Cost Center Dashboard

The Cost Center Dashboard is available to all VPs, Cost Center and Budget Managers. The dashboard groups announcements, tasks and reports available to manage cost centers and budgets.

> ⓘ Every Fiscal Year you must change the dates on the Spend Analysis - Supplier Invoices Report to reflect the current fiscal year.

On this Job Aid:

- Announcements
- Reports Tab
    - Spend Analysis - Supplier Invoices Report
        - Setup/Add dates to the Spend Analysis - Supplier Invoices Report
    - Variance Report
        - Setup the Variance Report
- Self Service Tab
    - Requisitions and Invoices
    - Find Requisitions, Purchase Orders and Expense Reports
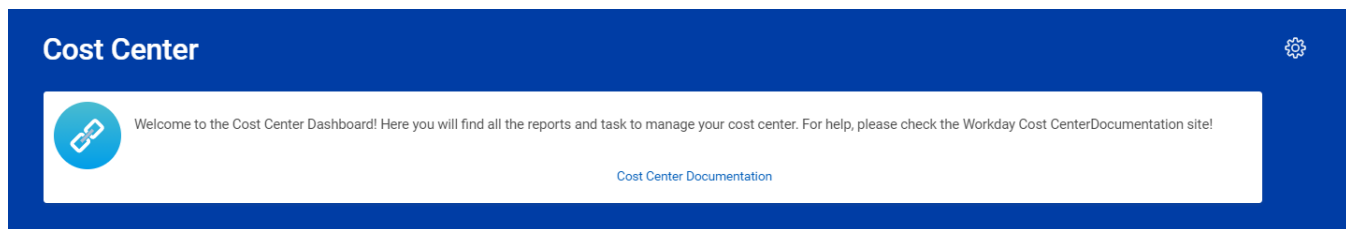
From your Applications, select Cost Center app

Cost Center

Announcements

The announcements area will display information for cost center and budget managers. Click on the Cost Center Documentation link for instructions and How to's documentation.

Cost Center

Welcome to the Cost Center Dashboard! Here you will find all the reports and task to manage your cost center. For help, please check the Workday Cost CenterDocumentation site!

Cost Center Documentation

Reports Tab

The Reports Tab will house the most important reports for Cost Center and Budget Managers. We will be adding more reports as they become available.

Reports   Self Service
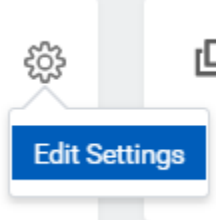
Spend Analysis - Supplier Invoices Report

The Spend Analysis - Supplier Invoices report list all invoices processed for your cost center(s) grouped by supplier and period (month).

Setup/Add dates to the Spend Analysis - Supplier Invoices Report

Most reports that require parameters to run, will require one time setup. You can modify these parameters at any time.
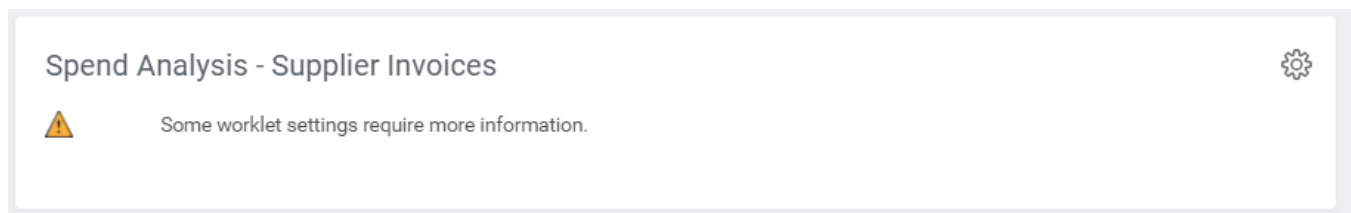
Spend Analysis - Supplier Invoices   ⚙

⚠   Some worklet settings require more information.

1. Click the gear icon next to the report and select Edit settings

⚙

Edit Settings

2. Enter your Organization(s)/Cost Center(s) and dates to display. We recommend 7/1/xx - 6/31/xx+1 to display the appropiate fiscal year.

Edit Worklet Settings

Cost Center Spend Analysis for Invoices - with Supplier
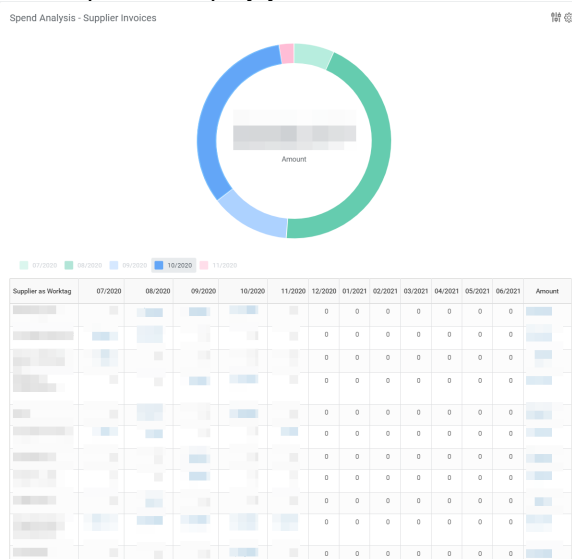

3. Click OK
4. Your repot will display your selection

Variance Report

The variance report shows the budget vs actual amounts for the cost center (organizations) assigned to you.
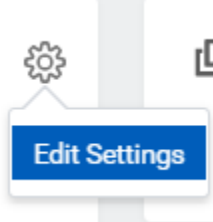
Setup the Variance Report

If you haven't configure a cost center on the report, the worklet will display the following message:

Variance Report   ⚙

⚠   Report parameter Organization is required.

