Sourcing Workbench

This job aid describes the process PRS will follow to assign a vendor to a requisition when the requester has submitted it without a vendor. This causes the requisition to fail batch PO sourcing. The requisition cannot be pushed back to the department or school by PRS if it has been picked up in the sourcing process without a vendor. Once PRS assigns a vendor to the requisition the sourcing process must be re-run.

Assign Vendor ID

1. From the Menu, click Purchasing → Purchase Orders → Stage/Source Requests → Sourcing Workbench

2. Enter the Business Unit: “NWUNV”.

3. Select Stage Status: “Error” from drop-down menu.

4. Click Search.

5. Requisitions with sourcing errors are displayed. Click the Sourcing Details icon for the desired Requisition to correct.
6. Click and uncheck “Let POCalc Override Vendor?”

7. Enter Staged Vendor and Vendor Location if known or click Vendor Search.

8. Enter Vendor Search Criteria and click Search.

9. Click Select checkbox of desired vendor. Optionally, click Vendor Detail and Address to view.

10. Click OK.
11. When **Staged Vendor** and **Vendor Location** are entered, click **Save**.

12. You are returned to the Sourcing Workbench and the **Staged Status** is now set to “Recycle” for the requisition you corrected.
Re-Run Sourcing Process

**PO Calculations** - The PO Calculations Application Engine process (PO_POCALC) performs most of the processing necessary to create a purchase order. After running the PO Calculations process, you can review the results of the process and make changes using the Sourcing Workbench - Sourcing page before the purchase order is created. After you run the PO Calculations process, run the Create Purchase Orders process to create the purchase order.

1. From the Menu, click **Purchasing → Purchase Orders → Stage/Source Requests → PO Calculations**

2. Find or Add the Run Control “POCALC”.
3. Enter **Business Unit** and **To Business Unit** “NWUNV”.
4. Ensure required fields* are filled in and click **Run**.

5. Ensure that PO Calculations is selected and Click **OK**.

7. Ensure that **Run Status** is “Success”. Click **Refresh** to update **Run Status** as needed.
Re-Run Sourcing Process

**PO Creation** - The Create Purchase Orders Application Engine process (PO_POCREATE) uses rows in the staging tables that have been processed by the PO Calculations process to create purchase orders. The Create Purchase Orders process maintains the purchase order groupings created by the PO Calculations process to create purchase orders. The Create Purchase Orders process determines the purchase order ID, assigns line, schedule, and distribution numbers, and creates contract release information for staged rows.

1. From the Menu, click **Purchasing → Purchase Orders → Stage/Source Requests → PO Creation**

![Create Purchase Orders](image)

2. Find or Add the Run Control “POCREATE”.

![Create PO](image)

3. Enter **Business Unit** and **To Business Unit** “NWUNV”.

4. Click **Run**.
5. Ensure that Create Purchase Orders is selected and Click OK.


8. Ensure that Run Status is “Success”. Click Refresh to update Run Status as needed.