
PO.020.280 - USING THE BUYER'S WORKBENCH


Purpose	To review or act on a purchase order.
Description	<p>The Buyer's Workbench allows users to perform a variety of processes on a single or multiple purchase orders. These processes include approving, canceling, closing, dispatching, and budget checking purchase orders.</p> <p>When any of these actions are taken, the Workbench reviews the documents to determine whether they are qualified for the action. Users can also review statuses and the results of actions taken through the Workbench.</p>
Security Role	BOR_PO_MAINTAIN or BOR_PO_INQUIRY
Dependencies/ Constraints	None
Additional Information	None

Procedure

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the Purchasing link.
4.	Click the Purchase Orders link.
5.	Click the Buyer's Workbench link.
6.	Select the Add a New Value tab. <i>Note: If a Workbench ID has been previously created, use Find an Existing Value.</i>
7.	Enter the Workbench ID and select the Add button. <i>Note: The Business Unit should auto-populate.</i>

Step	Action
8.	<p>Enter criteria in any of the following sections to reduce the number of search results returned.</p> <ul style="list-style-type: none"> • Search Criteria: Enter information in the fields to narrow down the search results. If no search criteria is entered, the system will retrieve all purchase orders for the business unit. • Status: Select the check boxes that correspond to the Purchase Order status for the system to retrieve. If users do not select a status, the system retrieves purchase orders in all statuses that also meet other search criteria entered. • Receiving: Use this section to define search criteria related to purchase order receipts, such as whether to retrieve purchase orders where receiving is required or optional for the purchase order. • Matching: Use this section to define search criteria related to purchase order matching controls, such as whether matching is required or not required on the purchase order. • Encumbrance: select the Open Encumbrances checkbox to retrieve any purchase orders that have a remaining encumbrance. <p>At year end, this will be helpful for locating Purchase Orders that need to be completed.</p> <ul style="list-style-type: none"> • ChartFields: select to limit the Purchase Orders retrieved by a combination of ChartFields, i.e., all Purchase Orders for a certain Project. If this section is used the GL Unit is a required field. All other fields are optional. <p>Wildcards cannot be used; however, rows can be inserted if additional ChartFields are needed.</p>
9.	<p>Select the Search button. The results from the search will be displayed on the Buyer's Workbench page.</p>
10.	<p>Enter a description for the workbench in the Description field.</p>

Step	Action
11.	<p>On the Detail tab of the Buyer's Workbench users can select the:</p> <ul style="list-style-type: none"> • Purchase Order ID: used to access the purchase order inquiry for the selected purchase order(s). • Doc Status: click the icon to view the Document Status page for the selected purchase order(s). • Purchase Order Lines: click the icon to view the PO lines associated with the selected purchase order(s). Users can also select individual PO lines from this page.
12.	<p>On the Other tab of the Buyer's Workbench users can select the:</p> <ul style="list-style-type: none"> • Purchase Order ID: click this link to view the Purchase Order Inquiry page. • Go to PO Activity Summary: click this icon to view the Activity Summary. • Edit the PO: click this icon to edit the purchase order. • Additional PO's Statuses: users can view multiple purchase order field statuses including Budget Status, Receipt Status, etc.
13.	<p>Select any or all of the purchase orders to take action on by clicking the checkbox next to each.</p>
14.	<p>Select one of the following actions:</p> <ul style="list-style-type: none"> • Approve: changes the status of the selected Open PO's to Pending Approval. Purchase Orders cannot be approved from the workbench. • Cancel: changes the status of the selected eligible PO's to be canceled. When users cancel a purchase order that is in a Dispatched status, the status changes to Pending Cancel. • Close: changes the status of the selected eligible PO's to complete. • Dispatch: dispatches the eligible selected purchase orders. Purchase orders are eligible to be dispatched if they are in an approved or pending cancel status with a valid budget header status. • Preview: select to preview the selected purchase order(s). • Budget Check: click this button to initiate the budget check process. However, do not click this button if budget checking multiple purchase orders. Instead, use business process PO.030.030 – Budget Checking POs (Batch Process). <p>Note: <i>If using the Buyer's Workbench to close POs, it is important to remember that after closing POs, the budget check process must be run in order to actually liquidate any remaining encumbrance balance on the closed POs.</i></p>

Step	Action
15.	<p>Once an action is selected, the Processing Results page appears. Use this page to review the selected purchase orders and select to proceed with order processing.</p> <p>The system reviews the purchase order(s) and determines if it is qualified or not qualified for the action selected.</p>
16.	<p>Review the Buyer's Workbench – Processing Results page. Purchase Order will be marked as either:</p> <ul style="list-style-type: none"> • Qualified: means this item meets all the criteria to process for the above-mentioned actions. These items will show in the qualified section of the page. • Non-Qualified: A non-qualified purchase order does not meet all the criteria to process and will be displayed in the non-qualified section of the page. If the selected purchase orders are not qualified for the action, click the Log button to access the log. The log states why the purchase order was not qualified for the previous processing action. <p>After reviewing the log, Buyers should determine if additional steps are needed before proceeding. Once the Buyer reviews the log and determines no further action is needed on the purchase order, they can override the status to qualify for action if their user preference allows.</p> <p>To override, select the purchase orders and the  icon between the lists to override the status and qualify them for the action.</p> <p>Note: some purchase orders cannot be overridden and will require additional processing.</p>
	<p>If users need to cancel a purchase order that is sourced from a requisition and plan to use the requisition again, then select the Re-source Requisition checkbox to transfer the purchase order quantities to the original requisition.</p>
17.	<p>Verify the Accounting Date for Action field populates with the correct accounting date. The system updates the accounting date on the transaction with the date defined in this field.</p> <p>The Accounting Date for Action field is used to determine the open period or allowable open date range for budget checking a purchase order.</p>

Step	Action
18.	<p>Select the Yes button continue with the process or select the No button to cancel.</p> <p>Selecting Yes will prompt a secondary message box to appear. To Continue with the process: select Yes. To Cancel, select No.</p>
19.	<p>Select Return to Buyer's Workbench to return to the Buyer's Workbench page.</p>
20.	<p>In the Go To Options section select one of the following:</p> <ul style="list-style-type: none"> • Set filter Options: returns users to the Filter Options search page. • Process Monitor: navigates to the Process Monitor. • View Processing Results: accesses the Processing Results page, where users can view the results of the actions performed. • Process Request Options: used to define process request options for use by the dispatch process. Also, users will need to define a valid Run Control ID for this functionality to work.
21.	<p>Click the Save button to save the search criteria that generated the list of purchase orders on the Buyer's Workbench page.</p>