About This Document

Overview
This document will help you get started using the OBI Procure to Pay (P2P) Reporting dashboard.

A prerequisite is that you have taken FIN-0340 Introduction to OBI Financial Reporting and have been granted access to OBI.

P2P Relationships in OBI
Consolidated Expenditure Reporting (CER) dashboards contain drillable links that open P2P reports.

Procure to Pay (P2P) dashboards contain drillable links that open Expense Requests and SU Card Activity reports and the Oracle Inquiry Tool.

Legend

⚠️ Indicates important information or a warning.

ℹ️ Indicates additional information or a helpful tip.
### Table of Contents

About This Document ........................................................................................................... 1
| Overview .......................................................................................................................... 1 |
| P2P Relationships in OBI ............................................................................................... 1 |
| Legend .............................................................................................................................. 1 |

Accessing the Dashboard ................................................................................................... 3

Home Tab ............................................................................................................................ 4
| Purpose of Report ........................................................................................................... 4 |

Procure to Pay at a Glance Tab ......................................................................................... 5
| Purpose of Report ........................................................................................................... 5 |
| Sample Business Questions ............................................................................................ 5 |

Procure to Pay Inquiry Tab .............................................................................................. 6
| Purpose of Report ........................................................................................................... 6 |
| Sample Business Questions ............................................................................................ 6 |

Purchase Requisitions Tab .............................................................................................. 7
| Purpose of Report ........................................................................................................... 7 |
| Sample Business Questions ............................................................................................ 7 |

Purchase Orders Tab ......................................................................................................... 8
| Purpose of Report ........................................................................................................... 8 |
| Sample Business Questions ............................................................................................ 8 |

AP Invoices Tab .................................................................................................................. 9
| Purpose of Report ........................................................................................................... 9 |
| Sample Business Questions ............................................................................................ 9 |

Purchase Order Trend Analysis Tab ................................................................................ 10
| Purpose of Report ........................................................................................................... 10 |
| Sample Business Questions ............................................................................................ 10 |
| Tips and Tricks ............................................................................................................... 11 |
| No Results Error Drilling on Invoice .............................................................................. 11 |
Accessing the Dashboard

1. Go to http://bi.stanford.edu and log in using your SUNet ID and password.
2. Go to the Dashboards menu and select Procure to Pay under the Finance business function.
# Home Tab

<table>
<thead>
<tr>
<th>Procure to Pay Reporting Dashboard Quick Start Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OBI Financial Reporting – Procure to Pay Reporting Dashboard Quick Start Guide</strong></td>
</tr>
</tbody>
</table>

## Purpose of Report

The dashboard’s **Home** tab is typically the landing page. Here you’ll find helpful information about the reports you can run and links to access them. You can view this information in two ways:

- Tabs at the top of the screen represent a report or suite of reports.
- The table lists reports as links and provides information about the each report.

While most links on the P2PR dashboard have a corresponding tab, there are four reports that are only available from the home page:

1. **Purchase Requisition Approval History** - For any given approvers, displays the full approval history for all the related purchase requisitions.
2. **Purchase Order Approval History** - For any given approvers, displays the full approval history for all the related purchase orders.
3. **Supplier** - Summary reports for Supplier, Supplier Sites and Supplier Site Contacts.
4. **Payments by Supplier** - Detailed Payment report for suppliers.
Procure to Pay at a Glance Tab

To View Results properly, be sure to follow Selection Criteria instructions above

Purpose of Report
The Procure to Pay at a Glance reports call out Purchase Requisitions that Need Action, Purchase Orders with Outstanding Commitment Amount, AP Invoices that are on Hold and AP Invoice Aging data, based on Selection Criteria.

Sample Business Questions
The At a Glance tab supports key business questions such as:

1. What is holding up my purchase order? Is there a problem with my purchase order and what is the issue?
2. What are my requisitions that still need action?
3. What are my invoices that are aging?
4. What are my invoices on hold?
5. What is my PO outstanding commitment amount?
6. What suppliers have activity for a set of PTAs for a specific time period?
To View Results properly, be sure to follow Selection Criteria instructions above.

Purpose of Report
The Procure to Pay Inquiry reports show various Summary and/or Detail reports about one or many Purchase Requisition, Purchase Order, AP Invoice, or Payment Issued Numbers. This report allows users to select available reports related to the item(s) entered.

