

## BEN Buys PO Manager Workshops

As directed by the Trainer, please complete the following workshops. Enjoy!

### # 1 – Penn Marketplace Requisition – Proceed to Checkout

Scenario: You need to buy supplies for the laboratory. Find and buy the items below:

*2 cases Pipettes from Fisher Scientific*

*1 Recycling Container for paper from Telrose/Office Depot*

- Use the Punchout search feature to find the Pipettes and the Recycling Container

Verify the items you need are in your Penn Marketplace shopping cart and return to BEN Buys

- Click the [**Return to BEN Buys Shopping Cart**] link

Check out using Proceed to Checkout with your default information

- Charge the items to Budget 020-0103-1-000000-XXXX-4401-0000 (xxxx is the object code – it's already there – do not remove☺)
- When you are finished
- Click on either the Home tab or Return to Shopping
- Click on the Requisition Number to see PO Number (Note: If PO Number doesn't appear right away, click on [**Refresh**] intermittently.

Requisition Number \_\_\_\_\_ Requisition Status \_\_\_\_\_ PO Number \_\_\_\_\_

## #2 – Penn Marketplace for Radioactive & Equipment

Scenario: Dr. Denzel Washington has asked you to order him the following:

- Radioactive **Iodine-125**
- CO2 **Incubator** from EMSCO/VWR that costs more than \$5000

Search for both items in the Marketplace using the key words **bolded**.

You want just the Incubator delivered directly to **SAS-BIO-201 LEIDY** by the Supplier.

You will have to meet the deliveryman at the lab to let him in since the lab is a secure area. Ask the Supplier to call you an hour before they arrive so you can plan to meet the deliveryman and let him in to the lab.

After all items have been added to the requisition, begin the [**Checkout**] process:

- “Does this delivery information apply to all items on your requisition?”, make the appropriate changes
- Charge the items to Budget **020-0103-1-000000-XXXX-4401-0000**.
  - *For the Incubator be sure to change the object code to 1872.*
- Add a note to the Supplier for the Incubator advising them of the delivery information.
- Add a note to Purchasing advising them of bid information for the Incubator.
- Your radioactive identification number is 1234-12345-XX (your terminal ID)
- Add Property Management information for the Incubator (location is **Leidy Labs, 2nd Floor, Room 201** and the Custodian is **Denzel Washington** and the Tagging Contact is **Sandra Bullock**).

Requisition Number \_\_\_\_\_ Requisition Status \_\_\_\_\_

Find the PO Number

- Click the Requisition # link from the “My Requisitions” list

PO Number(s): \_\_\_\_\_; \_\_\_\_\_

### #3 – Penn Marketplace and Non-Marketplace Supply item

Scenario: Professor Wilson has asked you to order him **2 new desk lamps** (but he hates brass lamps, so make sure you do not order brass lamps!) and a **Time Machine** (for a new Research project in the Lab) that is too new to be in the Penn Marketplace and **requires a Non-Marketplace requisition**.

You've already made arrangements to get the Time Machine from **Advanced Photonics, Inc.** in Ronkonkoma for a price of \$845.00 and want it delivered to SAS-CHEM STOCKROOM. Both items are to be charged to the department budget (020-0103-1-000000-XXXX-4401-0000). No additional approvers will be needed for this requisition.

Order the desk lamp from the Marketplace.

- Click on [**Return to BEN Buys Shopping Cart**]

Use the **Non-Marketplace Request** for the **Time Machine** supply item

- click **Return to Shopping** link
- click **Create Non-Marketplace Request** link
- Use **Research.Laboratory** for the **Category**

After all items have been added to the requisition, begin the Checkout Process:

- Click [**Proceed to Checkout**]
- “Does this delivery information apply to all items on your requisition?”, make the appropriate changes
- Charge the items to Budget 020-0103-1-000000-XXXX-4401-0000 (xxxx is the object code – it's already there – do not remove☺)
- Add a note to the Supplier for the Time Machine advising them to call first before delivery.

