This document provides direction to PASSHE suppliers on how to set up and complete tasks in the Workbench located within the supplier SAP Business Network (SBN) account.

The Workbench provides a dashboard for suppliers to view documents and complete tasks within the SAP Business Network (SBN).

Please click the topics below to be directed to guidance.

**Setting up the Workbench**

- **Confirm Trading Relationship has been established**
  This step is needed for the supplier to do business with PASSHE.

- **Set up the Supplier Workbench**
  The workbench will provide you with a centralized location to process purchase orders and invoices.

**What you can do within the Workbench**

- **View your POs**
- **Search for Individual PO**
- **PO Email Notification**
- **Create an Invoice**
- **Add Attachments**
- **View Invoice History**
1. Log into the SAP Business Network (SBN) account used to register with PASSHE with username and PW.

2. Navigate to the Customer Relationships.

Before setting up the Workbench, make sure the Trading Relationship is established.
Confirm the Trading Relationship.

“Pennsylvania State System of Higher Education” is listed as Trading

Click Close

If PASSHE is not listed, take a screenshot and send with brief explanation to supplierhelp@passhe.edu

If PASSHE is listed but does not have a Relationship Type of Trading
• Click box to the left of Customer name
• Click Accept

For additional resources and support please see Doing Business with the State System.
Setting up the Workbench

1. Set up the Workbench.
   - Click Workbench
   - Click Customize

2. Add or remove filters.
   You will be able to set up your workbench to meet your needs and preference.
   - Click “X” to remove filters
   - Click “+” to add filters
   - Click Apply when finished adding and removing tiles.

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Select Filters

- Minimum tiles should include New Orders, Orders, and Invoices.
- Add additional filters based on preference.
Apply and view filters applied to workbench.

Filters that you have chosen will be visible.

Change date range to “Last 365 days”

Filters that you have applied are now visible on the Workbench.
Updating Date Range from Workbench. This will allow you to view one (1) full year of POs.

1. Choose tile
2. Within date, select drop down.
3. Choose Last 365 days
4. Click Save filter

In the pop-up, change 31 to 365. Click Save.

The tile will now show 365 days

For additional resources and support please see Doing Business with the State System.
Viewing your POs within the SAP Business Network (SBN)

Click the **New Orders tile** or the **Orders Tile**

All POs in the last 365 days will show.
New orders will also show within the orders tile.

Searching for an individual PO within the SAP Business Network (SBN)

Click **Edit Filter**
Click **Exact Match**
Enter PO that you are looking for
Click **Apply**

Click on the PO number to open the PO

For additional resources and support please see **Doing Business with the State System**.
Notifications for new POs will be sent to the supplier contact that has been identified with the SAP Business Network (SBN).

Email will arrive from ordersender-prod@anssmtp.ariba.com

For additional resources and support please see Doing Business with the State System.
Creating an invoice within the SAP Business Network (SBN)

1. Locate Purchase Order (PO) to invoice.

    Identifies that you have orders on your workbench.

    Click on the PO number to display the purchase order.

    PO will now display

    Continued on next page
Create an invoice against a PO.

When the “Create Invoice” screen is presented, the supplier will see all the PO data has populated on to the invoice, including all line items.

**Important information as you proceed through the creating an invoice process.**
If the invoice you need to create is for a partial delivery for items shipped thus far…
- For a given PO line-item partial delivery, the supplier can adjust the line-item quantity to create a partial invoice.
- In the Include column, if the toggle is grey, it indicates that the line item is not included. Click directly onto the toggle to ensure it is green, indicating the line item has been included.
Entering Invoice Details.

Only two (2) fields are required in this section of the invoice. They are the invoice number and date.

**NOTE:** Date can only be backdated up to three days.

**Header level changes**
You can add shipping and/or special handling if applicable.

**Add to Header** can be found at the top and bottom of the screen.

This field cannot be changed. PASSHE is not subject to sales tax.

PASSHE does not require any additional field information.

Add other elements such as comments or attachments by clicking **Add to Header** and choosing from the available options.

**NOTE:** This is where you can attach a copy of your invoice.
NOTE! Be sure the invoice matches what you are billing.

An invoice will be a partial invoice if only partial items have been shipped.

- For a given PO line-item partial invoice, adjust the line-item quantity.
- For PO line items not being invoiced, select the line-item and choose the Delete option.

To invoice partial shipment for a line-item on a given PO, adjust the line-item quantity to reflect number of items shipped.

POs with multiple line-items Toggle "Include" button to grey for line items not being invoiced.

Adjust the line-item quantity, as necessary for partial invoicing.

Click Update to update and review.

Click Next once all steps have been completed.

Continued on next page
Check and confirm details of the invoice.

If changes are needed, click **Previous** and make changes accordingly.

If invoice information is correct, click **Submit**.
**5** Invoice has now been processed within SBN (known as PO Flip).

Confirmation is shown

Click Exit invoice creation

**6** The PO shown within SBN will show Total Invoiced amount.

See Total Invoiced

Click Done

For additional resources and support please see [Doing Business with the State System](#).
Attachments to Invoice

Supplier can add an attachment during the invoice process within the SAP Business Network (SBN).

- This will provide the supplier the ability to attach their company invoice to the network generated invoice, as well as other relevant documentation needed to support approval of the invoice by the university. i.e., service support documents.

Some universities will ask for the company invoice. This option gives you, the supplier, the location to attach your invoice within the network.

1. Choose option to Add Attachment.
   - Click Add to Header
   - Click Attachment

2. Choose browse to search and choose corresponding invoice.
   - You will use the Browse feature to locate the invoice within YOUR files.
   - Click Add Attachment

3. Invoice is now attached.
   - Invoice will now be visible to university.

For additional resources and support please see Doing Business with the State System.
Viewing invoice information within the workbench

1. Understanding the invoices within the workbench.

Want more information? Please see Doing Business with the State System. For questions, comments, or concerns, please reach out to the Supplier Support Team @ SupplierHelp@passhe.edu.