



Transaction Overview

Process

This Job Aid describes the function of the Transaction Catalog, introduces basic components of SAMS transactions, common Transaction layouts, and Workflow.

Related Job Aids

Refer to the documents listed below for additional information:

- TRN GS-101 Navigation Overview
- TRN GS-102 Pages Overview
- TRN GS-104 Common Transaction Actions

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Things to Know Before You Start

Knowing some of the fundamental concepts that underpin the SAMS system can help those processes go more smoothly.

Event Types

A SAMS Event Type code triggers a business process. In other words, the code tells the system what to do. When a user selects a specific event type for a transaction, SAMS knows exactly which posting codes to use so that the debits and credits for the transaction get recorded accurately.

All transactions have default Event Types. This means that when you process a transaction, the most common Event Type for that transaction will be auto-populated in the Event Type field. If you need to change the Event Type, you can do so by using the picklist. The picklist presents all allowable event types.

Posting Codes

In accounting, for a transaction to balance, an account needs to be debited and an account needs to be credited. These amounts need to balance or be equal. We mentioned that Event Types tell the system what to do. The advantage with SAMS is when the Event Type is selected and the accounting line information is entered, SAMS knows what to debit and what to credit. This information is known as the **posting pair** and is shown on the transaction in the *Posting* tab. The Event Type triggers the posting code so you do not need to populate the posting code area.

For example, if you are transferring money to another agency, a particular account will be debited and another one credited. The posting code is populated based on the Event Type.

Accounting Lines

In the simplest sense, accounting lines refer to the appropriation from which charges will be paid. The Accounting Lines provide very specific information to SAMS on which appropriation to access.



Transaction Catalog

The Transaction Catalog (DOCATLG) is similar to a filing cabinet; it serves as a repository for all of the transactions created in SAMS and is the central location where transactions can be searched, new transactions can be created, and existing transactions can be modified or cancelled. Access to transactions is controlled by a user's Security Role.

Many of the configuration options discussed below in the *Introduction to Transaction Pages* are also applicable in the Transaction Catalog.

The Transaction Catalog can be used in one of two modes:

- Search
- Create

Search

When using the search feature, you are presented with a set of search criteria. The primary search criteria are displayed in the page with secondary search criteria being accessed through the **Show More** action.

Search from the DOCATLG Page

In the *Global Search* bar in the Home Page:

- Click the **Category** drop-down arrow.
- Select **Page Code**.



In the *Search* field:

- Type **DOCATLG**.
- Select **DOCATLG Transaction Catalog (Financial)** from the drop-down list.

Transaction Code	Transaction ID	Created On	Transaction Phase	Transaction Status
PO	220000000068	05/31/2022	Draft	Held
IPO	34626	05/27/2022	Draft	Held
IPO	34626	05/26/2022	Final	Submitted
MA	7777777	04/12/2022	Final	Submitted
PO	220000000059	05/10/2022	Final	Submitted
MD	220000000052	05/14/2022	Draft	Rejected

Time Visited	Page
03:18 PM	File Transfer Maintenance

This will open the *Transaction Catalog (Financial)* page.

When accessed from the DOCATLG page, the system will display your recent searches as cards below the Search section in the *Recent Searches* section.

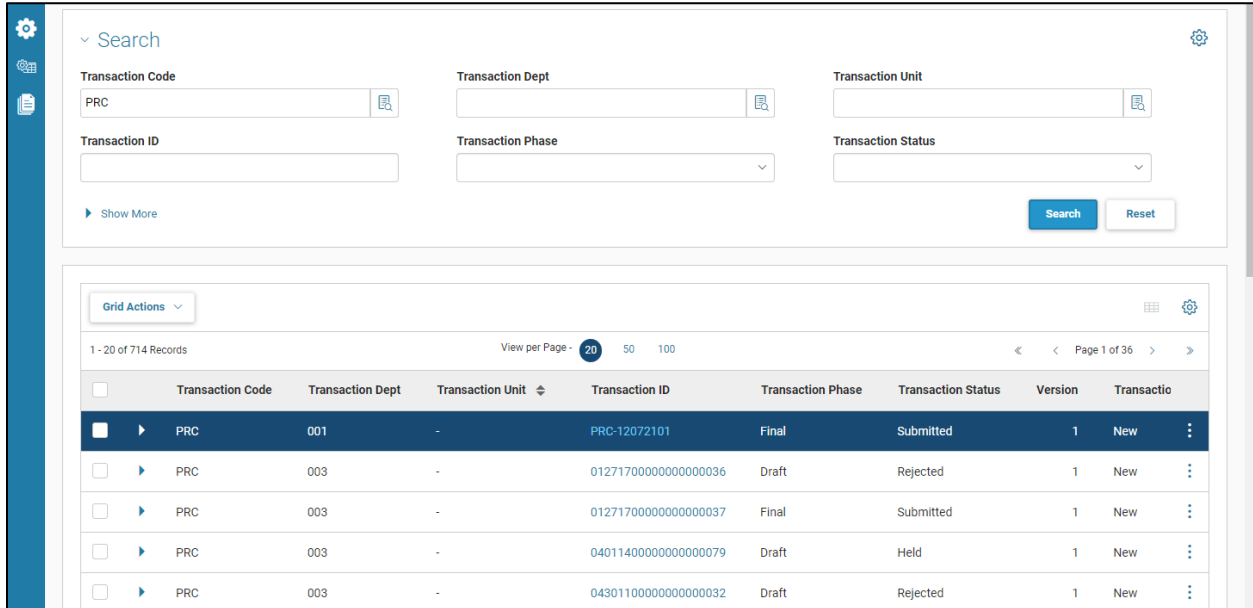


With each successive search, the system saves the criteria and displays it as a Search card in the *Recent Searches* section of the page. A single click of the search card will initiate the search again, returning updated results. The search card displays only a limited amount of search criteria, but all the criteria can be viewed by selecting *Show More*. The maximum number of search cards that can be displayed is controlled by site specific settings.

The screenshot displays the SAMS Financial Transaction search interface. The search form includes fields for Transaction Code, Transaction Dept, Transaction Unit, Transaction ID, Transaction Phase, and Transaction Status. Below the search form is a 'Recent Searches' section displaying six search cards. The second search card from the left is highlighted with a red box, indicating it is the oldest search card and will be removed when a new search is initiated. The search cards display transaction details such as Transaction Code, Transaction Dept, Transaction Unit, Transaction ID, Transaction Phase, and Transaction Status, along with the last searched date. The interface also includes a 'Show More' link and a 'Pinned' button.

If the limit has been reached and a new search is initiated, then the oldest search card is removed and a new search card is added for the newly entered search criteria. Searches can be saved by clicking the **pin icon** and the search card will not be removed even if the limit has been reached. The maximum number of search cards that can be pinned is also controlled by the system.

When creating a new search, the Recent Searches section is replaced with a table of search results. Open the desired transaction by selecting the **Transaction ID** link.



The screenshot shows the search interface with the following filters:

- Transaction Code: PRC
- Transaction Dept: (empty)
- Transaction Unit: (empty)
- Transaction ID: (empty)
- Transaction Phase: (empty)
- Transaction Status: (empty)

Buttons: Show More, Search, Reset

Grid Actions: (dropdown)

1 - 20 of 714 Records | View per Page: 20 | 50 | 100 | Page 1 of 36

Transaction Code	Transaction Dept	Transaction Unit	Transaction ID	Transaction Phase	Transaction Status	Version	Transaction
PRC	001	-	PRC-12072101	Final	Submitted	1	New
PRC	003	-	01271700000000000036	Draft	Rejected	1	New
PRC	003	-	01271700000000000037	Final	Submitted	1	New
PRC	003	-	040114000000000000079	Draft	Held	1	New
PRC	003	-	043011000000000000032	Draft	Rejected	1	New

