

Sourcing Workbench: After Expediting Req. Nothing Happened

If you have expedited a requisition, but it never shows up in your “Manage Purchase Orders” screen, it is likely stuck in the sourcing tables; simply put, there is an error preventing the system from creating a PO (maybe AP is updating the Supplier ID and the ID is temporarily unavailable, or the contract max amount would be exceeded, etc.). Below is information on using the Sourcing Workbench.

- Go to the following page:


Main Menu > Purchasing > Purchase Orders > Stage/Source Requests > Sourcing Workbench

- Once there, you will select various “Stage Status” options (most of the time they are under “Error”, so that is a good place to start):

Sourcing Workbench

Sourcing

The screenshot shows the Sourcing Workbench interface. At the top, there is a navigation breadcrumb: Main Menu > Purchasing > Purchase Orders > Stage/Source Requests > Sourcing Workbench. Below this is the "Sourcing" section with a "Search Criteria" form. The form has two columns of input fields. The left column includes: Process Instance, Business Unit, Requisition ID, Requisition Name, Buyer, Contract SetID, and Contract ID. The right column includes: System Source, PO Stage Type, PO Stage ID, Stage Status (set to "Error"), Item ID, Line Number, and Schedule Number. A dropdown menu is open for the "Stage Status" field, showing options: Completed, Error (highlighted), Error Recycle, In Process, Inv Demand Build in Process, Needs Approval, PO Create in Process, POCALC in Process, Ready to Create, Reset Req and Purge, Staged, and Warning Issued. Below the search criteria is a "Search" button. Underneath is the "Search Results" section with tabs for "Selected Items", "Stage Info", and "Error Messages". The "Error Messages" tab is active, showing a table with columns: Sel, Instance, *Stg Status, Unit, Buyer, Supplier ID, Loc, Item ID, Position ID, and Purchase Order. Two rows are visible in the table. The first row has Instance 315683, Stg Status Error, Unit SLC01, Buyer Jerry Vaculin, Supplier ID 0000005936, Loc 01, Item ID Copier maintenance for 09/16/1, Position ID 0000022857, and Purchase Order UNASSIGNED. The second row has Instance 278187, Stg Status Error, Unit SLC01, Buyer Jenny L. Jones, Supplier ID 0000003123, Loc 01, Item ID fuel, Position ID 0000020147, and Purchase Order UNASSIGNED. A small icon is visible next to the "Error" status in the first row.

- Once you find your name/req. click on the  icon to get the details of the error. Here is an example:

PO ID UNASSIGNED

Message Either the quantity or amount being sourced is more than the open quantity or amount of the Requisition.

- After seeing what the error detail is, simply click “Return to Sourcing Page” toward the top of the screen:

Sourcing Details

[Return to Sourcing Page](#)

Process Instance 315679

- Click on the box to the left of the “Instance” number, then click “Purge” followed by “Save”:

Search

Search Results

Selected Items | Stage Info | Error Messages

Sel	Instance		*Stg Status	Unit	Buyer▲	Supplier ID	Loc	Item ID
<input checked="" type="checkbox"/>	278187		Error ▼	SLC01	Jenny L. Jones	0000003123	01	Item
<input type="checkbox"/>	315679		Error ▼	SLC01	Jerry Vaculin	0000004896	01	Item

Select All
 UnSelect All

This will kick it back to your “Expedite Requisitions” screen and allow you to re-source to a PO once the error is resolved. (Note: if the error is that the contract maximums would be exceeded, please get in touch with Tiggy, Contracts Administrator, at acarlson@slco.org to verify that the amounts in PeopleSoft for the contract are correct and the best way to proceed)