

# 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

The screenshot shows the 'Buyer's WorkBench' search interface. At the top, there are two tabs: 'Find an Existing Value' (selected) and 'Add a New Value'. Below the tabs is a 'Search Criteria' section with a dropdown arrow. The search criteria include: 'Business Unit' with a dropdown set to '=' and a text input field containing '40700'; 'WorkBench ID' with a dropdown set to 'begins with' and an empty text input field; and 'Description' with a dropdown set to 'begins with' and an empty text input field. There is a 'Case Sensitive' checkbox which is unchecked. At the bottom of the search criteria section, there are buttons for 'Search' and 'Clear', followed by a 'Basic Search' icon and a 'Save Search Criteria' link. At the very bottom of the interface, there are links for 'Find an Existing Value' and 'Add a New Value'.

- 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.**

# Buyer's WorkBench

Filter Options Page:

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

Buyer's WorkBench

## Filter Options

Business Unit	40700	WorkBench ID	TEST
Description			
Enter search criteria and click on Search. Leave blank for all values.			
<b>Search Criteria</b>			
Purchase Order	<input type="text" value="000000000"/>	To	<input type="text" value="0001895230"/>
PO Date	<input type="text"/>	To	<input type="text"/>
Activity Date	<input type="text"/>	To	<input type="text"/>
Due Date	<input type="text"/>	To	<input type="text"/>
Request BU	<input type="text"/>	Requisition ID	<input type="text"/>
Supplier ID	<input type="text"/>		
Item ID	<input type="text"/>		
Buyer	<input type="text"/>		
Contract SetID	<input type="text"/>	Contract Version	<input type="text"/>
Contract ID	<input type="text"/>		
Release Number	<input type="text"/>		
GPO ID	<input type="text"/>		
GPO Contract	<input type="text"/>		

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

# Buyer's WorkBench

**Status**

Open       Pending Approval       Approved       Denied  
 Dispatched       Cancelled       Include Closed

**Receiving**

Recv Reqd:

All       Not Received       Partially Received       Fully Received

**Matching**

Required       Not Required       Partial Match       Fully Matched  
 All

**Encumbrance**

Open Encumbrances

**ChartFields**

1-1 of 1 | View All

GL Unit	Account	Fund	Dept	Fund Src	Class	Bud Ref	Product	PC Bus Unit	Project
<input type="text" value=""/>									

[Return to Buyer's WorkBench](#)

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.

# Buyer's WorkBench

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.

Buyer's WorkBench

Business Unit: US001 WorkBench ID: RECON

Description: recon

Select POs for Further Processing

List of Purchase Orders

1-6 of 545 | View 100

Purchase Order	Doc Status	Hold	PO Status	PO Date	Last Activity	Supplier ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input type="checkbox"/> 0000000001		N	Dispatched	07/10/2000	12/15/2016	SCM0000004	Kenneth Schumacher	Standard			
<input type="checkbox"/> 0000000002		N	Dispatched	07/10/2000	10/11/2000	SCM0000004	Blake, Scott	Standard			

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:

List of Purchase Orders

1-6 of 85 | View All

Purchase Order	Doc Status	Hold	PO Status	Procurement Card	Receipt Status	Backorder Status	Budget Status	NP Budget Status	Document Tolerance Status	Go To PO Activity Summary	Edit the PO?
<input type="checkbox"/> 0000001127		N	Dispatched		PO Partially Received	Not Backordered	Valid	Valid Budget Check	Valid		
<input type="checkbox"/> 0000001336		N	Dispatched		PO Partially Received	Not Backordered	Valid	Valid Budget Check	Valid		
<input type="checkbox"/> 0000001385		N	Dispatched		PO Partially Received	Not Backordered	Valid	Valid Budget Check	Valid		

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.

# Buyer's WorkBench

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

1. Select the **Lines** icon.

Business Unit US001 WorkBench ID RECON  
\*Description recon

Select POs for Further Processing

List of Purchase Orders

Purchase Order	Doc Status	Hold	PO Status	PO Date	Last Activity	Supplier ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input checked="" type="checkbox"/> 0000000001		N	Dispatched	07/10/2000	12/15/2016	SCM0000004	Kenneth Schumacher	Standard			<b>1</b>

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

List of Purchase Order Lines

Line	Status	Item ID	Description	Category ID	Recv Reqd	RFQ ID	RFQ Line
<input checked="" type="checkbox"/> 1	Active		Dell Latitude 7440	01448	N		
<input type="checkbox"/> 2	Active		Dell Thunderbolt 4 Dock-WD22TB4	06880	N		

Select All  Clear All

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.

