




Create Supplier Invoice Request (SIR)


1. In the Workday search bar, enter **Create Supplier Invoice Request** and select this task.


Primary Information


Invoice Date * 03/21/2023 

Invoice Received Date MM/DD/YYYY 

Company * 

Supplier * 


Remit-To Connection 


Currency * 

Control Total Amount


Supplier's Invoice Number


Additional Information


Ship-To Address 

Payment Terms 

Default Due Date (empty)

Reference Type 

Handling Code 

Statutory Invoice Type 

Freight Amount

Tax Amount

Memo

Lines Additional Fields Attachments

 Add

Viewing:  

Lines 

 Splits (0)

- Goods Line
 Service Line

Item 

Item Description

Submit

Save for Later


Cancel

2. Enter the following information into the fields on the **Primary Information** section:
 - a. **Invoice Date:** This will default to today's date. Enter the date of the invoice if different. **This is a required field.**
 - b. **Invoice Received Date:** Enter the date you received the invoice.
 - c. **Supplier:** Enter the supplier into this field. You can enter a few letters of the supplier's name and press enter to search *or* you can click the prompts in this field to locate the supplier. (If the supplier is not in Workday, please see the **Create Supplier Request** QRG.) **This is a required field.**
 - d. **Currency:** This field auto-populates with the supplier's default currency based on the supplier in the previous step, typically USD. If the supplier accepts multiple currencies, all accepted currencies will appear as options to select. **This is a required field.**
 - e. **Supplier's Invoice Number:** Enter the invoice number from the supplier invoice in this field. **This is a required field.**
 - f. If the invoice does **not** list an invoice number, please use one of the following formats:
 - i. A. MMYY0(insert last three initials of payee)(insert first two initials of payee). Exclude spaces and special characters.
OR
 - ii. B. MMYY0(insert first five characters of the organization's name or account number). Exclude spaces and special characters.
3. Enter the following information, if applicable, into the fields in the **Additional Information** section.
 - a. **Ship-To Address:** *This will auto-default to USD's main address.*
 - b. **Payment Terms:** This should default based on the supplier but please verify and update terms as needed. Payment terms must match those stated on the invoice.
 - c. **Reference Type:** Leave this blank.
 - d. **Handling Code:** Leave this blank.
 - e. **Statutory Invoice Type:** Leave this blank.
 - f. **Freight Amount** and **Tax Amount:** Enter the freight and tax amount as stated on the invoice, if applicable.
 - g. **Memo:** Include a short description of the goods/services. **This is a required field.**

4. Scroll down to the **Lines** section of the screen.
 - a. Goods Line view:

⊕ Add

0

Lines 


Goods Line

Service Line

Item	<input type="text"/>
Item Description	<input type="text"/>
Spend Category	<input type="text"/>
Quantity	<input type="text" value="0"/>
Unit of Measure	<input type="text"/>
Unit Cost	<input type="text" value="0"/>
Extended Amount	<input type="text" value="0"/>

b. Service Line view:

