PO Summary Dashboard Page

The PO Summary dashboard page details Purchase Orders and their associated Invoices.

Use PO Summary:

- To view information about Purchase Order and payment

### Prompts | Definition
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PO Number | The Purchase Order (PO) number. This does not include the prefix.
PO Prefix | Preceding letter(s)/number(s) to PO number. Example: OUP
Supplier | Name of the supplier/vendor. A PO can have 2 addresses, one for the order (send the PO) and the other to which we remit payment. Most often, the supplier on a PO is the vendor to which the order was placed.
Buyer | Procurement staff member responsible for the Purchase Order.
Requestor | OHIO staff responsible for requesting the Purchase Order creation.
Prevailing Wage | Indicates Contractor wage restrictions on Purchase Order.
Closure Status | The status of the Purchase Order.
Project Mgr Name | OHIO staff responsible for the project account.
Open Amount | Open amount of Purchase Order. Calculation: Encumbered Amount less Amount Billed. The user must know the exact amount open. This prompt should be used for an exception Purchase Order in Open status with an open amount of $0.00. The dollar sign ($) is not needed to search.
Planning Unit | Broad categories of departmental structures within the institution. Planning units are led by higher-level executive staff and are the source for budgeting and planning determinations. There are 21 planning units. Click the checkbox to select one or more planning units.
Account | Account string
Entity | Two-digit value that identifies how the transaction is summarized for financial reporting. Represents major components of the University requiring separate balance sheet/external reporting (legal entities, auxiliary operations, etc.).
Source | Six-digit value that identifies how the transaction is funded, classified by restrictions.
Organization | Six-digit value that identifies who administers the funds, such as a Planning Unit or department within Planning Unit.
| **Object** | Six-digit value that defines the what kind of transaction is taking place and delineates the values by account type for Assets, Liabilities, Fund Balance, Revenues, Expenses and Transfers. On a PO, the Object Code is typically an expense. |
| **Project Number** | Five-digit value that represents a person or scope of work. |
| **Task Number** | Up to five-character value, that represents the work breakdown structure for a Project. |
| **Award Number** | Seven-digit value that represents the source of funding that supports one or more Projects/Tasks. |
| **Approval Date Between** | The most recent date (range) the PO was approved. |

**Dashboard Page Columns (on screen)**

PO Prefix, PO Number, Invoice, Requisition Number, Description, AP/Recv Note, Oracle Attachment, Approval Date, Status, Status Action Date, Status Reason, Buyer, Supplier, Supplier Address, Ship to Attn, Ship to Location, FOB, Supplier Note, Prevailing Wage, P/C By

**Additional Fields Included in Export to CSV**

PO Header ID, Supplier Note, Line, Line Item Desc, UOM, Unit Proce, Closure Status, Closed Reason, Matching Basis, Cancelled, Reason for Cancel, POL CLOSED DATE, GL Date, Distribution Num, Requestor, Organization, Obj #/Desc, Charge Account, Project Manager Name, Project #, Task Number, Amt, Qty, Matched, Open Amount, Award #, Expenditure Type

**Drilldown Options**

To drill-down, under the **PO Number** column, click the desired link. The PO line details will display. To navigate back to the summary level, click the breadcrumbs trail at the bottom of the screen.