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**.

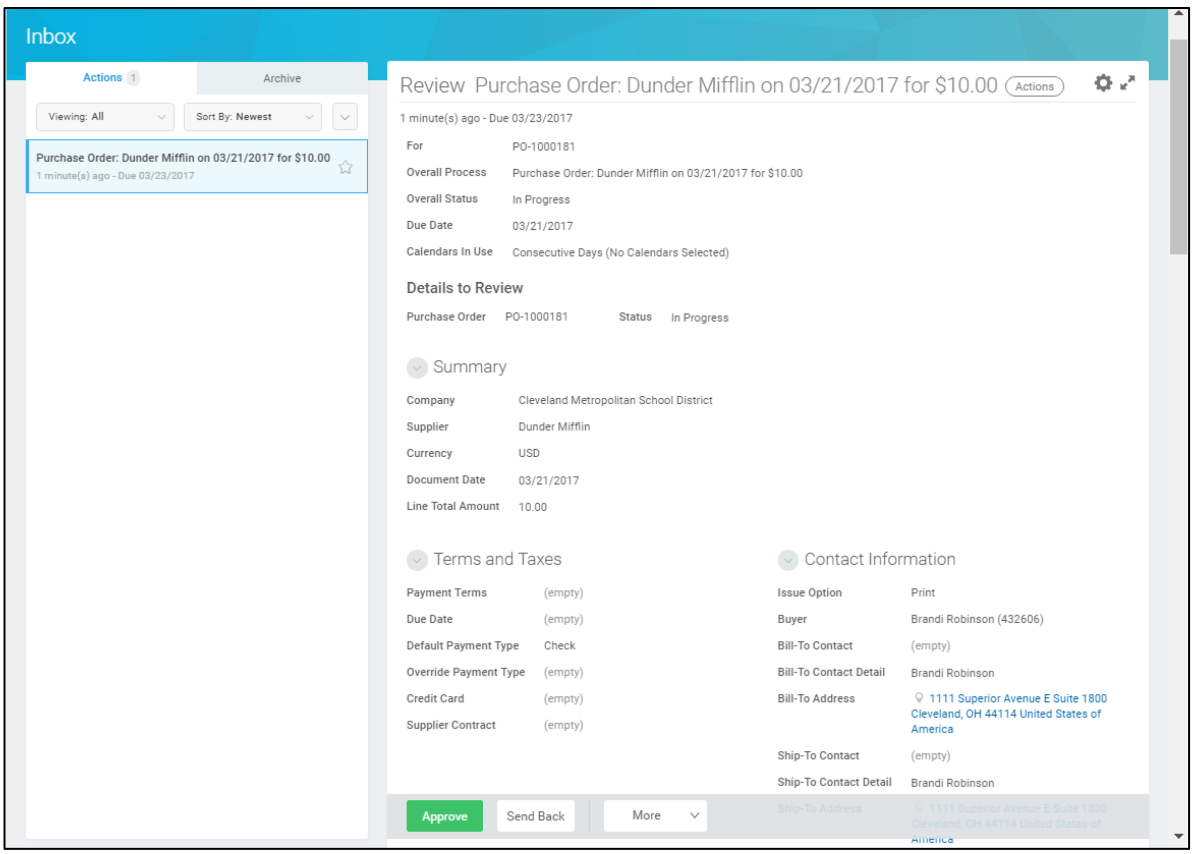
Audience: Managers and Financial Partners

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



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:

