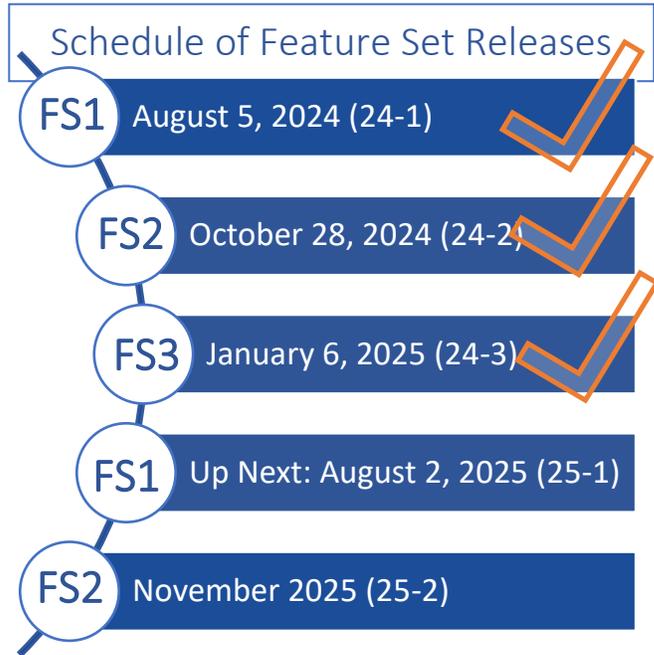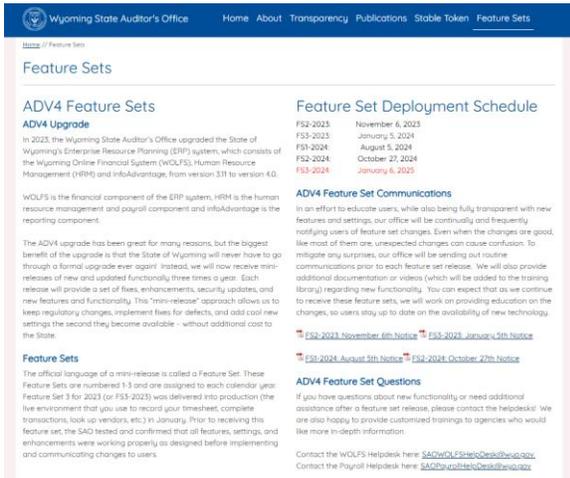# ADV4 Feature Set Education Bulletin: August 2025

New Features: Coming in HOTTTT!

Another summer starts kicking up the heat while we release some cool new features!

As we continue to release new functionality, we will continue to release corresponding Education Bulletins as we go. Users can catch up on some of our previous feature sets and improvements on the SAO website.

New to this? Read the full recap on the *Feature Set Landing Page* of our site: sao.wyo.gov/feature-sets.

Schedule of Feature Set Releases

- **FS1** August 5, 2024 (24-1)
- **FS2** October 28, 2024 (24-2)
- **FS3** January 6, 2025 (24-3)
- **FS1** Up Next: August 2, 2025 (25-1)
- **FS2** November 2025 (25-2)

What's New?

Feature Set 2025-1 eliminated pain-points that all users have experienced and updated Business Intelligence! These features are described below, but make life easier for users. Efficiency, ease, and the elimination of extra clicks is the theme of this feature set. We have also updated training materials!

Making Workflow Easier on Everyone

Do you ever get ahead of yourself when you are approving transactions? I always find myself opening the group worklist and finding the transaction I need to approve, only to open the transaction and review it before taking the task into my personal worklist. Then once I've reviewed the transaction, I have found myself clicking approve all or reject all directly from the worklist only to get the error below. Even though

I have been approving transactions for years, I'm always catching myself forgetting to take the task first before attempting to complete the task. Silly me!

Lucky for me and all other Advantage workflow approvers, we've now eliminated this extra step in workflow. Users now have the option to review and approve transactions directly from the worklist, removing the cumbersome steps of adding the transaction to your worklist, switching to your worklist, then clicking the necessary buttons for approval or rejection. Going forward you can open a transaction from any group worklist to which you have security access and simply click through approval.

This new feature allows users to work together in one large worklist where they can see the full picture on the amount of transactions to approve. You no longer have to worry about having transactions pulled into your worklist and forgotten before you take off for a vacation, leaving the transaction to wait in pending status until the submitter recalls the transaction from workflow so they can resubmit it back to the group worklist. Efficiency for the win!

Helpful Timesheet Tip: Freezing Columns—An Oldie but a Goodie!

Did you know you can freeze columns so that when you scroll to the right on your timesheet, the event codes are still visible? To freeze the Event column, for example, click on the word **Override**, then click the freeze column icon. The scroll bar can be moved and the Event column will remain on the left side of the screen. To unfreeze, just click the freeze column icon again. Isn't that handy?

Searching Vendor Payments by Legal Name: Find That Payment Faster!

The Disbursement Detail Query (DISBDQ) page now includes Vendor name (Legal Name) and Payee name (Payee legal name) fields in the filter section to enable the user to search the transaction details using legal name. This will be helpful when searching for payments made to miscellaneous vendors.

Users can now go to the *Disbursement Detail Query* (DISBDQ) page. You'll now see "Vendor Name" as a filter option at the bottom left side of the screen. You will need at least one additional search criteria in order to search—such as the VC number or the check number. In the example below, both the check number and legal name are entered to return results.

**Adjust Interface Approval Page to Speed Through Approvals**

For those agencies who interface payments or other transactions into the financial or payroll system, this helpful tip can speed up your review before approving the file. Users can configure the page so the columns needed are visible from the grid. This personalization will remain each time you log into the system.

