Penn APEX P2P Dashboard and Reporting Tool
Quick Reference Guide

The APEX P2P Dashboard and Reporting tool is available to all BEN Financials users with the Senior BA Reporting and/or PO Manager responsibilities.

The tool gives users the ability to drill down into the details of each dashboard item, as well as to save, share and export data, and send reports by email.

1. **Accessing the Dashboard**
   
The APEX P2P Dashboard and Reporting tool will appear in BEN Financials as a menu entry for both the PO Manager and Senior BA Reporting responsibilities. An additional log in will be required to access the Dashboard.

   **Tip:** Use your BEN Financials User Name and password to log into the Dashboard. When finished, click the “BEN Home Page” link (on the upper right of the Dashboard) to return to BEN Financials.

2. **MENU**
   
The main menu for Penn APEX P2P Dashboard / Reports. The default view is the **Dashboard**, which includes tools to view information about **MY PO Invoices Currently on Hold**, **PO Invoices on Hold > 7 Days**, **Over Procurement**, **After the Fact PO's**, and **PO Invoice Sources**.

   This tool will also allow you to look up and run pre-defined reports from the menu or to create your own as needed.

3. **Dashboard Display Options**
   
The default view shows you as the **BUYER**. In this view, each dashboard section refers to Purchase Orders in which you were the first individual with **PO Manager** access to approve a given requisition.

   Other options include views by your **ORG**, as well as by your **CENTER**. You will also have the option to select a range or all **ORGs**.

   **Note that when selecting a range of ORGs, the tool will show all ORGs in that range.**

4. **My PO Invoices Currently on Hold**
   
   A quick reference tool to show how many invoices are currently on hold for Purchase Orders in which you are the **BUYER**.

   This view will not change—other than by clearing your PO Invoice Holds—and only relates to your own Purchase Orders.

   **University Best Practice is to clear all invoice holds within 7 days.**

5. **PO Invoices on Hold > 7 days – Monthly Snapshot**
   
The default dashboard view shows a chart of the most recent three (3) months. Numbers for each month show the total number of invoices that have been on hold for more than seven (7) days at the end of each month.

   Note that this number may include invoice holds that have since been resolved.

   **Clearing holds within 7 days will help keep this section clear over time.**

6. **Over Procurement**
   
The default dashboard view shows a chart of the current fiscal year. Numbers for each month show the total number of invoices that have been invoiced for an amount greater than the original Purchase Order by 10% and $1K.

   **Remember: If there is a material difference (> $1,000) that exceeds an originally authorized PO amount (excluding freight and miscellaneous handing charges), a new Purchase Order should be created for the additional purchase amount.**

7. **After the Fact POs**
   
The default dashboard view shows a chart of the current fiscal year. Numbers for each month show the total number of PO invoices dated prior to the PO being fully approved.

   **Remember that University Policy requires that PO’s be created and fully approved prior to placing vendor orders.**

8. **PO Invoice Sources**
   
The pie chart shows invoice sources (by percentage) for the current fiscal year.

   Note the Intramural Mail section, which generally indicates invoices sent to a department rather than directly to Accounts Payable.

   **University Suppliers should be reminded to send all PO Invoices directly to Accounts Payable—preferably electronically.**