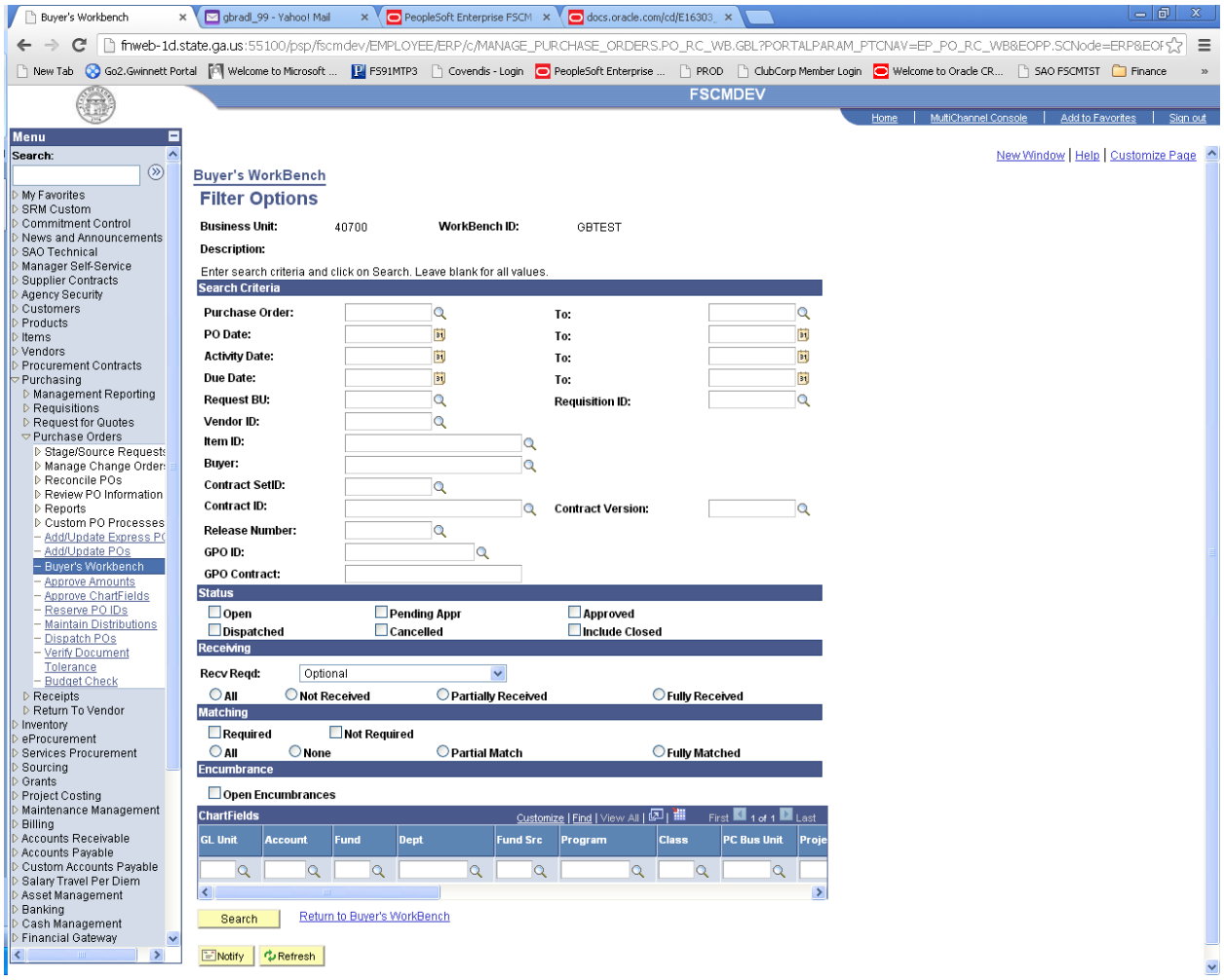
Buyer's Workbench Guide

Buyers need to use the Buyer's Workbench which is the delivered PeopleSoft Purchase Orders closing process. It replaces the customized GA Reconciliation Workbench process.

