**Accessing the Purchase Order (PO) Management Dashboard**

1. Log into Workday
2. Select Menu in the upper left-hand corner.
3. Select “Dashboards” from the dropdown list.
4. Select “PO Management” from the list of Dashboards.

**PO Management Dashboard**

The Dashboard opens to an explanation page, which includes the following:
- description of the dashboard’s purpose
- link to the procedure associated with the dashboard 3201 PR 01 Purchase Order Process
- summary for each of the report areas featuring a description of the reports:

- **POs Approaching 100% Invoiced – Yale**
  POs that have the total invoiced amount nearing the PO total amount and may need additional funding. You can sort from ascending or descending values.

- **POs Significantly Over Invoiced – Yale**
  POs that are at 110% over the PO value or the POs that are more than $1,000 above the PO value. The report is automatically sorted from lowest to highest amount over invoiced.

- **POs with Multiple Change Orders – Yale**
  POs that have multiple (2 or more) change orders may have substantial variances from the original amount or may not follow university best practices.

- **POs Nearing Award Line End Date – Yale**
  POs with remaining obligations nearing or past their end dates for Sponsored Awards.

**Tabs to access:**
- 1 Links to Reports
  - Provides links to Workday reports
- 2 By Cost Center
  - Provides a visual display of Workday reports by Cost Center
- 3 By Supplier
  - Provides a visual display of Workday reports by Supplier

**Links to Reports**

1. Select the report to view from the list.
2. Enter the appropriate Cost Center Hierarchy when prompted.
3. Default values for these reports are set but may be adjusted as needed.
The “By Cost Center” or “By Supplier” views provide the same information as the “Reports” view but are presented visually to help you easily identify the POs that require your attention.

1. Select the By Cost Center or By Supplier tab.
2. Enter the appropriate Cost Center Hierarchy when prompted.

3. Each tile visually represents one of the four Workday reports. In each tile, the charts and tables group the PO information -- by Cost Center, or By Supplier.

NOTE: Not every Cost Center or Planning Unit will see all these tiles populated (e.g., when you don’t have any POs that match the criteria of the reports). In that case, the tile will note: “No POs meet this Qualification.”