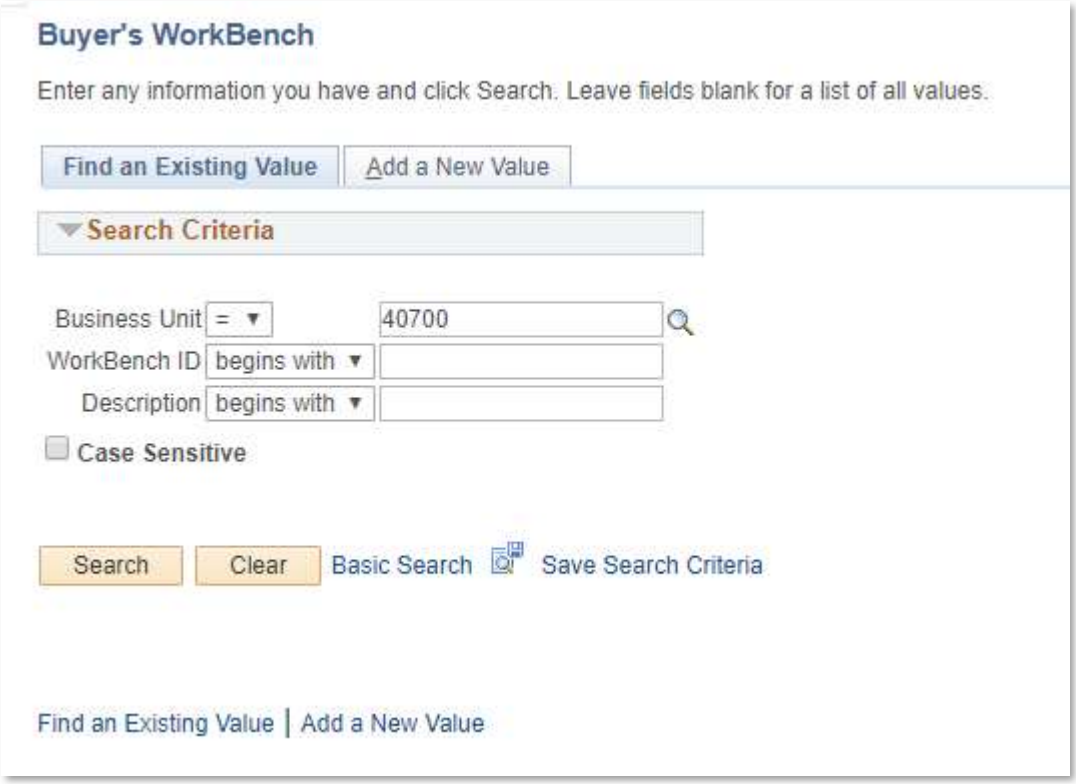
Buyer's WorkBench

Users may use the **Buyer's Workbench** to manage and/or review purchase orders. You can cancel, close, and/or preview purchase orders and/or purchase order lines. This guide describes the steps to use the Buyer's Workbench page.

Navigation:

- **Purchasing WorkCenter** – Buyer's WorkBench link
- **NavBar** – Navigator > Purchasing > Purchase Orders > Buyer's WorkBench



- Enter the Workbench ID in the search criteria section of the **Find an Existing Value** tab and select **Search**, if a WorkBench ID already exists
- If an existing value does not exist, select the **Add a New Value** tab and create a new Workbench ID and description for the new value.

  Note: It is not necessary to create a new Workbench ID for every PO. Workbench ID can and should be reused.

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Filter Options Page:

The Filter Options page of the Buyer’s Workbench allows users to select attributes to search for purchase orders.

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Filter Options

Business Unit 40700 WorkBench ID TEST

Description

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

Purchase Order	0000000000	To	0001895230
PO Date		To	
Activity Date		To	
Due Date		To	
Request BU		Requisition ID	
Supplier ID			
Item ID			
Buyer			
Contract SetID			
Contract ID		Contract Version	
Release Number			
GPO ID			
GPO Contract			

Use this section to define the **search criteria** related the purchase orders. Generally, users will enter the purchase order ID and any additional information that will help you narrow down your search. The more information entered here, the narrower your results.

