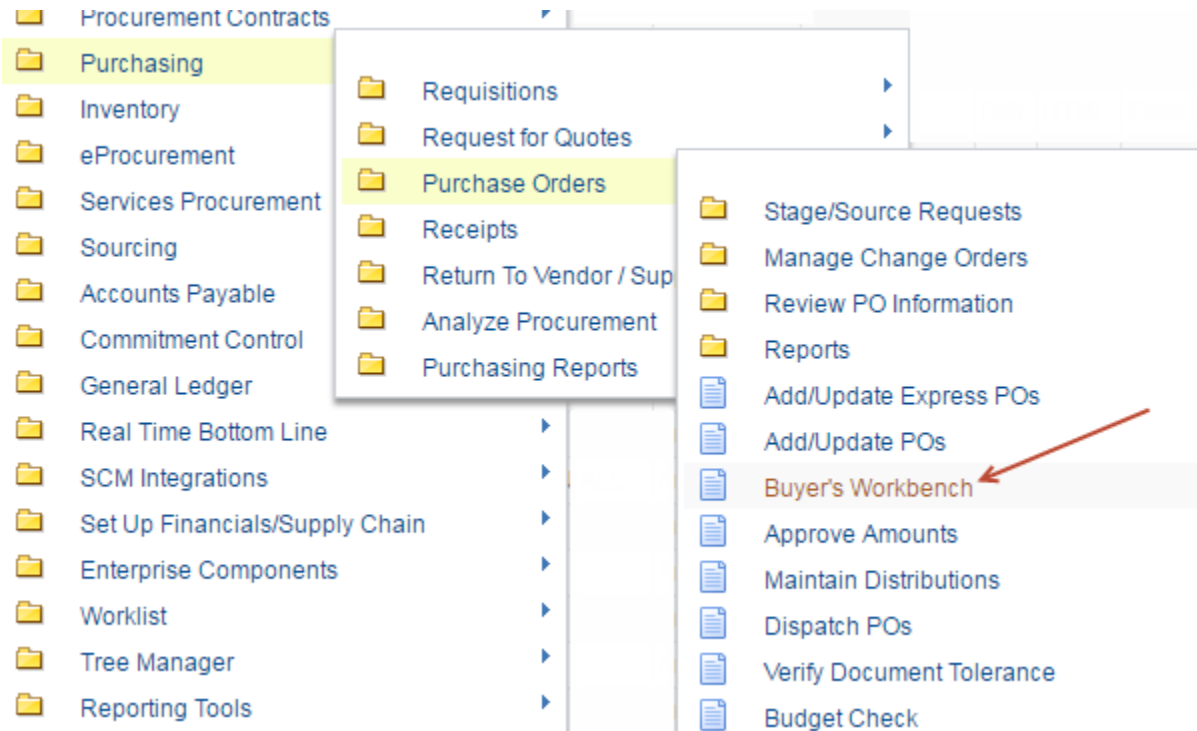




**Locating and closing POs that have had no activity for a period of time.**

Navigation: Purchasing > Purchase Orders > Buyer's Workbench



Once at the Buyer's Workbench, enter your WorkBench ID and select Search. If you don't know or have a WorkBench ID, selecting Search will display a list of existing IDs.

## Buyer's WorkBench

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

▼ Search Criteria

Business Unit: [= ▼] 12500


WorkBench ID: [begins with ▼] Enter workbench ID


Description: [begins with ▼]

Case Sensitive

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

## Buyer's WorkBench

Business Unit:  

WorkBench ID:   Type your description



The **Filter Options** screen is where you define your search parameters in PeopleSoft.

To find POs that have not been used since a specific date, enter that timeframe in the **Activity Date To** field in the **Search Criteria** section of the page:












## Filter Options

Business Unit 09000      WorkBench ID CLOSE\_PO

Description CLOSE PO

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	<input type="text" value="12/31/2015"/>	
Due Date	<input type="text"/>		To	<input type="text"/>	
Request BU	<input type="text"/>		Requisition ID	<input type="text"/>	
Supplier ID	<input type="text"/>				

This will give you all POs that have not been touched since 12/31/2015.

