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PO.030.020 - Using Sourcing WB for Req Select, PO Calc & Create Trigger:

Concept

This topic demonstrates how to use the PO Sourcing Workbench, including Requisition Selection, correcting any errors that may exist, and running the PO Calculations and PO Create processes in order to create Purchase Orders.

Institutions should review the Sourcing Workbench on a daily basis to ensure there are no Requisitions in Error status. The Sourcing Workbench enables you to view transactions in the PO staging tables to analyze them before and after sourcing has been completed. You can view rows for transactions that have been rejected during the sourcing process and correct the errors. Transactions can be viewed by rows and subsets of rows.

Topic Objectives:
Upon completion of this topic, you will be able to:
- Explain the benefit of the Sourcing Workbench.
- Identify the status of a Purchase Order that indicates it has been successfully run through the PO Calculations process.

Assumptions

Dependencies/Constraints

Additional Information

Procedure

In the following scenario, you will first see how to search for requisitions available for sourcing to purchase orders.

Next, you will search for Purchase Orders that were created by searching on a Process Instance, and then search by specifying the Stage Status of Error. You will determine that a purchase order could not be created because there was no vendor assigned to the requisition. You will assign Dell as the vendor and run the Purchase Order through the PO Calc process.

Once you have run the PO Calc process, you will navigate to the Workbench to view the status of the Requisition. You will verify the Requisition is in Ready status, and then run the PO Create process to create a Purchase Order from the Requisition.

Finally, you will return to the Workbench to verify the Purchase Order status is Completed.

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