

Finding & Editing Draft Procurement Card Transactions

If the verification process for a transaction has been started, but not completed, the transaction will go into what is known as a “Draft” status. Transactions in “draft” status will no longer appear under Actions>Verify Procurement Card Transactions. “Draft” transactions will appear under the View>Procurement Card Transaction Verifications. Please follow the steps below to check if you have any transactions in draft and/or how to edit and submit them.

It is important to note that transactions in “Draft” status will not reflect in your budget until they are submitted to your Cost Center Manager for review and approval.

1. Log into your Workday account and Click on the “Purchases” Application.

Menu

Apps

Shortcuts

Your Saved Order



Purchases



Expenses



Student Employees



My Team



Academic Administrators



Time



Grants Management



Financials Dashboard

2. In the “View” Box, select “Procurement Card Transaction Verification” (second option down)

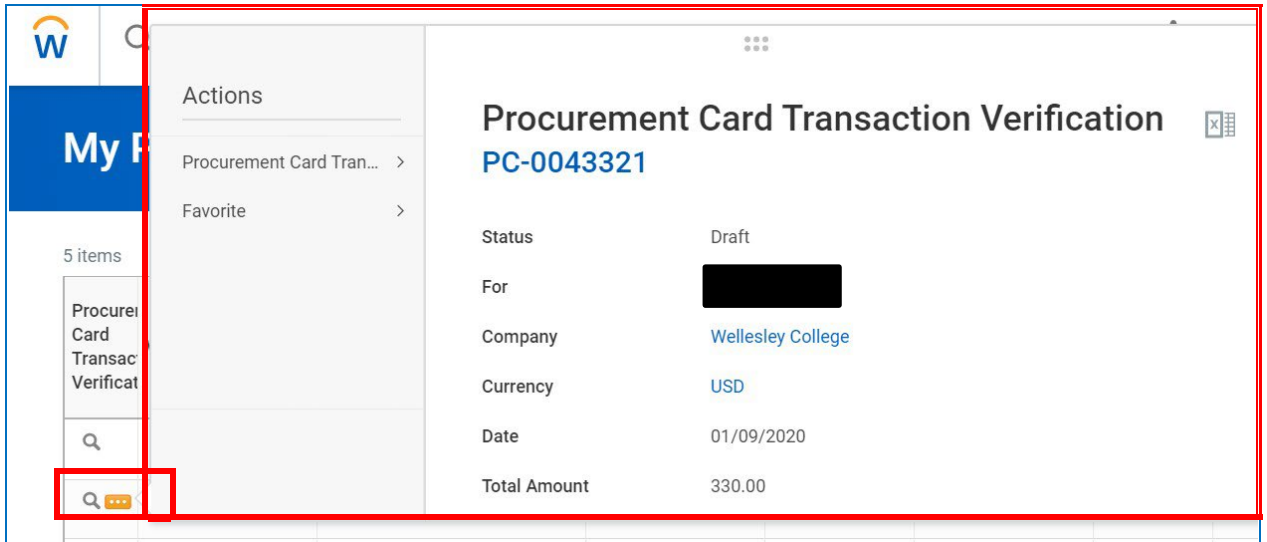
The screenshot shows a software interface with two main columns. The left column is titled 'Actions' and contains five buttons: 'Verify Procurement Card Transactions', 'Create Requisition', 'Select from My Procurement Favorites', 'Create Receipt', and 'Edit Receipt'. The right column is titled 'External Links' and contains one button: 'Amazon Business - Wellesley College'. Below these is a 'View' section with five buttons: 'Procurement Card Transactions', 'Procurement Card Transaction Verifications', 'Requisitions', 'Receipts', and 'Supplier Requests'. The 'View' section is highlighted with a red border, and the 'Procurement Card Transaction Verifications' button is also highlighted with a red border. To the right of the 'View' section is a 'Cart' section showing '0 Items' and a 'Cart' button.

3. Locate the transaction(s) you have in Draft status by looking under the “status” column.

The screenshot shows a table titled 'My Procurement Card Transaction Verifications' with a blue header and an 'Actions' button. The table has 5 items and 8 columns: Procurement Card Transaction Verification, Verification Number, Company, Verification Date, Status, Verification Amount, Currency, and Number of Transactions. The 'Status' column is highlighted with a red box, and the row for transaction PC-0043321 with a 'Draft' status is highlighted with a red box.

Procurement Card Transaction Verification	Verification Number	Company	Verification Date	Status	Verification Amount	Currency	Number of Transactions
Q	PC-0043320	Wellesley College	01/09/2020	Approved	22.45	USD	
Q	PC-0043321	Wellesley College	01/09/2020	Draft	330.00	USD	
Q	PC-0037119	Wellesley College	09/10/2019	Approved	213.29	USD	
Q	PC-0037127	Wellesley College	09/10/2019	Approved	129.47	USD	
Q	PC-0035445	Wellesley College	07/12/2019	Approved	4,247.80	USD	

- Once you have located the draft transaction, hover your mouse to the right of the magnifier, and an orange “twinkie” will appear. Click on the “twinkie.” A sub-menu will then appear.



- On the sub-menu, under “Actions”, hover your mouse over “Procurement Card Transaction”, and click “edit”. Clicking “edit” will bring you into the “edit mode” and you will be able to complete the verification and submit it.