⊕ Add

Lines 

Goods Line
 Service Line

Item

Item Description

Spend Category

Quantity 0

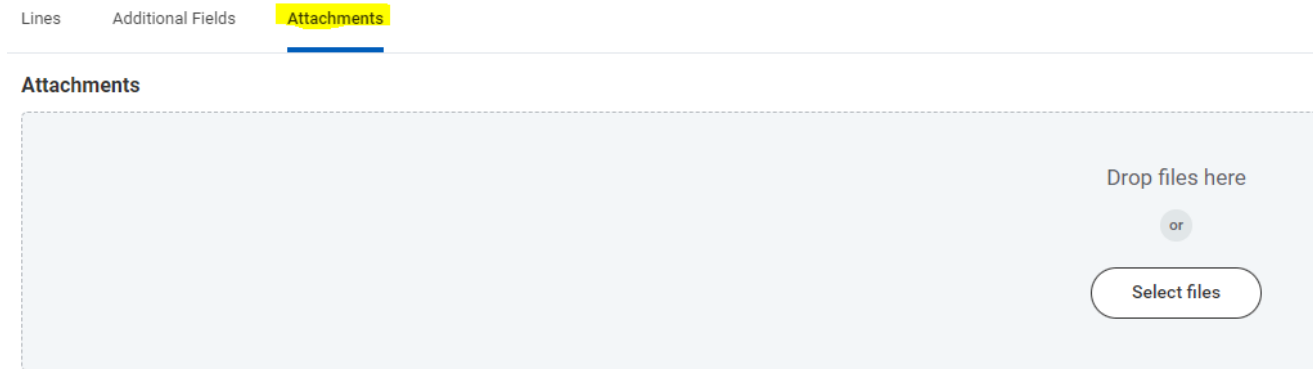
Unit Cost 0

Extended Amount

5. First, select whether this is a **Goods Line** or a **Service Line**. Instructions for these different options are below:
6. If processing a Supplier Invoice Request for goods, select Goods Line and enter the following information into the fields on this screen:
 - a. **Item**: Do not choose a value in this field. Use **Item Description** instead.
 - b. **Item Description**: Enter a brief description of your item(s). There is no character limit. **This is a required field.**
 - c. **Spend Category**: Use the prompt in this field to select the appropriate spend category that best describes your goods. **This is a required**

- field.
- d. **Quantity:** The quantity of item(s). **This is a required field.**
 - e. **Unit of Measure:** Choose the unit of measure for your item(s) (e.g., dozen, each, case, etc.) **This is a required field.**
 - f. **Unit Cost:** Enter the cost of each item. **This is a required field.**
 - g. **Extended Amount:** This value will calculate automatically. **This is a required field.**
7. The next six fields are **Worktag** fields. These allow you to associate your supplier invoice with specific financial designations, which will ensure they are routed correctly to and from the appropriate ledger accounts. The fields are described below.
- a. **Gift:** If the supplier invoice is tied to a gift, such as an alumni gift, select it here.
 - b. **Grant:** If the supplier invoice is tied to a particular grant, such as an NSF grant, select that specific grant in this field.
 - c. **Project:** If the supplier invoice is tied to a particular project, such as renovations, improvements, or additions, select that project in this field.
 - e. **University Designated:** If the supplier invoice is associated with a research or start up fund, select that value here.
 - f. **Agency:** If the supplier invoice is associated with a particular agency or group, select it here.
 - g. **Academic Program:** If the supplier invoice is associated with an academic program (e.g., Biology, Computer science, Communication Studies, etc.) select it here.
 - i. **Cost Center:** The cost center may default based on your department but can be changed if needed. **This is a required field.**
 - j. **Additional Worktags:** This field is tied to the cost center and will default based on the cost center. If there are additional custom worktags you want to add, you can enter them into this field. **This is a required field.**
8. Enter a **Memo** if desired.
9. To add additional lines, use the **Add** button at the top left corner of this section. You should use additional lines to split the accounting (e.g. add different spend categories and worktags) if needed.
10. To finish and submit your goods invoice request, proceed to step 14.
11. If processing a Supplier Invoice Request for Services, select Service Line and enter the following information into the fields on this screen:
- a. **Item:** Do not select a value in this field. Use **Item Description** instead.
 - b. **Item Description:** Enter a brief description of the service(s). **This is a required field.**
 - c. **Spend Category:** Use the prompt in this field to select the appropriate spend category that corresponds to your service (e.g., consulting services). **This is a required field.**
 - d. **Extended Amount:** Enter the amount of the invoice into this field. **This is a required field.**
12. See step 7 for information about the worktag fields.
13. To add additional service lines, use the **Add** button at the top left corner.

