

How a PI Creates a Supplier Invoice Request

1. Log in to Workday using your **ID** and **Password**.
2. In the search bar, type in **Create a Supplier Invoice Request ❶** and click on **Create a Supplier Invoice Request ❷**.

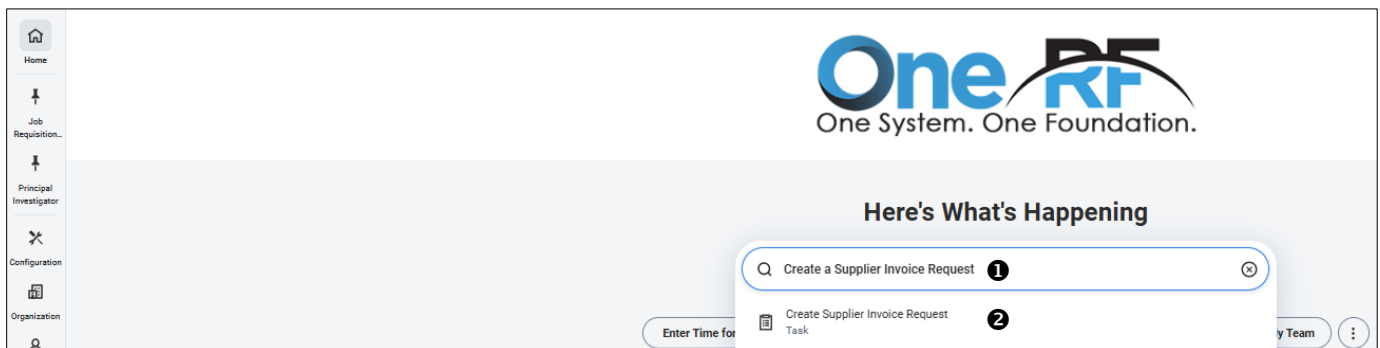


Figure 1

3. After you enter **Create a Supplier Invoice Request** and click in the search space, then click on **Create a Supplier Invoice Request**, and the **Supplier Invoice Request** screen will appear as shown in **Figure 2, Page 2**.

Fill in the required fields in the **Supplier Invoice Request** in **Figure 2, on Page 2**. A detailed explanation of the required fields is shown on **Page 3**.

- ❶ **Invoice Date:** Input from the Invoice.
 - ❷ **Invoice Received Date:** Input the date you received the item.
 - ❸ **Company:** You will have two choices – RFCUNY Research Foundation of the City University of New York.
 - ❹ **Supplier:** Type in the name of the supplier. Must match the vendor of the invoice.
 - ❺ **Currency:** Type in USD.
 - ❻ **Control Total Amount:** Enter the total dollar amount of the invoice.
 - ❼ **Supplier's Invoice Number:** Enter the invoice number listed on the invoice.
 - ❽ **Ship-To Address:** Ship-to address is where the products are getting delivered to. The **Ship-To Address** should always be the campus address. This information is on the invoice. The rest of the fields are optional to fill out.
 - ❾ **Payment Terms:** Auto-populates to immediate.
 - ❿ **Freight Amount:** Fill in if charged.
 - ⓫ **Item Description:** Enter the description of the item.
 - ⓬ **Spend Category:** Enter the Cost Code.
 - ⓭ **Quantity:** Enter the total number of items ordered.
 - ⓮ **Unit of Measure:** Enter measurement from the drop-down menu.
 - ⓯ **Unit Cost:** Cost per item.
 - ⓰ **Extended Amount:** Total dollar amount from invoice.
 - ⓱ **Grant:** Enter the Grant.
 - ⓲ **Cost Center, Fund, and Additional Worktags:** Auto-populates.
 - ⓳ **+ADD:** Enter if any memo is required. If PI purchases variations of a product, click the **+Add** button to add information for another product. This can be used to split by any amount, spend category, quantity, or grant. If you want to split by grant, each add line would have a different grant.
 - ⓴ **Attachments:** Attach the invoice and any other pertinent data by clicking attachments.
4. After completing all the required fields in the **Supplier Invoice Request**, you must attach the invoice by clicking on **+Add** ❸, attach the invoice form your computer as shown in **Figure 3** below by clicking **Select Files** ❶.