Sample Business Questions
The Inquiry tab supports key business questions such as:

1. What are the requisition details by requisition number including the invoice and payment matched to the associated PO line(s)?
2. If I know a PR, PO, AP invoice or payment issue number, how can I query the detailed information for the related transaction numbers?
3. What is outstanding on my purchase order and what lines have been paid, with details on payment and what changes have been made (including PTA information, transfers, etc.)?
4. How could I find the payment details for my invoices?
Purchase Requisitions Tab

To View Results properly, be sure to follow Selection Criteria instructions above

Purpose of Report
The Purchase Requisitions reports show both Summary and Detail reports for one or many Purchase Requisitions and Related Transaction Numbers. The selection criteria allows for analysis at several levels including Budget Unit, Organization, PTA or Supplier Name, and Requisition Type or Status.

Sample Business Questions
The Purchase Requisitions tab supports key business questions such as:

1. What are the requisition details for multiple requisition numbers including the invoice and payment matched to the associated PO numbers?
2. What requisitions were created for a specific date range?
3. What are the Purchase Requisition details for a PTA, Org or Supplier?
4. How can I find requisitions by requester or preparer plus related transactions (order, invoices, or payments) for a submitted or creation reporting period?
5. What suppliers have requisitions for a set of PTAs for a specific time period?
Purchase Orders Tab

To View Results properly, be sure to follow Selection Criteria instructions above

Purpose of Report
The Purchase Orders tab shows both Summary and Detail reports for one or many Purchase Orders and Related Transaction Numbers. The selection criteria allows for analysis at several levels including Budget Unit, Organization, PTA or Supplier Name, and Purchase Order Type or Status.

Sample Business Questions
The Purchase Orders tab supports key business questions such as:

1. What is my PO outstanding commitment amount?
2. What are the purchase order details by PO number and/or supplier for my PTA and/or organization including the associated requisitions, invoices and payment numbers?
3. What purchase orders are open for my PTA and/or organization and what is the remaining balance on each of the open purchase orders?
4. Have any unallowable charges been incurred on sponsored PTAs within my organization?
5. How can I find purchase orders by requester or buyer plus related transactions (requisitions, invoices, payments) for a specific reporting period (submitted, creation or GL Period)?
6. Which suppliers exist with cancelled orders?
7. What suppliers have purchase orders for a set of PTAs for a specific time period?
AP Invoices Tab

To View Results properly, be sure to follow Selection Criteria instructions above.

Purpose of Report
The AP Invoice reports show both Summary and Detail reports for one or many invoice numbers and displays Related Transaction Numbers. The selection criteria allows for analysis at several levels including Budget Unit, Organization, PTA or Supplier Name, and Invoice Type or Status.

Sample Business Questions
The AP Invoices tab supports key business questions such as:

1. What are my invoices on hold?
2. How could I find the payment details for my invoices?
3. What suppliers have invoices for a set of PTAs for a specific time period?
Purchase Order Trend Analysis Tab

To View Results properly, be sure to follow Selection Criteria instructions above

Purpose of Report
The Purchase Order Trend Analysis displays the top \( X \) (report defaults to 10, but can be changed) entities by total dollar volume, by time periods. This tab also includes a line graph and a pie chart showing this activity over time and as a portion of the whole, respectively.

Sample Business Questions
The PO Trend Analysis tab supports key business questions such as:

1. How can I find the top 10 suppliers that my org purchased from for a specific PO submitted date range and view by Month, Calendar Quarter or Calendar Year?
2. For Project, Task or Award, or PTA how can I find the top 10 Suppliers with the highest PO total amount for a specific PO submitted date range?
3. For my org, which projects, tasks or expenditure types produce the highest volume?
Tips and Tricks

No Results Error Drilling on Invoice

P2PR authority applies to invoice lines only. Therefore you may be able to see invoices in the reports that you do not have access to drill into. When you try to drill on an invoice that you do not have authority for, you will receive this error:

![No Results Error]

The specified criteria didn't result in any data. This is often caused by applying filters and/or selection steps that are too restrictive or that contain incorrect values. Please check your analysis filters and selection steps and try again. The filters or selection steps currently being applied are shown below.

Filters
Expense Requistions: Transaction Number is equal to / is in ERI100355

Return -Refresh