Following are the steps of how to use the Buyer's Workbench:

Navigation: Purchasing> Purchase Orders> Buyers WorkBench



Buyer: Select the buyer you want to filter the purchase orders by. If you select a buyer that has the rights to use procurement cards on a purchase order, the Card Number field becomes available.

Contract SetID: Select a contract setID. When you search based on a setID, the system returns the purchase orders that are in the setID.

Contract Version: Select a specific version of the contract on which to search.

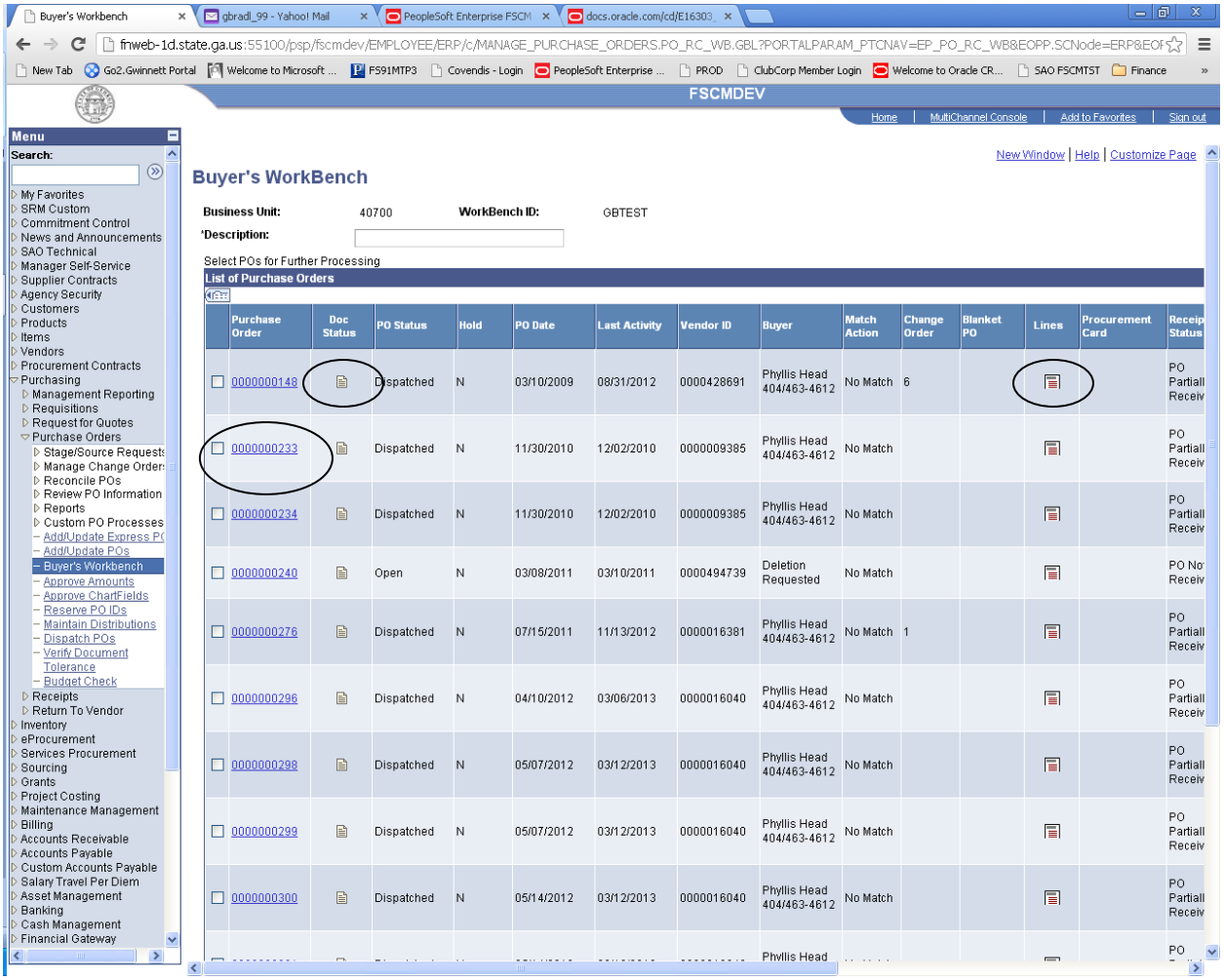
Release Number: Select a contract release number to limit contract information. If the purchase order is tied to a contract, the contract release number is available.