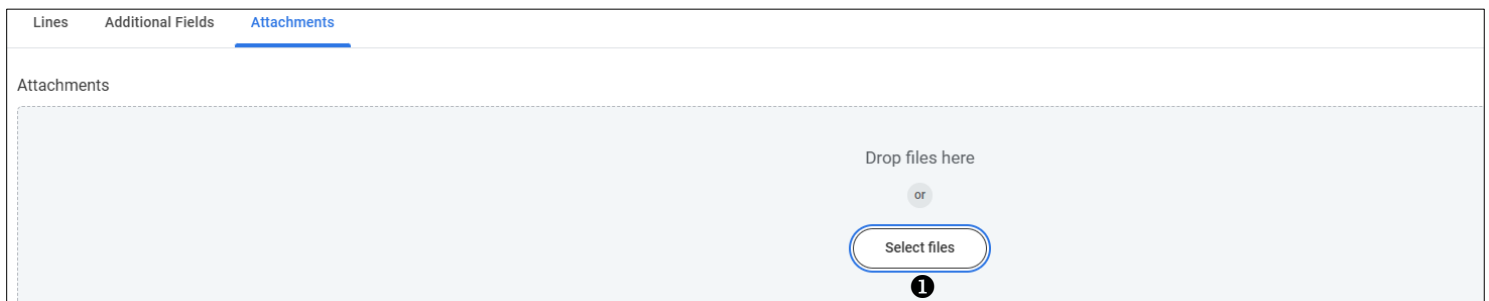
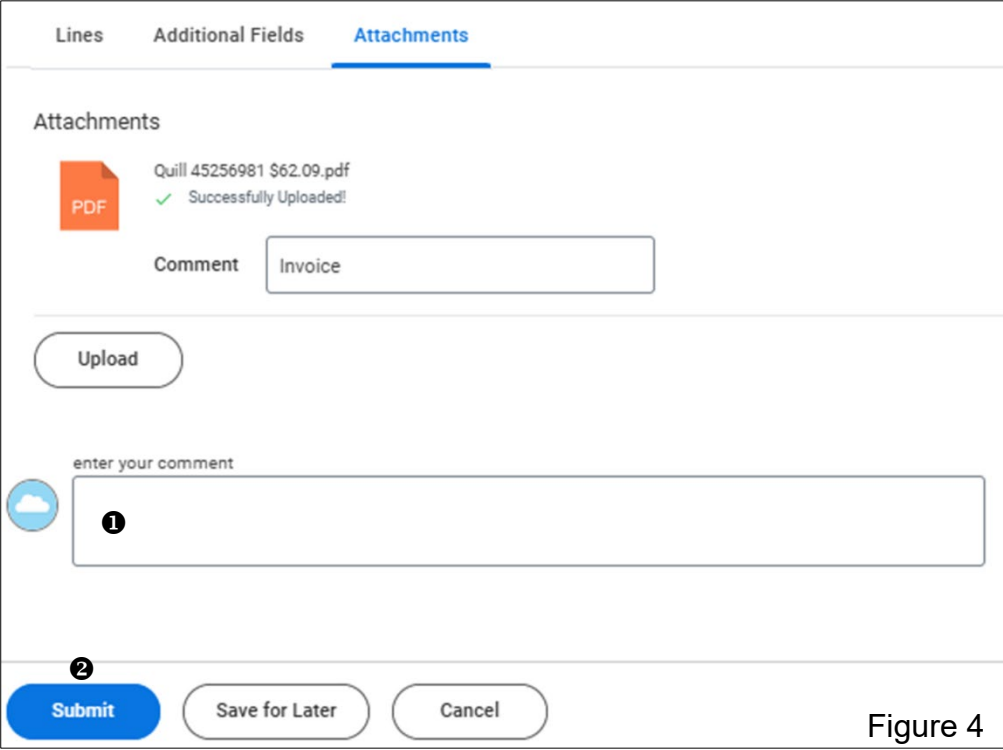


Figure 3

Please Note: Memo and Internal Memo Box are for the PI to input any comments. Also, in ❷ **Spend Category:** Enter the initial few characters or code (**for example, it's 6200**) to begin your search, press **Enter**, and the cost center will populate, or click on the drop-down menu ☰ and select from the list your cost code.

- After attaching the invoice, you can add a comment in the comment box ❶ if needed. Then click **Submit** ❷ as shown in **Figure 4** below. After **Submit** is clicked, a pop-up box will appear stating **You have submitted** as shown in **Figure 5** below. Click **View Details** ❶ in **Figure 5**, and the submitted details will appear as shown in **Figure 6**, on Page 5.

Please Note: If it goes to another PI who owns the grant, they can review and approve the supplier invoice request. According to the pop-up message, there is a second approver as shown in **Figure 5**.



Lines Additional Fields **Attachments**

Attachments

PDF Quill 45256981 \$62.09.pdf
✓ Successfully Uploaded!