Navigate to the Service Request page and select the personalization gear on the right-hand side of your page to configure columns. In the image to the left, the seven most helpful columns have been toggled-on. Make your personalization settings match this configuration to ensure the important items are always displayed each time you log in.

Once you've made this personalization complete, enjoy your increased efficiency.
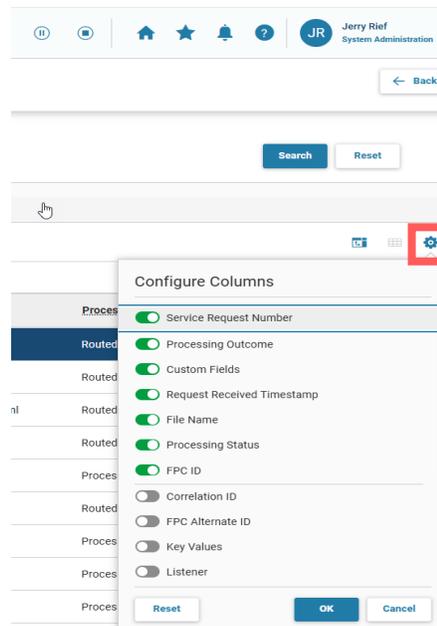
Easily Access PLINQ From Your Toolbar Inside Your Transaction

We've sent users information about the Posting Line Inquiry (PLINQ) page and the ability to see all posting lines on a transaction at once in previous bulletins. If you are using this page, you know how helpful it is to review transaction posting lines—especially when there are a lot of accounting lines to review. Users who have found PLINQ helpful will understand how much of a relief this feature has become. You can now scroll through each posting line of a transaction without having to navigate through all the accounting lines one at a time. Hooray!
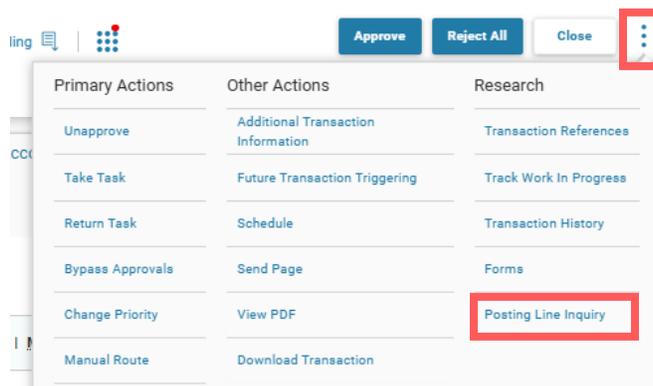
From the **Transaction Action Menu (⋮)** at the top of each transaction, users can now navigate to the PLINQ page with all posting lines already populated for review.
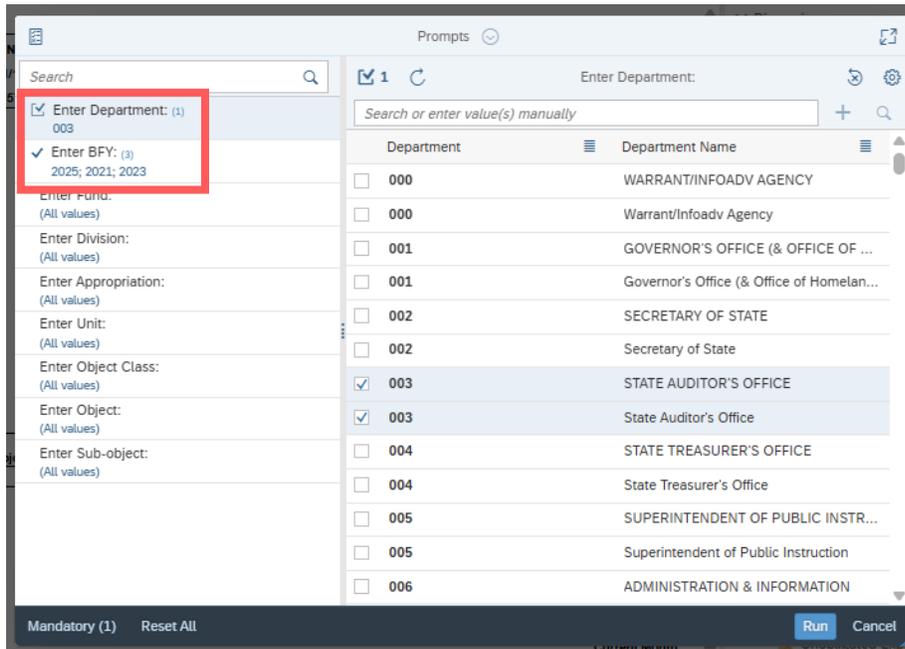
For users who review these posting lines to ensure your cost accounting profiles are populated the way you intended, this feature is especially helpful.

Business Intelligence Gets a Tiny Face Lift

When you open Business Intelligence (BI-infoAdvantage) after August 2, 2025, you may see some very slight differences in the look and feel of the application. All features and navigation have remained the same but there are one or two places where the page has been upgraded.

The biggest, *and dare I say best*, change in the update comes in the *Prompts* window where you can now see all available prompts on the left side while you populate options for each prompt on the right side. As you can see below, when you choose an option from the right side, it fills the left side in real time.

Additionally, all the previous time-out errors have been resolved. This news is fantastic for users that would have to rush through the scheduling pages in order to successfully schedule reports. This is a huge bonus for all users and we hope you are as excited about this as we are!

Annual Update to the Advantage User Guides Available

The SAO Fiscal and Payroll Education Coordinators are excited to announce that they have been hard at work updating user guides. Users can now access refreshed training materials for financial, payroll, and business intelligence. Click on the training material links on your home page, pictured below, to view the updated documents.