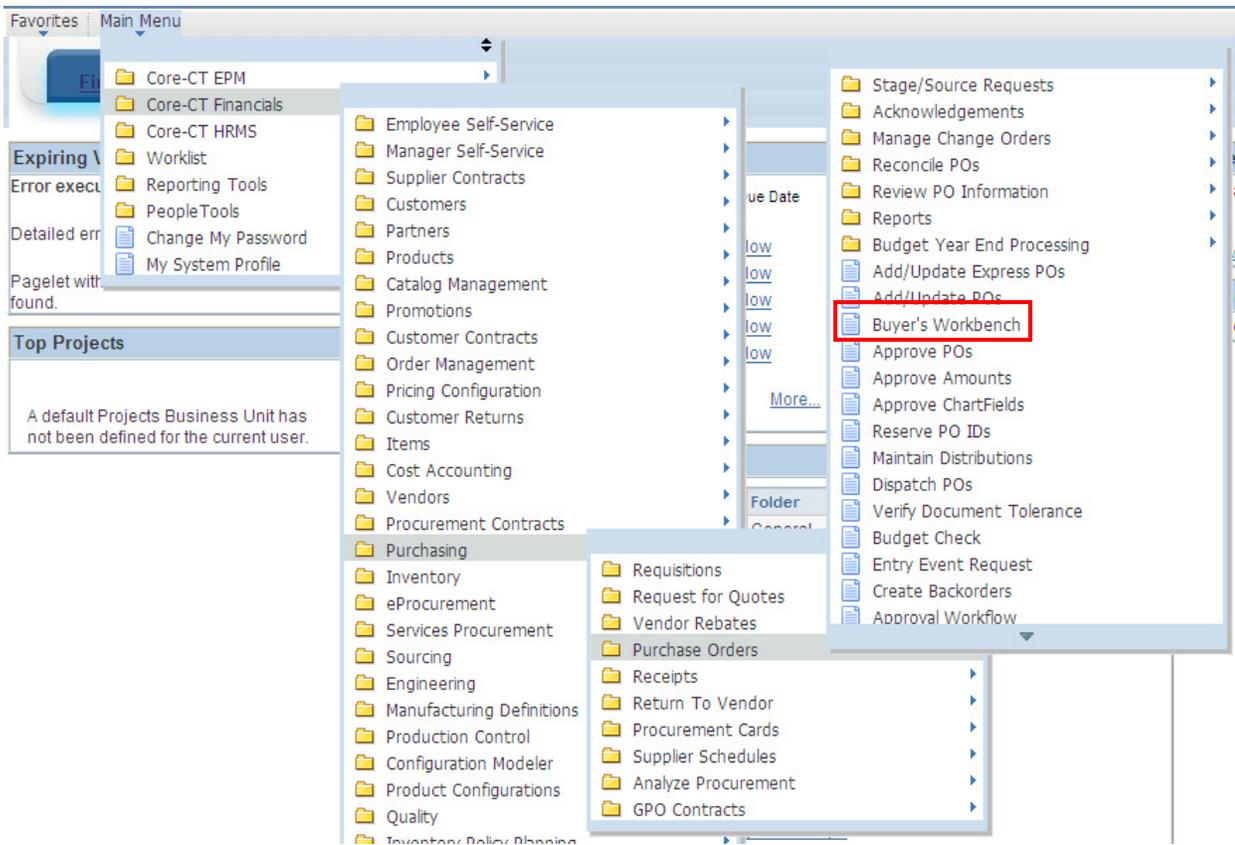# Using Buyer's Workbench

Purpose

Use this procedure to close a purchase order, or group of POs, from the Reconciliation Workbench. By closing a PO, you are asking Core-CT to stop all future processing with the selected purchase orders. This procedure is an Ad-Hoc process which means it is initiated and run by a user with the authority to close POs.

Procedure

1. Navigation: **Main Menu > Core-CT Financials > Purchasing ➔ Purchase Orders ➔ Buyer's Workbench** to display the **Buyer's Workbench** page.

2. Select an existing Workbench ID from the Search Results or create a new ID.

NOTE: When closing PO's for the first time, you MUST create a new Run Control ID.
Click on Add a New Value .

Buyer's WorkBench

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value   Add a New Value

▼ Search Criteria

Business Unit: = ▼   [   ] 🔍
WorkBench ID: begins with ▼ [   ]
Description: begins with ▼ [   ]
☐ Case Sensitive

Search   Clear   Basic Search 📇 Save Search Criteria

When adding a new value, enter a name for your **Workbench ID** (aka run control id) and
click Add .

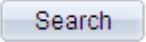## Buyer's WorkBench

Find an Existing Value   Add a New Value

Business Unit: DOBM1 🔍
WorkBench ID: PO_CLOSE

Add

Find an Existing Value | Add a New Value

When adding a new Workbench ID it is advised to leave the Status, Receiving, Matching, Chartfields, and Encumbrances area's blank (nothing checked off). In doing so, you will ensure that all PO's that meet your filter option will show up in your search results. If you wish to narrow your search additional criteria can be selected in those same fields.