14. After all invoice lines have been entered, click the **Attachments** tab.



Lines Additional Fields **Attachments**

Attachments

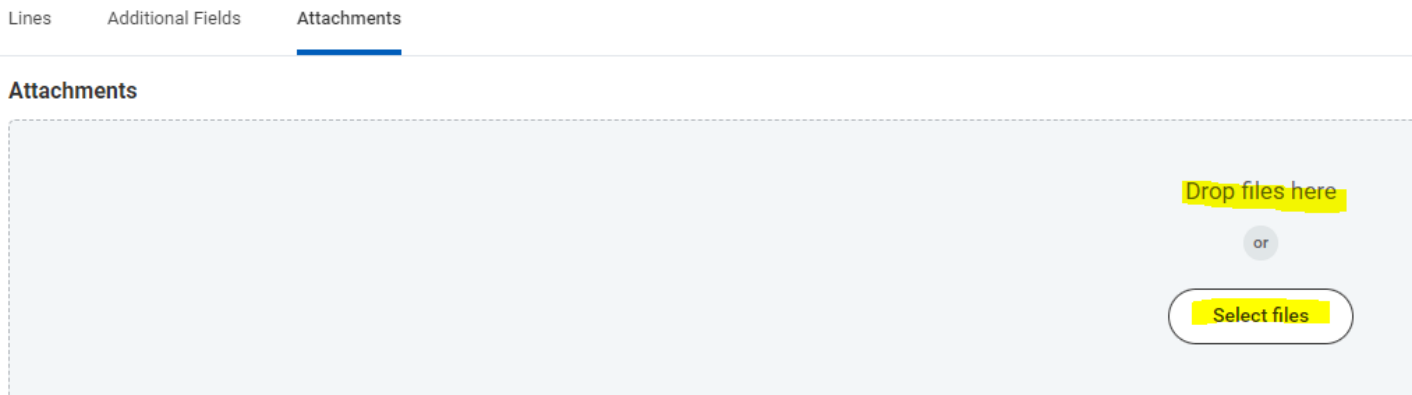
Drop files here

or

Select files

15. Note that you are *required* to upload supporting documentation (i.e., the supplier invoice) to this request. Ensure that the file upload has a green check mark to indicated that it was successfully uploaded. There is no limit to the number of attachments or different file types that can be uploaded (ex. Pdf, jpg, excel, word, etc.) **This is a required field.**

16. You may drag and drop the files you'd like to attach or use the **Select Files** button to locate your files for upload in the **Attachments** grid:



Lines Additional Fields **Attachments**

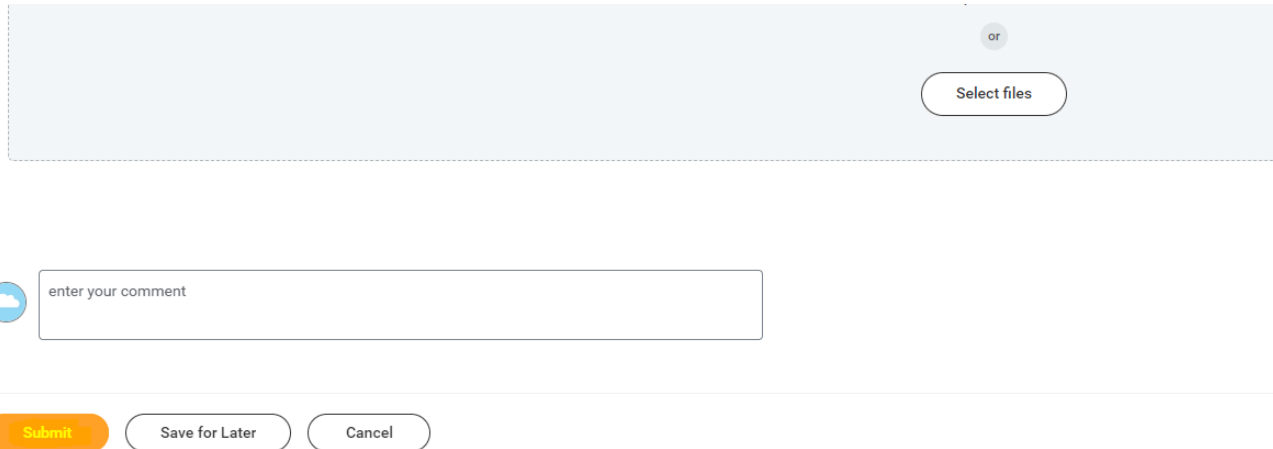
Attachments

Drop files here

or

Select files

17. Once you are finished, click **Submit**.



The screenshot shows a light blue rectangular area with a dashed border. Inside this area, there is a small grey circle with the word "or" inside it, and a rounded rectangular button labeled "Select files". Below this area is a text input field with a blue cloud icon on the left and the placeholder text "enter your comment". At the bottom of the form, there are three buttons: "Submit" (orange), "Save for Later" (white with grey border), and "Cancel" (white with grey border).

The request will now be routed for review and approval. Note that if approvers need more information or need you to correct information, they may send the request back to your Workday inbox for review and/or correction.

Important: Workday will perform a budget check for this transaction. An item may appear in your inbox asking you to review and acknowledge the budget check status—you can do this by clicking **Submit** for this item in your inbox. After you have submitted the transaction, make sure to check your inbox for this step. If this step appears in your inbox, you *must* approve it before the process can be approved.

18. To view or monitor the status of your **Supplier Invoice Request**, search for the **My Supplier Invoice Requests** using the Workday search bar.