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

GPO ID

GPO Contract

**Status**

Open       Pending Appr       Approved       Denied

Dispatched       Cancelled       Include Closed

**Receiving**

Recv Reqd

All       Not Received       Partially Received       Fully Received

**Matching**

# Filter Options

Business Unit 12500

WorkBench ID CLOSE PO

Description Close PO No Acty

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	09/30/2015
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"/>		

## Status

<input checked="" type="checkbox"/> Open	<input checked="" type="checkbox"/> Pending Appr	<input checked="" type="checkbox"/> Approved	<input checked="" type="checkbox"/> Denied
<input checked="" type="checkbox"/> Dispatched	<input type="checkbox"/> Cancelled	<input type="checkbox"/> 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

Personalize | Find | View All | First 1 of 1 Last

### Chartfields

GL Unit	Account	Sub-Account	Fund Type	Class-Funding	Dept	Bud Ref	CFDA#	Program	PC
<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"/>

[Return to Buyer's WorkBench](#)

To find POs that are not closed or canceled and have not been touched since 12/31/2014, your page will have the following fields populated. When you select **Search**, your results will look like this: **(Note: Be sure to select **View All** to see all of your search results.)**

Buyer's WorkBench

Business Unit 12500 WorkBench ID CLOSE PO  
 \*Description Close PO No Actvy

Select POs for Further Processing

List of Purchase Orders Personalize | Find | View All | **Download** | First 1 of 97 Last

Purchase Order▲	Doc Status	PO Status	Hold	PO Date	Last Activity	Supplier ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input type="checkbox"/> 1259000446		Dispatched	N	09/09/2008	07/24/2014	0000000978	Donna Ward	Standard	12		

Select All  Clear All

Action:

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

You can also download this information to an Excel spreadsheet by selecting **Download**.

Select POs for Further Processing

List of Purchase Orders Personalize | Find | View 1 | **Download** | First 1-97 of 97 Last

Purchase Order▲	Doc Status	PO Status	Hold	PO Date	Last Activity	Supplier ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input type="checkbox"/> 1259000446		Dispatched	N	09/09/2008	07/24/2014	0000000978	Donna Ward	Standard	12		
<input type="checkbox"/> 1259000467		Dispatched	N	11/07/2008	09/26/2014	0000000390	Donna Ward	Standard	21		
<input type="checkbox"/> 1259000614		Dispatched	N	08/06/2010	11/20/2013	0000001100	Donna Ward	No Match	8		
<input type="checkbox"/> 1259000616		Dispatched	N	08/12/2010	11/18/2013	0000054823	Donna Ward	Standard	8		
<input type="checkbox"/> 1259000631		Dispatched	N	09/21/2010	06/19/2013	0000069316	Donna Ward	Standard	6		
<input type="checkbox"/> 1259000632		Dispatched	N	09/21/2010	06/19/2013	0000069316	Donna Ward	Standard	4		
<input type="checkbox"/> 1259000633		Dispatched	N	09/21/2010	06/19/2013	0000069316	Donna Ward	Standard	5		
<input type="checkbox"/> 1259000634		Dispatched	N	09/21/2010	06/20/2013	0000069316	Donna Ward	Standard	5		
<input type="checkbox"/> 1259000698		Dispatched	N	07/28/2011	11/15/2013	0000001101	Donna Ward	No Match	8		
<input type="checkbox"/> 1259000699		Dispatched	N	07/28/2011	11/20/2013	0000001100	Donna Ward	No Match	13		

Select All  Clear All

Action:

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

Choose **Select All** and then **Close**.

### Buyer's WorkBench

Business Unit 12500 WorkBench ID CLOSE PO  
 \*Description Close PO No Actvy

Select POs for Further Processing

List of Purchase Orders Personalize | Find | View 1 | Download First 1-97 of 97 Last

