






LOCATING AND CLOSING POs THAT HAVE HAD NO ACTIVITY FOR A PERIOD OF TIME.


Navigation: Purchasing > Purchase Orders > Buyer's Workbench


NavBar: Menu 


P

 Recently Visited

-  PeopleTools >
-  Procurement Contracts >
-  **Purchasing** >



 Favorites


NavBar: Menu 


 Recently Visited


Menu

Purchasing

-  Analyze Procurement >
-  **Purchase Orders** >







 Favorites


NavBar: Menu 


 Recently Visited


Menu > Purchasing

Purchase Orders

-  Add/Update Express POs
-  Add/Update POs
-  Approval Workflow PO
-  Approve Amounts PO
-  Budget Check Purchase Order
-  **Buyer's Workbench**

 Favorites

 **Menu**

 Expenses

Once at the **Buyer's Workbench**, enter your workbench ID and select **Search**. If you don't have a workbench ID, or don't know yours, selecting search will display a list of IDs already created.

Buyer's WorkBench

Enter any information you have and click Search. Leave fields blank for

Find an Existing ValueAdd a New Value

▼ Search Criteria

*Business Unit = ▼ 12500 🔍

WorkBench ID begins with ▼ Enter workbench ID

Description begins with ▼

Case Sensitive

SearchClearBasic Search Save Search Criteria

To create a workbench ID, select the **Add a New Value** tab, type in an ID of your choosing and select **Add**. (The Workbench ID is just a text field and will not accept spaces.)

Buyer's WorkBench

Find an Existing ValueAdd a New Value

*Business Unit 12500 🔍

*WorkBench ID ↙ Type your description

Add

The **Filter Options** screen is where you tell PeopleSoft what you are looking for.

To find POs that have not be used since a specific date, in the **Activity** row, leave the first field blank and enter a date in the **To** field on the **Search Criteria** section of the page.

Buyer's WorkBench

Filter Options

Business Unit 12500

WorkBench ID CLOSE PO

Description Close PO No Actv

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

Search Criteria

Purchase Order	<input type="text"/>	To	<input type="text"/>
PO Date	<input type="text"/>	To	<input type="text"/>
Activity Date	<input type="text" value="Leave blank"/>	To	<input type="text" value="01/01/2019"/>
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 ID	<input type="text"/>	Contract Version	<input type="text"/>
Release Number	<input type="text"/>		
GPO ID	<input type="text"/>		
GPO Contract	<input type="text"/>		

This will give you all POs that have not been touched since 01/02/2019 (for this example).

In the **Status** and **Receiving** sections of the page, enter the following criteria to filter out those POs that have already been closed or canceled.

Status

- Open
- Dispatched

- Pending Approval for more than
- Cancelled

Days

- Approved
- Include Closed

Denied

Receiving

Recv Reqd

All

Not Received

Partially Received

Fully Received

To find POs that are not closed or canceled and have not been touched since 01/01/2019, your page will have the following fields populated and then you select **Search** at the bottom of the screen.

Buyer's WorkBench

Filter Options

Business Unit 12500 WorkBench ID CLOSE PO

Description Close PO No Actvy

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

Search Criteria

Purchase Order	<input type="text"/>	To	<input type="text"/>
PO Date	<input type="text"/>	To	<input type="text"/>
Activity Date	<input type="text"/>	To	01/01/2019
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 Version	<input type="text"/>
Contract SetID	<input type="text"/>		
Contract ID	<input type="text"/>		
Release Number	<input type="text"/>		
GPO ID	<input type="text"/>		
GPO Contract	<input type="text"/>		

Status

- Open
- Pending Approval for more than Days
- Approved
- Denied
- Dispatched
- Cancelled
- Include Closed

Receiving

Recv Reqd

- All
- Not Received
- Partially Received
- Fully Received

Matching

- Required
- Not Required
- All
- None
- Partial Match
- Fully Matched

Encumbrance

- Open Encumbrances

ChartFields

<input type="text"/> 1-1 of 1									
Chartfields									
GL Unit	Account	Alt Acct	Oper Unit	Fund Type	Dept	Program	Class-Funding	Bud Ref	Sub-Acco
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

[Search](#)

[Return to Buyer's WorkBench](#)

Your results will look like this.

