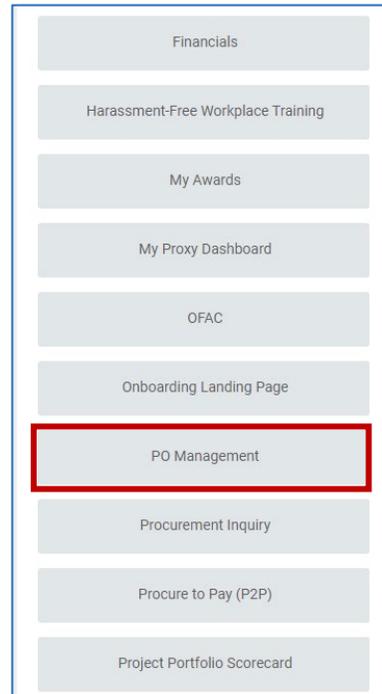


Accessing the Purchase Order (PO) Management Dashboard

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

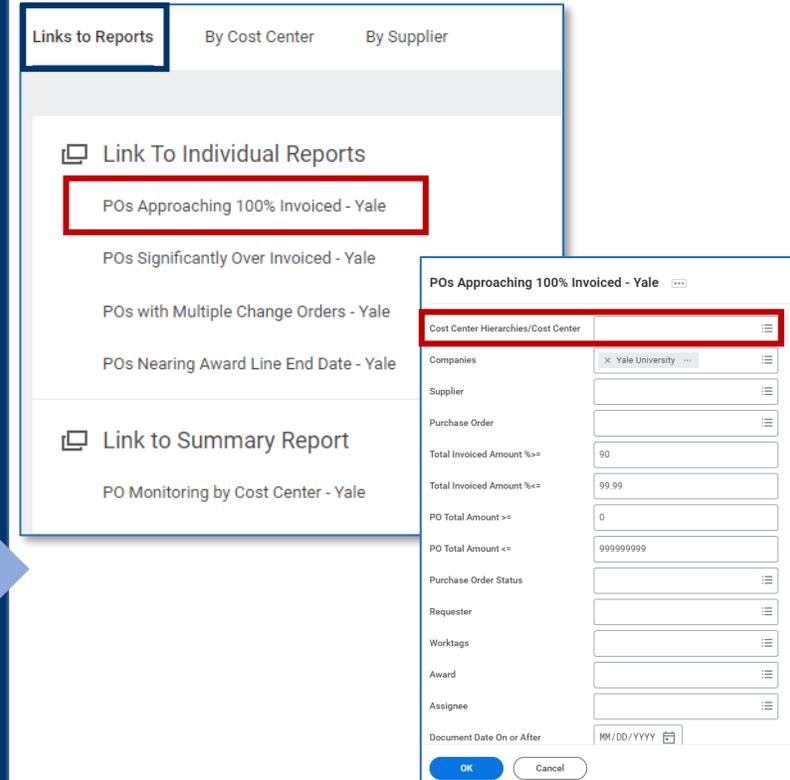
POs with remaining obligations nearing or past their end dates for Sponsored Awards.

- **① Tabs to access:**
 - 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 Links to Reports lists the standard reports seen as tables in Workday.

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.

