

08_Approve Requisition

Purpose: The purpose of this task is to review and approve a submitted requisition.

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

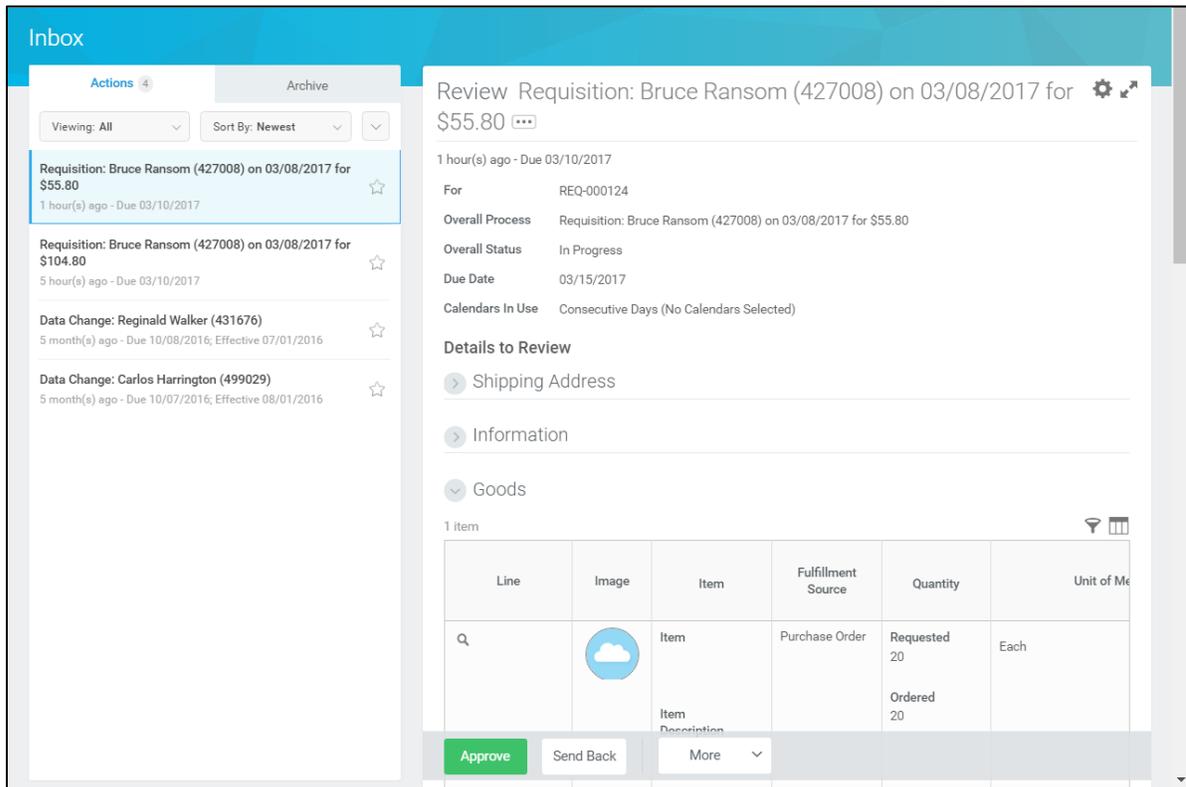
Audience: Approvers

Helpful Hints:

- Be sure to check your 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 review and approve a requisition.

Inbox



Inbox

Actions 4 Archive

Viewing: All Sort By: Newest

Requisition: Bruce Ransom (427008) on 03/08/2017 for \$55.80
1 hour(s) ago - Due 03/10/2017

Requisition: Bruce Ransom (427008) on 03/08/2017 for \$104.80
5 hour(s) ago - Due 03/10/2017

Data Change: Reginald Walker (431676)
5 month(s) ago - Due 10/08/2016; Effective 07/01/2016

Data Change: Carlos Harrington (499029)
5 month(s) ago - Due 10/07/2016; Effective 08/01/2016

Review Requisition: Bruce Ransom (427008) on 03/08/2017 for \$55.80

1 hour(s) ago - Due 03/10/2017

For REQ-000124

Overall Process Requisition: Bruce Ransom (427008) on 03/08/2017 for \$55.80

Overall Status In Progress

Due Date 03/15/2017

Calendars In Use Consecutive Days (No Calendars Selected)

Details to Review

- Shipping Address
- Information
- Goods

1 item

Line	Image	Item	Fulfillment Source	Quantity	Unit of Measure
Q		Item	Purchase Order	Requested 20 Ordered 20	Each

Approve Send Back More

1. Review your **Inbox Actions** tab for requisitions requiring approval.
2. Select the required Requisition task.

Note: For the purpose of this work instruction, the required **Requisition 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 requisition, on what day, and for how much.
Overall Status	Required	Identifies the current status of the requisition.
Due Date	Required	Identifies the date the requisition is to be approved.
Item	Optional	Identifies the name of the product to be procured.
Item Descriptions	Required	Identifies the product to be procured.
Spend Category	Required	Is a way of grouping similar items or services that drives the financial reporting.
Supplier	Required	Identifies the vendor filling the order.
Supplier Contract	Optional	Identifies the applicable contract with the vendor, if it exists.
Quantity	Required	Identifies how many items/services to procure.
Unit of Measure	Required	Identifies how the requested item is sold. Examples include: <ul style="list-style-type: none"> • 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.
Fund	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
Cost Center	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
Function	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
Program	Required	Used to identify which budget will pay for the items being procured. Value defaults in based on the person entering the requisition.
Additional Worktags	Required	Used when creating a requisition being paid by a Grant, Gifts, or Projects.