The search criteria can include:

- **Purchase Order ID** – Entering the Purchase Order ID will filter results by PO ID. Users can view a range of PO’s by entering the first PO ID in the initial field and the last PO ID in the “to” field. For example: The above selection will display all PO’s between 000000000 and 0001895230.
- **PO Date** – Entering the PO Date will display all PO’s with a specific PO date
- **Buyer ID** – Entering the Buyer ID to display all purchase orders belonging to a particular Buyer

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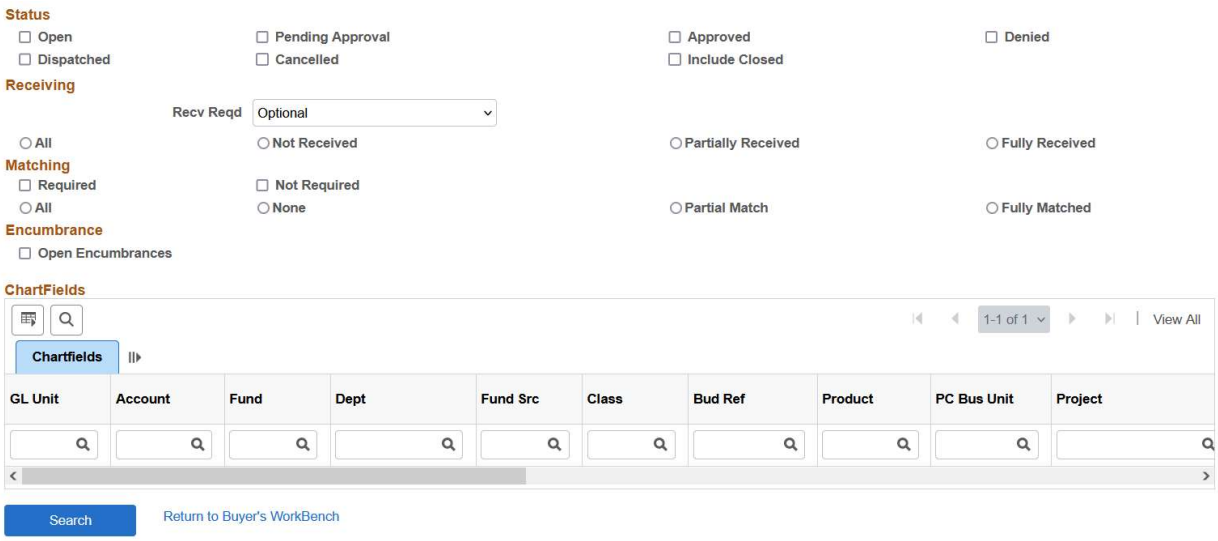

You can also search by:

- **PO Status**: Select this option to display PO's based on the status of the PO. Ex: Selecting only the **Approved** checkbox will display all purchase orders in an approved status.
- **Encumbrance**: Select this option to display PO's with an Open encumbrance.
- **Chartfields:** Enter chartfield details here to display PO lines with specified chartfield details

Note: Users may select multiple options to narrow down their search. However, filtering too much may cause the system to return nothing at all.

Once you have selected your filter options select the **Search** button at the bottom of the page.

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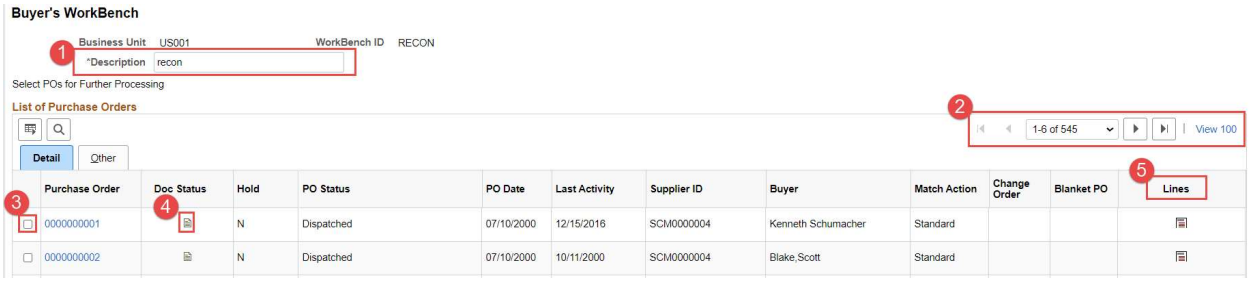
Buyer’s Workbench PO Selection Page:

A list of available purchase orders that meet the criteria selected on the previous page will be displayed in the Buyer’s Workbench list of purchase orders.

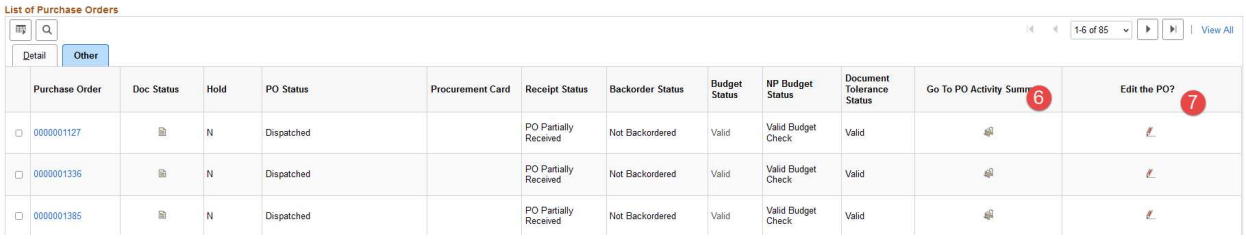
1. The Workbench **Description** is a required field.



