Create Supplier Invoice Request
*Workday Job Aid for Employees*

Overview

This job aid provides a detailed overview of how to request the creation of a supplier invoice. The Supplier Invoice Request module should be used when the Department has received an invoice from a Vendor for goods or services that they have purchased and received.

Process Flow: Supplier Invoice Request

Employee initiates the Supplier Invoice Request → The request automatically routes for reviews/approvals (see below)
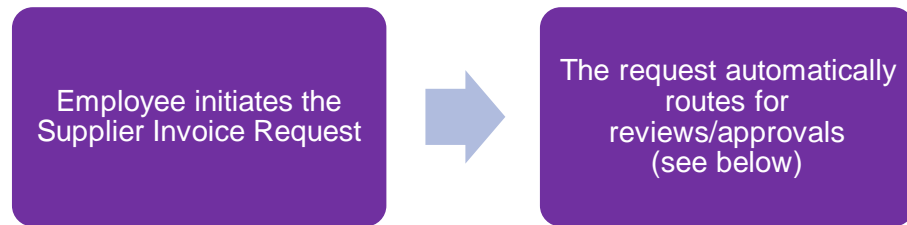
Reviews: Supplier Invoice Request

- If there is a Grant Worktag, then Principal Investigator (Grant) reviews the request.

- If the Spend Category is Trackable_SINVR_SINV, then Business Asset Accountant reviews the request.

- EAP Partner reviews the supplier invoice request if the Spend Category is EAP.

Approvals: Supplier Invoice Request

- Cost Center Manager or Secondary Cost Center Manager approves the request.

- If the Spend Category is IT, then IT Personnel approves the request.

- If the Spend Category is Facilities, then Facilities Manager approves the request.

- If there is a Grant Worktag, then Award Billing Specialist approves the request.

- If there is a Project Worktag, then Project Manager Tracking approves the request.

- If the Spend Category is greater than $5K and Non-Cap?, then Business Asset Accountant approves the request.

- Manager approves the request if the Spend Category is EAP.

Create Supplier Invoice Request

1. Using the Search field, enter and select **Create Supplier Invoice Request**.

2. The **Invoice Date** is required and defaults to the current date. Modify as necessary.

   Note: This automatically populates the Ship-To Address in the Additional Information column.

3. Select the **Company**.

4. Select an existing **Supplier** from the list. Once selected, the **Currency** and **Payment Terms** default.

   Note: If the supplier is not listed, you must submit a supplier request and wait for confirmation that the supplier has been added. Then can select the new supplier before submitting this form. Review the *Create Supplier Request* job aid to view more details about this process.

5. Enter the **Supplier's Invoice Number**.

6. In the Additional Information section, enter a **Memo**.

7. Scroll down to the Lines section.

8. Select **Goods Line** or **Services Line**.
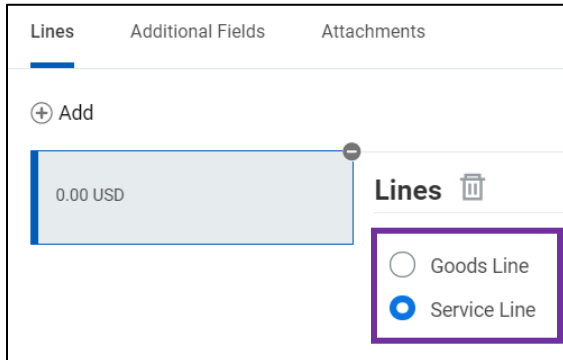
9. Select an **Item** if it is listed.

10. Enter an **Item Description**.

11. A **Spend Category** will be automatically populate if an item is selected. In absence of an item please chose a **Spend Category**.

12. Select the **Quantity** and specify the **Unit Cost**. Together these calculate the extended amount.

13. Select a **Cost Center**.

    Note: Once selected, the Fund and Program will default. For EAP related requests Fund must be 1110; Cost Center must be MC0001.

14. Enter a **Memo** or **Internal Memo**, if applicable.

15. At the top right corner, click **Splits** if the invoice request line is being split across multiple cost centers or projects.

16. Supplier invoice requests may be split by either Amount or Quantity.

17. For a Goods Line, split by **Amount** or **Quantity**. If Amount was selected, enter either the **Percent** or **Amount**. If Quantity was selected, enter the value in the **Quantity** field.

18. For a Service Line, enter either the **Percent** or **Amount**.

19. Enter details in the **Memo** field.

20. Select a **Cost Center**.

21. Select a **Fund**.

22. Select a **Program**.

23. Continue adding split lines using the **Add Row** icon following the steps above. To remove a row of data, use the **Subtract Row** icon. Enter all split lines until the **Remaining Amount to Split** equals zero (0.00).

24. Click the **Attachments** tab.
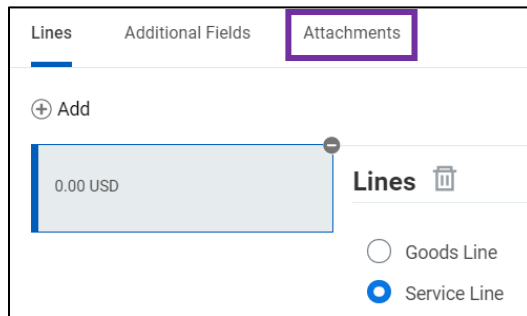
25. Drag and drop or click **Select files** to upload a copy of the supplier invoice or any other supporting documentation to attach it to the request.

    Note: Attachments are required.

26. Click **Add** to add additional lines to the request.
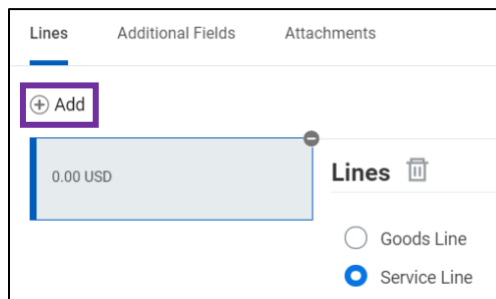
27. Review the information and click **Submit**.

My Supplier Invoice Requests

1. Using the Search field, enter and select **My Supplier Invoice Requests**.

2. Enter any information that would narrow the search for the invoice request or leave all fields blank and click **OK**.

3. Supplier invoice requests that have been submitted by the worker are listed here, along with the request number, company, request status, supplier, request amount, and other important information.