4. As required, review any attachments.

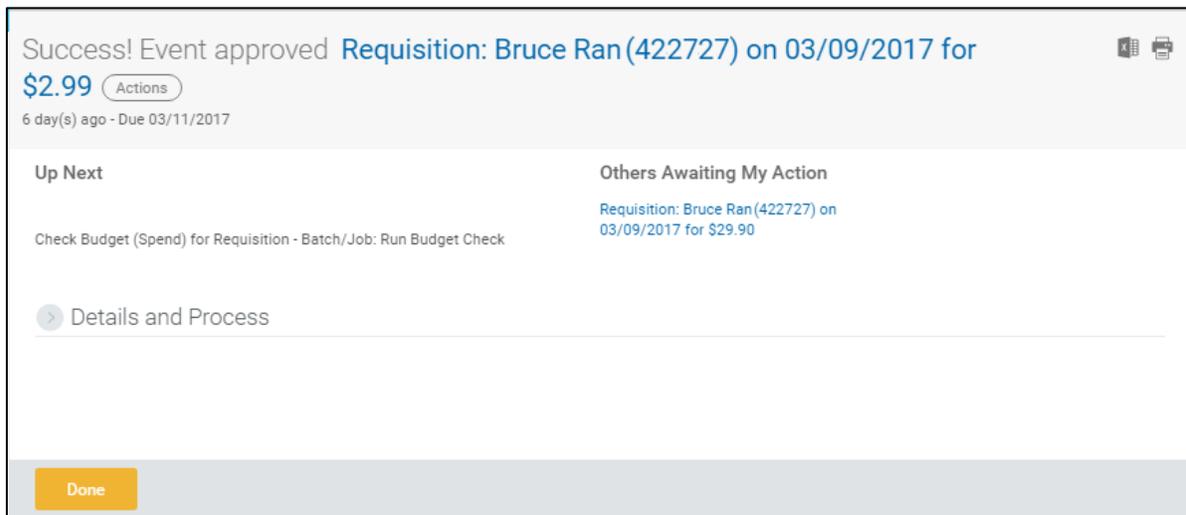
Note: Attachments are required for all Board Authorizing or Board Awarding requisitions.

5. As required, enter any notes in the **enter your comment** field.
6. As required, review the *Process History* section to review all of the processing steps of the requisition.
7. Complete one or more of the following:

If you want to...	Then...	Go to
Approve the requisition,	Click  .	Step 8
Reject the requisition,	Click More > Deny.	Step 10

Note: Even though there is an option to **Send Back** the requisition to the initiator, do not use. Instead, use the **Deny** option, which will require the initiator to create a new requisition, with the correct information.

Success



Success! Event approved **Requisition: Bruce Ran (422727) on 03/09/2017 for \$2.99** Actions

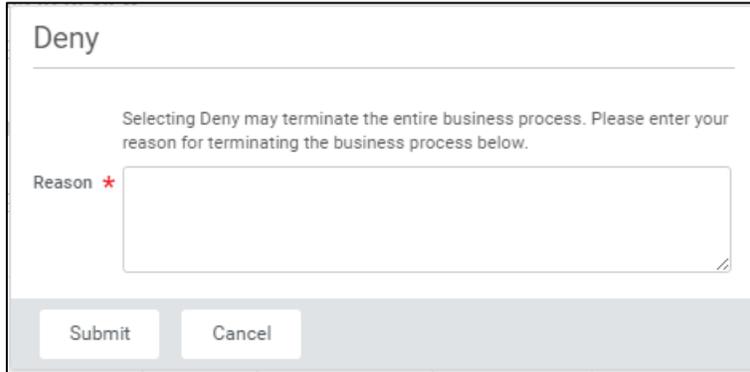
6 day(s) ago - Due 03/11/2017

<p>Up Next</p> <p>Check Budget (Spend) for Requisition - Batch/Job: Run Budget Check</p> <p>Details and Process</p>	<p>Others Awaiting My Action</p> <p>Requisition: Bruce Ran (422727) on 03/09/2017 for \$29.90</p>
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Done

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 requisition. Continue to the *Results* section of this document.

Deny



Deny

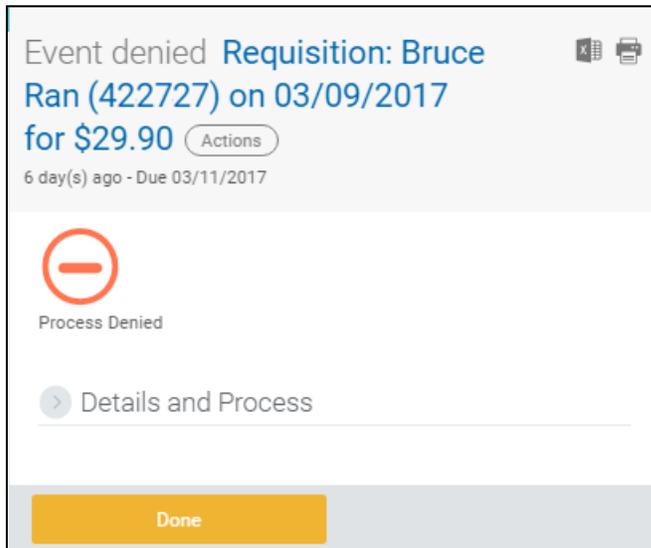
Selecting Deny may terminate the entire business process. Please enter your reason for terminating the business process below.

Reason *

Submit Cancel

10. Complete the **Reason** field to enter why the requisition is being denied.
11. Click [Submit](#) to deny the requisition.

Event denied



Event denied **Requisition: Bruce Ran (422727) on 03/09/2017 for \$29.90** [Actions](#)

6 day(s) ago - Due 03/11/2017

 Process Denied

[Details and Process](#)

Done

12. Click Done.

Result:

You have successfully approved or denied a requisition.

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