Requisition Number \_\_\_\_\_ Requisition Status \_\_\_\_\_

Find the PO Number

- Click the Requisition # link from the “My Requisitions” list

PO Number(s): \_\_\_\_\_; \_\_\_\_\_

#### **WORKSHOP #4 (Non-Marketplace)**

Scenario: You have made arrangements to work with a consultant for the next 6 months to help you design and implement your graduate studies program. The consultant charges \$1000 per month.

- Select Create Non-Marketplace Request from the Requisitions Home page
- Select the appropriate Item Type and Category
- Describe the service: Consulting services for 6 months @ \$1000 per month to design and implement the graduate studies biology program
- Complete the Amount
- Pick the Supplier: PLM Consulting

After you complete the Non-Marketplace request, begin the checkout process

- Click **[Proceed to Checkout]**
- The consultant will work in the Mudd Building
- Charge the items to Budget 020-0103-1-000000-XXXX-4401-0000
- Add a note to Purchasing advising them that this is the best bid & bids to follow
- Add a note to the Supplier asking them to call you to finalize design elements before they arrive on campus.

Requisition # \_\_\_\_\_ PO # \_\_\_\_\_

#### **WORKSHOP #5: (Create Receipt – Requisitioner Responsibility)**

Scenario: The 10-passenger van we ordered for Penn Transit has arrived in good condition. Process a receipt for the van using **Express Receive**.

Receipt # \_\_\_\_\_

#### **WORKSHOP #6 (Approve Purchase Orders)**

Part A: You have a notification that a PO for \$1,945.71 requires your review and approval. Review and approve the PO.

- From the Worklist select the link [PO XXXXX for \\$1945.71 requires your approval.](#)


Who is the BUYER on the PO? \_\_\_\_\_

- Approve the PO

## WORKSHOP #7 (Edit Rejected PO)

Scenario: A PO to Mecha-Draulic for servicing Dr. Frank N. Stein's electromagnetic isopheric chamber was rejected by our default approver.

Review the reason for the PO being rejected and resubmit the PO.

- From the Worklist click on the **PO# 12XXX has been Rejected** link (make sure the supplier is Mecha-Draulic)
- Review the reason for the PO being rejected
- Go to the **PO Distribution form**
- Add a line or click on the New  icon
- Copy the information from distribution line 1 to distribution line 2
  - *From the Toolbar click on **Edit>Duplicate>Record Above***
- Change the **Quantity** for both line 1 and line 2 to **13000** (no comma)
- Change the charge account distribution for line 2 to:  
**020-0104-4-523815-5401-2000-0000**
- Change the **GL Dates**
- Close **PO Distribution** form
- Close **PO Shipment** form
- **Check funds**
- Click on [**Approve**]
- Enter Note: **Distribution changed to appropriate fund per instructions from note**
  
- Click on the [**Details Notifications**] icon on the task bar
- Click on **Return to Worklist** on the bottom section of Notifications Detail

## WORKSHOP #8 - Create Receipts (PO Manager Responsibility)

Scenario: PC's for the Department -- laptop has finally arrived and is in good working order. Receipt the laptop.

- Enter the **PO#** for PC's for Department
- Save your work
- View Receipt Number
- Close **Receipt Header** form
- Close **Receipt** form
- Return to Navigator

## **WORKSHOP #9 (2 part workshop-Canceling a PO and Canceling a PO Line)**

Part 1: Cancel the pipets line from the PO you created in Workshop #1

- from the **PO Headers** form click the PO to select it
- Select the pipets line
- from the **Menu Path** select **Tools>Control**
- click **Cancel PO Line**
- Enter Reason: **Don't need this item. Found some in the closet.**
- Enter Note: **Spoke with Mr. Peabody. They won't ship pipets.**
- Acknowledge warning
- Acknowledge funds adjustment
- Acknowledge control action taken
- Return to Navigator

Part 2: Cancel the entire PO for \_\_\_\_\_

- Type a reason
- Send a note to the supplier advising them not to ship the order
- Acknowledge warning
- Acknowledge funds adjustment
- Acknowledge control action taken
- Return to Navigator

**Thanks for participating! Enjoy being a PO Manager!**

*Last Updated 10/09/09(BAM)*