Purchase Order	Doc Status	PO Status	Hold	PO Date	Last Activity	Supplier ID	Buyer	Match Action	Change Order	Blanket PO	Lines
<input checked="" type="checkbox"/> 1259000446	Doc Status	Dispatched	N	09/09/2008	07/24/2014	0000000978	Donna Ward	Standard	12		
<input checked="" type="checkbox"/> 1259000467	Doc Status	Dispatched	N	11/07/2008	09/26/2014	0000000390	Donna Ward	Standard	21		
<input checked="" type="checkbox"/> 1259000614	Doc Status	Dispatched	N	08/06/2010	11/20/2013	0000001100	Donna Ward	No Match	8		
<input checked="" type="checkbox"/> 1259000616	Doc Status	Dispatched	N	08/12/2010	11/18/2013	0000054823	Donna Ward	Standard	8		
<input checked="" type="checkbox"/> 1259000631	Doc Status	Dispatched	N	09/21/2010	06/19/2013	0000069316	Donna Ward	Standard	6		
<input checked="" type="checkbox"/> 1259000632	Doc Status	Dispatched	N	09/21/2010	06/19/2013	0000069316	Donna Ward	Standard	4		
<input checked="" type="checkbox"/> 1259000633	Doc Status	Dispatched	N	09/21/2010	06/19/2013	0000069316	Donna Ward	Standard	5		
<input checked="" type="checkbox"/> 1259000634	Doc Status	Dispatched	N	09/21/2010	06/20/2013	0000069316	Donna Ward	Standard	5		
<input checked="" type="checkbox"/> 1259000698	Doc Status	Dispatched	N	07/28/2011	11/15/2013	0000001101	Donna Ward	No Match	8		
<input checked="" type="checkbox"/> 1259000699	Doc Status	Dispatched	N	07/28/2011	11/20/2013	0000001100	Donna Ward	No Match	13		

Select All  Clear All

Action:

To see all of your results, select **View All**, **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 03/16/2017

Update Budget Date Equal to Accounting Date

Not Qualified	Personalize	View All	First	1-2 of	Last
<input type="checkbox"/>			11	11	

Qualified	Personalize	View 100	First	1-2 of	Last
<input type="checkbox"/>			107	107	

PO ID	Line	Sched	Distrib Line
1259000446			
1259000467	4		

Select All  Clear All

Proceed:   Return to Buyer's WorkBench

Notice not everything is eligible. Choose **Select All** and then the override button.

Buyer's WorkBench

## Processing Results

Business Unit 12500

WorkBench ID CLOSE PO

\*Description

Select POs for Further Processing

Override button

Accounting Date for Action

Update Budget Date Equal to Accounting Date

Not Qualified		
Personalize   View 2		
First 1-11 of 11 Last		
	PO ID	Log
<input checked="" type="checkbox"/>	1259000467	
<input checked="" type="checkbox"/>	1259000616	
<input checked="" type="checkbox"/>	1259000698	
<input checked="" type="checkbox"/>	1259000699	
<input checked="" type="checkbox"/>	1259000753	
<input checked="" type="checkbox"/>	1259000754	
<input checked="" type="checkbox"/>	1259000790	
<input checked="" type="checkbox"/>	1259000809	
<input checked="" type="checkbox"/>	1259000823	
<input checked="" type="checkbox"/>	1259000855	
<input checked="" type="checkbox"/>	1259000864	



Qualified				
Personalize   View 2				
First 1-100 of 107 Last				
PO ID	Line	Sched	Distrib Line	
1259000446				
1259000467	4			
1259000467	3			
1259000467	5			
1259000467	1			
1259000467	2			
1259000614				
1259000616	3			
1259000616	2			
1259000631				
1259000632				
1259000633				
1259000634				
1259000699	2			
1259000699	3			

**Select All**  Clear All

Proceed:

[Return to Buyer's WorkBench](#)

Select **Yes** to proceed.

Buyer's WorkBench

## Processing Results

Business Unit 12500

WorkBench ID CLOSE PO

\*Description

Select POs for Further Processing

Accounting Date for Action

Update Budget Date Equal to Accounting Date

Not Qualified	Personalize   View 2	First 1 of 1 Last
	PO ID	Log
<input type="checkbox"/>		

Qualified	Personalize   View 2	First 1-97 of 97 Last		
PO ID	Line	Sched	Distrib Line	
1259000446				
1259000614				
1259000631				
1259000632				
1259000633				
1259000634				
1259000704				
1259000729				
1259000742				
1259000749				
1259000750				
1259000751				
1259000755				
1259000757				
1259000758				

Select All  Clear All

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

When you receive a confirmation to close, choose **Yes**.

Continue to Close POs. (10224,10)

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