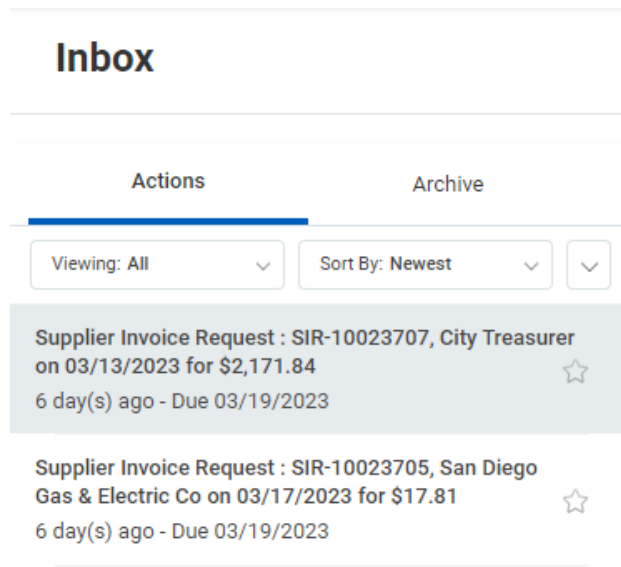


# Review and Approve Supplier Invoice Request (SIR)

1. All submitted supplier invoice requests route for the employee's manager approval. Afterwards, the supplier invoice request will route to the appropriate worktag approver(s).
2. After logging into Workday, click on the **Inbox** icon at the top right corner.



3. Items that need your review and/or approval will appear in your inbox in order of when they were routed to you. Locate the supplier invoice request item in your inbox.



4. The Primary Information section will display information inputted for this SIR:

**Review** Supplier Invoice Request : SIR-10023707, City Treasurer on 03/13/2023 for \$2,171.84 \*\*\*

6 day(s) ago - Due 03/19/2023

**For** Supplier Invoice Request: SIR-10023707

**Overall Process** Supplier Invoice Request : SIR-10023707, City Treasurer on 03/13/2023 for \$2,171.84

**Overall Status** In Progress

**Due Date** 03/19/2023

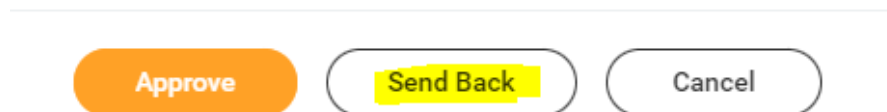
**Details to Review**

|                          |                |              |        |             |           |                 |
|--------------------------|----------------|--------------|--------|-------------|-----------|-----------------|
| Supplier Invoice Request | Request Number | SIR-10023707 | Status | In Progress | Requester | Giselle Sanchez |
|--------------------------|----------------|--------------|--------|-------------|-----------|-----------------|

▼ **Primary Information**

|                           |  |
|---------------------------|--|
| Invoice Date              | 03/13/2023                                   |
| Invoice Received Date     | (empty)                                      |
| Company                   | University of San Diego                      |
| Supplier                  | City Treasurer                               |
| Remit-To Connection       | City Treasurer_AP_PO Box 129020_San Diego_CA |
| Currency                  | USD  |
| Control Total Amount      | 0.00   |
| Supplier's Invoice Number | 0323048738                                   |

5. Scroll down to see the invoice request lines.
6. Review the following prior to approving:
  - ☐ The SIR has an appropriate **Line Item Description** and the correct **Spend Category** (Remember: the spend category defines what is being purchased.)
  - ☐ The **Extended Amount** is accurate (note: you may need to scroll to the right in the grid at the bottom to view these additional fields)
  - ☐ Review all worktags to make sure that the accounting is correctly reflected. For example, if this invoice request should be paid from a grant, make sure that that grant has been entered as the **Grant** worktag.
  - ☐ If supplier invoice request has been itemized, check that the worktags on the itemization are correct
  - ☐ A copy of the invoice has been attached in the **Attachments** section below the lines. Use the copy to verify the amounts and information entered by the initiator.
7. If any of these items are incorrect or need correction, use the **Send Back** option at the bottom of the screen. This will allow you to send the invoice request back to the initiator with instructions on what they need to submit.



8. Comments: Are optional to be added at the bottom for internal communication within USD on the approval workflow.
9. If the supplier invoice request meets with your approval, click **Approve**.

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Approve

Send Back

Cancel

10. There may be additional approvals before the supplier invoice request is sent to accounts payable for final review and payment processing. Workday will instruct you of the next approval in the approval process and the person it is going to. All users can view the process history related to the supplier invoice request.