Buyer's WorkBench

Business Unit US001 WorkBench ID RECON  
\*Description recon

Select POs for Further Processing

List of Purchase Orders

Purchase Order	Doc Status	Hold	PO Status	PO Date	Last Activity	Supplier ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input checked="" type="checkbox"/> 0000000001		N	Dispatched	07/10/2000	12/15/2016	SCM0000004	Kenneth Schumacher	Standard			

Select All  Clear All

Action:

Go To:

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

# Buyer's WorkBench

The Processing Results Page:

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

Buyer's WorkBench

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**Processing Results**

Business Unit US001 WorkBench ID RECON  
\*Description fecon

Select POs for Further Processing

**1** Not Qualified

PO ID	Log
<input type="checkbox"/> 0000000001	<b>3</b> 

**2** Qualified

PO ID	Line	Sched	Distrib Line

Select All  Clear All

Proceed:   **5** [Return to Buyer's WorkBench](#)

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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Buyer's WorkBench  
Processing Results

Business Unit 40700 WorkBench ID WB\_TEST  
\*Description WB\_TEST

Select POs for Further Processing

Accounting Date for Action 04/16/2019

Not Qualified Personalize | View All | First 1 of 1 Last

PO ID	Log
0000000675	

Select All  Clear All

Proceed:

Buyer's WorkBench  
Purchase Order Logs

Business Unit 40700 WorkBench ID WB\_TEST  
Description  
PO Number 0000000675

Log Personalize | View All |

Line	Sched	Dist	Message Text
2		1	1 PO lines have not been fully vouchered or finalized

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.

Buyer's WorkBench  
Processing Results

Business Unit 40700 WorkBench ID WB\_TEST  
\*Description WB\_TEST

Select POs for Further Processing

Accounting Date for Action 04/16/2019

Not Qualified Personalize | View All | First 1 of 1 Last

PO ID	Log
0000000675	

Select All  Clear All

Proceed:

Qualified Personalize | View All | First 1-2 of 2 Last

PO ID	Line	Sched	Distrib Line
0000000675	1		
0000000675	3		

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

# Buyer's WorkBench

Buyer's WorkBench  
Processing Results

Business Unit 40700      WorkBench ID WB\_TEST  
\*Description WB\_TEST

Select POs for Further Processing

Accounting Date for Action 04/16/2019

Not Qualified		Qualified			
PO ID	Log	PO ID	Line	Sched	Distrib Line
		0000000675			

Select All     Clear All

Proceed:   [Return to Buyer's WorkBench](#)

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

Buyer's WorkBench  
Processing Results

Business Unit 40700      WorkBench ID WB\_TEST  
\*Description WB\_TEST

Select POs for Further Processing

Accounting Date for Action 04/16/2019

Not Qualified		Qualified			
PO ID	Log	PO ID	Line	Sched	Distrib Line
		0000000675			

Select All     Clear All

Proceed:   [Return to Buyer's WorkBench](#)

The Accounting Date for Action **WILL DEFAULT** 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.

# Buyer's WorkBench

Buyer's WorkBench  
Processing Results

Business Unit 40700      WorkBench ID WB\_TEST  
\*Description WB\_TEST

Select POs for Further Processing

Accounting Date for Action 04/16/2019

Not Qualified		Qualified			
PO ID	Log	PO ID	Line	Sched	Distrib Line
		0000000675			

Select All     Clear All

Proceed:    Yes    No    Return to Buyer's WorkBench

 

Click on 'Proceed'

Buyer's WorkBench  
Processing Results

Business Unit 40700      WorkBench ID WB\_TEST  
\*Description WB\_TEST

Select POs for Further Processing

Accounting Date for Action 04/16/2019

Not Qualified		Qualified			
PO ID	Log	PO ID	Line	Sched	Distrib Line
		0000000675			

Select All     Clear All

Proceed:    Yes    No    Return to Buyer's WorkBench

 

Message

Continue to Close POs. (10224,10)

Yes    No

Click on 'Yes'

# Buyer's WorkBench

Buyer's WorkBench

Business Unit 40700      WorkBench ID WB\_TEST  
\*Description WB\_TEST

Select POs for Further Processing  
List of Purchase Orders      Personalize | Find | View All | | Download %1 Table to Excel      First 1 of 1 Last

Purchase Order	Doc Status	Hold	PO Status	PO Date	Last Activity	Supplier ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input checked="" type="checkbox"/> 0000000675		N	Complete	06/28/2017	04/16/2019	0000000126	Meinya Leslie 404/463-4612	No Match	1		

Select All     Clear All

Action:                  
       

Go To:    [Set filter options](#)    [Process Request Options](#)  
          [Process Monitor](#)        [View Processing Results](#)

  

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.