

PeopleSoft General Ledger Documentation

SUBJECT: How to Cancel Requisition via Requester's Workbench

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A requisition must have a VALID budget status before it can be canceled.

1. Navigate to the **Requester's Workbench**.

Using Classic Menu

Favorites T Main Menu T Purchasing 🔻 Requisitions V Requester's Workbench

Using Fluid Menu

NavBar: Navi	gator	0	NavBar: Nav	igator	0
	Vendors	>		Purchasing	
Recent Places	Procurement Contracts	>	Recent Places	Requisitions	>
*	Purchasing	>	*	Purchase Orders	>
My Favorites	eProcurement	>	My Favorites	UHS Contracts	>
Navigator	Services Procurement	>	Navigator	Analyze Procurement	>
	Grants	>			
Classic Home	Project Costing	>	Classic Home		



How to Cancel Requisition via Requester's Workbench Last Update Date: March 3, 2021



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2. Click the **Search** button. Select **"REQ_CANCEL"** WorkBench ID.

Requester's WorkBench

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Ex	isting Value	Add a New Value		
Search (Criteria			
Business Uni WorkBench II Description:	t: = D: begins with begins with sitive	00759	Q	
Search Search Res	Clear Bas	ic Search 💆 Save S	Search Criter	ria
Search Search Res View All	Clear Bas sults First	ic Search 🔄 Save S	Search Criter	ria
Search Search Res View All Business Unit	Clear Bas sults First WorkBench ID	ic Search 🖾 Save S	Search Criter	ria
Search Search Res View All Business Unit 00759	Clear Bas sults First WorkBench ID 1	ic Search 🖉 Save S (1-5 of 5) Las Description REQ_CLOSE1	Search Criter	ria
Search Res View All Business Unit 00759 00759	Clear Bas sults First WorkBench ID 1 2	ic Search 🖾 Save S (1-5 of 5) Las Description REQ_CLOSE1 CLOSE_REQ	Search Criter	ria
Search Search Res View All Business Unit 00759 00759 00759	Clear Bas sults First WorkBench ID 1 2 CLOSE_REQ	ic Search 🖉 Save S (1-5 of 5) Las Description REQ_CLOSE1 CLOSE_REQ CLOSE REQUISITION	Search Criter	ria
Search Res View All Business Unit 00759 00759 00759 00759	Clear Bas sults First WorkBench ID 1 2 CLOSE_REQ REQWORKBEN	ic Search 🖾 Save S 1-5 of 5 🕑 Las Description REQ_CLOSE1 CLOSE_REQ CLOSE REQUISITION requisition	Search Criter	ria

Find an Existing Value Add a New Value



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3. Enter the *Requisition ID*. You can add criteria based on *Status, Sourcing, Encumbrance,* or *ChartFields* information. Click the **Search** button.

	indenen						
Filter Option	S						
Business Unit:	00759	WorkBench	h ID:	REQ_	CANCEL		
Description:	REQ_CAN	ICEL					
Enter search criteri	a and click on Sea	irch. Leave blank for a	all values.				
Search Criteria							
Requisition:	000	0044057	To:		0000044057	Q	
Requisition Name				Q			
Reg Date:		31	Until:			31	
Activity Date:		81	To:			31	
Due Date:		31	To:			31	
/endor ID:		Q					
tem ID:			Q				
Requester:				Q			
Status							
🗌 Open		Approved			Lines A	pproved	
Pending Appr		Canceled			Denied		
Sourcing							
Partially or Fu	Illy Sourced						
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Open Pre-enc	umbrances		Deserve allere 1	The day	6 All L 🗐 L 🔲		4 - 54 (0 1 1
ChartFields			Personalize		/iew All 🖾 🔠	First 🕚	1 of 1 🕑 Last
SL Unit Acc	ount	Alt Acct	Dept		Program	Fund	Bud Ref
Q	Q	Q		Q	Q	Q	Q
4			-				+
Search	Ret	turn to Requester's Wo	orkbench				
Notify 📿 🛛	efresh						



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4. Select the requisition by checking the checkbox. Click the **Cancel** button.

