions

1 - 19 of 19 Records View per Page - 20 50 100 Page 1 of 1

Transaction Code	Transaction Dept	Transaction Unit	Transaction Actual Amount	Transaction ID	Transaction Phase	Transaction Stat...
GAX	600	-	\$21.00	240000	Final	Submitted
GAX	550	-	\$35.47	240000	Final	Submitted
GAX	090	-	\$43.45	240000	Final	Submitted

Columns Filters

Clicking on the **Columns** (  Columns ) option you can choose which columns options to omit from view or you can rearrange the order by selecting the (  ) icon.



Search...

Transaction Code

Transaction Dept

Transaction Unit

Transaction Actual Amount

Contains

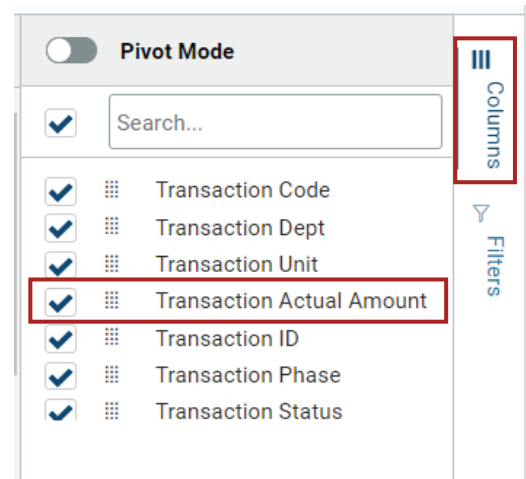
Filter...

Transaction ID

Transaction Phase

Transaction Status

Columns Filters



Pivot Mode

Search...

Transaction Code

Transaction Dept

Transaction Unit


Transaction Actual Amount

Transaction ID

Transaction Phase

Transaction Status

Columns Filters

Clicking on the **Filters** (  Filters ) option you can refine the search by selecting any column title by inputting a keyword to narrow the search further. In this case, by selecting **Transaction Actual Amount**, you can filter your search for a specific dollar amount.

## Accounting Template change

The Department and Department Name fields have been relabeled **Responsible Department** to differentiate them from the (Inferred) **Department**. The Responsible Department field is now available as a search field.

Accounting Template ☆

Accounting Template

Sub Fund

Appr Unit

Name

Department

Program

Fund

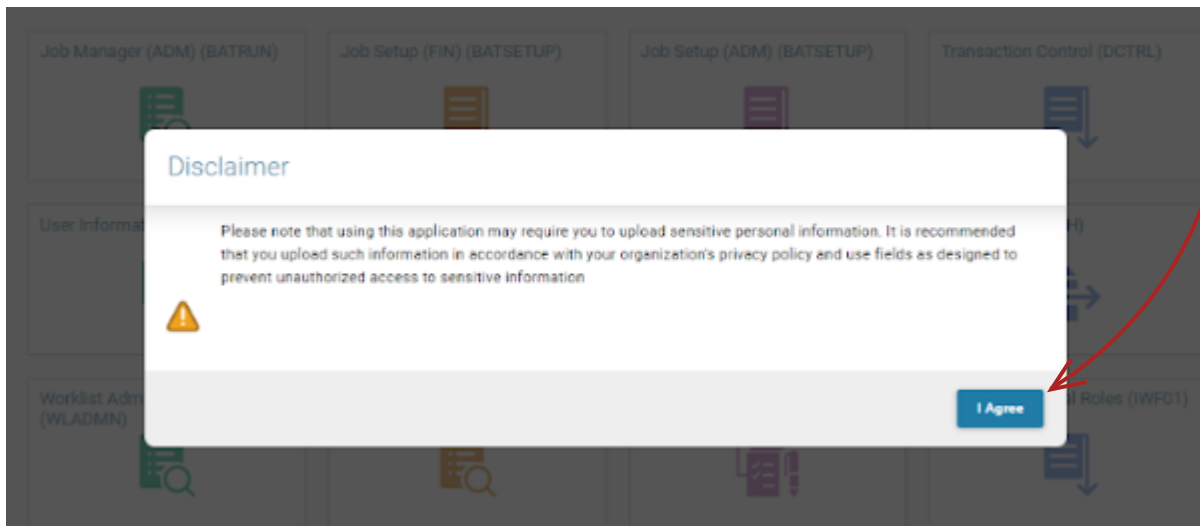
Unit

Responsible Department

Search Reset

## Disclaimer added at login

A disclaimer will appear at first login on a device and require user confirmation to proceed into the application.



## Invoicing search by fiscal year

On the Invoicing Search page (**INSRCH**), the search criteria and grid sections have been enhanced by adding the **Budget Fiscal Year** field.

Invoicing Search ☆

← Back

Filters

Transaction Code	Transaction Dept	Transaction ID
<input type="text"/>	<input type="text"/>	<input type="text"/>
Record Date	Procurement Folder	Vendor/Customer
<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>	<input type="text"/>
Commodity Code	Issuer Code	Requestor Code
<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Budget FY</b>		
<input type="text"/>		

Show Less

Apply Reset

## Lifecycle Inquiry

The Lifecycle Inquiry (**LINQ**) page allows you to view the complete chain of transactions associated with the selected transaction on a single page. This inquiry can only be accessed from Advantage Financial. The Backward action allows you to view all transactions the selected transaction referenced. The Forward action allows you to view all transactions that referenced the selected transaction.

Lifecycle Inquiry ☆

← Back

Filters

Transaction Code	Transaction Department	Transaction ID
<input type="text"/>	<input type="text"/>	<input type="text"/>
Transaction Filter Code	From Date	To Date
<input type="text"/>	<input type="text"/>	<input type="text"/>

Forward Backward Reset


Results for Search Transaction: | | |


Recent Searches





Pinned All

## Payment Plan Printing

When printing from the Invoice Query (**INVQ**) page, a user can navigate to the **View Forms** page.



1. Click on the 3-dot menu (  ) on the right-hand side of the row, and select **Related Pages**.
2. Select **Forms**. The new link is now available on the row level menu.

Invoice 



 Save  Save and Close  Cancel 

**Filters**


Customer:   
Transaction Code: RE  
Unit:   
Print Status: Replacement Pending  
Transaction Dept: 150  
Billing Profile:   
Transaction ID: 24\*1  
Department:



 Apply  Clear

1 - 1 of 1 Records View per Page: 20 50 100

Customer	Billing Profile	Department	Unit	Transaction	Print Status	Related Pages
M0000000	14010	150	ALL	RE,150,2400	Replacement Pending	 Dunning/Collection Letter Print History Print Forms 



You will see the **Status** showing on the View Forms page.

View Forms 

 Back 

**Filters**

Transaction Code: RE  
Transaction Dept: 150  
Transaction ID: 240000001



 Apply  Reset

**Grid Actions**

1 - 1 of 1 Records View per Page: 20 50 100

Status	Description	Transaction Code	Transaction Dept	Transaction ID	File Name
Pending	-	RE	150	240000001	2155703_Invoice

### Parameters For Print

 Save & Close  Cancel

Print Job Code:   
Print Resource ID:   
 View Forms  
View Forms Description: