Purchase Order (PO) Management Dashboard Quick Reference Guide

workday.

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Accessing the Purchase Order (PO) Links to Reports **PO Management Dashboard Management Dashboard** The Dashboard opens to an explanation page, which includes Log into Workday **U** Links to Reports lists the standard reports seen as the following: tables in Workday. Select Menu in the upper description of the dashboard's purpose 2. • link to the procedure associated with the dashboard 3201 left-hand corner. Select the report to view from the list. PR.01 Purchase Order Process Enter the appropriate Cost Center Hierarchy when 2. Select "Dashboards" from 3. • summary for each of the report areas featuring a description prompted. the dropdown list. of the reports: Default values for these reports are set but may be 3. (†_↓) adjusted as needed. POs Approaching 100% Invoiced – Yale Financials POs that have the total invoiced amount nearing the PO total amount and Links to Reports By Cost Center By Supplier may need additional funding. You can sort from ascending or descending Harassment-Free Workplace Training values. POs Significantly Over Invoiced - Yale My Awards POs that are at 110% over the PO value or the POs that are more than Link To Individual Reports \$1,000 above the PO value. The report is automatically sorted from lowest to highest amount over My Proxy Dashboard POs Approaching 100% Invoiced - Yale invoiced. POs Significantly Over Invoiced - Yale POs with Multiple Change Orders - Yale OFAC POs Approaching 100% Invoiced - Yale POs that have multiple (2 or more) change orders may have substantial POs with Multiple Change Orders - Yale variances from the original amount or may not follow university best Cost Center Hierarchies/Cost Center **Onboarding Landing Page** practices. × Yale University … POs Nearing Award Line End Date - Yale POs Nearing Award Line End Date - Yale Supplier PO Management POs with remaining obligations nearing or past their end dates for Purchase Orde Link to Summary Report Sponsored Awards. Total Invoiced Amount %> Procurement Inquiry Fotal Invoiced Amount %• 99,99 PO Monitoring by Cost Center - Yale Tabs to access: PO Total Amount >= 1 Links to Reports Procure to Pay (P2P) PO Total Amount <= 000000000 - Provides links to Workday reports Purchase Order Statu := **2** By Cost Center := Requeste Project Portfolio Scorecard - Provides a visual display of Workday reports by Cost := Worktags Award Center Assignee Select "PO Management" 3 By Supplier 4. Ocument Date On or Afte MM/DD/YYYY 🛱 - Provides a visual display of Workday reports by Supplier from the list of Dashboards. Cancel

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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.

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

Links to Reports	By Cost Center By Supplier	
🖵 Link To		
POs Appr	oaching 100% Invoiced - Yale	
POs Signi	ficantly Over Invoiced - Yale	
POs with	Multiple Change Orders - Yale	
POs Near		
🖵 Link to	By Cost Center for PO Management	:
PO Monit	Cost Center Hierarchy/Cost Center *	:=
	OK Cancel	

 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.

POs Approaching 100% Invo	biced		107	POs Significantly	Over Invoiced		
				e			
CC1664 FASEEB Max Planck-Vale CMOC							
0 1	2 3 4 3 6 7	8 9 10 11	12 13 14 15 16 1				
Count 40					0 3 6 9 12 15 18 21 2	2 27 30 33 36 39 42	45 48 51 54
			Total	Count			
Cost Centar		Court	Sum of PO Lines	Count 103			
		17~	566.422 *	Cost Center		Court	Sum of PO
		17	\$24,096			59	\$103
		4	81.987			75	50 ¹
		1	89,900				
		3	68,720			17	\$1.
		,	\$63.927			2	
Total		40	\$176,152	Total		103	5165.
POs Nearing Award Line En	nd Date		101 @	POs with Multip	le Change Orders		
			I I I I				
11 - November						1.1.1.1.1	
12 - December							
		1 1 1 1					
0 100 200 300	400 500 600 700 800 9	900 1,000 1,100 1,200	1,300 1,400 1,500 1,600	Court			
Court				Court 18			
Count 1 537		Tetal		Cost Center		Court	Sum of PC
Award Month		Count	Sum of PO Lines			15	\$52
11 - November		1,356	\$559,796			1	\$3
12-December		1.534	\$1.40,560			1	50
Total		1.557	\$1992.752 -			1	5
	View More			Total		18	\$67

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.

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