



Closing Requisitions in the Requester's Workbench



Navigation:

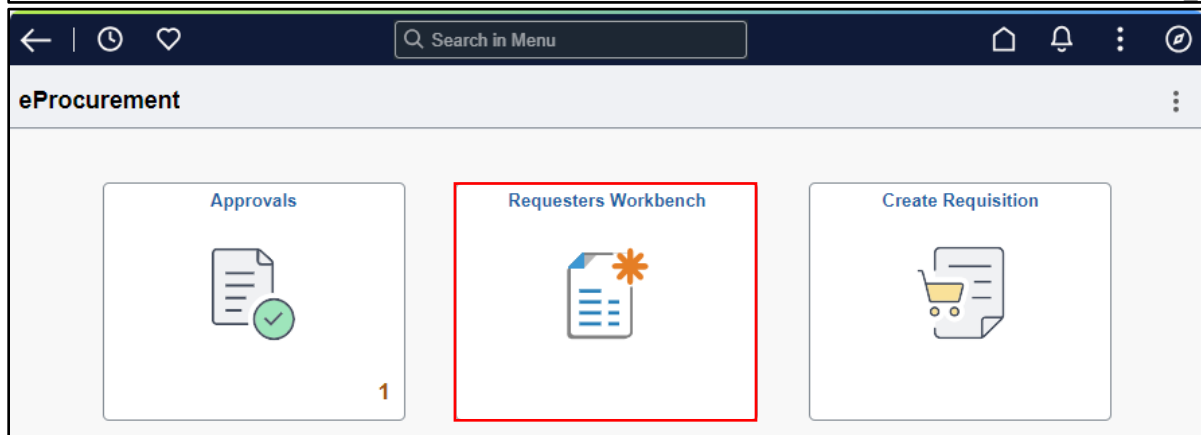
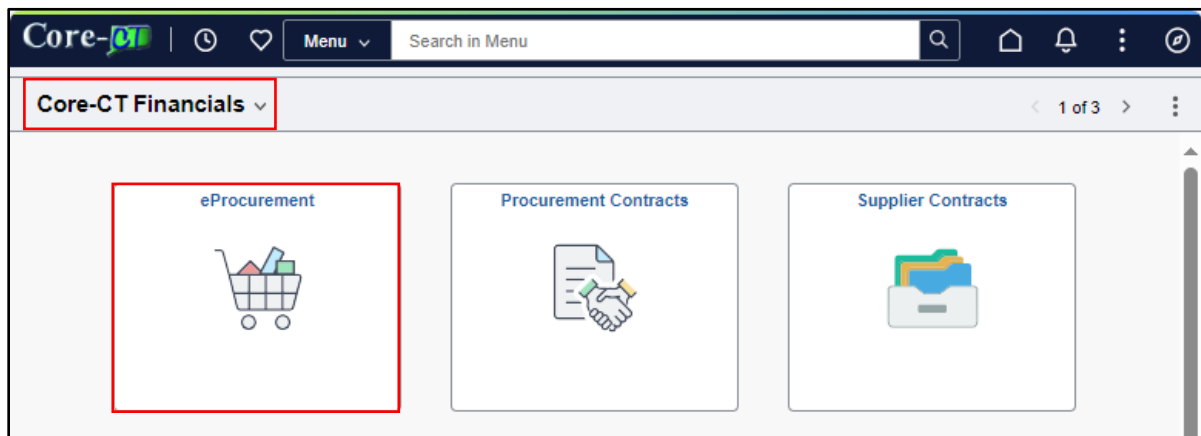
Nav Bar > Menu > Core-CT Financials > Purchasing > Requisitions > Requester's Workbench

Or

Select **Core-CT Financials**

Click the **eProcurement** tile

Click the **Requesters Workbench** tile



- Click the Add a New Value button
- The Business Unit will Default

The screenshot shows the 'Requester's WorkBench' interface. At the top right, there are links for 'New Window' and 'Help'. Below this is the section 'Find an Existing Value' with a red-bordered button labeled '+ Add a New Value'. Underneath is a 'Search Criteria' section with the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two dropdown menus for 'Recent Searches' and 'Saved Searches', both set to 'Choose from recent searches' and 'Choose from saved searches' respectively. Below these are three search criteria: '*Business Unit' with a dropdown set to '=' and a text input containing 'MHAM1'; 'WorkBench ID' with a dropdown set to 'begins with' and an empty text input; and 'Description' with a dropdown set to 'begins with' and an empty text input. There is also a 'Show fewer options' link and a 'Case Sensitive' checkbox. At the bottom are 'Search' and 'Clear' buttons.

- Enter a Workbench ID of your choice – this field is alpha-numeric
- Click the Add button

The screenshot shows the 'Requester's WorkBench' interface. At the top right, there are links for 'New Window' and 'Help'. Below this is the section 'Add a New Value' with a blue-bordered button labeled 'Find an Existing Value'. Underneath are two input fields: '*Business Unit' with a dropdown set to '=' and a text input containing 'MHAM1'; and '*WorkBench ID' with a text input containing '4321'. A red box highlights the '*WorkBench ID' field. At the bottom is a red-bordered 'Add' button.