On the **DETAIL** tab:

2. The number of PO(s) that meet the criteria is displayed, use the arrows to navigate between the list of purchase orders.
3. Select the PO checkbox to take action on the associated PO. Selecting the PO hyperlink will take you to the actual PO.
4. Select the **Doc Status** icon to see documents (e.g., receipts, events, contracts, etc.) attached to the purchase order.
5. Select the **Lines** icon to view details about the lines of the purchase order.

On the **Other** tab:



6. Select the **PO Activity Summary** hyperlink to display the PO summary in a new page.
7. Select the **Edit the PO** hyperlink to navigate to the Add/Update PO page.

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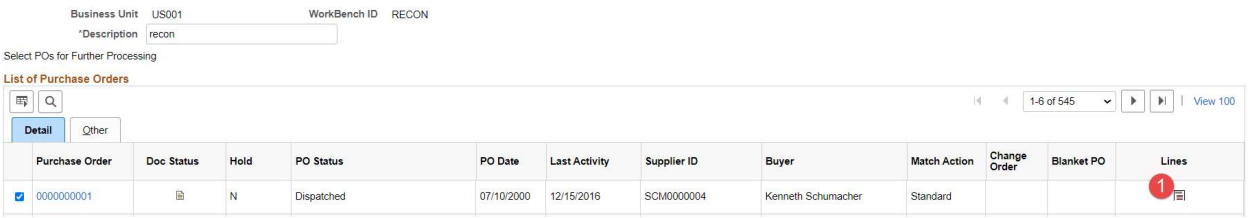
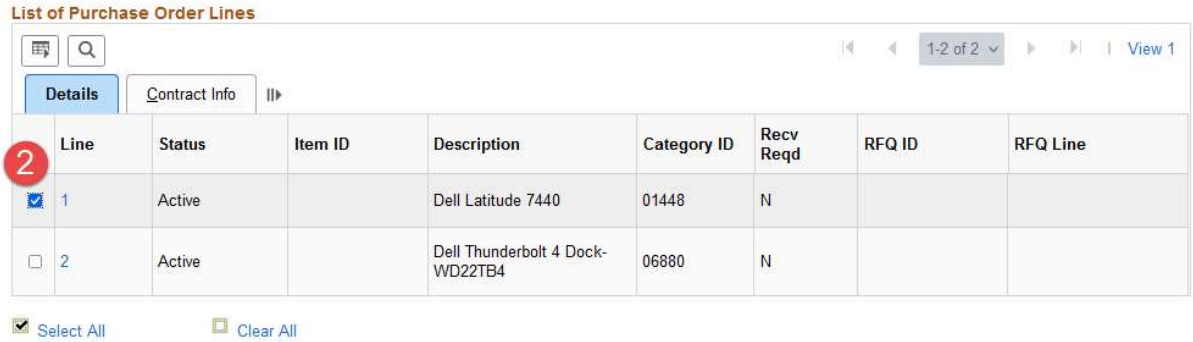
To take action on an **PO Lines**:

1. Select the **Lines** icon.

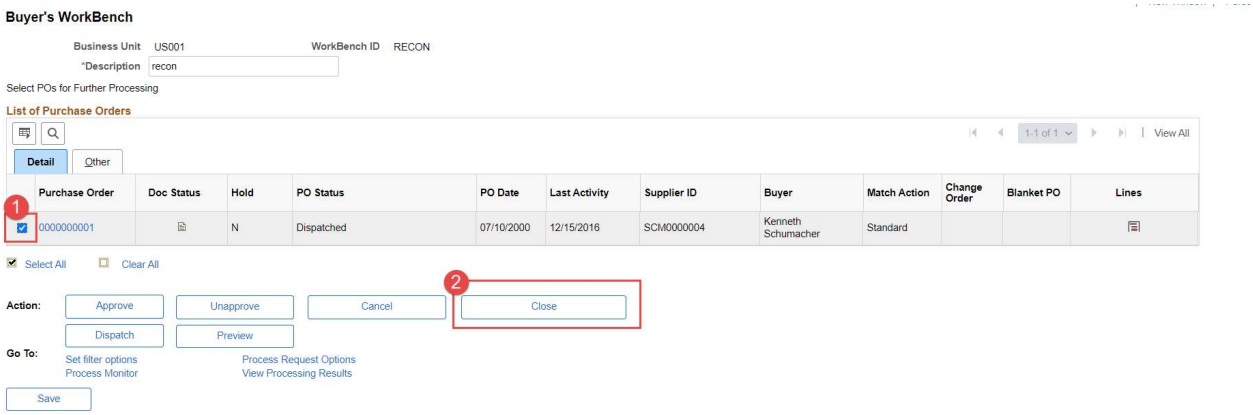


2. Check the box next to the purchase order **Line(s)** you wish to take action on.



To take action on an **Entire PO**:

1. Check the box next to the purchase orders you wish to take action on.
2. On the **Action** section, select the button of the desired action. This example will close the entire purchase order if the PO is eligible for closure.