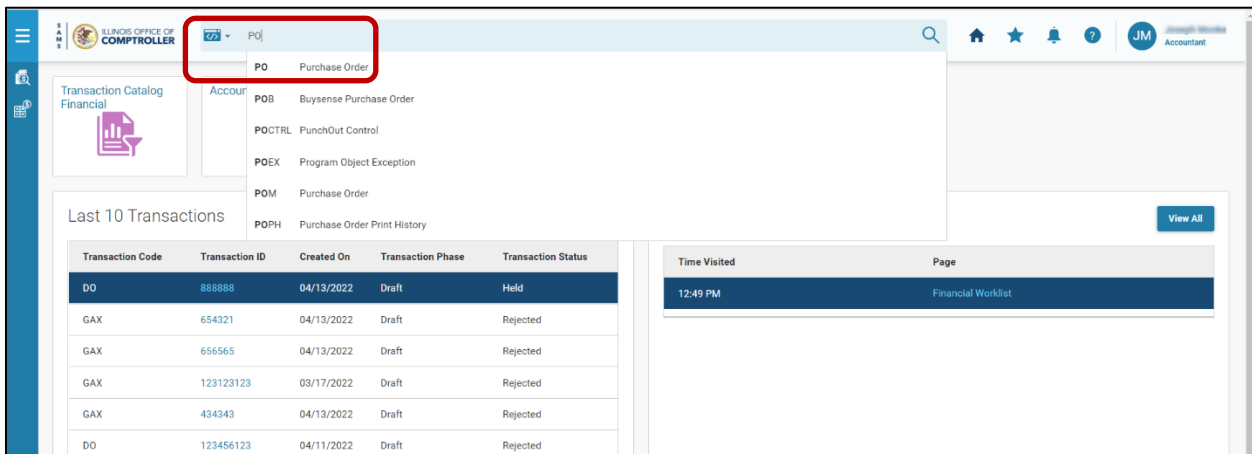
Search from a Transaction Page

In the *Global Search* bar in the Home Page:

- Click the **Category** drop-down arrow.
- Select **Page Code**.

In the *Search* field:

- Type the **Page Code**.
- Select the appropriate Page Code from the drop-down list.



The screenshot shows the search results for 'PO' (Purchase Order). The search results are:

- PO Purchase Order
- POB Buysense Purchase Order
- POCTRL PunchOut Control
- POEX Program Object Exception
- POM Purchase Order
- POPH Purchase Order Print History

Last 10 Transactions:

Transaction Code	Transaction ID	Created On	Transaction Phase	Transaction Status
DO	888888	04/13/2022	Draft	Held
GAX	654321	04/13/2022	Draft	Rejected
GAX	656565	04/13/2022	Draft	Rejected
GAX	123123123	03/17/2022	Draft	Rejected
GAX	434343	04/13/2022	Draft	Rejected
DO	123456123	04/11/2022	Draft	Rejected

Time Visited: 12:49 PM | Page: Financial Worklist

This will return the *Financial Transaction* page.



In the *Financial Transaction* page, any of the displayed fields can be used to search for the desired record.

- Enter the **Transaction Dept.**
-- AND/OR --
- Enter the **Transaction ID** code.
-- AND/OR --
- Click the drop-down arrow in the **Transaction Phase** field and select the appropriate option.
- Complete additional *Search* fields as necessary.
- Click the **Search** button.

Financial Transaction ☆

← Back Create

Search

Transaction Code PO Transaction Dept 101 Transaction Unit Transaction ID Transaction Phase Transaction Status

Show More Search Reset

Grid Actions

1 - 20 of 51 Records View per Page: 20 50 100 Page 1 of 3

Transaction Code	Transaction Dept	Transaction Unit	Transaction ID	Transaction Phase	Transaction Status
PO	101	-	220000000003	Historical (Final)	Submitted
PO	101	-	220000000003	Final	Submitted
PO	101	-	220000000003	Pending	Submitted
PO	101	-	220000000004	Final	Submitted

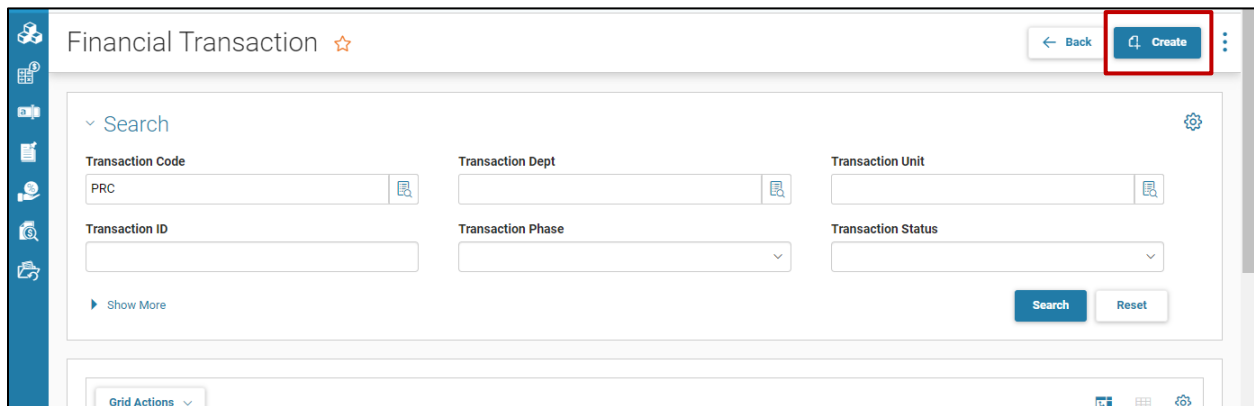
Records matching the selection(s) are displayed in the lower panel.

Searching and browsing are available on most pages throughout SAMS. If no search criteria are entered, all records are returned. When a page search will return too large a quantity of data, the user will be required to enter a minimum number of search fields to filter the results and may be prohibited from searching with a wildcard.

Create

There are many Transactions that can be created from the Transaction Catalog.

Enter the type of transaction to create in the **Transaction Code** field, then click the **Create** button at the top right of the Transaction Catalog.



Financial Transaction ☆

← Back **Create**

Search

Transaction Code: PRC

Transaction Dept: [Empty]

Transaction Unit: [Empty]

Transaction ID: [Empty]

Transaction Phase: [Empty]

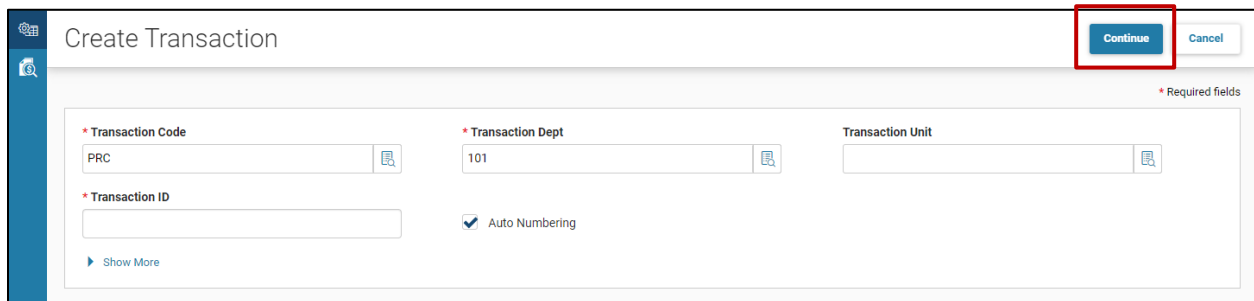
Transaction Status: [Empty]

Show More Search Reset

Grid Actions

This opens the specific *Create Transaction* page to initiate the selected transaction.

- Enter the required fields, then click the **Continue** button.