Status: Select the Purchase Order Status that you want to include in your search

Open Encumbrances: If you are using commitment control, click the Open Encumbrances check box to search for purchase orders with open encumbrances. When you use commitment control, the system deducts each type of financial obligation from the budget and tracks it according to obligation type. When you generate a requisition, a pre-encumbrance is created in your budget records by the budget-checking process. When a requisition is sourced to a purchase order, commitment control liquidates the pre-encumbrance from the requisition and establishes an encumbrance for the purchase order.

Receiving: Use this section to define search criteria related to purchase order receipts.

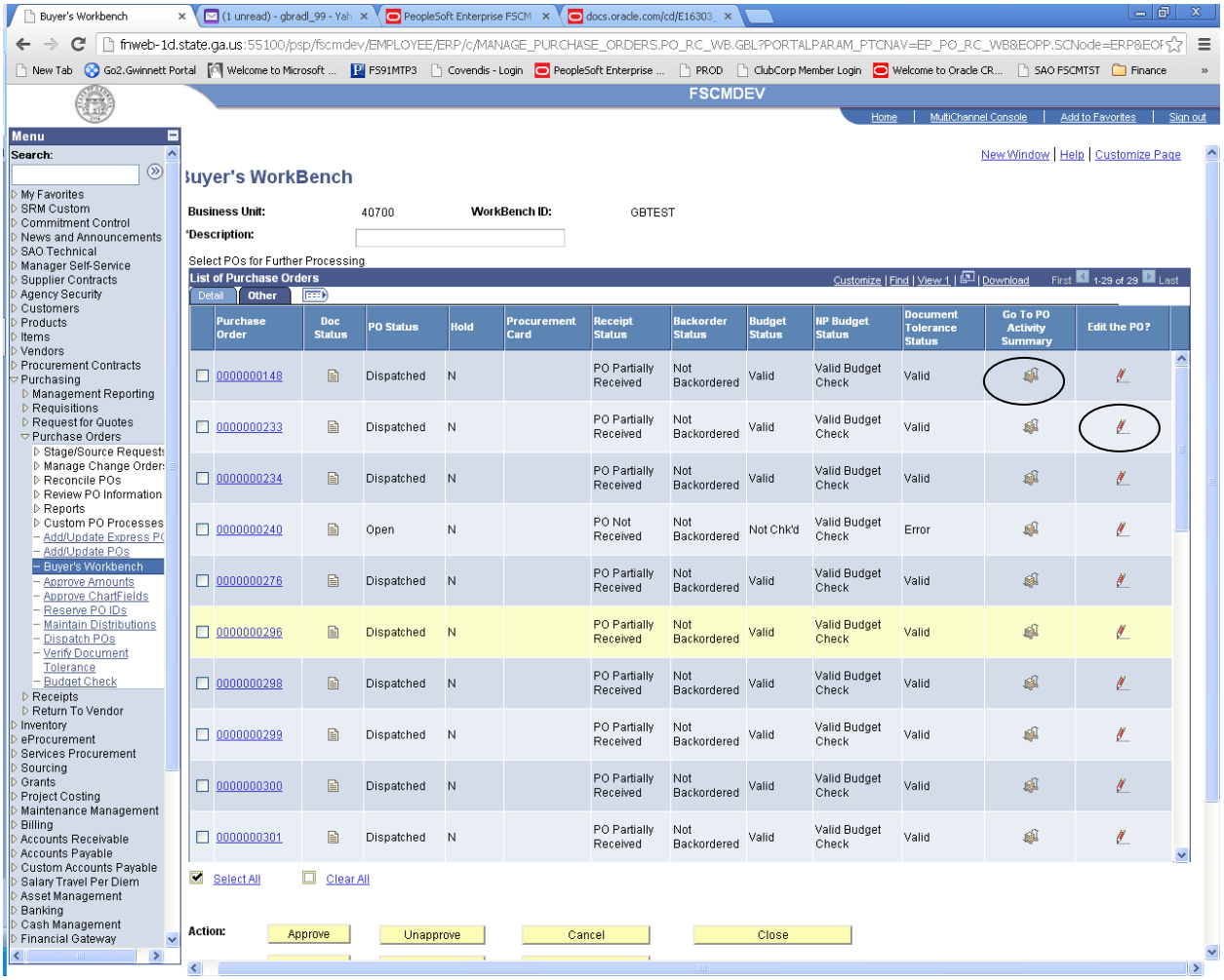
ChartFields: You can enter multiple ChartField combinations as search criteria. For example, you can search for purchase orders in GL Unit (PeopleSoft general ledger business unit) 40700 and Account 846001, as well as 40700 and Account 815070.



