1. At the top of the page you’ll find the Holds Over Time chart, which provides various hold information for invoices from the units included in your filter results.

![Holds Over Time Chart]

**NOTE:** The top graph includes ALL months resulting from your filter selection, while the Monthly Trend Graph in the lower left corner of the dashboard will always exclude the current month’s data. This was to not show a sharp decline if run early in the month.

1a. Once you click on a bar graph the Top Vendors list will populate for that selection.

![Top Vendors List]

2. At the top of the Holds Over Time chart you will find the Quick Filters which you can use to look at different units and or time periods.

![Quick Filters]

3. Looking at the Invoice Date (FY) filter more closely, first notice the date displayed is different from the extract date you’ll see at the top of the filter page. The extract date from the filter page includes the last 25 months of data (run for FY). The date you see in the header date section (highlighted in blue, above) defaults to the last fiscal year. Also notice there is flexibility for the dates and time periods you examine.

![Invoice Date Filter]

4. Next to the Quick Filters is the key for the chart, shown here. As you can see, bars which are blue represent invoices which had a status of No Hold, and orange bars represent invoices which Went on Hold.

![Chart Key]

5. Hover over the bottom axis and click the plus + sign which is located to the left of the first unit name to toggle to an Org Unit Number view.) To return to Department view Hover over the Name on top and click the minus -
6. The number in the bars represent the number of invoices with a particular status. For example, in the picture above, there are 140 invoices which had a status of “No Hold,” (Blue) and 36 with a status of “Went on Hold.” (Orange.)

- Therefore, this particular unit had a total of 176 invoices during the time period identified in the quick filter at the top. (Note: the default choice is this fiscal year.)
- Bars in the chart will also be shaded either entirely blue, entirely, orange, or with a combination of blue and orange as seen above.
- The size of the shaded section depicts the percentage of the invoices which had a particular status. In the example above, 94% of the invoices were No Hold. (47/50 *100) and 3% (3/50*100) went on hold.

7. If the bar is very small (e.g. small percentage of the total) the number may not be visible. To view this number, hover over the small colored bar to see a pop-up which provides detail.

8. At the bottom of the Invoice Hold Activity Dashboard page you will see the Monthly Trends chart.

- Click on a particular unit in the chart at the top of the dashboard to view only that units holds in the Monthly Trend Chart.

NOTE – drilling in to Org Unit#/Name on the bar graph (at the top of the dashboard) will cause the Monthly Trend graph at the bottom to populate with the chosen Ops Mgr’s total. In other words, it will not show the value for the holds for a specific Org Unit#/Name. The value will be that of the Ops Mgr for the chosen unit. Therefore if that Ops Mgr’s other units have holds, those will be included in the value as well.

9. To the right of the monthly trend chart is the Hold Count by Vendor table. Here you can see the specific vendors associated with the invoices based on you selection from the bar chart.