- Fill in the criteria (including the checkboxes and Chartfields)
- Click the Search button

Requester's Workbench

[New Window](#) | [Help](#) | [Personalize Page](#)

Requester's Workbench

Filter Options

Business Unit MHAM1 WorkBench ID 4321
Description

Enter search criteria and click on Search. Leave blank for all values.

Search Criteria

Requisition	<input type="text"/>	To	<input type="text"/>
Requisition Name	<input type="text"/>		
Req Date	<input type="text"/>	Until	<input type="text"/>
Activity Date	<input type="text"/>	To	<input type="text"/>
Due Date	<input type="text"/>	To	<input type="text"/>
Supplier ID	<input type="text"/>		
Item ID	<input type="text"/>		
Requester	<input type="text"/>		

Status

<input type="checkbox"/> Open	<input type="checkbox"/> Approved	<input type="checkbox"/> Lines Approved
<input type="checkbox"/> Pending Appr	<input type="checkbox"/> Canceled	<input type="checkbox"/> Denied

Sourcing

Partially or Fully Sourced

Encumbrance

Open Pre-encumbrances

ChartFields

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
GL Unit	Fund	Dept	SID	Program	Account	Bud Ref	Cl	

[Return to Requester's Workbench](#)

- Add a Description for your Workbench ID
- Choose the requisitions to close
- Click on Close

Requester's Workbench

Business Unit MHAM1 WorkBench ID 4321
 *Description Close Reqs

Select Reqs for Further Processing

List of Requisitions

Requisition ID	Doc Status	Hold	Requisition Status	Budget Status	Req Date	Last Activity	Name	Track Batch	Lines
<input checked="" type="checkbox"/> 0000035669		N	Open	Not Chk'd	03/16/2021	03/16/2021	MHA-		
<input checked="" type="checkbox"/> 0000037505		N	Open	Not Chk'd	02/09/2023	02/09/2023	MHA-		
<input type="checkbox"/> 0000038317		N	Open	Not Chk'd	03/26/2024	03/26/2024	MHA-		
<input type="checkbox"/> 0000038456		N	Open	Not Chk'd	05/02/2024	05/02/2024	MHA-		

Action:

Go To:

- Click the log Icon to verify why this did not qualify before moving it to the qualified side.
- Check the box for the requisition in the “not qualified column” and
- Click the > to move it to the “qualified column.”
 (Req. must have a budget status of VALID and not be associated with an open purchase order to qualify to close).

Requester's Workbench

Requester's Workbench

Processing Results

Business Unit DASM1 WorkBench ID 20208CLOSE
 Description Close 7948

Select Reqs for Further Processing

Accounting Date for Action 05/06/2024

Update Budget Date Equal to Accounting Date

Not Qualified

Requisition ID	Log
<input type="checkbox"/> 0000005901	<input checked="" type="checkbox"/>
<input type="checkbox"/> 0000005976	<input checked="" type="checkbox"/>

Select All Clear All

Qualified

Requisition ID	Line	Sched	Distrib Line

Proceed: [Return to Requester's Workbench](#)

Requester's Workbench

Requester's Workbench

Processing Results

Business Unit DASM1 WorkBench ID 20208CLOSE
Description Close 7948

Select Reqs for Further Processing

Accounting Date for Action 05/06/2024

Update Budget Date Equal to Accounting Date

Not Qualified

Requisition ID	Log
<input type="checkbox"/>	

Select All Clear All

Proceed: [Return to Requester's Workbench](#)

Qualified

Requisition ID	Line	Sched	Distrib Line
0000005976			<input type="button" value="-"/>
0000005901			<input type="button" value="-"/>

➤ Click YES

Accounting Date for Action 05/06/2024

Accounting Date

Qualified

Continue to Close Reqs (10109,5)

Requisition ID	Line	Sched	Distrib Line
0000005976			

➤ Click YES

Requisition is status is now Complete which means it is Closed

The screenshot displays the 'Requester's Workbench' interface. At the top, it shows the Business Unit as 'DASM1' and WorkBench ID as '20208CLOSE'. A description field contains 'Close 7948'. Below this, there is a search bar and a 'Select Reqs for Further Processing' section. The main area is titled 'List of Requisitions' and features a table with columns: Requisition ID, Doc Status, Hold, Requisition Status, Budget Status, Req Date, Last Activity, Name, Track Batch, and Lines. Two requisitions are listed, both with a 'Complete' status, which is highlighted with a red box. The first requisition has ID '0000005901' and the second has ID '0000005976'. Navigation controls at the top right of the table indicate '1-5 of 267' items and a 'View 100' option.

Requisition ID	Doc Status	Hold	Requisition Status	Budget Status	Req Date	Last Activity	Name	Track Batch	Lines
<input checked="" type="checkbox"/> 0000005901		N	Complete	Valid	10/18/2019	05/06/2024	DAS-St. Amand,Philip		
<input checked="" type="checkbox"/> 0000005976		N	Complete	Valid	01/03/2020	05/06/2024	DAS-St. Amand,Philip		