1. The first step in using the Procure to Pay Dashboard is to select your filters. Click on the Filter Page tab to begin.

To the right you can see, you can filter by Lead Admin, Ops Mgr, Division or Department Name, or even the Org Unit # /Name combination. These filters will cascade throughout the dashboards

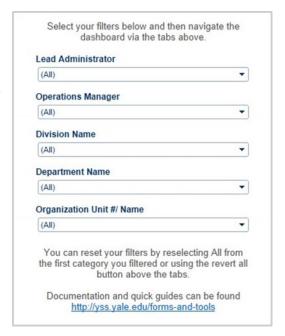**2.** To set a filter, click the appropriate drop-down menu and select you choice(s),

3. By default, all items in the list will be selected, as seen below. (All checkbox is checked.)

To select individual items in a list, first click the (All) box to deselect all items in the list. Next, you'll individually select the items you'd like to include.

Click in another area of the screen to close the drop down menu.

Once you have selected your filters, you can access the various dashboards using the appropriate tab at the top of the screen

Select your filters below and then navigate the dashboard via the tabs above.

Lead Administrator
(All)

Operations Manager
(All)

Division Name
(All)

Department Name
(All)

Organization Unit #/ Name
(All)

You can reset your filters by reselecting All from the first category you filtered or using the revert all button above the tabs.

Documentation and quick guides can be found http://yss.yale.edu/forms-and-tools

NOTE: In some menus, you may be able to only choose 1 item from a list (e.g. Lead Administrator.)

In others, you can select multiple items (e.g. Operations Manager.)