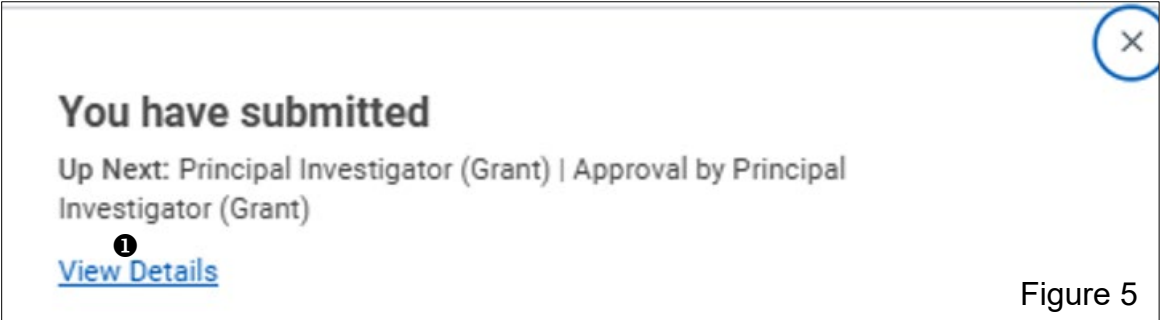
Comment Invoice

Upload

enter your comment ❶

❷ Submit Save for Later Cancel

Figure 4



You have submitted

Up Next: Principal Investigator (Grant) | Approval by Principal Investigator (Grant)

❶ [View Details](#)

Figure 5

6. After clicking on **View Details** in **Figure 5**, on **Page 4**, the following screen will appear as shown in **Figure 6** below. You are currently looking at the **Details Tab ①**, as indicated by its blue highlighting. If you click **Process ②** the **Process History** screen will appear as shown in **Figure 7** below. If you click on the **Blue Arrow > ③** next to **Details and Process** as shown in **Figure 6** below. The **Details and Process** section will open as shown in **Figure 8**, on **Page 6**.

You have submitted [Supplier Invoice Request : SIR-0000095, QUILL LLC on 09/11/2025 for \\$62.09](#) ...

Up Next

Principal Investigator (Grant)
Approval by Principal Investigator (Grant)

③ > Details and Process

① Details **② Process**

Supplier Invoice Request 🔍 Request Number SIR-0000095 Status In Progress Requester **John Doe** [C]

▼ **Primary Information**

Invoice Date	09/11/2025
Invoice Received Date	(empty)
Company	RFCUNY
Supplier	QUILL LLC
Currency	USD
Control Total Amount	62.09
Supplier's Invoice Number	45256981

Figure 6

Request Lines Process History Attachments						
Process History 4 items						
Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons
Supplier Invoice Request Event	Supplier Invoice Request Event	Step Completed	09/11/2025 01:26:05 PM	09/13/2025	John Doe [C]	1
Supplier Invoice Request Event	Approval by Authorized Signatory	Not Required		09/13/2025		0
Supplier Invoice Request Event	Approval by Principal Investigator (Grant)	Awaiting Action			Lisa Jones [C] (Principal Investigator (Grant)) 0	2
					Paul Price [C] (Principal Investigator (Grant)) 0	

Figure 7

- After clicking on the **Blue Arrow**  **3** next to **Details and Process** in **Figure 6**, on **Page 5**, the **Details Screen** will open as shown below in **Figure 8**. Click on the hyperlink **For Supplier Invoice Request: SIR-0000095 1**. It'll bring you to the **View Supplier Invoice Request** screen as shown in **Figure 9** below and click on **Process History 1**.

You have submitted [Supplier Invoice Request : SIR-0000095, QUILL LLC on 09/11/2025 for \\$62.09](#) 

Up Next

Principal Investigator (Grant)
Approval by Principal Investigator (Grant)

 **Details and Process**

For 1 [Supplier Invoice Request: SIR-0000095](#)

Overall Process [Supplier Invoice Request : SIR-0000095, QUILL LLC on 09/11/2025 for \\$62.09](#)

Overall Status In Progress

Due Date 09/13/2025

[Details](#) [Process](#)

Figure 8

View Supplier Invoice Request

Total Amount
62.09 USD

Supplier Invoice Request		Request Number	SIR-0000095	Status	In Progress	Requester	John Doe	[C]
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 **Primary Information**

Invoice Date	09/11/2025
Invoice Received Date	(empty)
Company	RFCUNY
Supplier	QUILL LLC
Currency	USD
Control Total Amount	62.09
Supplier's Invoice Number	45256981

 **Additional Information**

Ship-To Address	 160 Convent Avenue New York, NY 10031 United States of America
Payment Terms	Immediate
Due Date	09/11/2025
Memo	Black Ink was purchased.