Note: TeamWorks does not use all available action features at this time.

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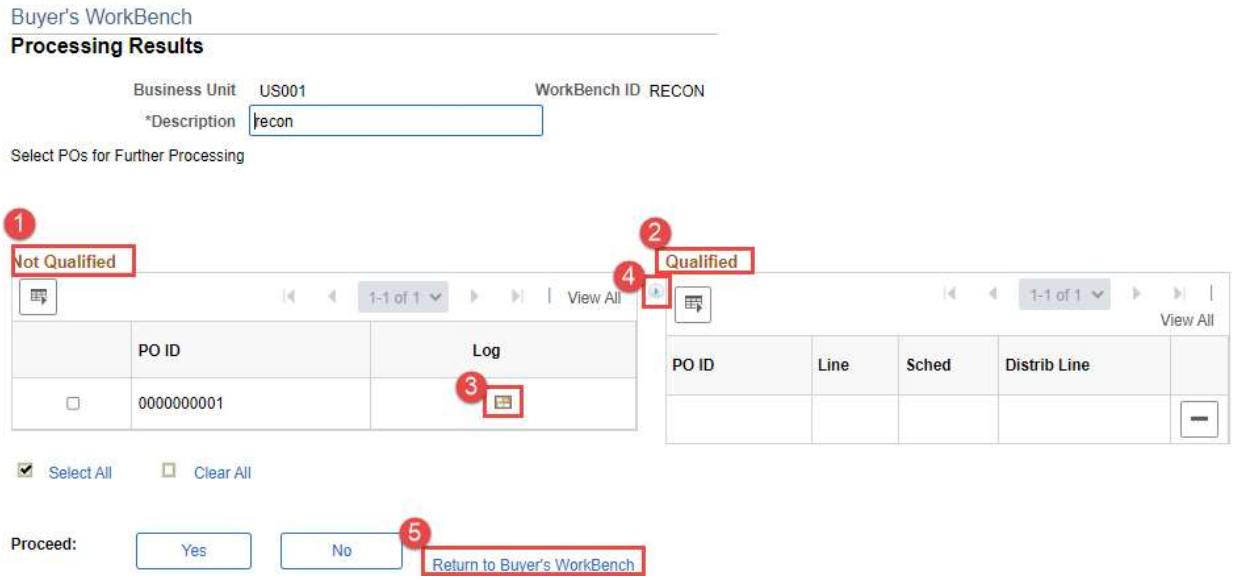
The Processing Results Page:

The **Processing Results** page will display the line(s) that are 'Not Qualified' and 'Qualified' for the action being taken.



1. PO(s) in the **not qualified** section do not meet the criteria selection for the action.
2. PO(s) are **qualified** based on their status and any associated activity.
3. The **Log Icon** explains why the PO is not eligible for closure
4. The **override icon** allows users with the proper security roles to override PO line(s) and move the lines from the not qualified column to the qualified column.
   Note: Please refer to your agency's policies and guidelines for manually overriding PO lines.

