

## 15\_Approve a Purchase Order or a Change Order

**Purpose:** The purpose of this task is to review and approve a submitted purchase order or change order.

**How to Access:** Open your Workday **Inbox** and look for Actions that begin with “Purchase Order”, and the title is **Review Purchase Order**.

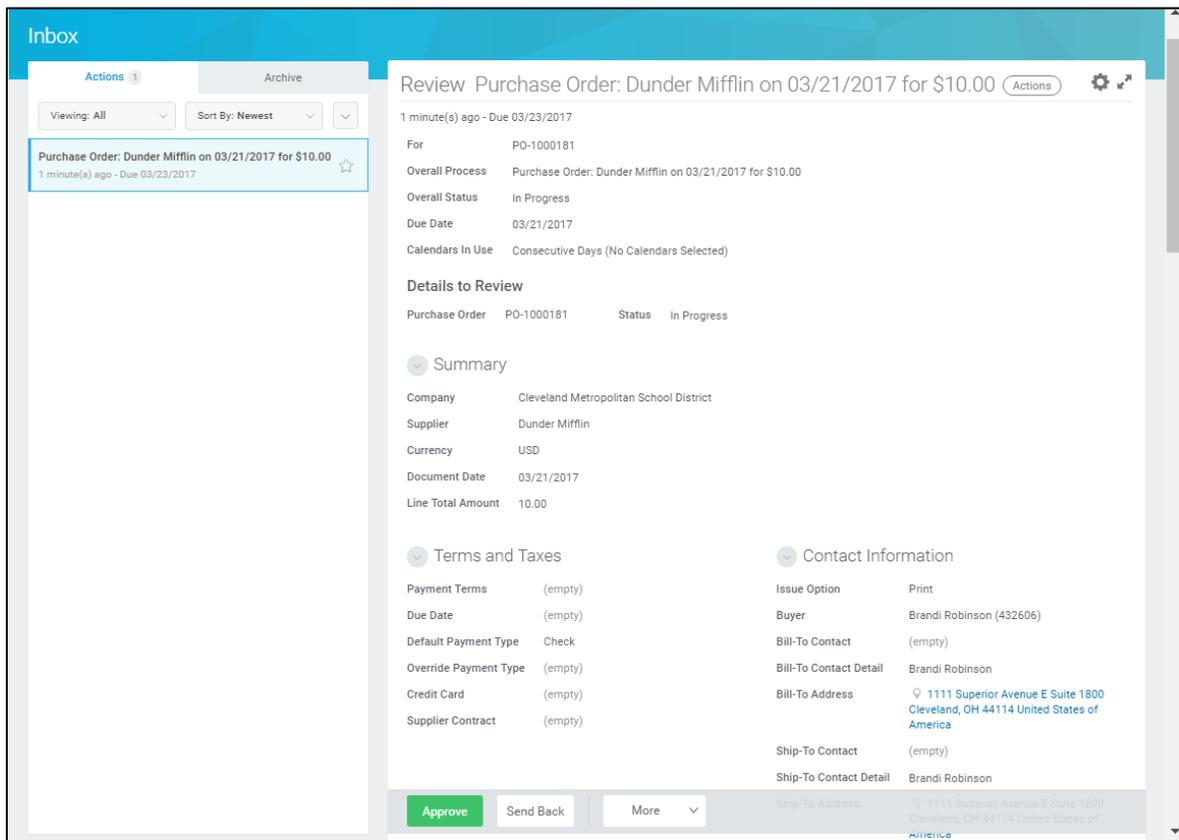
**Audience:** Managers and Financial Partners

**Helpful Hints:**

- Be sure to check your Workday Inbox frequently to ensure open actions are processed in a timely manner.
- Workday displays fields in this task that CMSD is not using, only the fields listed in this document require you to complete, review, and/or update.