To find an existing Workbench ID (containing existing Filter Options criteria): type the applicable information and click Search .

Buyer's WorkBench

Enter any information you have and click Search. Leave fields blank for a list of all values.
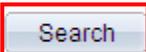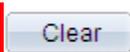
| Find an Existing Value | Add a New Value |

▼ Search Criteria

Business Unit: = ▾ DOBM1 🔍
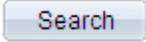WorkBench ID: begins with ▾
Description: begins with ▾
☐ Case Sensitive

Search   Clear   Basic Search 📑 Save Search Criteria

Search Results

View All   First ◀ 1-11 of 11 ▶ Last

Business Unit	WorkBench ID	Description
DOBM1	0000001006	close
DOBM1	061104	061104
DOBM1	06_29_2012	CoreCt closed
DOBM1	4/25/2006	closed
DOBM1	CKCLOSEPO	CLOSE
DOBM1	CKCLOSEREQ	CLOSE
DOBM1	CKRECON	Close
DOBM1	CMHPOCLOSE	CMHPOCLOSE
DOBM1	DDD	Close
DOBM1	FOR_KAREN	close
DOBM1	POCLOSE	Close

Find an Existing Value | Add a New Value

When selecting from an **existing value**, enter any information you have available and click Search . The search results will include all Workbench ID's for your agency that meet your search criteria**.**

Remember the Filter Options can vary between Workbench ID's.

3. The **Reconciliation Workbench - Filter Options** page displays. Workbench IDs are viewable by everyone in the Business Unit who has access to this process. The workbench allows for a wide variety of search features (PO Number, PO Date, Vendor, Buyer, etc). Scan through the criteria in each of the fields to be sure it correctly reflects your desired criteria. Then click on the search button at the bottom of the page.

Buyer's WorkBench
Filter Options

Business Unit: DOBM1   WorkBench ID: PO_CLOSE

Description:

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

Search Criteria

Purchase Order:		To:
PO Date:		To:
Activity Date:		To:
Due Date:		To:
Request BU:		Requisition ID:
Vendor ID:		
Item ID:		
Buyer:		
Contract SetID:		
Contract ID:		Contract Version:
Release Number:		
GPO ID:		
GPO Contract:		

Status

☐ Open   ☐ Pending Appr   ☐ Approved
☐ Dispatched   ☐ Cancelled   ☐ Include Closed

Receiving

Recv Reqd: (Invalid Value)
○ All   ○ Not Received   ○ Partially Received   ○ Fully Received

Matching

☐ Required   ☐ Not Required
○ All   ○ None   ○ Partial Match   ○ Fully Matched

Encumbrance

☐ Open Encumbrances

ChartFields   Personalize | Find | View All | 📷 | 🔳   First ◄ 1 of 1 ► Last

GL Unit	Fund	Dept	SID	Program	Account	ChartField 1	ChartField 2	Bud F

[Search]   Return to Buyer's WorkBench

✉ Notify   ⟳ Refresh

5. The **Buyer's Workbench** page displays. This page shows the results of the search. The key piece of information on this page is the **Last Activity** column. If the last activity is within the last 30 days, the purchase order will not qualify to close. Core CT production support staff may be able to adjust the close day's criteria for your business unit if the activity date is the only obstacle to POs being qualified to close. This will be discussed further later in this document.

If this is a new run control, enter in a **Description** and click [Save].
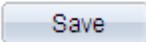
If you are only closing a single PO, select the check box to the left of the purchase order that you want to close from the **List of Purchase Orders** section on the Reconciliation Workbench Page.

Review the list of available purchase orders and select (by selecting the checkbox to the left of the Purchase Order field) the purchase order(s) you want to close from the **List of Purchase Orders** section on the **Buyer's Workbench** Page.

Note: If you did not limit your search to an individual purchase order or to a small number of purchase orders, you may have several pages of purchase orders to review. Click ◀ and ▶ to move forward and backward through the list of displayed purchase orders or you can click View All to see all the purchase orders in the **Buyer's Workbench**.

