Buyer’s Workbench Process Overview

The Buyer’s Workbench provides a consolidated location to perform virtually all of the major purchasing processing functions. This includes PO Approval, Dispatch, Cancellation, Budget Check, and Closure of multiple POs at a time. In this way the Buyer’s Workbench can be a very effective tool for making mass changes to POs. For details related to PO Approval, Dispatch, Cancellation, Budget Check, and Closure see the specific Business Process Documents.

<table>
<thead>
<tr>
<th>Process Frequency</th>
<th>The Buyer’s Workbench is used for ad hoc Purchase Order processing for any of the tasks described above.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependencies</td>
<td>The usage of the Buyer’s Workbench is dependent upon the PO entry process.</td>
</tr>
<tr>
<td>Assumptions</td>
<td>It is assumed that the Buyer using the Buyer’s Workbench has the proper Roles, Permission Lists, Buyer setup, and User Preference authorizations.</td>
</tr>
<tr>
<td>Responsible Parties</td>
<td>Campus Buyers are responsible for this process</td>
</tr>
<tr>
<td>Alternate Scenarios</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Process Detail

I. Searching for POs to Process

*Navigation: Purchasing > Purchase Orders > Buyer’s Workbench*
1. Click **Add a New Value** tab
2. Enter *Business Unit* ‘UW***’
3. Enter a *Workbench ID* - any alphanumeric string up to 10 in length with no spaces or special characters
4. Click **Add**
5. Use the many filter options to narrow your search to the list of POs you would like to process.
6. Click **Search**

7. Enter a *Description*

8. From the list of POs returned, **select** the checkbox adjacent to the ones you would like to perform the said action for.
II. Buyer’s WorkBench Actions

a. Approve

1. Click Approve

Proceed: Yes  No  Return to Buyer’s WorkBench
2. **Click** Yes

![Message]

3. **Click** Yes

![Buyer's WorkBench]

4. **Verify** the **PO Status** is ‘Approved’
b. Unapprove

1. Click Unapprove

2. Click Yes
3. Click Yes

4. Verify the PO Status is ‘Open’
c. Preview

1. Click Preview

2. A window will pop-up with the Buyer copy of the PO Dispatch report marked as unauthorized.
d. Dispatch

1. Click Dispatch

   ![Diagram of Buyer's Workbench process request options]

   - Server Name: PSUNIX
   - Run Control ID: PS_PO_DISPATCH_DEFAULT
   - Fax Cover Page: 
   - Output Destination Type: WEB
   - Output Destination Format: PDF

   Click OK
2. **Enter Server Name** ‘PSUNX’
3. **Enter Run Control ID** ‘PS_PO_DISPATCH_DEFAULT’
4. **Select Output Destination Type** ‘WEB’
5. **Select Output Destination Format** ‘PDF’

6. Click **Yes**

7. Click **Yes**
8. Click **Refresh** until the *Distribution Status* is updated to ‘Posted’.

9. **Verify** the *PO Status* is ‘Dispatched’
e. Cancel

1. Click **Cancel**
2. Click Yes

![Message]

Continue to Cancel POs. (10224,11)

[Yes][No]

3. Click Yes

![Buyer's WorkBench]

4. Verify the PO Status is ‘Canceled’

Note: If the PO was Budget Checked prior to Cancel, it will need to be Budget Checked again after the Cancelation process to liquidate the associated encumbrance.
f. Budget Check

1. Click **Budget Check**
2. Click Yes

3. Click Yes

4. Verify the Budget Status is ‘Valid’
g. Close

1. Click **Close**

2. Click **Yes**
3. Click **Yes**

4. Verify the **PO Status** is ‘Complete’

   **Note:** The PO will also need to be Budget Checked after the Close process. See section f, for more information.

**Revision History**

<table>
<thead>
<tr>
<th>Author</th>
<th>Version</th>
<th>Date</th>
<th>Description of Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mark Flemington</td>
<td>1.0</td>
<td>06/20/2013</td>
<td>Initial Draft</td>
</tr>
<tr>
<td>Susan Kincanon</td>
<td>1.1</td>
<td>06/26/203</td>
<td>Final review, edit, format and publish</td>
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