[Request Lines](#) **1** [Process History](#) [Attachments](#)

Figure 9

8. After clicking on **Process History ①** in **Figure 8**, on **Page 6**, the **Process History** screen will appear as shown below in **Figure 10**. You can view the next PI Approver under the Persons Column ① in **Figure 10** below. The PI approvers are **Luis Jones** or **Paul Price ②**, but only one person is needed to approve. Hence, either Luis or Paul can approve the **Supplier Invoice Request**. The PI or PIs can locate the Supplier Invoice Request for approval in your **Awaiting Your Action** section or **Task Box** on the Workday Homepage. When you click the Task, the Review Screen opens, allowing you to approve the **Supplier Invoice Request**, as shown in **Figure 11**.

Request Lines <u>Process History</u> Attachments						
Process History 4 items						
Process	Step	Status	Completed On	Due Date	Person (Up to 5) ①	All Persons
Supplier Invoice Request Event	Supplier Invoice Request Event	Step Completed	09/11/2025 01:26:06 PM	09/13/2025	John Doe [C]	1
Supplier Invoice Request Event	Approval by Authorized Signatory	Not Required		09/13/2025		0
Supplier Invoice Request Event	Approval by Principal Investigator (Grant)	Awaiting Action			Luis Jones [C] (Principal Investigator (Grant)) () Paul Price [C] (Principal Investigator (Grant)) ()	2

Figure 10

9. When you click on the **Task ①** PI can click **Send Back** to the initiator to make corrections, or they can click **Deny**, then the initiator will have to start a new supplier invoice request or Cancel the request ②. The PI needs to review and then click **Approve ③**. It will then be routed to the buyer group (Procurement and Payables).

All Items 46 items

Search: All Items

[Advanced Search](#)

Supplier Invoice Request : SIR-0000095, QUILL LLC on 09/11/2025 for \$62.09 ①

Spend Authorization: SA-0000042, on 09/11/2025 for 1,000.00 USD

Due: 09/13/2025

Wage Theft Notice: MIS/IT Aide - H -

Due: 09/13/2025

Updated: 09/11/2025

Assign Work Schedule for Hire: 09/11/2025

One-Time Payment: 09/11/2025

Requires your attention as information has been...

Effective: 05/26/2025

Offer for Job Application: 09/10/2025

(Reinstatement) (C100212)

Expense Report: EXP-0000387, 09/09/2025 for \$25.58

Effective: 09/09/2025

Assign Organizations: Create Position: Budget 09/08/2025

Created: 09/11/2025

Review Supplier Invoice Request : SIR-0000095, QUILL LLC on 09/11/2025 for \$62.09

For Supplier Invoice Request: SIR-0000095

Overall Process Supplier Invoice Request : SIR-0000095, QUILL LLC on 09/11/2025 for \$62.09

Overall Status In Progress

Due Date 09/13/2025

Details to Review

Supplier Invoice Request Request Number SIR-0000095 Status In Progress Requester John Doe [C]

Primary Information

Invoice Date 09/11/2025

Invoice Received Date (empty)

Company RFCUNY

Supplier QUILL LLC

Currency USD

Control Total Amount 62.09

Supplier's Invoice Number 45256981

Additional Information

Ship-To Address 160 Convent Avenue New York, NY 10031 United States of America

Payment Terms Immediate

Due Date 09/11/2025

Memo Black Ink was purchased. ②

③ Approve Send Back Deny Cancel

Figure 11

10. After clicking Approve ❶ in **Figure 11**, on **Page 7**, a pop-up box will appear stating **Supplier Invoice Request: SIR-0000095, Quill LLC on 09/11/2025 for \$62.09**, ❶ as shown in **Figure 12** below, indicating you have completed the Supplier Invoice Request.

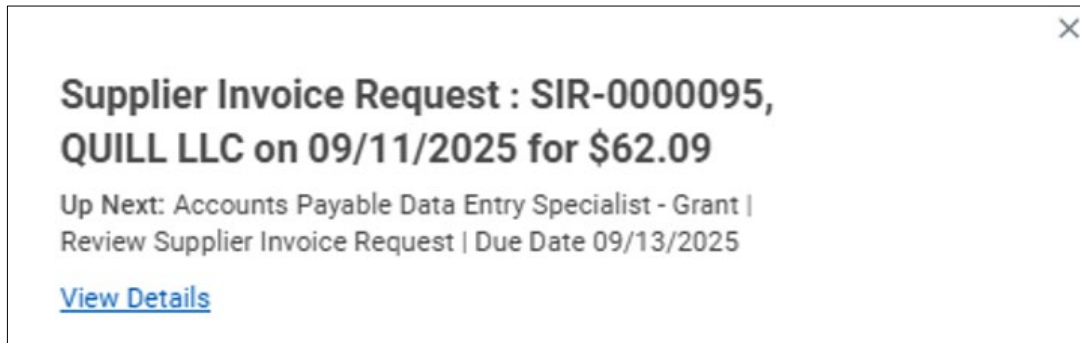


Figure 12