EP.020.650 - USING THE REQUESTER'S WORKBENCH

Purpose	To review or take action on a requisition.
Description	The Requester's Workbench is a PeopleSoft page that allows you to perform a variety of processes on multiple Requisitions at a time. These processes include approving, un-approving, canceling, closing, and budget checking, and pre-budget checking requisitions.
Security Role	**BOR_PO_REQ_WORKBENCH**
Dependencies/ Constraints	NA
Additional Information	None

Procedure

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Menu** icon.
3.	Click the **Purchasing** link.
4.	Click the **Requisitions** link.
5.	Click the **Requester's Workbench** link.
6.	Select the **Add a New Value** tab. ***Note****: If a Workbench ID has been previously created, use Find an Existing Value.*
7.	Enter the Workbench ID and select the **Add** button. ***Note****: The Business Unit should auto populate.*
8.	The **Filter Options** search page is used to search for the Requisitions you want to perform certain actions against. It is recommended users always enter some selection criteria to reduce the number of records retrieved. • **Search Criteria:** enter information in the fields to narrow the search results. If no search criteria is entered, the system will retrieve all purchase orders for the business unit. • **Status**: select the check boxes that correspond to statuses that you want the system to retrieve during the search. The check boxes limit the number of retrieved requisitions to only those you select. If you do not select a status, the system will retrieve requisitions in all statuses that also meet other search criteria that you enter. • **Sourcing**: Use this section to check the **Partially or Fully Sourced** checkbox if you want to limit the search to Requisitions that have been partially or fully sourced to a Purchase Order. • **Encumbrance**: Use this section to select the **Open Pre-encumbrances** checkbox to retrieve any Requisitions that have a remaining pre-encumbrance. At year end, this will be helpful for locating Requisitions that need to be completed. • **ChartFields:** Select to limit the Requisitions retrieved by a combination of Chartfields, i.e., all Requisitions for a certain Project. Wildcards cannot be used; however, rows can be inserted if additional chartfields are needed.

Step	Action
9.	Select the **Search** button. The requisitions from the inputted filters are displayed in the List of Requisitions.
10.	Enter a description for the workbench in the **Description** field.
11.	On the **Detail** tab of the Requester's Workbench users can select the: • **Requisition ID**: used to access the requisition inquiry for the selected requisition(s). • **Doc Status:** click the icon to view the Document Status page for the selected requisition(s). • **Lines:** click the icon to view the requisition lines associated with the selected requisition(s). Users can also select individual requisition lines from this page.
12.	On the **Approval** tab of the Requester's Workbench users can select the: • **Requisition ID:** click this link to view the Requisition Inquiry page. • **Doc Status:** click the icon to view the Document Status page for the selected requisition(s). • **Requisition Status:** users can view detailed information regarding approval status of the selected requisition(s).
13.	Select any or all of the requisitions to take action on by clicking the checkbox next to each.

Step	Action
14.	Select one of the following actions: • **Approve**: Select Approve from the Action section. Changes the status of the selected requisition from Open to Pending Approval. • **Unapprove**: Select Unapprove from the Action section. Changes the status of the selected requisition from Approved to Pending Approval if workflow approval is turned on for this business unit. ***Note****: Requisitions approved using AWE <u>cannot</u> be unapproved.* • **Cancel**: Select Cancel from the Action section. Changes the status of the selected requisition to canceled. • **Close:** Select Close from the Action section. Changes the status of the selected eligible requisition(s) to closed. • **Budget Check:** Select Budget Check from the Action section to initiate the budget check process. • **Budget Pre-Check**: Select Budget Pre-Check from the Action section to initiate the pre-budget check process which performs the budget check but without pre-encumbering funds. This does not guarantee the funds will be available at the time the Budget Check is initiated.
15.	Once an action is selected, the Processing Results page appears. Use this page to review the selected requisitions and select to proceed with order processing. The system reviews the requisition(s) and determines if it is qualified or not qualified for the action selected.

Step	Action
16.	Review the **Requester's Workbench – Processing Results** page. A Requisition will be marked as either: • **Qualified:** means this item meets all the criteria to process for the above-mentioned actions. These items will show in the qualified section of the page. • **Non-Qualified:** A non-qualified requisition does not meet all the criteria to process and will be displayed in the non-qualified section of the page. If the selected requisitions are not qualified for the action, click the Log button to access the log. The log states why the purchase order was not qualified for the previous processing action. After reviewing the log, Requesters should determine if additional steps are needed before proceeding. Once the Requester reviews the log and determines no further action is needed on the requisitions, they can override the status to qualify for action if their user preference allows. Please be aware that a Requisition with an unchecked budget status or budget error should **not** be overridden or "forced to close". The budget issues should be addressed before proceeding. To override, select the requisitions and the icon between the lists to override the status and qualify them for the action. ***Note:*** *Some requisitions cannot be overridden and will require additional processing.*
17.	Verify the **Accounting Date for Action** field populates with the correct accounting date. The system updates the accounting date on the transaction with the date defined in this field. The Accounting Date for Action field is used to determine the open period or allowable open date range for budget checking a requisition.
18.	Select the **Yes** button continue with the process or select the **No** button to cancel. Selecting Yes will prompt a secondary message box to appear. To Continue with the process select Yes. To Cancel the action select No.

Step	Action
19.	Select **Return to Requester's Workbench** to return to the Requester's Workbench page.
20.	In the **Go To Options** section select one of the following: • **Set Filter Options:** returns users to the Filter Options search page. • **View Processing Results**: accesses the Processing Results page, where users can view the results of the actions performed.
21.	Click the **Save** button to save the search criteria that generated the list of requisitions on the Requester's Workbench page.