Purchase Order: Click the Purchase Order number to access the purchase order inquiry for that purchase order number.

Doc Status: Click the Doc Status button for the selected purchase order to access the purchase order Document Status page in a new window for the purchase order.

Lines: Click the Lines button for the selected purchase order to access the Buyer's Workbench - Purchase Order Lines page. Using this page you can view the lines associated with the purchase order or select individual lines to process the particular action for. You can cancel or close an individual line on a purchase order.

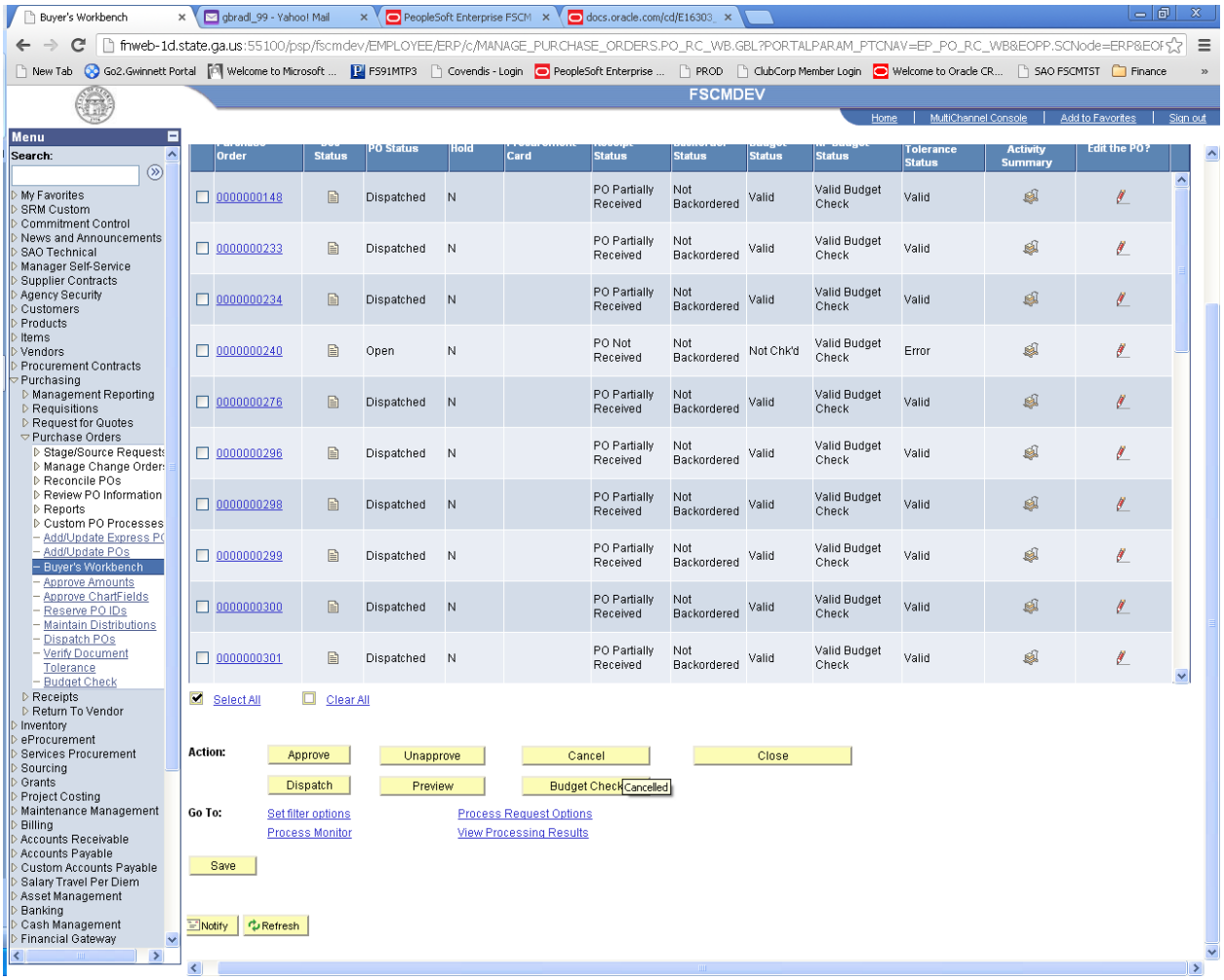


Other Tab: You will see two additional colums:

Go To PO Activity Summary: Use the "Go to the PO Activity Summary" button for the selected purchase order to access the Activity Summary inquiry page in a new window.

Edit the PO: Use "Edit the PO" button to access the Maintain Purchase Orders component in a new window, so that you can edit the purchase order.

Actions that you can Perform from the Workbench



Approve: Click the Approve button to change the status of the selected purchase orders to Approved.

Unapprove: Click the Unapproved button to change the status of the selected purchase orders to Open. (Note: You cannot unapprove dispatched purchase orders)

Close: Click to close the selected purchase orders from further processing. You can override unqualified purchase orders and make them available for closing by selecting the purchase order IDs and clicking the Override button.To give a user the authority to override non-qualified requisitions, click the Override Non-Qualified POs for Close checkbox on the User Preferences - Procurement: Purchase Order Authorizations page.

Dispatch: Select to dispatch the selected purchase orders, including all lines on the purchase order. Only purchase orders with approved or pending cancel statuses can be dispatched. If commitment control is enabled, the purchase order must also have a valid budget check status before it can be dispatched.

Preview: Select to preview the selected purchase orders.