Create Transaction

Continue Cancel

* Required fields

* Transaction Code: PRC

* Transaction Dept: 101

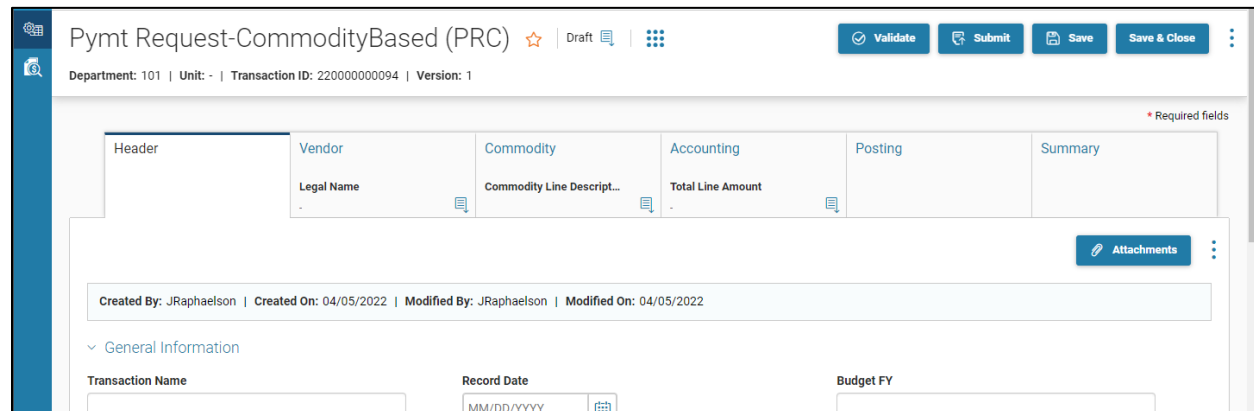
Transaction Unit: [Empty]

* Transaction ID: [Empty]

Auto Numbering:

Show More

This opens the requested Transaction to start entering data.



Pymt Request-CommodityBased (PRC) ☆ Draft

Validate Submit Save Save & Close

Department: 101 | Unit: - | Transaction ID: 220000000094 | Version: 1

* Required fields

Header	Vendor	Commodity	Accounting	Posting	Summary
	Legal Name	Commodity Line Descript...	Total Line Amount		

Attachments

Created By: JRaphaelson | Created On: 04/05/2022 | Modified By: JRaphaelson | Modified On: 04/05/2022

General Information

Transaction Name: [Empty]

Record Date: MM/DD/YYYY

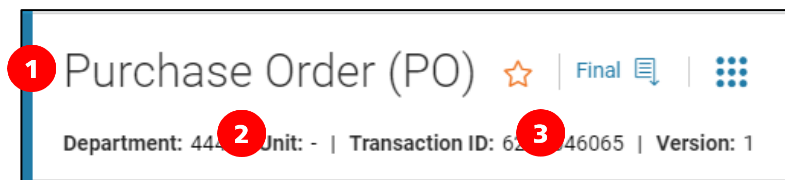
Budget FY: [Empty]

Introduction to Transaction Pages

SAMS uses transactions to record financial events (such as a Payment Request or Purchase Order) and administrative events (Configurations) into the system. A transaction is designed to ease data entry as well as to consolidate pertinent information for approval and query purposes. Transactions can be created manually, interfaced, uploaded, system-generated, and even created through wizards.

Page Title Bar

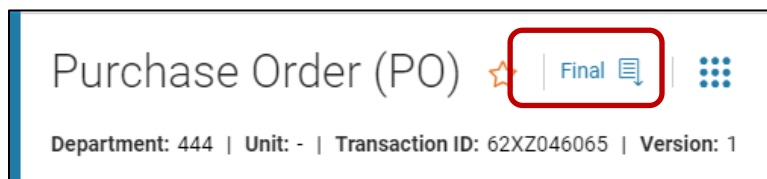
Transaction Identification



A transaction is uniquely identified by the combination of its Transaction Code, Transaction Department Code, and its Transaction ID.

1. The **Transaction Code** identifies the type of transaction being created (ex., Purchase Order (PO), Vendor Customer Creation (VCC), etc.)
2. The 3-digit Transaction **Department** Code identifies the organization responsible for the transaction (ex., 101).
3. The **Transaction ID** is a unique identifier for the transaction within a Transaction Department.

Transaction Phases



A transaction's life cycle normally consists of the following **Phases**:

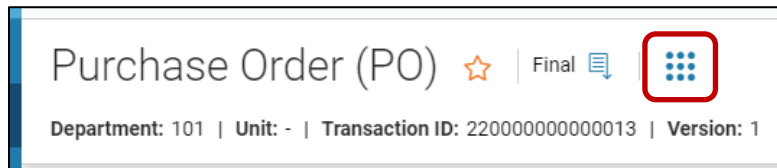
- **Draft** – The transaction has been created but not yet submitted or approved. All transaction versions start in this phase and stay in this phase, even if saved and/or validated, as long as the transaction has not been submitted. Also, the transaction will stay in this phase even after it is submitted if there are rejection errors.

Note: any transaction in **Draft** phase can be discarded without creating a Cancellation version.

Select the 3-dot menu at the top right of the transaction page while in the transaction page **OR** at the far right of the record entry while in the Financial Transaction Search grid. Select **Discard** in the *Primary Actions* menu. Click **Yes** in the *Discard Confirmation* pop-up window.

- **Pending** – The transaction has been submitted and SAMS has not detected any system errors. The transaction will stay in this phase until the final approval is applied. If an approver rejects the transaction at any approval level, the transaction will be returned to the creator and the phase reset to Draft to allow for corrections/edits.
- **Final** – All approvals, when applicable, have been applied and the transaction has been fully accepted into the system.
- **Historical Final** – When a transaction has been submitted to Final and then a new version of the transaction is created through the Modify or Discard/Cancel action and finalized, the previous version of the transaction goes from *Final* to *Historical (Final)* to indicate it is no longer the current version of the transaction.

Smart Menu

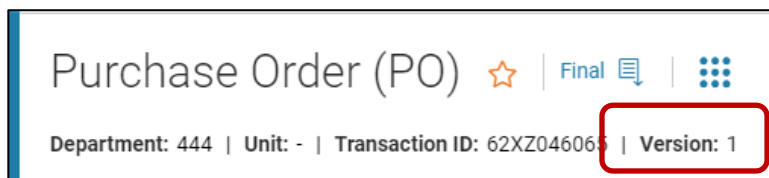


To the right of the Transaction Code and Phase information is a set of nine dots in a square known as the **Smart Menu**. This menu allows you to view, and in some cases update, types of transaction information that are not represented by a field on the transaction, including:

- **Comment** – This action transitions you to the Transaction Comment page, which displays any existing comments and allows for additional comments.
- **Attachments** – This action opens the Attachments Summary window, which displays attachments by tab and provides a history of attachments.
- **Additional Transaction Information** – If additional transaction information has been added, this action transitions you to the Additional Transaction information page.
- **Collaboration** – This action transitions you to the Transaction Collaboration Path page while in Draft phase. This allows you to view the transaction collaboration rules.

When the first of any of these areas are added to a transaction, a red dot appears in the Smart Menu to indicate there is additional information.

Transaction Versions



Transaction Versions are used to identify each version of a transaction.

The version number is a sequential number that is initially set to 1 (one) and incremented when a new version of the same transaction is created. For example, when an accepted transaction is modified or cancelled, a new version of the transaction is created to allow the existing version of the transaction to remain in place while the subsequent version processes through the *Draft*, *Pending*, and *Final* phases.

All versions of the transaction appear in the Transaction Catalog and in the transaction's history.

Transaction Functions

Each transaction version is classified as having a certain **Transaction Function**. A transaction version is assigned this function when the version is initially created, and this function doesn't change throughout the life cycle of that version. Valid transaction functions are:

- **New** – The first version of a transaction has a function of *New*. This introduces the transaction into the system for the first time.
- **Modification** – Once a transaction has a phase of *Final*, updates or changes to that transaction can only be made through a Modification transaction. When this occurs, a new draft version of the transaction is created and the function for that new transaction is set to *Modification*.
- **Cancellation** – For certain transaction types, once a transaction has a phase of *Final*, the transaction can only be cancelled through creating a Cancellation transaction. When this occurs, a new draft version of the transaction is created and the function for that new transaction is set to *Cancellation*. **Note:** cancelled transactions remain in the system.

Transaction Status

Each transaction version has a transaction status. A transaction is assigned this status when the version is initially created, but is changed by the system or, in a limited fashion, by a user, as the transaction is processed.

Valid transaction functions are:

- **Held** – Each version of a transaction is created with a status of *Held*. This remains the status until the transaction is validated and submitted into workflow.
- **Ready** – This status is set when a transaction has been loaded into SAMS but has not yet been approved for workflow.
- **Rejected** – This status is set by the system when it encounters a rejection or error upon a Validate or Submit action, or if an IOC staff member auditing the transaction finds errors.
- **Submitted** – This status is set when all system edits have passed with a Submit action and 1) when there is no workflow, 2) when a transaction moves to workflow with the *Pending* transaction phase, or 3) when a transaction enters workflow and all approval levels have been applied, resulting in a *Final* phase.

