Approval for a payment from a Campus Organization to a department or service center on campus can be made through the Workday request *COA Purchase Order*. The treasurer of the club making the payment (the payor) will initiate the request. The completed request will create an approval to spend funds from your on campus account. Once approved, the treasurer will submit the approval notification to the department or service center to complete the payment process. Club to club payments are made via the *COA Internal Transfer* Request.

These instructions are organized in three parts:

- **Initiating the Request** will help with finding the request form in Workday and filling in the details of the form
- **Viewing the Status of the Request** will detail how to see the approval status of the Purchase Order request (or any other request made through *Create Request*)
- **Completing your Purchase Order** will give an overview of how to find your Purchase Order approval notification, and what to do with your approval to complete the payment process.

Initiating the Request

The treasurer will log into Workday, and access *Create Request* though either the Requests application icon on the homepage, or by typing "create request" in the search bar. Select *COA Purchase Order* in the list of requests, or type "purchase order" in the *Request Type* box before selecting "OK".
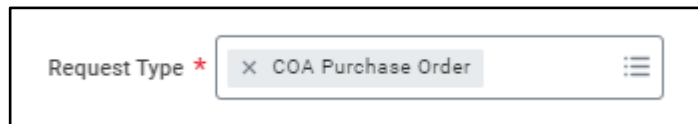
The request form will appear. All text fields are required. Please see below for detailed descriptions of what to enter in each field from the perspective of the treasurer.

> **Describe the Request:** Please add a short description of why you will be making the payment.
>
> **Payor Organization Name:** Write in your own full organization name (no abbreviations please!)
>
> **Payor Organization Program Worktag:** Write in your organization Program Worktag (in format PGXXXXXX)
>
> **Requested Amount to Transfer:** Enter the total amount of the payment.
>
> **Describe the purchase you are making:** List any details of what you are purchasing- you might list items or services purchased, an event name and date, or an invoice/order numbers.
>
> **Payor Organization Advisor to Approve:** Write in the name of the organization advisor who should approve this Workday request. If your organization has multiple advisors you only need to write in one name, as only one advisor needs to approve the request.
>
> **University Department to be Paid:** Enter the name of the University Department or officeyou are paying.

Attachments:

Attachments are very welcome on this form! If the ISU department or service center give you an invoice, order confirmation, or details about your purchase through email, you may wish to attach that information to the request.

Viewing the Status of the Request

Check the status of requests by using *My Requests* in the *Requests* application, or search *My Requests* in the search bar*.*
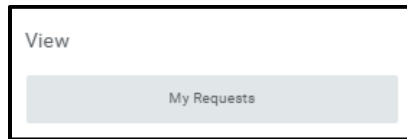
A list of every request you've made will populate, and the status column will show whether the request is Complete or In Progress. If you want to find more information about an in-progress request, first select the more actions orange button from within the first column (**1**). Then go to "Business Process" from the menu that appears (**2**). Then select the link "View Business Process Event History" (**3**).
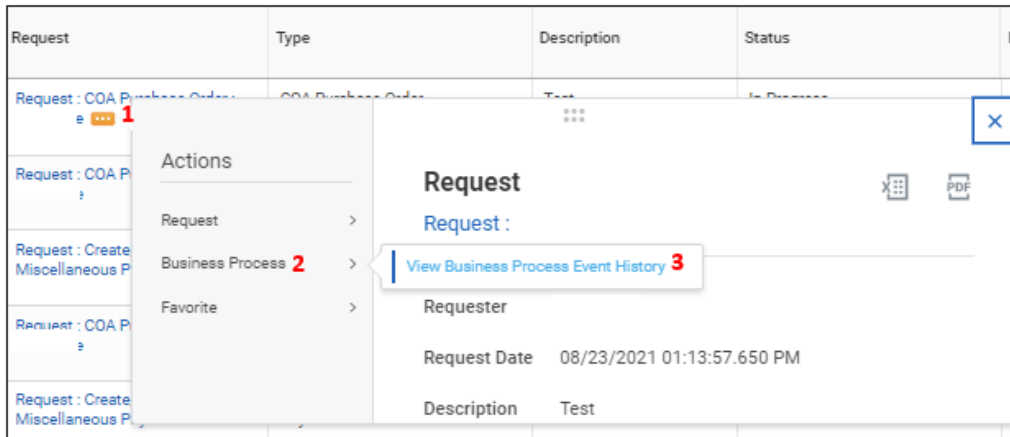
You'll then find what information you entered on the form (under Details), and who has approved or has yet to approve the request (under Process).
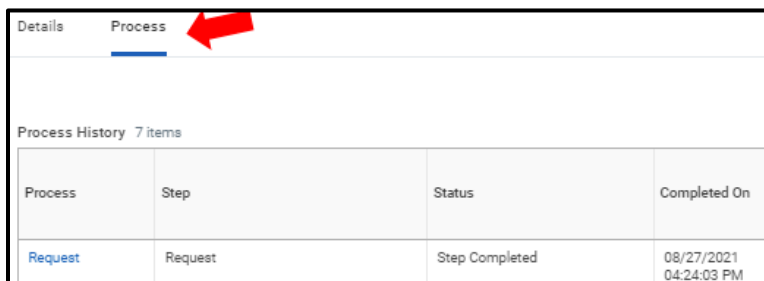
Completing Your Purchase Order