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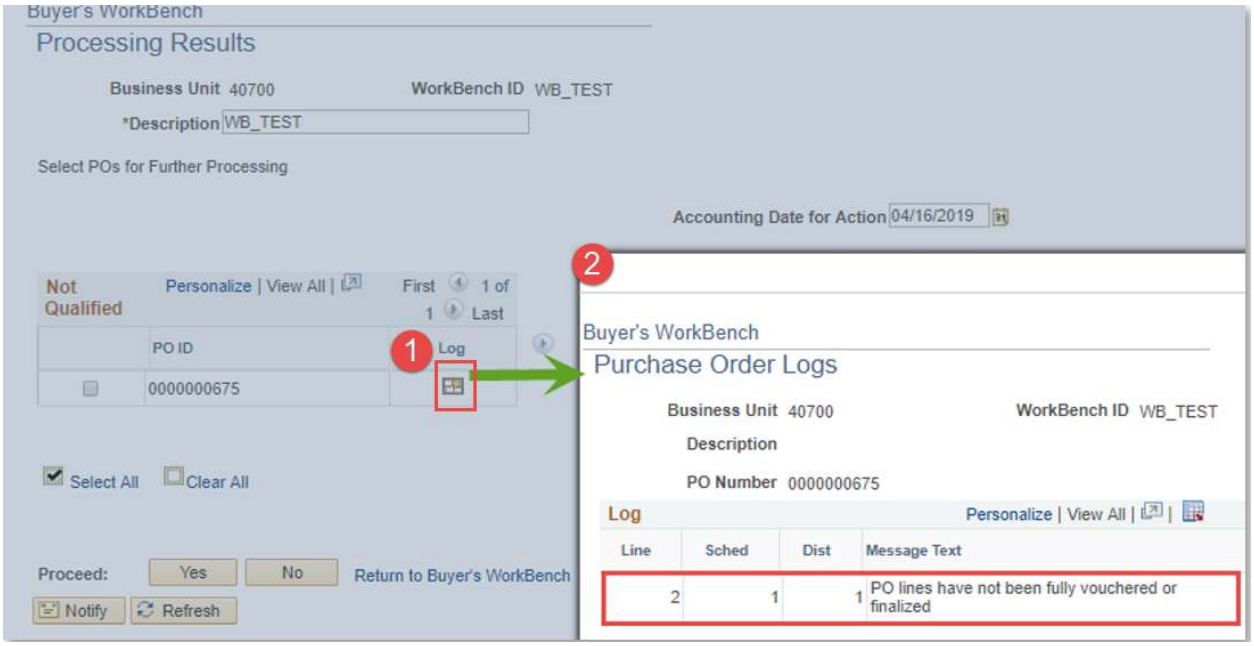
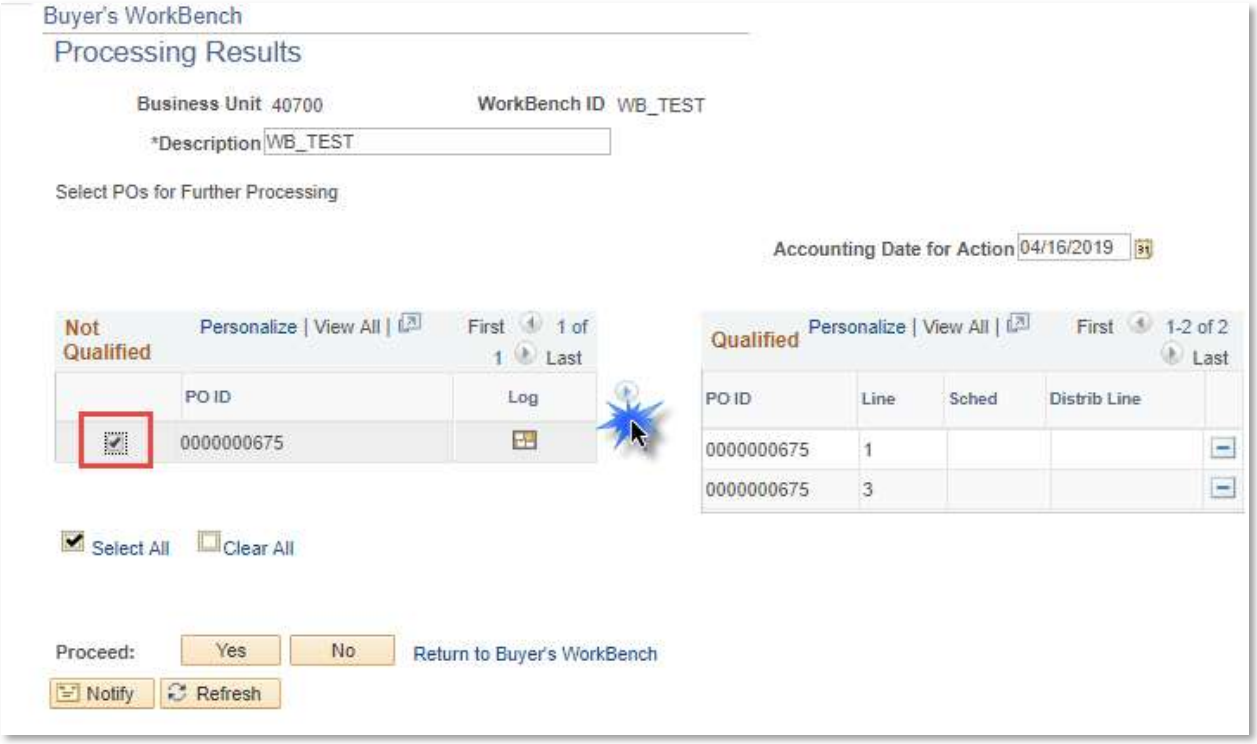


1. For this example, click on the **Log icon** to view the Log File to review why the PO is not qualified for the action.
2. The Log file indicates that lines 2 does not have vouchers against the line. Therefore, the line can be closed.



Use the directional arrow to move the PO to 'Qualified'.

