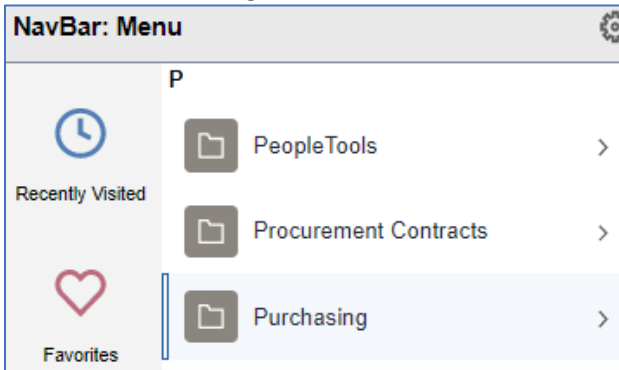
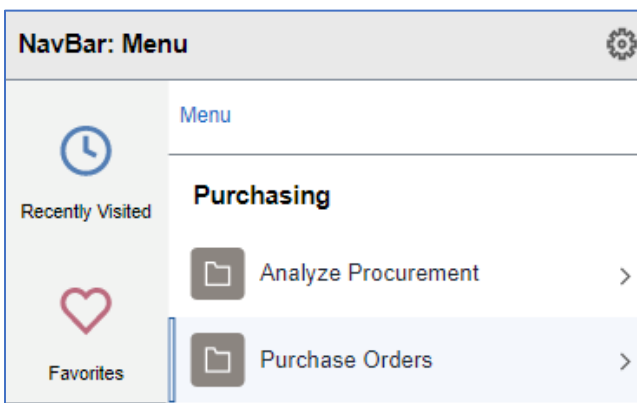


## LOCATING AND CLOSING POs THAT HAVE HAD NO ACTIVITY FOR A PERIOD OF TIME.

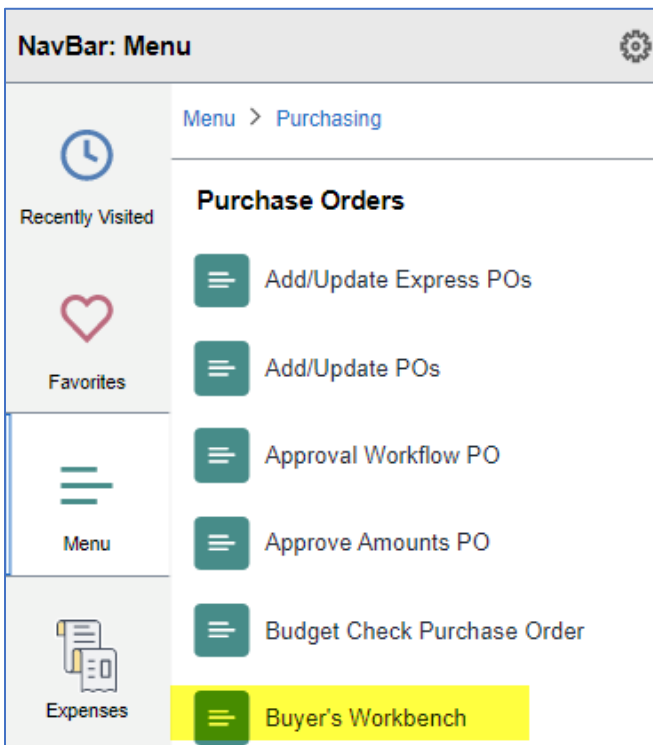
**Navigation:** Purchasing > Purchase Orders > Buyer's Workbench  
**Select** the Purchasing icon in the menu.



On the next screen, **select** Purchase Order.



**Select** the Buyer's Workbench icon from the Purchase Orders menu.



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 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](#)

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 Value](#) [Add a New Value](#)

\*Business Unit  🔍

\*WorkBench ID  Type your description

[Add](#)

The Filter option 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 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	Leave blank <input type="text"/>	To	01/01/2019 <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"/>		

This will give you all POs that have not been touched since 01/02/2019 9 (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  Pending Approval for more than  Days  Approved  Denied  
 Dispatched  Cancelled  Include Closed

**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  To   
 PO Date  To   
 Activity Date  To 01/01/2019  
 Due Date  To   
 Request BU  Requisition ID   
 Supplier ID   
 Item ID   
 Buyer   
 Contract SetID   
 Contract ID  Contract Version   
 Release Number   
 GPO ID   
 GPO Contract

**Status**

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

**Receiving**

Recv Req

All  Not Received  Partially Received  Fully Received

**Matching**

Required  Not Required  Partial Match  Fully Matched  
 All  None

**Encumbrance**

Open Encumbrances

**ChartFields**

1-1 of 1

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"/>

[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

Select POs for Further Processing

List of Purchase Orders

1-6 of 139 [View 100](#)

Detail    Approval    Other

	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 Request Options Process Monitor 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	

Select All  Clear All

Qualified 1-2 of 149 View 100

PO ID	Line	Sched	Distrib Line
1259000256	1		
1259000256	2		

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

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

Qualified

1-2 of 138

View 100

PO ID	Line	Sched	Distrib Line	
1259000318				
1259000793				

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

### Purchase Order Logs

Business Unit 12500

Description

PO Number 1259000962

WorkBench ID CLOSE PO

Log

1-1 of 1

View All

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

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