Business Unit:		00759	WorkE	Bench ID:	REQ	CANCEL					
Description:		REQ_CANCE	EL								
Select Reqs for	Further I	Processing									
List of Requ	isitions	5					Pe	rsonalize Find '	view All 🔄 Download %1 Ta	ble to Excel First	st 🕢 1 of 1 🕟 Las
Requisitio	n ID	Doc Sta	tus	Status	Hold	Budget Status	Req Date	Last Activity	Name	Track Batch	Lines
00000440)57			Open	N	Valid	09/29/2020	09/29/2020	Goucher, Jennifer Erwin		
Select All											
					_						
Action:	Ap	oprove	Una	approve		Can	cel				
Action:	Ap C	oprove Close	Una Budg	approve get Check		Can	cel				



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5. If the requisition is qualified for the selected *Action* (ie. *Cancel, Budget Check*), it will display on the *Qualified section*. If displayed on the *Not Qualified section*, click on the ^{III} icon under *Log* column for the reason. Click the **Yes** button to proceed.

Requester's Workben	ich						
Processing Resu	lts						
Business Unit:	00759	WorkBench ID:	REQ_CANCE	L			
Description:	REQ_CANCEL						
Select Reqs for Further Pr	ocessing						
		Accounting Date f	or Action:	01/28/202	1 🛐		
		Update Budget	Date Equal to Accourt	nting Date			
Not Personalize Qualified	View All 🔁 ④ 1 of	Personalize	Qualified Pe	rsonalize \	View All 🗾	Personali 1 of 1	ze ④ D Last
Requisition ID	Log		Requisition ID	Line	Sched	Distrib Line	
	22		0000044057				-
Proceed: Yes	No	Return to Requeste	er's Workbench				

🖃 Notify 🛛 🕄 Refresh



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6. Click the **Yes** button to continue.

Requester's Workbench	h							
Processing Result	is							
Business Unit: 0	00759 WorkE	ench ID:	REQ_CANCEL	-				
Description:	REQ_CANCEL							
Select Reqs for Further Proc	cessing							
	Account	ing Date for A	ction:	01/28/202	1 🛐			
	🗌 Upda	te Budget Dat	e Equal to Accour	nting Date				
Not Personalize Qualified	View All 🔁 Personal	ize ist	Qualified Pe	rsonalize \	/iew All 🗾	Personalize	e 🕢 Last	
Requisition ID	Log		Requisition ID	Line	Sched	Distrib Line	ſ	Message
	22		0000044057				-	moodgo
								Continue to Cancel Reqs (10109,6)
								Yes No
Proceed: Yes	No Return	o Requester's \	Vorkbench				(
E Notify Refresh								

 Once cancelation is processed, the page will navigate back to the *Requester's Workbench* page. The requisition needs to be re-budget checked to release the fund back to the cost center. Select the requisition by checking the checkbox. Click the **Budget Check** button.

Rec	uester's Wor	kbench										
Busi	Business Unit: 00759 WorkBench ID:		REQ_C	ANCEL								
Sele	Select Reqs for Further Processing											
Li	st of Requisition	S					Per	sonalize Find Vie	w All 🔄 Download %1 Table t	o Excel F	irst 🕢 1 of 1	Last
	Requisition ID Doc Status Status		Status	Hold	Budget Status	Req Date	Last Activity	Name	Track Batch	Lines		
	0000044057			Canceled	Ν	Not Chk'd	09/29/2020	01/28/2021	Goucher, Jennifer Erwin			
Act	ion: Aj	pprove	Una	pprove		Cancel						
Go	To: Set filter	roptions	Budg	et Check /iew Processin	g Results							
* -	Notify 2 Refres	h										



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8. If the requisition is qualified for the selected *Action* (ie. *Cancel, Budget Check*), it will display on the *Qualified section*. If displayed on the *Not Qualified section*, click on the ^{III} icon under *Log* column for the reason. Click the **Yes** button to proceed.