****Note – be sure to select View 100 to see the first 100 POs of your search.****

Buyer's WorkBench

Business Unit 12500 WorkBench ID CLOSE PO
*Description Close PO No Actby

Select POs for Further Processing

List of Purchase Orders

1-6 of 139 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"/>	1259000962		Y	Open	06/28/2016	06/28/2016	0000000090	Donna Ward	Standard			
<input type="checkbox"/>	1259000852		N	Dispatched	02/12/2014	07/21/2016	0000278261	Donna Ward	Standard			
<input type="checkbox"/>	1259000851		N	Dispatched	01/29/2014	01/16/2015	0000000240	Donna Ward	Standard	2		
<input type="checkbox"/>	1259000814		N	Dispatched	07/16/2013	06/03/2015	0000001100	Donna Ward	No Match	7		
<input type="checkbox"/>	1259000256		N	Dispatched	02/22/2007	06/16/2016	0000029755	Donna Ward	Standard	24		
<input type="checkbox"/>	1259000318		N	Dispatched	08/20/2007	09/04/2015	0000264399	Suzen Rodesney	Standard	44		

Select All Clear All

Action:

Go To:

You can also download this information to an Excel spreadsheet by selecting the spreadsheet icon and then choosing **Download List of Purchase Orders Table to Excel**.

List of Purchase Orders

Personalize
Zoom List of Purchase Orders
Download List of Purchase Orders Table to Excel

PO Status
Open

Choose the **Select All** link and then select **Close**.

List of Purchase Orders

Detail Approval Other

	Purchase Order	Doc Status	Hold	PO Status	PO Date	Last Activity	Supplier ID	Buyer	Match Action	Chan Order
<input checked="" type="checkbox"/>	1259000962		Y	Open	06/28/2016	06/28/2016	0000000090	Donna Ward	Standard	
<input checked="" type="checkbox"/>	1259000852		N	Dispatched	02/12/2014	07/21/2016	0000278261	Donna Ward	Standard	
<input checked="" type="checkbox"/>	1259000851		N	Dispatched	01/29/2014	01/16/2015	0000000240	Donna Ward	Standard	2
<input checked="" type="checkbox"/>	1259000814		N	Dispatched	07/16/2013	06/03/2015	0000001100	Donna Ward	No Match	7
<input checked="" type="checkbox"/>	1259000256		N	Dispatched	02/22/2007	06/16/2016	0000029755	Donna Ward	Standard	24
<input checked="" type="checkbox"/>	1259000318		N	Dispatched	08/20/2007	09/04/2015	0000264399	Suzen Rodesney	Standard	44

Select All Clear All

Action: Approve Unapprove Cancel Close

Dispatch Preview Budget Check

Go To: Set filter options Process Monitor Process Request Options View Processing Results

Save

To see all of you results, select **View All**. You can select **View 100** if there are more than 100 results.

Buyer's WorkBench

Processing Results

Business Unit 12500

WorkBench ID CLOSE PO

Description Close PO No Actvy

Select POs for Further Processing

Accounting Date for Action 01/26/2022

Update Budget Date Equal to Accounting Date

Not Qualified

1-2 of 23

[View All](#)

	PO ID	Log
<input type="checkbox"/>	1259000256	
<input type="checkbox"/>	1259000626	

Qualified

1-2 of 149

[View 100](#)

PO ID	Line	Sched	Distrib Line
1259000256	1		
1259000256	2		

Select All Clear All

Proceed:

Yes

No

[Return to Buyer's WorkBench](#)

[Notify](#)

[Refresh](#)

Notice not everything is eligible in the **Qualified** section of the screen. Choose **Select All** and then the Override icon.

Override icon

Not Qualified

1-2 of 23 | View All

	PO ID	Log
<input checked="" type="checkbox"/>	1259000256	
<input checked="" type="checkbox"/>	1259000626	

Select All Clear All

Qualified

1-2 of 149 | View 100

PO ID	Line	Sched	Distrib Line	
1259000256	1			
1259000256	2			

If one or more POs don't move from the **Not Qualified** section to **Qualified** section, you can select the Log icon to see why. In this example, the PO is on hold and can't be closed until the **Hold** box is deselected from the **Add/Update PO** screen. Once satisfied, select **Yes** to proceed.

Update Budget Date Equal to Accounting Date

Not Qualified

1-1 of 1 | View All

	PO ID	Log
<input type="checkbox"/>	1259000962	

Select All Clear All

Qualified

1-2 of 138 | View 100

PO ID	Line	Sched	Distrib Line	
1259000318				
1259000793				

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

After you select **Yes** to proceed you will receive a confirmation to close. Select **Yes**.

Purchase Order Logs

Business Unit 12500

WorkBench ID CLOSE PO

Description

PO Number 1259000962

Log

1-1 of 1 | View All

Line	Sched	Dist	Message Text
			The Purchase Order is on Hold From Further Processing.

[Return](#)

Your POs will be closed and will budget check in the overnight process to release any remaining balances.