**Procedure:** Complete the following steps to approve a submitted purchase order.

### Inbox



**Inbox**

Actions 1 | Archive

Viewing: All | Sort By: Newest

**Purchase Order: Dunder Mifflin on 03/21/2017 for \$10.00**  
1 minute(s) ago - Due 03/23/2017

**Review Purchase Order: Dunder Mifflin on 03/21/2017 for \$10.00** Actions

1 minute(s) ago - Due 03/23/2017

For PO-1000181

Overall Process Purchase Order: Dunder Mifflin on 03/21/2017 for \$10.00

Overall Status In Progress

Due Date 03/21/2017

Calendars In Use Consecutive Days (No Calendars Selected)

**Details to Review**

Purchase Order	Status
PO-1000181	In Progress

**Summary**

Company	Cleveland Metropolitan School District
Supplier	Dunder Mifflin
Currency	USD
Document Date	03/21/2017
Line Total Amount	10.00

**Terms and Taxes**

Payment Terms	(empty)
Due Date	(empty)
Default Payment Type	Check
Override Payment Type	(empty)
Credit Card	(empty)
Supplier Contract	(empty)

**Contact Information**

Issue Option	Print
Buyer	Brandi Robinson (432606)
Bill-To Contact	(empty)
Bill-To Contact Detail	Brandi Robinson
Bill-To Address	1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America
Ship-To Contact	(empty)
Ship-To Contact Detail	Brandi Robinson
Ship-To Address	1111 Superior Avenue E Suite 1800 Cleveland, OH 44114 United States of America

Approve | Send Back | More

1. Review your Inbox Actions.

2. Select the required Purchase Order Action.

**Note:** For the purpose of this work instruction, the required **Purchase Order Action** displays.

3. As required, review the following fields for each line item:

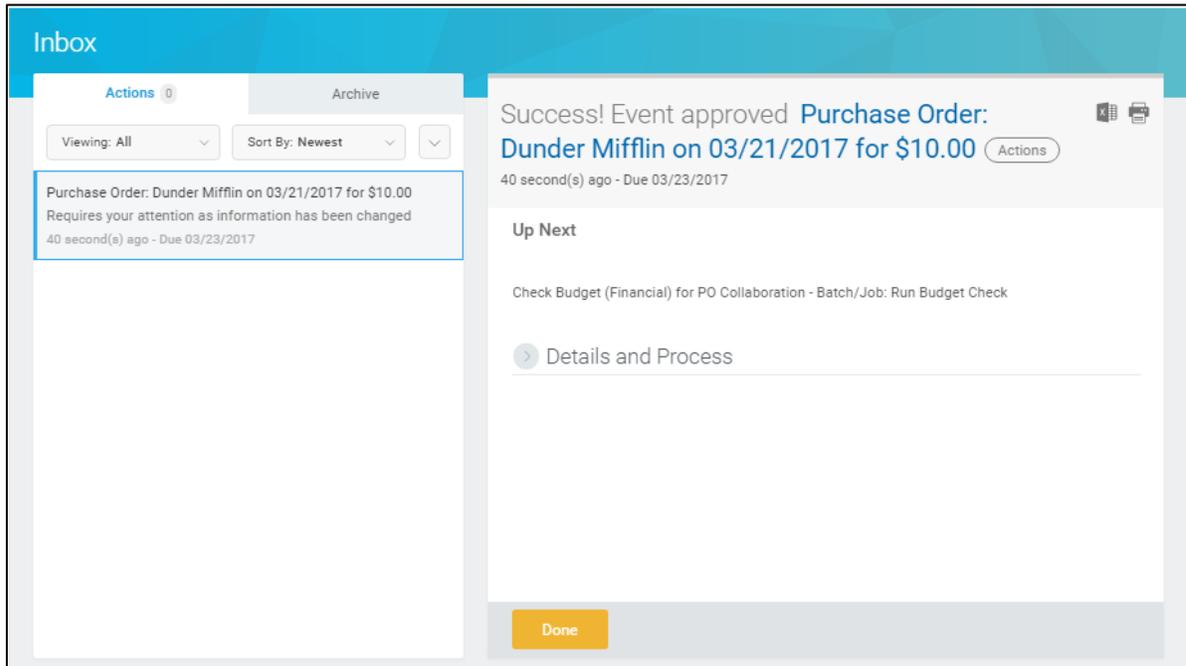
Field Name	Required / Optional	Description
<b>Overall Process</b>	Required	Identifies who created the purchase order, on what day, and for how much.
<b>Overall Status</b>	Required	Identifies the current status of the purchase order.
<b>Due Date</b>	Required	Identifies the date the order is to be approved.
<b>Supplier</b>	Required	Identifies the vendor filling the order.
<b>Line Total Amount</b>	Required	Identifies the total cost for all line items.
<b>Buyer</b>	Required	Identifies the person who created the order.
<b>Bill-To Contact Detail</b>	Required	Identifies the contact information for the party responsible for paying the order.
<b>Bill-To Address</b>	Required	Identifies the address for the party responsible for paying for the order.
<b>Ship-To Contact Detail</b>	Required	Identifies the contact information for the party receiving the order.
<b>Ship-To Address</b>	Required	Identifies the address for the party responsible for receiving the order.
<b>Item</b>	Do Not Use	Identifies the name of the product to be procured. <b>Note:</b> Item will not be selected on direct purchase order lines.
<b>Item Description</b>	Required	Identifies the product to be procured.
<b>Spend Category</b>	Required	Is a way of grouping similar items or services that drives the financial reporting.
<b>Ordered (Quantity)</b>	Required	Identifies how many items to procure.
<b>Received (Quantity)</b>	Optional	Identifies the number of items received for the line item.
<b>Invoiced (Quantity)</b>	Required	Identifies the number of items that have been invoiced for the line item.
<b>Unit of Measure</b>	Required	Identifies how the requested item is sold. Examples include: <ul style="list-style-type: none"> <li>• Each</li> <li>• Box</li> <li>• Case</li> </ul>
<b>Unit Cost</b>	Required	Identifies the dollar amount for each item.
<b>Extended Amount</b>	Required	Identifies the total cost for the line item.
<b>Ship-To Address</b>	Required	Identifies the location to deliver the items.