Transaction Components

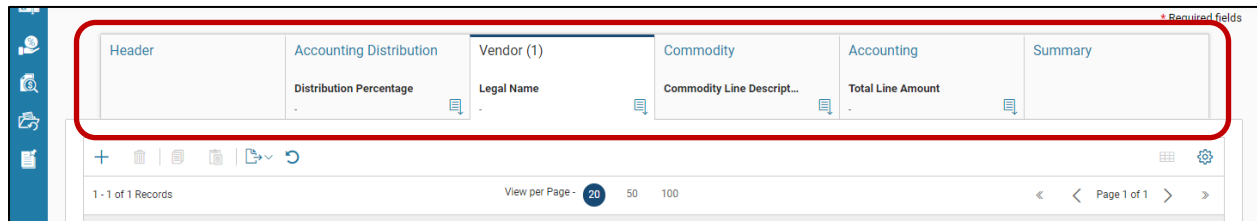
Transactions collect information into a single input form, much like a spreadsheet, with the transaction tab components representing the various worksheet tabs. Some complex transactions have numerous horizontal tabs (Header, Vendor, Accounting, and so on), others are simple and may only have a single tab. Tabs can be configured with collapsible sections and may contain data grids.

Most transactions support a relationship between components as the hierarchy moves from left to right. Often referred to as a parent-child relationship, the parent (e.g., a commodity line) can have many children (e.g. one or more accounting lines); however, a child (e.g., the commodity line) can have only one parent (e.g. a vendor).

Within a transaction some fields are required, and many of these are designated with a red asterisk (*) at the start of the field name. Some fields are conditionally required, meaning they may be required based on entries made in other fields. Other fields are optional.

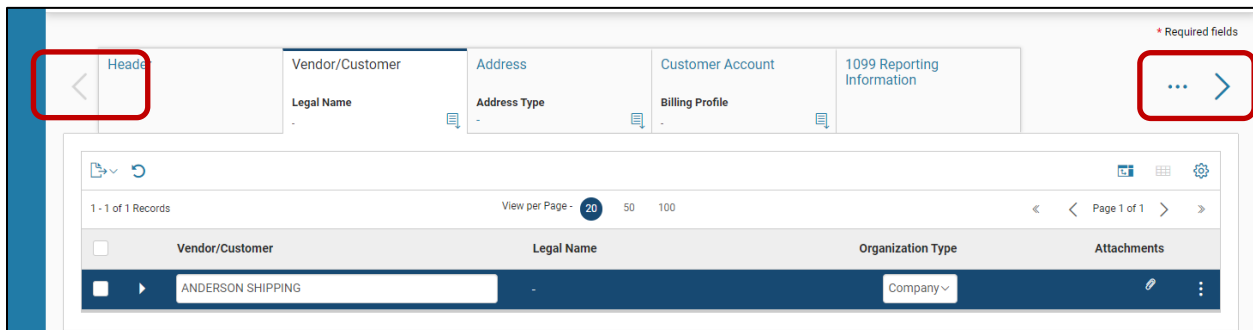
Tabs

Transaction tab components are displayed in a horizontal series just beneath the Page Title Bar (Header, Accounting, and so forth). Move between the tabs by clicking on the tab name.

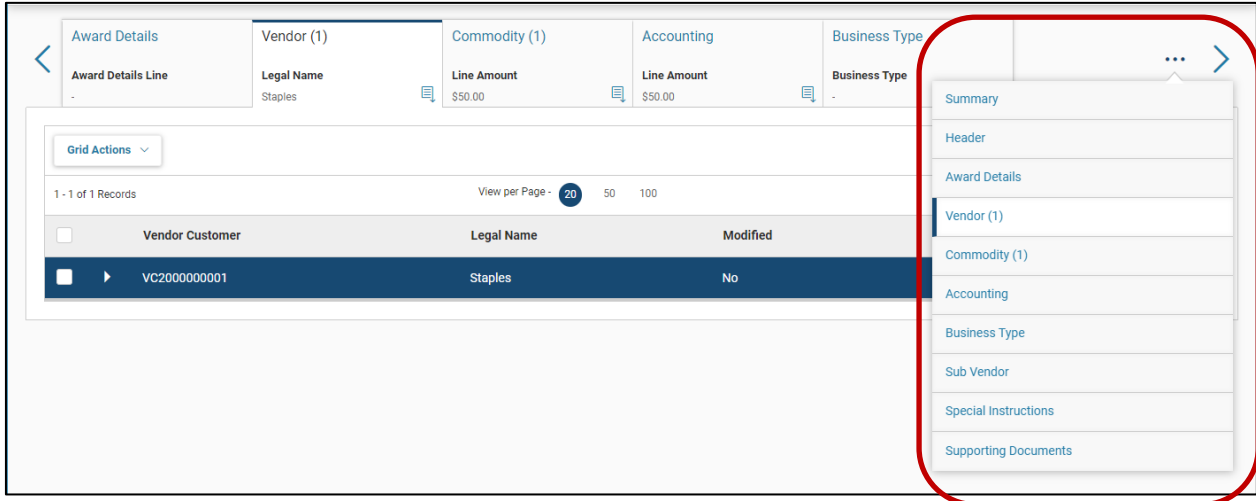


When there are more tabs than will display in the space, navigation options will appear.

- Select the Next (>) icon that appears to the far right of the last tab in view to move to the next tab. Continue selecting the Next icon to navigate to each of the remaining tabs. Once you reach the last tab, the Next icon is disabled.
- Select the Previous (<) icon that appears to the left of the first tab in view to view any tabs that are to the left of the first tab in view. Once you reach the first tab, the Previous icon is disabled.



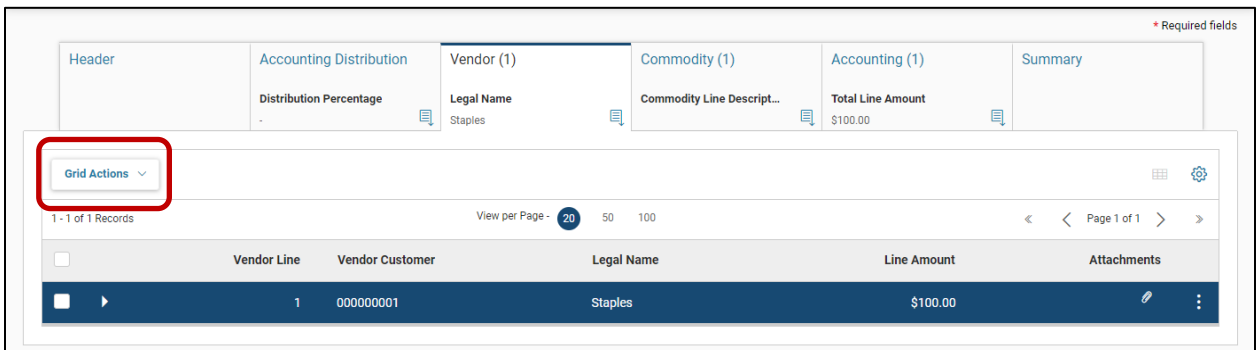
- A list of all of the tabs are displayed by selecting the three horizontal dots (...) at the right of the last tab in view. Select the tab name from the list that appears. After selecting the tab's name, you are navigated directly to that tab.



The screenshot shows a navigation bar with tabs: Award Details, Vendor (1), Commodity (1), Accounting, and Business Type. Below the tabs is a grid with columns: Vendor Customer, Legal Name, and Modified. A single record is visible: VC200000001, Staples, No. A dropdown menu is open on the right, listing: Summary, Header, Award Details, Vendor (1), Commodity (1), Accounting, Business Type, Sub Vendor, Special Instructions, and Supporting Documents.

Grid Actions

Transaction tabs that contain more than one record display the records in a grid. Common actions are provided with each grid by selecting the **Grid Actions** drop-down arrow. If you need to perform an action for only one transaction record, use the row-level menu.