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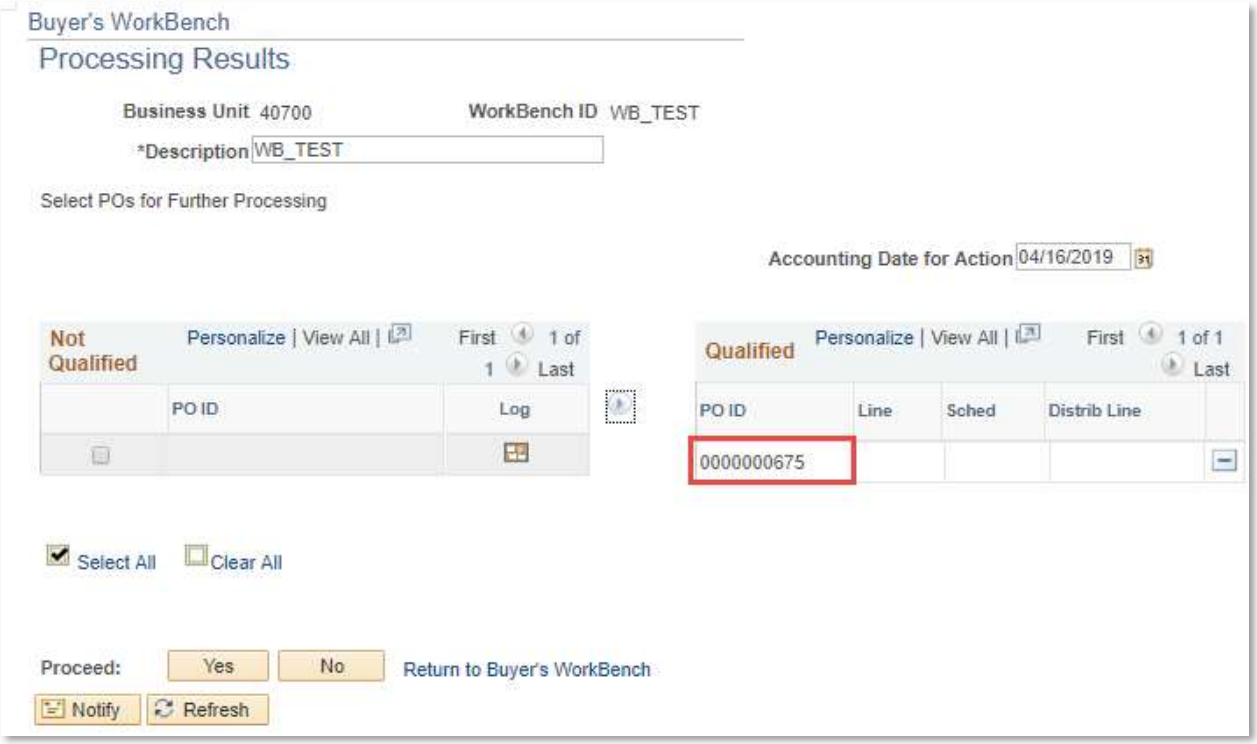
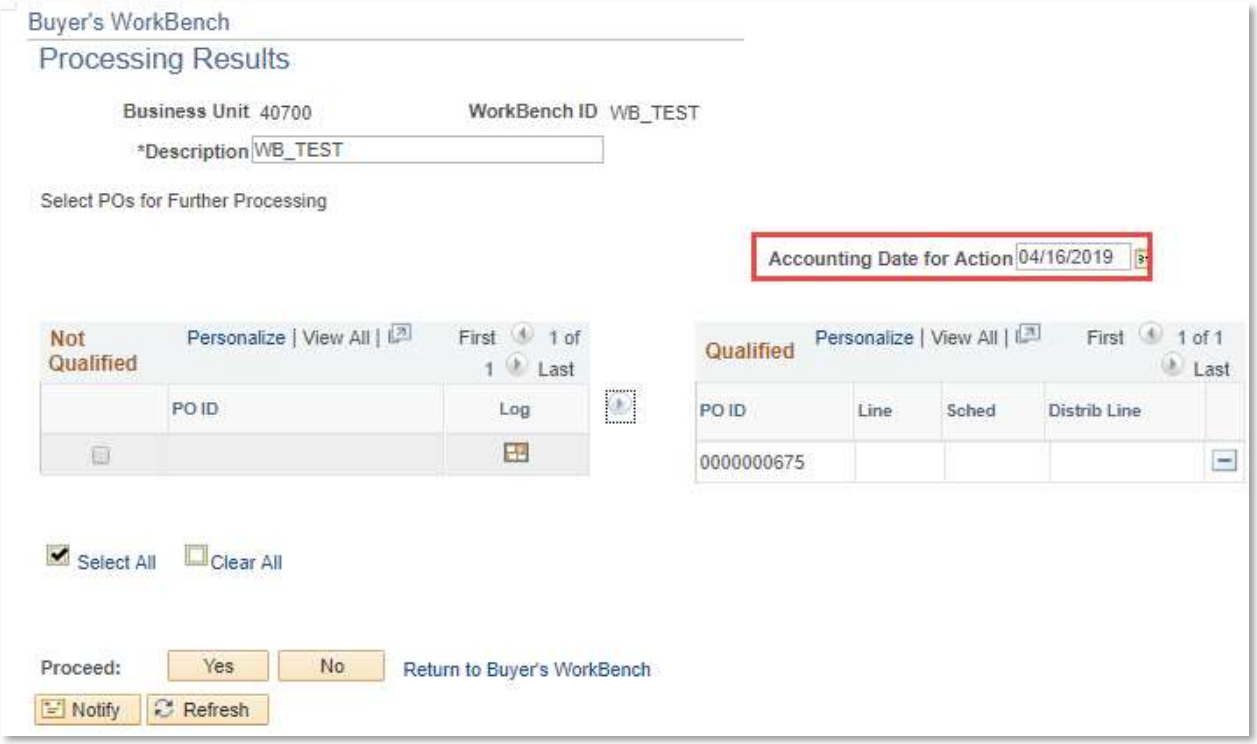