Field Name	Required / Optional	Description
<b>Fund</b>	Required	Identifies the fund that will pay for the items being procured.
<b>Cost Center</b>	Required	Identifies the cost center that will pay for the items being procured.
<b>Function</b>	Required	Identifies the function that will pay for the items being procured.
<b>Program</b>	Required	Identifies the program that will pay for the items being procured. <b>Note:</b> Workday defaults this value after entering the cost center.
<b>Additional Worktags</b>	Required	Used when creating a requisition being paid by a Grant, Gifts, or Projects.
<b>Splits</b>	Optional	Identifies if the line item is to be split out to multiple locations.

4. As required, review the Process History section to see the processing steps of the purchase order.
5. As required, review any attachments.
6. As required, enter any notes in the **enter your comment** field.
7. As Required, complete one of the following:

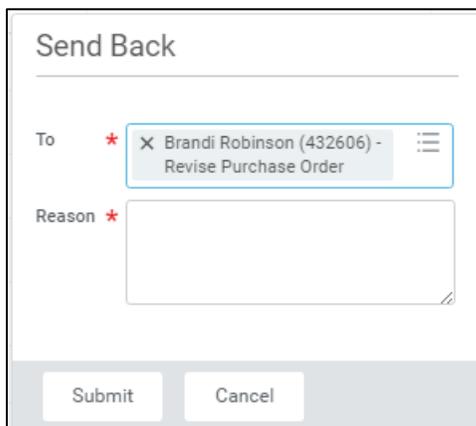
If you want to...	Then...	Go to
Approve the purchase order,	Click  .	<a href="#">Step 8</a>
Return the purchase order to the initiator for updates,	Click  .	<a href="#">Step 10</a>
Reject the purchase order,	Click More > Deny.	<a href="#">Step 14</a>

Success



8. Review the displayed information, pay particular attention to the *Up Next* section to confirm the next step in the process.
9. Click **Done**.  
**Note:** You have successfully approved the purchase order. Continue to the *Results* section of this document.

Send Back



The 'Send Back' form has a 'To' field with a dropdown menu showing 'Brandi Robinson (432606) - Revise Purchase Order'. There is a red asterisk next to the 'To' label. Below it is a 'Reason' field with a red asterisk and a text area. At the bottom, there are 'Submit' and 'Cancel' buttons.