Budget Check: Click to initiate the Commitment Control Budget Processor process for the selected purchase orders. This button is available if commitment control is enabled for PeopleSoft Purchasing. When you click the Budget Check button, the Processing Results page appears. Use this page to review the selected purchase orders and select to proceed with order processing.

Budget Pre-Check: Click to check the budget only. This button enables you to check whether a budget exists for a purchase order before the amount is committed to the preencumbrance or encumbrance and makes it possible to validate documents in work-in-progress mode without affecting budget balances. When performing budget pre-check only processing, the Budget Processor performs all of its budget checking and edits, but does so without committing changes to the ledger or other records. The statuses of Provisionally Valid or Error on the transaction pages indicate whether a budget is available. If you click the button and if the budget check is valid, then the system sets the budget header status for the requisition to Prov Valid. If the budget check is not valid, then the system sets the budget header status to Error with a link to the Exception page.The button is visible only if the Purchasing checkbox is selected in the Enable Commitment Control section on the Installation Options - Products page and the Purchasing checkbox is selected in the Enable Budget Pre-check section on Installation Options - Commitment Control page. The button is not visible if the budget status is Valid.

Set filter options: Click to access the Buyer's Workbench - Filter Options page. Enter selection criteria for a new subset of purchase orders to review, modify, or take action on.

Process Request Options: Click to access the Buyer's Workbench - Process Request Options page. Use this page to define process request options for use by the dispatch process.

Process Monitor: Click to access the Process Monitor page. Here you can view the status of the purchase orders that you submitted to dispatch or preview.

View Processing Results: Click to access the Buyer's Workbench - Processing Results page. Here you can view the results of the actions that you have performed.

Save: Click this button to save the search criteria that generated the list of purchase orders on the Buyer's Workbench page.