



Workday Finance, configured by a Chartered Accountant.

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■ WORKDAY FINANCE · STEP BY STEP

Convert Project to Capital Project

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■ Purpose & Overview

- This guide explains how to convert a project to a capital project in Workday.
- The process ensures the project follows the correct approval workflow.
- Successful completion updates the project status accordingly.

■ Prerequisites

- Required Workday security access.
- Valid requisition linked to the project.
- Approvers identified and available.
- Project is eligible for capital conversion.

■ Preliminary Setup

- Navigate to the My Requisitions task and run for a requisition.

Find Requisitions

Company

×

Global Modern Services, Inc. (USA)

⋮

Recommended

+ Global Modern Services, Ltd (C...

+ Global Modern Services, PLC (...)

Requisition

Requester

Requisition Type

Requesting Inventory Site

Requisition Date On or After

05/27/2024

📅

Requisition Date On or Before

MM/DD/YYYY

📅

Status

⋮

☐ Has Unsourced Lines

☐ Fully Sourced

☒ None of the above

Sourcing Buyer

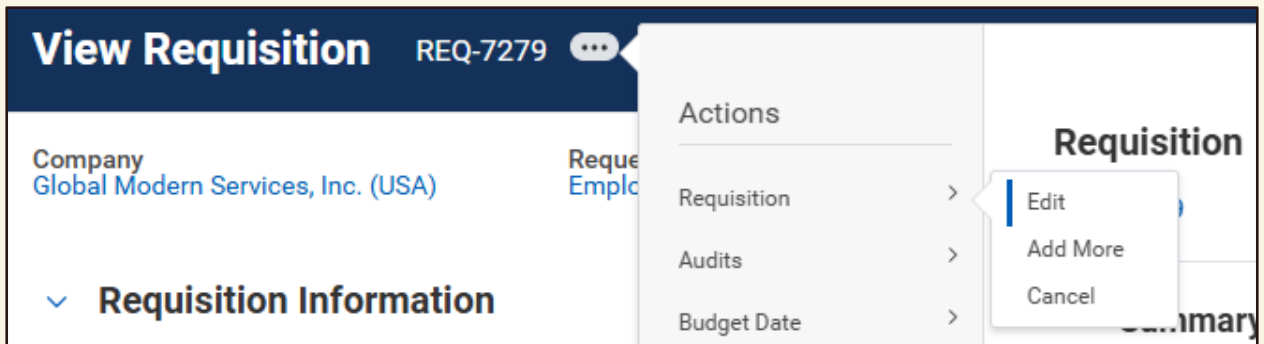
Fulfillment Source

Cancel

OK

■ Preliminary Setup

- On the far-right column, click Edit Requisition.
- This pulls the requisition out of draft status.



■ Complete Approvals

- Click into the Process tab.
- Follow the approval chain displayed.

Goods Lines		Process History					
Process History		5 items					
Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Requisition Event	Requisition Event	Step Completed	05/12/2025 11:59:22 AM	05/19/2025	Teresa Serrano	1	
Requisition Event	Complete Questionnaire	Not Required		05/19/2025		0	
Requisition Event	Check Budget	Not Required		05/19/2025		0	
Requisition Event	To Do: Please explain over budget	Not Required		05/19/2025		0	

■ Complete Approvals

- Proxy as the approver.
- Navigate to the approver's inbox and click Approve.

✓

Requisition Information

Request Date

*

05/17/2024 

Currency

*

✕

 USD ...

Requisition Type

✕

 z-integration ...

Approve

Send Back

Add Approvers

...

- Repeat until Overall Status is Successfully Completed.

■ Common Errors & Resolutions

Error	Possible Cause	Resolution
Edit Requisition option not available	Requisition already submitted or locked	Verify requisition status and security access
Approval stuck in progress	Approver unavailable or incorrect routing	Proxy as approver or update approval chain
Overall status not completed	Pending approval step missed	Review Process tab and complete all approvals



Thank You

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