PO ID is moved over to the 'Qualified' box.



The Accounting Date for Action **<u>WILL DEFAULT</u>** to the current date.

If the action is being done when two fiscal years are open, determine the fiscal year that the close/cancel needs to occur in and adjust the accounting date accordingly.

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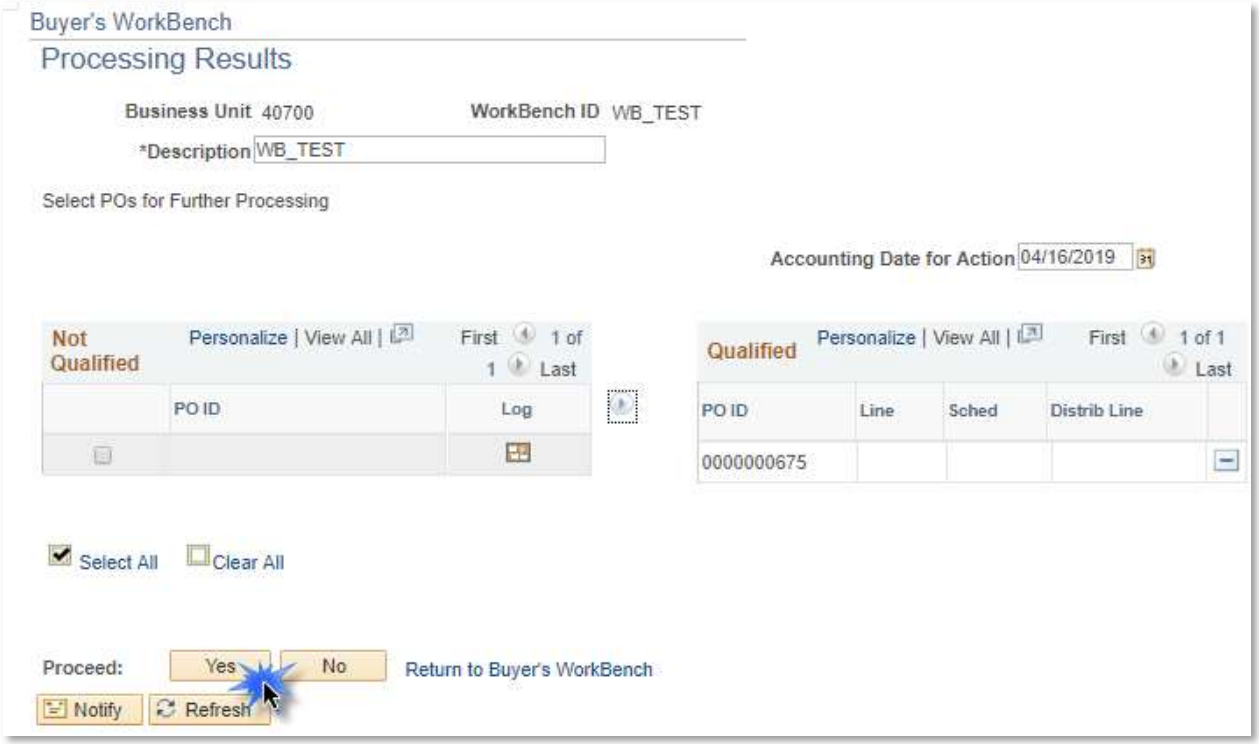
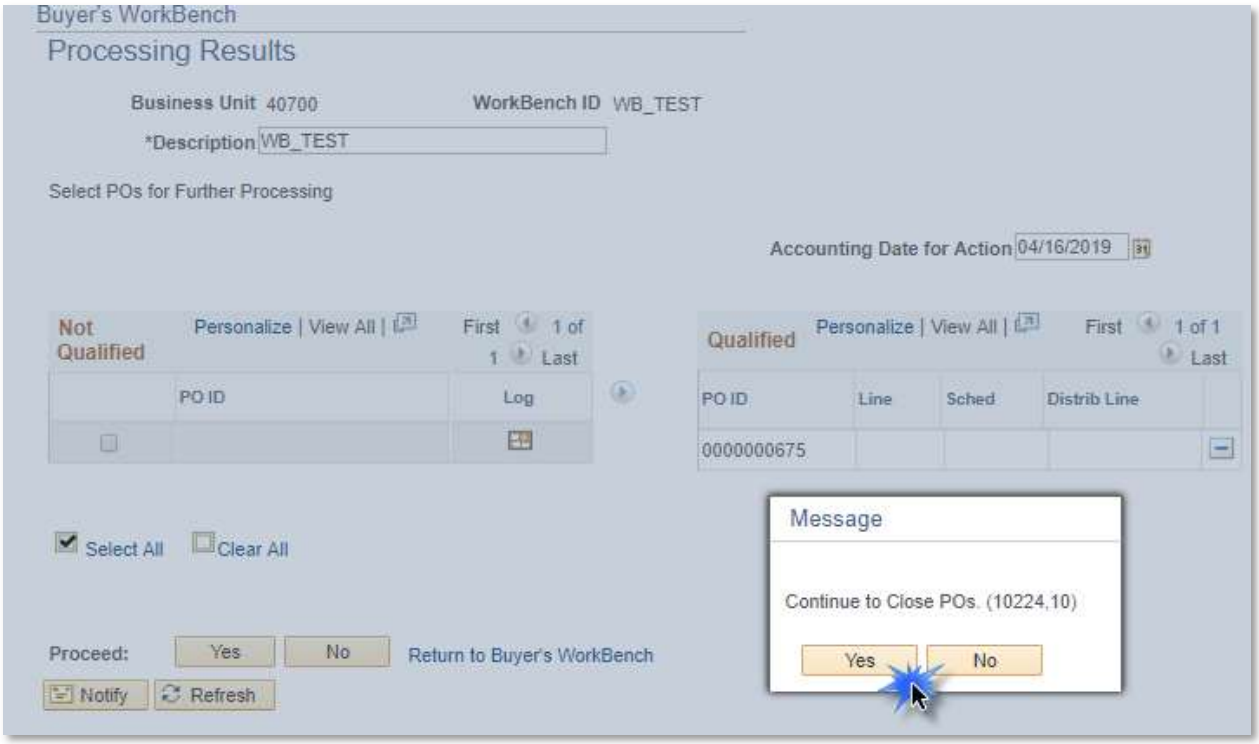