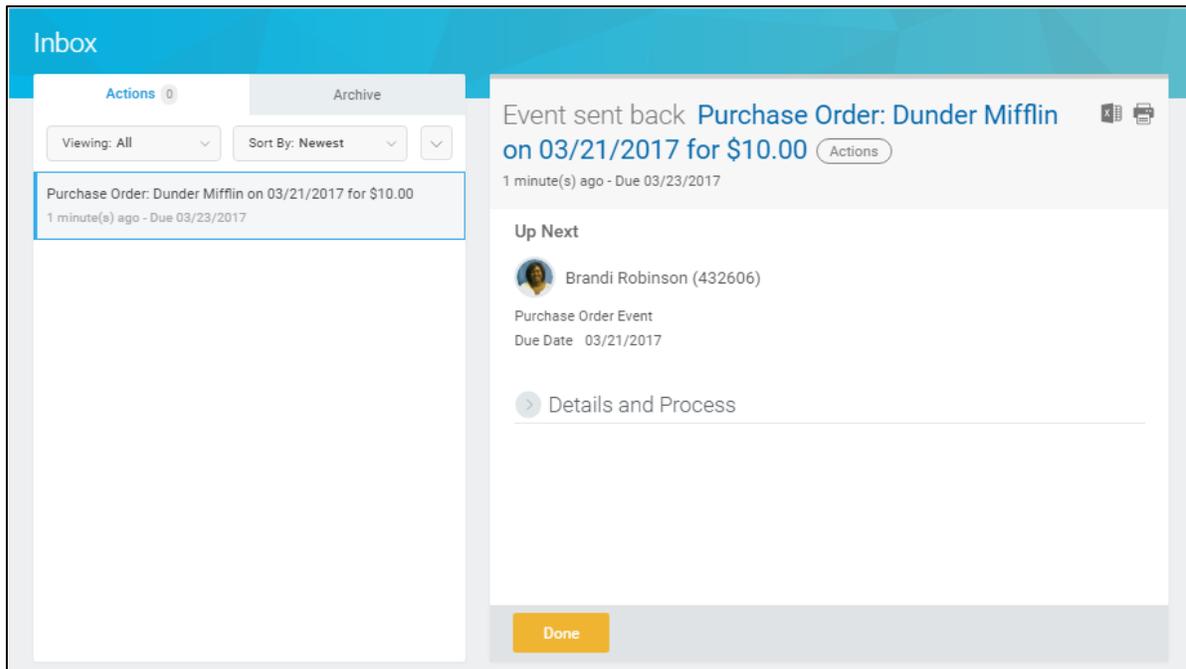
10. Complete the following fields:

Field Name	Required / Optional	Description
To	Required	Identifies who to return the requisition to for additional processing. Defaults to the initiator.

Field Name	Required / Optional	Description
Reason	Required	Enter the reason why the requisition is being returned.

11. Click **Submit** to trigger the return of the purchase order and return to the *Workday Inbox* screen.

### Inbox – Event Sent Back



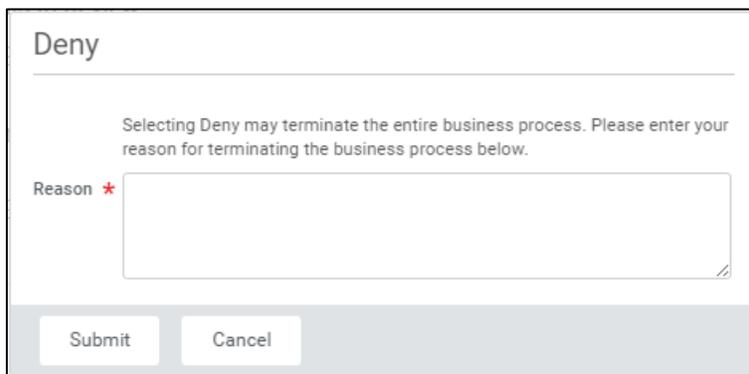
The screenshot shows the Workday Inbox interface. On the left, there is a list of items with a search bar and filters. The main area displays an event titled "Event sent back Purchase Order: Dunder Mifflin on 03/21/2017 for \$10.00". Below the event title, it says "1 minute(s) ago - Due 03/23/2017". The "Up Next" section shows the user "Brandi Robinson (432606)" and the event details: "Purchase Order Event" and "Due Date 03/21/2017". There is a "Details and Process" link and a "Done" button at the bottom.

12. Review the **Up Next** section to confirm who the purchase order was returned to.

13. Click **Done**.

**Note:** The approval process is now on hold until the person updating the purchase order resubmits it for approval. Continue to the *Results* section of this document.

### Deny



The screenshot shows a "Deny" dialog box. It contains a warning message: "Selecting Deny may terminate the entire business process. Please enter your reason for terminating the business process below." Below the message is a text input field labeled "Reason" with a red asterisk. At the bottom, there are "Submit" and "Cancel" buttons.

14. Complete the **Reason** field to enter why the purchase order is being denied.

15. Click **Submit** to deny the purchase order.

16. Click **Done** to confirm the cancelation of the purchase order.

***Result:***

You have successfully approved, sent back, or denied a purchase order.

**Note:** For additional information on this requisition, click  to the left of **Details and Process** and review the available details.