



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
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.