Click on 'Proceed'



Click on 'Yes'

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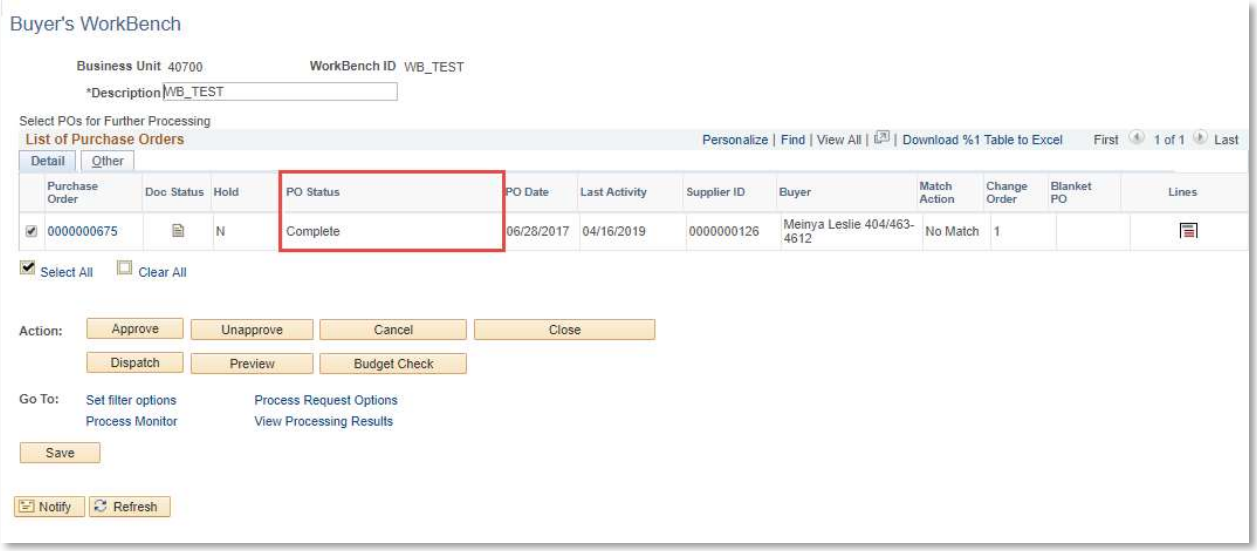

When the close/cancel process is done, the PO Status will update to 'Complete'. Final budget check will run in batch to complete the close/cancel process and update the budget ledgers.