Buyer's WorkBench

Business Unit: DOBM1   WorkBench ID: PO_CLOSE

*Description: Close PO

Select POs for Further Processing

List of Purchase Orders   Personalize | Find | View 1 | 🔼 | Download   First ◀ 1-18 of 18 ▶ Last

Detail | Other

	Purchase Order	Doc Status	PO Status	Hold	PO Date	Last Activity	Vendor ID	Buyer	Match Action	Change Order	Blanket PO	Lines
☑	0000003632	📄	Dispatched	N	07/27/2011	11/05/2012	0000010011	DOB-Karnilowicz Carol	Standard	8		📋
☑	0000003698	📄	Dispatched	N	07/09/2012	11/01/2012	0000010007	DOB-Zern Karen	Standard	1		📋
☑	0000003700	📄	Dispatched	N	07/11/2012	11/05/2012	0000012808	DOB-Zern Karen	Standard	2		📋
☑	0000003701	📄	Dispatched	N	07/11/2012	11/08/2012	0000010194	DOB-Zern Karen	Standard	1		📋
☑	0000003702	📄	Dispatched	N	07/11/2012	11/08/2012	0000010194	DOB-Zern Karen	Standard	1		📋
☑	0000003714	📄	Dispatched	N	08/29/2012	08/30/2012	0000010573	DOB-Zern Karen	Standard			📋
☑	0000003716	📄	Dispatched	N	09/10/2012	10/19/2012	0000059169	DOB-Zern Karen	Standard	3		📋
☑	0000003717	📄	Dispatched	N	09/11/2012	09/12/2012	0000010011	DOB-Zern Karen	Standard			📋
☑	0000003718	📄	Dispatched	N	09/11/2012	10/11/2012	0000010194	DOB-Zern Karen	Standard			📋
☑	0000003719	📄	Dispatched	N	10/05/2012	10/11/2012	0000128334	DOB-Zern Karen	Standard			📋

☑ Select All   ☐ Clear All

Action: [Approve]   [Unapprove]   [Cancel]   [Close]

         [Dispatch]   [Preview]

Go To: Set filter options   Process Request Options

         Process Monitor   View Processing Results

[Save]

📧 Notify   🔄 Refresh

Then click [Close] to allow the application to validate whether or not the purchase order meets the criteria for closure.

6. The **Processing Results** page shows the results of the process.

To view the details, why this PO did not qualify, click on the **Log** box next to the Purchase Order Number.

The **Purchase Order Log** page will display. In this case, it shows us that this purchase has not been fully matched.

If the only message in the log indicates that the activity date is greater than that allowed, the Core CT Help Desk staff may be contacted to reduce the close days criteria for your business unit.

If this purchase order was qualified for closure you would click on the Proceed (Yes) button and there would be **one final chance to verify that you want to close this purchase order.**

If you have multiple purchase orders**, review** the list of qualified purchase orders to determine that each purchase order in the list **should be closed**. In the event that you have a qualified a purchase order that you **do not want to close**, click [—] associated with that PO. Once you have reviewed each purchase order, continue with this procedure.

NOTE: The Qualified PO displays only two purchase orders. To view all of the POs, click View All.
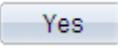
7. Click [Yes] to proceed.

Buyer's WorkBench
Processing Results

Business Unit:	DOBM1	WorkBench ID:	PO_CLOSE
*Description:	Close PO		

Select POs for Further Processing

Accounting Date for Action: 02/25/2013 📅
☑ Update Budget Date Equal to Accounting Date

Not Qualified	Personalize | View All | 🔳 First ◀ 1-2 of 14 ▶ Last
PO ID	Log
0000003632	🖼
0000003698	🖼

Qualified	Personalize | View 2 | 🔳 First ◀ 1-4 of 4 ▶ Last			
PO ID	Line	Sched	Distrib Line	
0000003716				[—]
0000003721				[—]
0000003722				[—]
0000003723				[—]
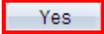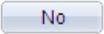
Proceed: [Yes]   [No]   Return to Buyer's WorkBench

[📧 Notify] [🔄 Refresh]

You are prompted with a confirmation message asking you whether or not you would like to continue to close. Click ▢ Yes ▢ to confirm that you would like to continue with the process to close the qualified purchase orders. Core-CT may take a few moments to process this request.

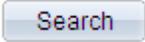When the process is finished, the Buyer's Workbench will reappear. The status of the qualified POs should read **Complete**.

The purchase order(s) will be picked up and processed for the final budget check in the next scheduled batch process for budget check. The purchase order will be available for review using:

Navigation: Main Menu > Core-CT Financials > Purchasing > Purchase Orders> Review PO Information > Purchase Orders

Additional Information

- Use at least one of the fields on the **Buyer's Workbench - Filter Options** page to limit the number of purchase orders that display in the Reconciliation Workbench. Once you have utilized the desired search filters, click Search to execute your search and to populate the Reconciliation Workbench with the POs that match your search parameters.

- From the **Buyer's Workbench**, you can select multiple purchase orders. Once selected, you can request that Core-CT process the selected purchase orders as a group. By clicking Close , Core-CT automatically closes the selected purchase orders and all associated PO lines. In the event that a PO has been successfully processed through the Buyer's Workbench (i.e. PO Status reads complete as on the screenshot above), but when viewing the PO document either the PO lines or header do not read Complete or Closed, please contact the Help Desk for information.

Updated: 01/03/2013