Once the Purchase Order Request has been fully approved, you will receive an email from Workday. The email will include details and descriptions of the purchase from what you entered on the request form.

This approval will need to be submitted to the department or service center being paid, and should be submitted however they have communicated to you that they would like this done. **The only way they will know that they may charge your Program Worktag is by sharing the Purchase Order notification**. They may wish for the approval to be submitted electronically, over email, or printed and turned in to a certain location.

The completion of a *COA Purchase Order* request will also create a Workday notification, as an additional location where the approved purchase order can be found. Workday notifications can be accessed by clicking the bell in the upper right corner of the home page:

A list of notifications for completed requests and processes will appear. For a *COA Purchase Order*, when selecting the purchase order on the left column, the right side of the screen will display the notification information. The PDF icon will generate a PDF that can be easily forwarded or printed to share with the department or service center you are paying.
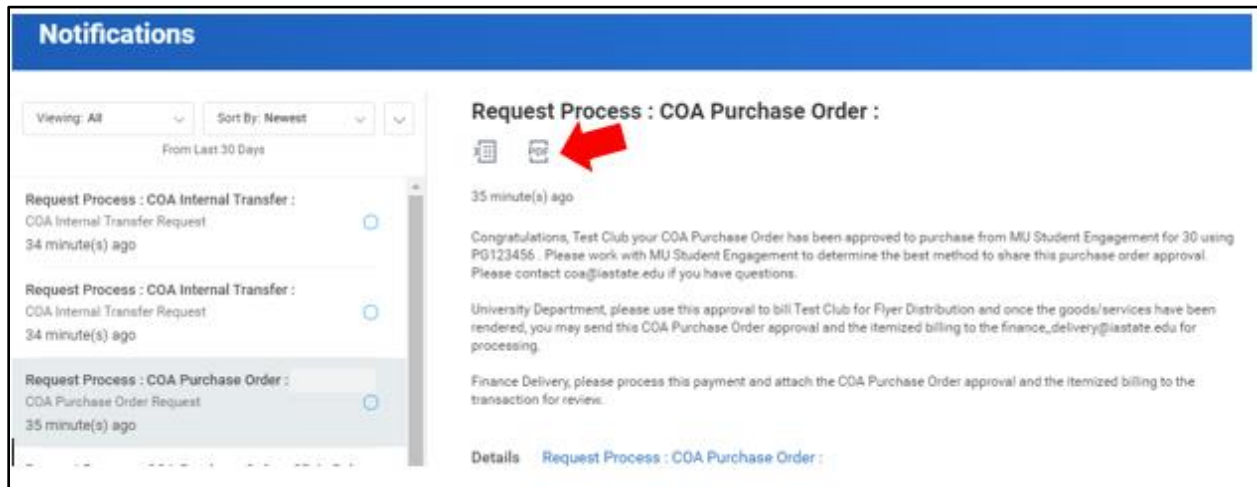
As described on the notification, the department receiving the payment from your organization will process the payment after you have shared the notification with them.