The screenshot shows a navigation bar with tabs: Header, Accounting Distribution, Vendor (1), Commodity (1), Accounting (1), and Summary. Below the tabs is a grid with columns: Vendor Line, Vendor Customer, Legal Name, Line Amount, and Attachments. A single record is visible: 1, 000000001, Staples, \$100.00. A dropdown menu labeled "Grid Actions" is highlighted with a red box.

The following list of actions (listed alphabetically) are common across the majority of grids on transaction tabs. Based on the Grid, additional actions may be available. Security and site-specific transaction set up may limit some actions. These actions are only available when the transaction is in Draft.

- **Add Record** - This action adds a new record line to the grid.
- **Copy** - This action copies all information from the selected line. Use in combination with **Paste** action.
- **Delete** - Deletes the selected line/lines and all associated components such as attachments, children components, and so forth, from the transaction. Click the check box at the far left of each record to select multiple records, if desired.

- **Paste** - This action inserts a new line using data from the previously copied line or lines. This action is only available from an open transaction in Draft and is only available if the Copy action has already been selected for an existing line.
- **Undo** - This action will undo the previous change that occurred in the grid.

The following actions can also be performed if the transaction is in Final.

- **Export** - Click the check box at the far left of a record, then access the Grid Action to select a record to export to a CSV file. Some grids allow you to select multiple records for export, if desired. Click the check box at the far left of each record to select multiple records.
- **Export All** - Some grids in SAMS allow you to export all of the records in the grid (including those on other pages of the grid) to a CSV file.

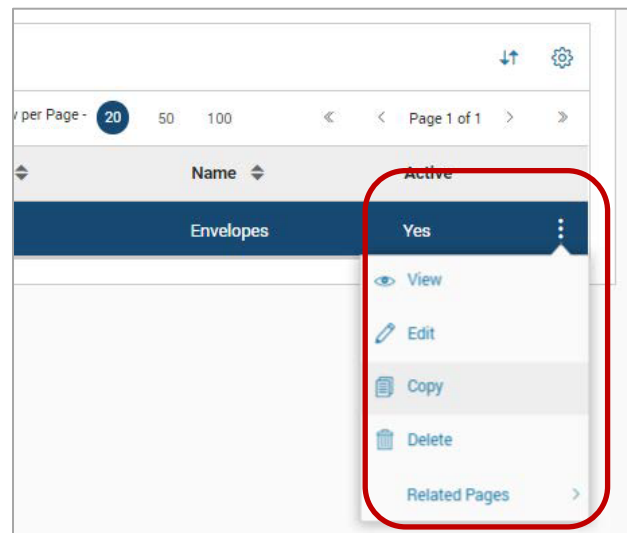
Row-level Actions

3-dot Menu

Some actions are provided through a row-level menu (3-dot menu) at the far right of a record. The actions available through the 3-dot menu will vary based on where the record line is located.

Some examples of actions are:

- **View** – This action opens the transaction in a 'read-only' format.
- **Edit** – This action transitions you to an 'edit' mode for the record.
- **Copy** - This action copies all information from the selected line. To paste a copy of the selected line, select the Paste Copied Records icon at the top of the grid.
- **Delete** - Deletes the selected line and all associated components such as attachments, children components, and so forth, from the transaction. This action is only available from an open transaction in Draft.



Additional links may be consolidated into **Primary Actions** and **Other Actions** groups. Select the group link to expand the group.

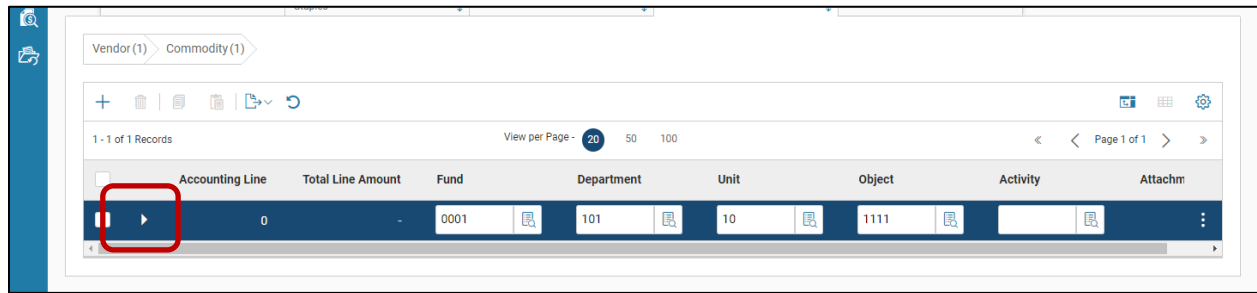
You may also find the following links in the row-level menu (3-dot menu) or in the page-level menu (vertical 3-dot menu).

- **Related Page:** Many reference data and inquiry pages have links designed into them to transition to a page often used in conjunction with the first page. These links may just open the additional page for a user to search, or the links may take information from the currently selected record on the first page and do a search on the second page with some or all of the key information of that record.

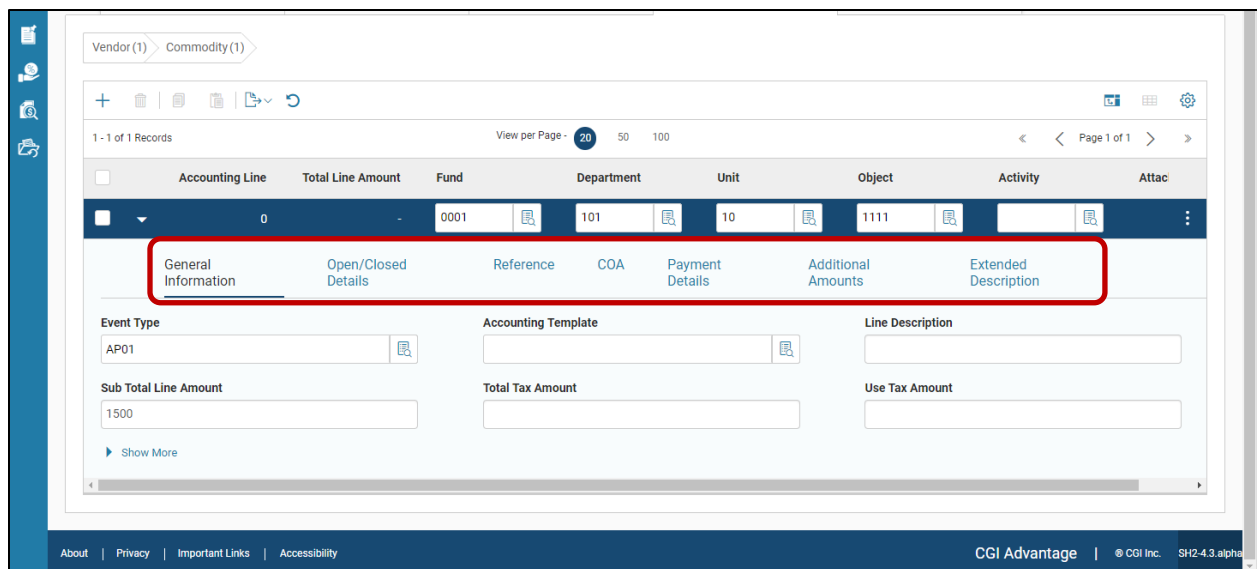
- **Related Action:** This menu offers a selection of actions that can be taken from the transaction that is open.

Expand / Collapse a Record

Click the caret (▶) icon at the left of the row to expand the record to show additional fields.



In the expanded section, navigate through the subsections by clicking on the tabs.



Click the caret icon again to collapse the section.

Grid Navigation

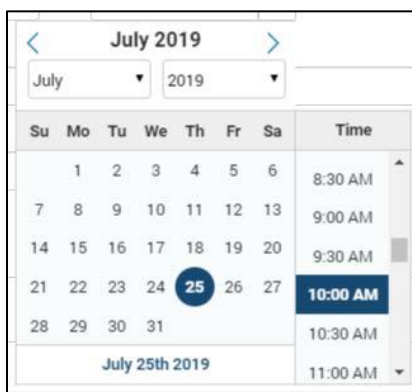
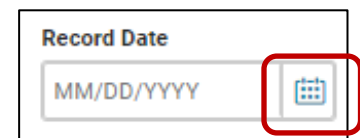
Any page that presents more than one record will have navigation actions. The following screen shot shows an example of the navigation actions available for a grid of records. These actions may not be enabled every time a page is viewed. The application only activates them when there are more records after (next and last) or before (first and previous) the current record(s) displayed.