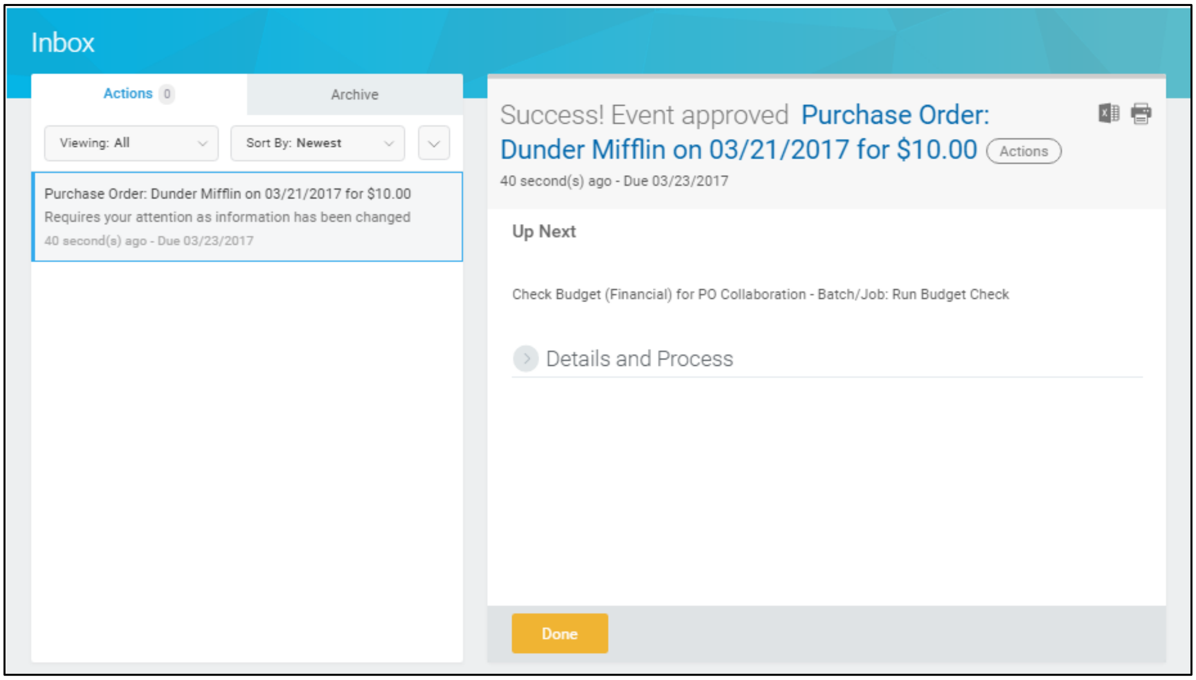
Field Name	Required / Optional	Description
Overall Process	Required	Identifies who created the purchase order, on what day, and for how much.
Overall Status	Required	Identifies the current status of the purchase order.
Due Date	Required	Identifies the date the order is to be approved.
Supplier	Required	Identifies the vendor filling the order.
Line Total Amount	Required	Identifies the total cost for all line items.
Buyer	Required	Identifies the person who created the order.
Bill-To Contact Detail	Required	Identifies the contact information for the party responsible for paying the order.
Bill-To Address	Required	Identifies the address for the party responsible for paying for the order.
Ship-To Contact Detail	Required	Identifies the contact information for the party receiving the order.
Ship-To Address	Required	Identifies the address for the party responsible for receiving the order.
Item	Do Not Use	Identifies the name of the product to be procured. ***Note:*** Item will not be selected on direct purchase order lines.
Item Description	Required	Identifies the product to be procured.
Spend Category	Required	Is a way of grouping similar items or services that drives the financial reporting.
Ordered (Quantity)	Required	Identifies how many items to procure.
Received (Quantity)	Optional	Identifies the number of items received for the line item.
Invoiced (Quantity)	Required	Identifies the number of items that have been invoiced for the line item.
Unit of Measure	Required	Identifies how the requested item is sold. Examples include: • Each • Box • Case
Unit Cost	Required	Identifies the dollar amount for each item.
Extended Amount	Required	Identifies the total cost for the line item.
Ship-To Address	Required	Identifies the location to deliver the items.

Field Name	Required / Optional	Description
Fund	Required	Identifies the fund that will pay for the items being procured.
Cost Center	Required	Identifies the cost center that will pay for the items being procured.
Function	Required	Identifies the function that will pay for the items being procured.
Program	Required	Identifies the program that will pay for the items being procured. ***Note:*** Workday defaults this value after entering the cost center.
Additional Worktags	Required	Used when creating a requisition being paid by a Grant, Gifts, or Projects.
Splits	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:

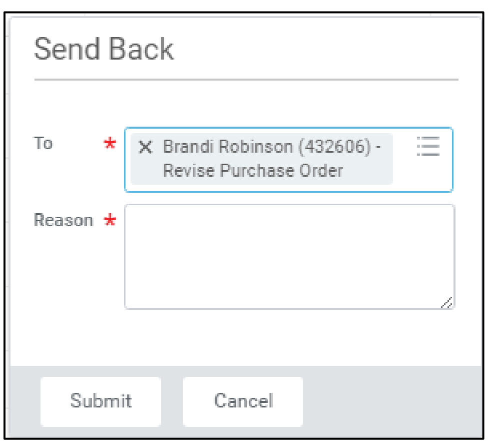
If you want to…	Then…	Go to
Approve the purchase order,	Click Approve .	Step 8
Return the purchase order to the initiator for updates,	Click Send Back .	Step 10
Reject the purchase order,	Click More > Deny.	Step 14

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



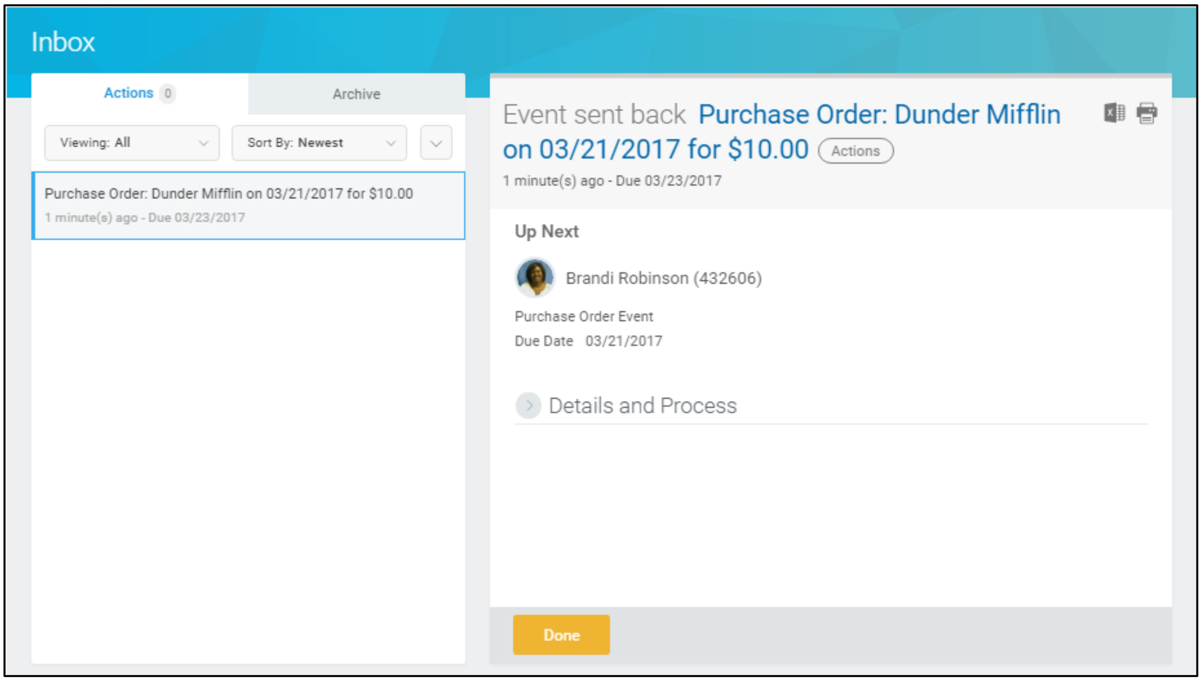
10. Complete the following fields:

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.

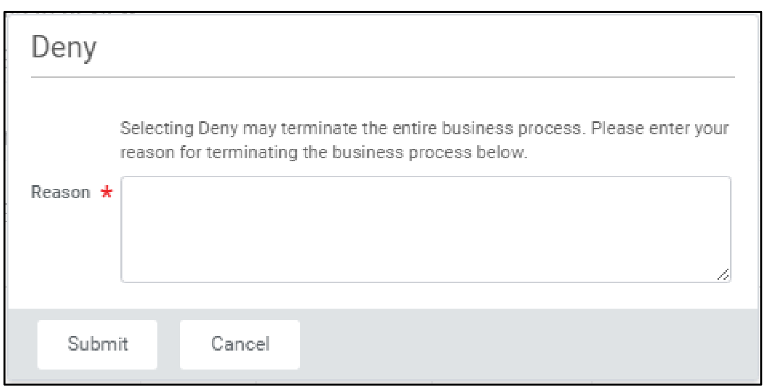
Inbox – Event Sent Back



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



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.