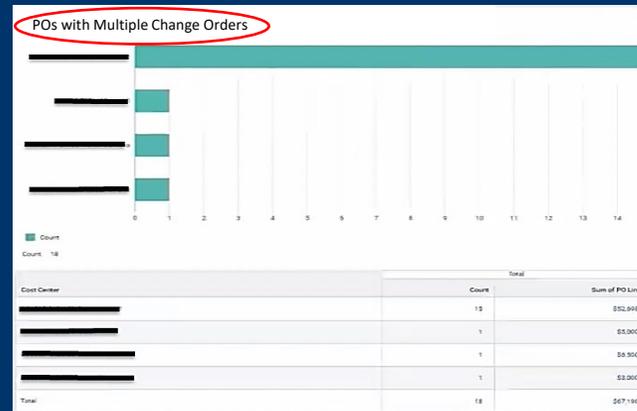
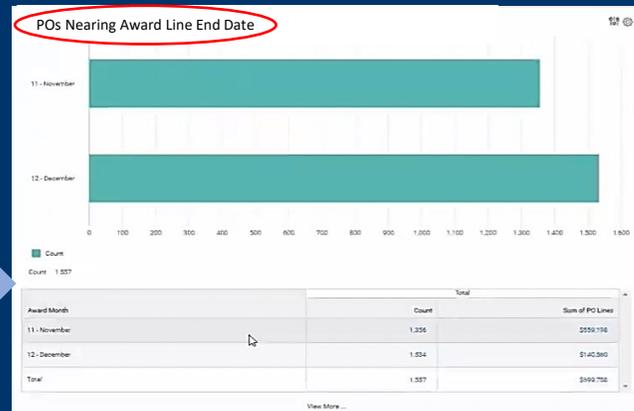
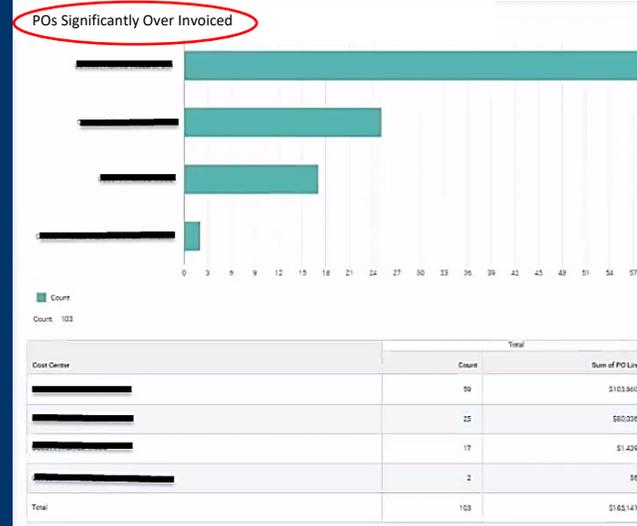
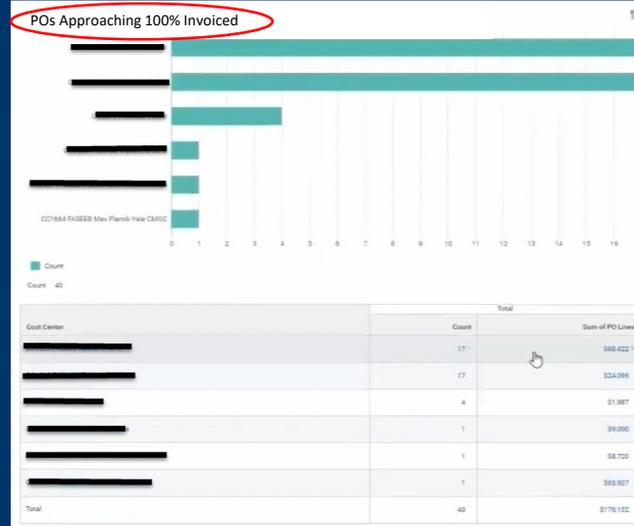


By Cost Center/By Supplier Views

② ③ 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.”

By Cost Center

Displays reports as bar charts with a tile for each one of the reporting areas. Each visual chart presents information that allows you to understand and prioritize which Cost Centers have the highest count for each report area. The tables provide you with the value of the PO lines associated with the POs for each one of the Cost Centers.

Clicking on these allows you to examine the detailed information for this area.

By Supplier

These visuals group the information on the POs by Supplier (Y axis (left) is the supplier's name). You will see additional tiles on this screen because you get the “Count by Supplier” and “Count by Supplier Segmented by Cost Center”: hovering over the Cost Centers listed highlights all the relevant suppliers.