- SAMS indicates the total count of records returned, along with the set of records that are currently displayed on the grid, for example, **1 - 20 of 49** or **21 - 40 of 49**.
- By default, grids only display 20 records at a time; however, you can change the number of records that are displayed in the grid by selecting one of the **View per Page** options: 20, 50 or 100. The above example has 20 selected. If you select 50 on one page, then the value changes to 50 on all pages that have the View per Page option. After you log out of SAMS, the value defaults back to 20.
- Navigation actions are provided that assist you in navigating between the first (<<), previous (<), next (>) and last (>>) record in the grid.

Calendar Selection

The Calendar window is accessed by selecting the calendar icon. After selecting a date, the calendar window closes and the date that was chosen is populated in the date field. The date can also be entered by selecting the date field and entering the date through the keyboard in a MM/DD/YYYY format.



Some date fields also capture the time. After selecting a date and a time, click outside of the calendar window and the date and time selected are entered into the corresponding field.



Drop-down Selection

Transaction Phase

- No Phase
- Draft
- Pending
- Final
- Historical (Final)
- Conflict Draft
- Template

Many fields have pre-defined values that are available in a drop-down menu by selecting the drop-down arrow in the fields text box.

You can select a value using the mouse or by using the up and down keys on the keyboard to highlight a value. When a value is selected using the mouse, the drop-down disappears and the selected value is shown in the field. When a selection is done by the up and down keys, you must select the 'Enter' key to select a value.

Pick List Selection

After clicking the pick list icon, a pop-up window appears that displays search criteria and a results grid.

You can narrow search results by entering values in the search fields.

Once the desired record is chosen, select the **OK** button. This closes the pick list pop-up window and enters the selected value in the pick list field.

Transaction Code

Configure Columns

Pages with a grid include a Configure Column feature (gear icon), which allows you to determine which columns should appear as a column header in the grid. This adjustment changes only your view and will remain until you adjust the columns again or the page reverts to the default grid columns from an administration action.

For some grids, all available columns are displayed by default. For other grids, only some of the columns are displayed by default and any additional fields are displayed when the row is expanded.

To add fields to the column header in the grid, select the Configure Columns icon to open the Configure Columns pop-up window. This window lists all fields that are available in the table.

All fields that are currently listed as column headers have the column header toggle switch turned on (that is, green). All fields that are not listed as column headers have the column header toggle switch turned off (that is, grey).

If you select the header toggles to display additional fields, these will appear in the grid after selecting 'OK'. Your preference setting will remain until you change the settings.

Configure Columns

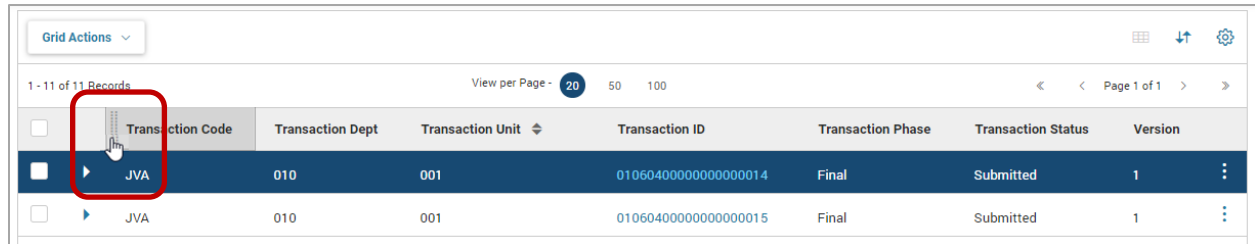
- Commodity Line
- Commodity
- Commodity Line Description
- Line Amount
- Modified
- Attachments
- Commodity Description
- Line Type

OK Cancel

Move Columns

You can rearrange the display order of the columns in a grid by dragging and dropping a column to the desired location.

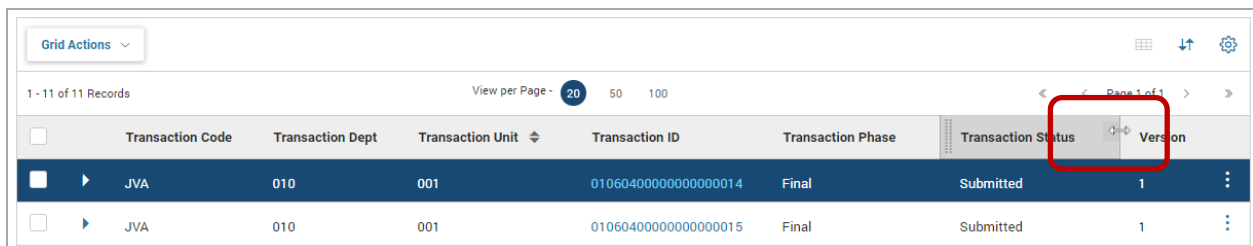
Hold your mouse over the column that you want to move. The cursor will change to a hand icon as shown below. Drag the column to the desired location. Once the column is moved, the user preference will remain until you rearrange the display order again.



Resize Columns

You can make columns wider or narrower on pages with a grid. Selecting the left or the right edge of a column changes your pointer to a line with arrows at both ends. Hold that spot and drag the edge of the column to change the width of the column.

This feature may not always be available due to the number of fields in the grid and is not available on the left edge of the first column and the right edge of the last column. Certain columns cannot be resized, such as check box columns, three dot menu columns, attachment columns, and the expand/collapse row columns.

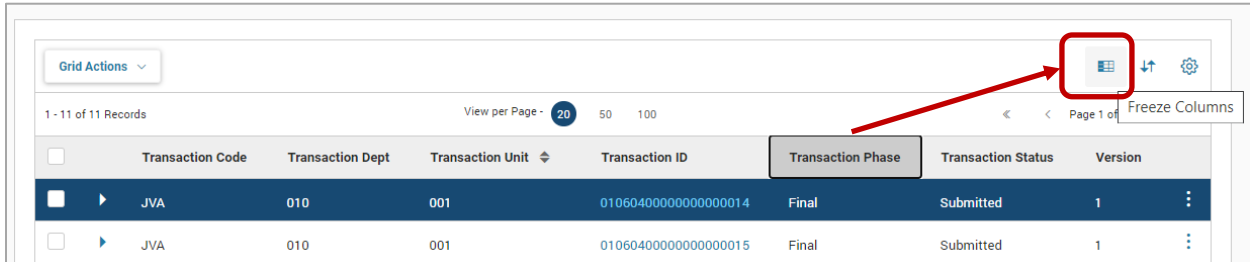


Freeze Columns

The system may automatically freeze header rows for certain pages, which makes it easier to keep track of information on a given page. Additionally, you can freeze one column in a Grid so that horizontal scrolling keeps a targeted amount of information in view for reference.

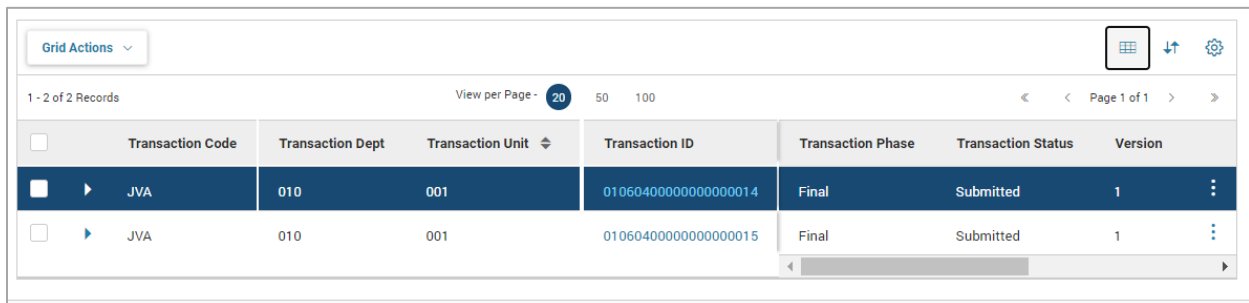
To use this feature, select the column that will be the first column to scroll (everything to the left of this column will be frozen). The column that you select plus any column to its right will scroll horizontally.