1. Click the gear icon next to the report and select Edit settings

   ⚙   ⬚

   Edit Settings

2. Enter your Organization(s)/Cost Center(s)

   # Edit Worklet Settings
   ## LU - Variance Report

   Edit Settings

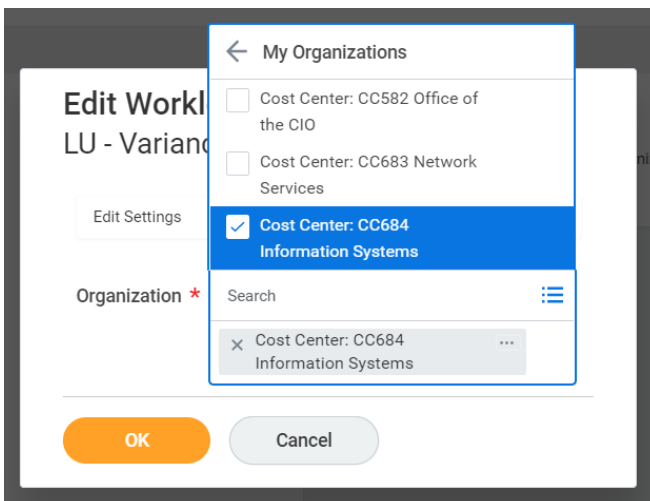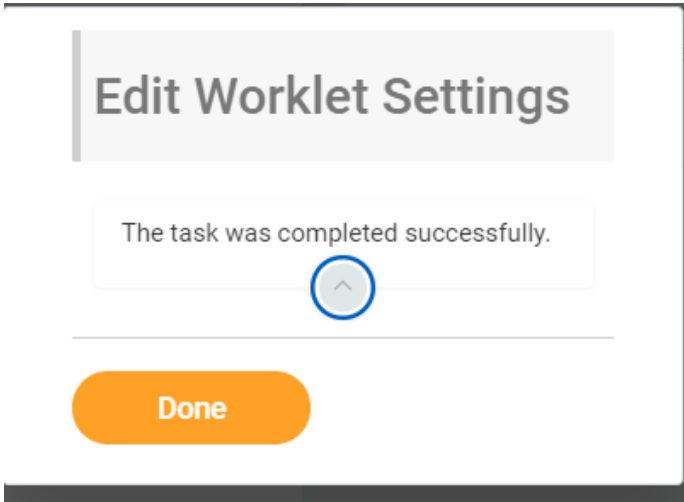   Organization * | Search   ☰

   OK   Cancel

3. Under My Organizations, select the cost center available to you.

   Edit Workl
   LU - Varianc

   Edit Settings

   Organization *

   OK   Cancel

   ← My Organizations

   ☐ Cost Center: CC582 Office of
       the CIO

   ☐ Cost Center: CC683 Network
       Services

   ☑ **Cost Center: CC684**
       Information Systems

   Search   ☰

   ✕ Cost Center: CC684   ...
       Information Systems

4. Click Done

Edit Worklet Settings

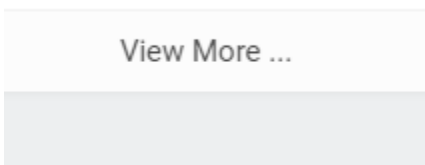The task was completed successfully.

⌃

Done

5. Your report with the selected cost center(s) will display every time you open the dashboard.

Variance Report ⚙

Spend Category	Current Year Budget (FY21B)	Pre-Encumbrance	Encumbrance	Actuals (FY21A)	Spent	Remaini Budg Doll

6. To display the report on a separate window, scroll down and click View More

View More ...

ⓘ Visit the Variance report page for more details.

Self Service Tab

The Self Service tab house the most important tasks for Cost Center and Budget Managers.

Cost Center Reports   Self-Service

Requisitions and Invoices

The Requisitions and Invoices area group all tasks needed to create Supplier Request, Create Supplier Invoice Request (no PO) and Create Requisition.

Requisitions and Invoices

Create Supplier Request

Create Supplier Invoice Request

Create Requisition

Find Requisitions, Purchase Orders and Expense Reports

The "Find" area group all tasks needed to find specific requisitions, purchase orders and expense reports for your cost center. You can limit your search by selecting search parameters or leave blank to display all items.

Find Requisitions, Purchase Orders and Expense Reports

Find Requisitions

Find Purchase Orders

Find Expense Reports

Sample of search parameters.

Companies	
Organization	
Requisition	
Requester	
Requisition Type	
Requesting Inventory Site	
Requisition Date On or After	MM/DD/YYYY
Requisition Date On or Before	MM/DD/YYYY