Requester's Workber	nch							
Processing Resu	ults							
Business Unit:	00759	WorkBenc	h ID:	REQ_CANCE	L			
Description:	REQ_CANCEL							
Select Reqs for Further P	rocessing							
		Accounting	Date for A	tion:	01/28/202	1 🛐		
Not Personalize Qualified	e View All 🗾 ④ 1 o	Personalize		Qualified Pe	rsonalize	View All 🛛 🗖	Personali 1 of 1	ize ④) Last
Requisition ID	Log			Requisition ID	Line	Sched	Distrib Line	
	2			0000044057				-
Proceed: Yes	No	Return to Re	equester's V	Vorkbench				
		_						
🖃 Notify 🛛 🕄 Refresh	1							



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9. Click the **Yes** button to continue.

Requester's Workbenc	h								
Processing Results									
Business Unit: 00759 WorkBench ID: REQ_CANCEL									
Description: REQ_CANCEL									
Select Reqs for Further Proc	cessing								
	Accountin	g Date for A	ction:	01/28/202	31				
Not Personalize Qualified	View All Personaliz	e	Qualified Per	sonalize \	/iew All 🔁	Personaliz 1 of 1	e 🕢 Last		
Requisition ID	Log		Requisition ID	Line	Sched	Distrib Line	L		
	2		0000044057				Message		
							Continue to Rudge	t Chaok Dago (10100 50)	
							Continue to Budge	CHECK Reds. (10109,50)	
Yes No									
Proceed: Yes No Return to Requester's Workbench									
E Notify Refresh]								

10. Once budget checking is done, the page will navigate back to the *Requester's Workbench* page. The *Requisition Status* displays *Canceled* and the *Budget Status* displays *Valid*.

Req	uester's	Workb	ench								
Busi	less Unit: 00759 WorkBench ID: REQ_CANCEL										
*Des	*Description: REQ_CANCEL										
Sele	ect Reqs for F	urther Pro	cessing								
Lis	st of Requis	sitions					P	ersonalize Find	View All 🔄 Download %1 Ta	ble to Excel F	irst 🕢 1 of 1 🕑 Last
	Requisition	ID Doc Status Status		Hold	Budget Status	Req Date	Last Activity	Name	Track Batch	Lines	
	000004405	7	Canceled		ed N	Valid	09/29/2020	01/28/2021	Goucher, Jennifer Erwin		
Acti	Action: A		pprove Unapprove			Can	cel				
		Clos	e	Budget Check	k						
Go	To: S	et filter op	tions	View Proc	cessing Result	s					
	Save										
1	Notify 📿	Refresh									





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The requisition is now canceled.

Favorites	Main Menu	▼ >	Purchas	ing 🔻 >	Requisitior	ns▼ >	Add/Update Requisitions	
IIHSFIN	ANCE							
Requisition	IS							
Use the followi	ing search to lo	ok for an e	existing Re	quisition.				
				1				
Find an Exi	sting Value	Add a No	ew Value					
Search C	riteria							
Business Unit	-	= 🗸]	00759		Q		
Requisition ID	I.	begir	ns with 🗸	0000044	057			
Requisition Na	ame:	begir	ns with 🗸					
Requisition St	atus:	=	~				~	
Origin:		begir	ns with 🗸			Q		
Requester:		begir	ns with 🗸			Q		
Requester Na	me:	begir	ns with 🗸			Q		
Hold From Fi	urther Process	sing						
Case Sens	sitive							
			-					
Search	Clear	asic Searc	h 🔍 Sa	ive Search	i Criteria			
No matching values were found.								
Find an Existin	g Value Add	a New Val	ue					