Selecting the column header will activate the **Freeze Columns** icon on the upper right. You must select that icon to freeze the columns. That freeze will remain while you are on the page or until you select the column and the icon again to unfreeze.



Transaction Code	Transaction Dept	Transaction Unit	Transaction ID	Transaction Phase	Transaction Status	Version
JVA	010	001	01060400000000000014	Final	Submitted	1
JVA	010	001	01060400000000000015	Final	Submitted	1

In this example, everything to the left of **Transaction Phase** is frozen and the scroll bar can be used to see additional columns that are enabled for the grid. Select the column and then select the Unfreeze Columns icon to remove the freeze.



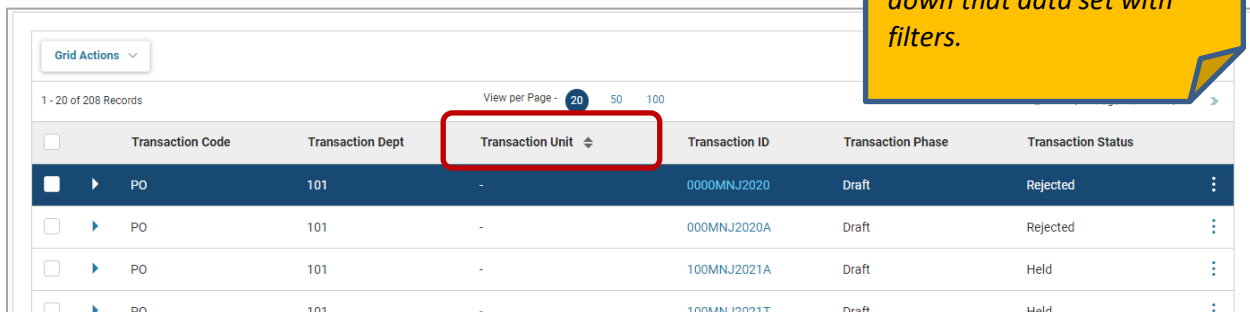
Transaction Code	Transaction Dept	Transaction Unit	Transaction ID	Transaction Phase	Transaction Status	Version
JVA	010	001	01060400000000000014	Final	Submitted	1
JVA	010	001	01060400000000000015	Final	Submitted	1

Sort

Pages with a grid can have the sorting feature.

The ability to sort is denoted by the sort icon (up and down arrows) next to the column name.

In the following example, the grid can be sorted only by the **Transaction Unit** column. The other columns do not have a sort icon.



Transaction Code	Transaction Dept	Transaction Unit	Transaction ID	Transaction Phase	Transaction Status
PO	101	-	0000MNJ2020	Draft	Rejected
PO	101	-	0000MNJ2020A	Draft	Rejected
PO	101	-	1000MNJ2021A	Draft	Held
PO	101	-	1000MNJ2021T	Draft	Held

*It is strongly recommended **not** to do sorting on a page that is known to have a large amount of data without first narrowing down that data set with filters.*



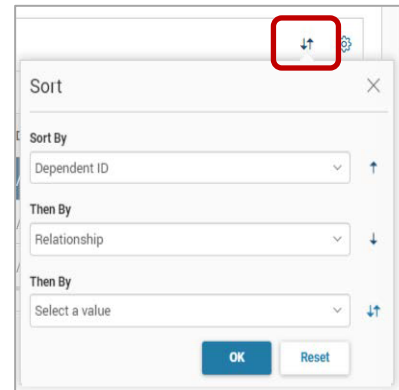
Select the sort icon once to sort the grid by the corresponding column in ascending order. Select the sort icon again to sort in descending order.

Multi-sort

When a grid allows you to sort by more than one column heading, the multi-sort icon (side-by-side down/up arrows) will appear above the grid. Selection of the Multi Sort icon will open the Sort window that allows you to sort the grid by up to three columns. The columns that allow sorting appear as values in the three drop-downs on the Sort window.

You can also specify whether you want to sort the columns in ascending or descending order by selecting the arrow icon next to the Sort By and Then By fields on the Sort window.

Select OK when you are done making your selections on the Sort window.



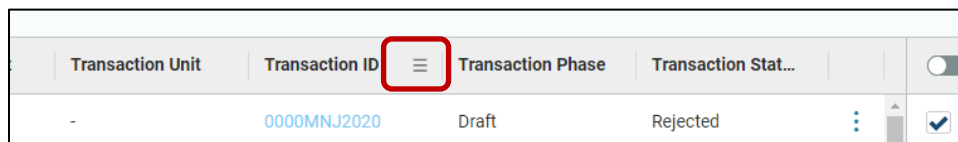
Advanced Grid

The Advanced Grid option transforms the grid into a format that provides advanced grid capabilities, much like a pivot table in Microsoft Excel.

Transaction Code	Transaction Dept	Transaction Unit	Transaction ID	Transaction Phase	Transaction Stat...
PO	101	-	0000MNJ2020	Draft	Rejected
PO	101	-	0000MNJ2020A	Draft	Rejected
PO	101	-	100MNJ2021A	Draft	Held
PO	101	-	100MNJ2021T	Draft	Held
PO	101	-	10MNJ2021RD	Draft	Held
PO	101	-	200MNJ2022A	Draft	Held
PO	101	-	200MNJ2022B	Draft	Held
PO	101	-	220000000003	Historical (Final)	Submitted
PO	101	-	220000000003	Final	Submitted

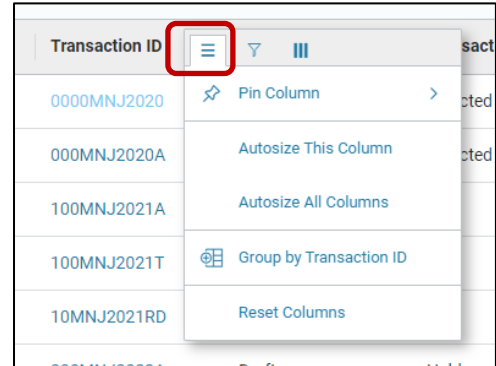
Advanced Grid Column Menu

The Advanced Grid includes a column menu that is accessed by hovering your mouse over the column heading and then selecting the column menu icon (3 horizontal lines) that appears.



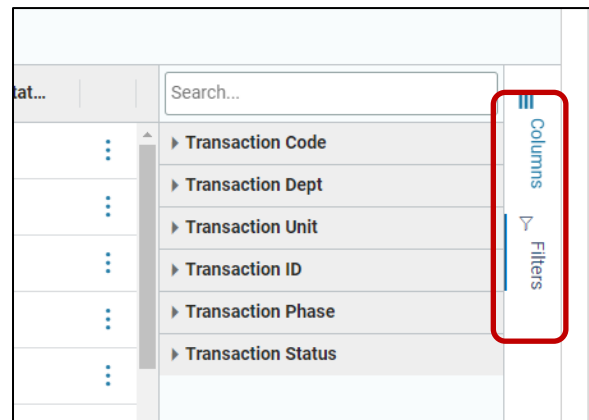
The following functionality is available via the Advanced Grid column menu:

- Pin Column** – You can pin any column to the left or right side of the grid by selecting one of the following options from the column’s menu: Pin Column > Pin Left or Pin Column > Pin Right. This moves the column to the far left or right side of the grid, based on your selection. This allows you to scroll to the right or left and the pinned column does not move. The Pin Left and Pin Right actions can be selected for more than one column, if desired. Select Pin Column > No Pin to remove the pin from a column.
- Autosize This Column** – Automatically resizes a column based on the width of the data in the column.
- Autosize All Columns**– Automatically resizes all columns based on the width of the data in each column.
- Group by <Column Name>** – Groups all records based on the values in the column. You can also drag columns to the header area of the grid where it says “Drag here to set row groups”. You can remove a grouping by selecting the “x” next to the column name. Note: For performance reasons, grouping by columns is not available if you have selected to view more than 100 records in the grid pagination.
- Reset Columns**– Sets all columns back to the delivered view.
- Expand All** – This action is only displayed if the grid is grouped by a column. Selecting this action expands all groups.
- Collapse All** – This action is only displayed if the grid is grouped by a column. Selecting this action collapses all groups.



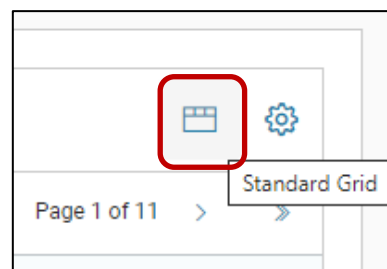
Tabs

- Filter** – The Filter tab on the column menu allows you to filter by column values.
- Columns** – The Columns tab on the column menu allows you to remove columns from the grid by clearing the check box next to the column name. This is the same functionality offered via the Configure Columns icon.



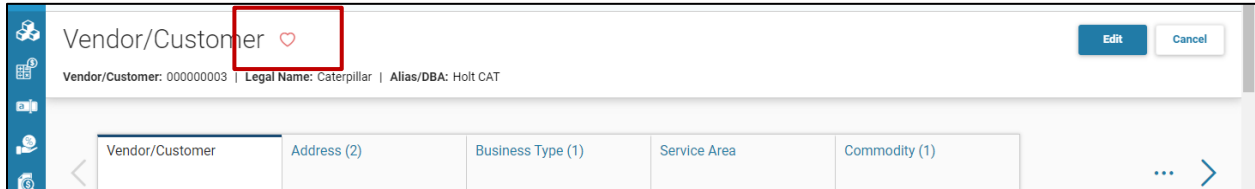
Restore the Grid

Select the Standard Grid icon to restore the grid.

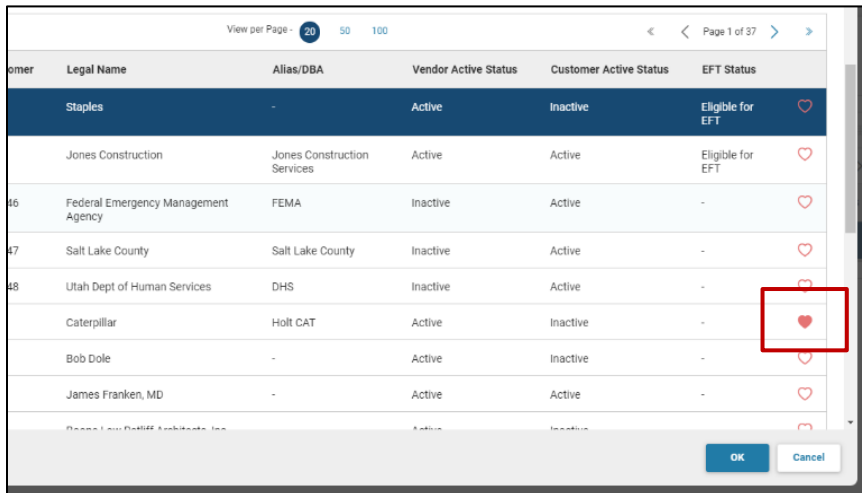


Favorites

SAMS allows you to mark a record as a favorite by selecting the **Favorite** icon (heart) next to the page's name when the record is in Edit mode.

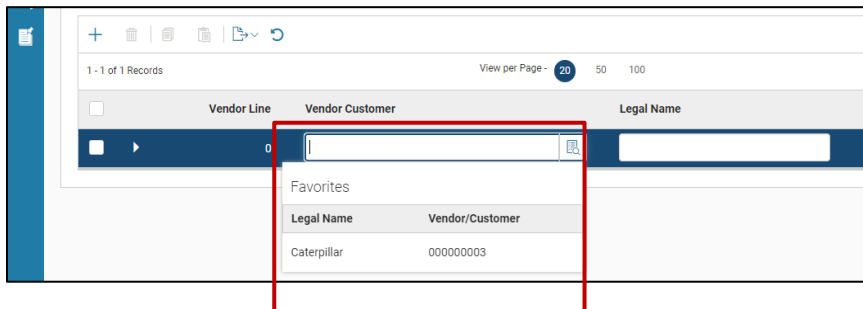


Once a record is marked as a favorite, it will appear in the Favorites section of the page when the page is in Search mode.



Vendor	Legal Name	Alias/DBA	Vendor Active Status	Customer Active Status	EFT Status	
Staples			Active	Inactive	Eligible for EFT	♥
Jones Construction	Jones Construction Services		Active	Active	Eligible for EFT	♥
66	Federal Emergency Management Agency	FEMA	Inactive	Active	-	♥
67	Salt Lake County	Salt Lake County	Inactive	Active	-	♥
68	Utah Dept of Human Services	DHS	Inactive	Active	-	♥
Caterpillar	Holt CAT		Active	Inactive	-	♥
Bob Dole	-		Active	Inactive	-	♥
James Franken, MD	-		Active	Active	-	♥
James Law Office, Inc			Active	Inactive	-	♥

The record will also appear in a Favorites picklist for the key field any time the key field is used on another page in SAMS. For example, if you have marked a vendor record as a Favorite on the Vendor/Customer page, then the vendor will appear in a Favorites drop-down for the Vendor Customer field on all pages that include that field.





Access Keys

Text can be typed in upper or lower case. SAMS supports the following features for finding records on a page and each of these can be combined.

Wildcards

Entering an exact value (name, data, description, etc.) in a field limits the search results. You can use Wildcards to replace characters in a field and expand the results from the search. A Wildcard represents one or more characters when specifying search criteria in SAMS. For example, if you know a vendor name contains *Brown* but are not sure of the rest of the name, you can search for *Brown* (asterisks before and after) to find the vendor you need.

Note that if a search is made using only the asterisk and no other characters, the search returns every record.

Wildcard	Example
Asterisk (*):	If 01* is entered, the search returns all records that begin with 01. If *01* is entered, the search will return all records that contain 01 anywhere in the field. If *01 is entered, the search returns all records that end in 01.
Comma (,):	Use a comma to separate the values if searching for a group of records, such as multiple names, dates, descriptions, etc. (e.g., 0100, 0200). When searching for data that contains commas, enclose the search criteria with single quotes. For example, type 'Construction, Inc.', in the Vendor Legal Name search field to view the Construction, Inc. vendor record.

Range Characters

Range Characters	Example
Colon (:)	If 01/01/2019 : 06/30/2019 is entered in the Create Date field on the Transaction Catalog, all transactions created on or after 1/1/2019 and on or before 6/30/2019 are returned in the search.
Greater Than (>):	If > 09/01/2019 is entered in the Create Date field on the Transaction Catalog, all transactions created after September 1, 2019 are returned in the search.
Greater Than or Equal to (>=):	Adding the equal sign after the greater than symbol (>=) (for example, >= 09/01/2019) results in transactions created on or after September 1, 2019 being returned in the search.
Less Than (<)	If < 12/06/2019 is entered in the Create Date field on the Transaction Catalog, all transactions created before December 6, 2019 are returned in the search.



Less Than or Equal to
(<=)

Adding the equal sign after the less than symbol (<=) (for example, <= 12/06/2019) results in transactions created on or before December 6, 2019 being returned in the search.

Export Transactions to CSV

In the *Financial Transaction* record grid:

- Click the **Grid Actions** button.
- Under **Export All**, Click **CSV**

The screenshot shows the SAMS Financial Transaction record grid. The search filters are: Transaction Code (PRC), Transaction Dept (101), Transaction Unit (empty), Transaction ID (empty), Transaction Phase (Final), and Transaction Status (empty). The Grid Actions menu is open, showing options: Export, Export All (selected), Primary Actions, Other Actions, and Print. The 'Export All' option is highlighted, and the 'CSV' option is selected. The table below shows the search results:

Transaction Unit	Transaction ID	Transaction Phase	Transaction Status
101	1116 TESTING	Final	Submitted
101	1865-2	Final	Submitted
101	1865-3	Final	Submitted

This will download transactions to a CSV spreadsheet.