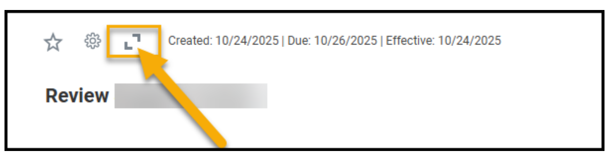
Approve Supplier Invoice

This How-To Guide covers how to **approve a supplier invoice request**.

Note: A **Supplier Invoice Request** is submitted to process **Non-Purchase Order supplier invoices** for payment.

Start Here

1. Open **Google Chrome.**
2. Navigate to **Workday.**
3. If prompted, login with your **College email** and **password.**
4. In the top-right, select the **My Tasks icon**, which looks like an envelope; or find recent submissions displayed in the **Awaiting Your Action** box.
5. Select a **Supplier Invoice Request** to review.
   Note: The **Supplier Invoice Request** option will only appear if there are invoices waiting for your approval. If no items are pending, this task will not be listed.
6. Use the **arrow icon** along the top left to expand the box.



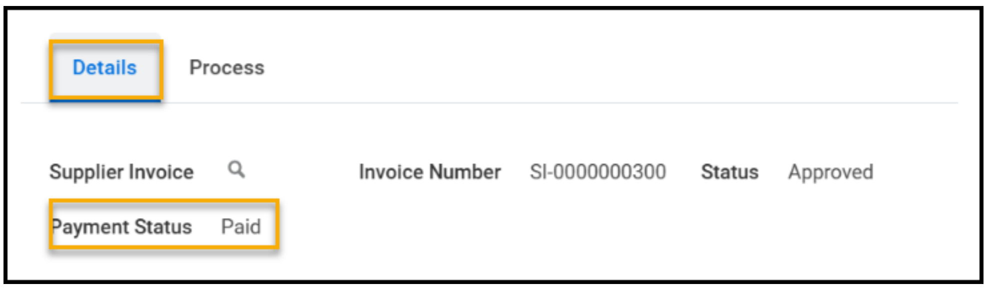
7. Scroll down to find the **Additional Fields - Attachments**. Open the document so you can confirm the information was entered correctly in Workday. You will have to **download the attachment** or **use a duplicate tab** in your browser so you can view the attachment and the invoice request at the same time.
8. Find **Details to Review**. Confirm the following matches the attachment:

   - **Invoice Date**
   - **Supplier**
   - **Control Total Amount**
   - **Supplier's Invoice Number**

9. Review the **line items** to confirm the correct information and the accurate **budgetary worktags** were charged:
    - **Line type** – Good or Service?
    - **Spend Category** – Does this describe the expense?
    - **Quantity and Amounts** – Does this match the invoice line?
    - **Grant, Capital Project, and/or Cost Center** – Was this the correct choice?
    - **Additional Worktags** – Should this be associated with a Gift, Roll Forward, Activity, Location, Employee, or Travel type?
10. Choose one of the following options:
    - Select **Approve** if the request meets with your approval, aligns with College Policy, and matches the invoice documents attached.
    - Select **Add Approvers** if you think this request should be reviewed by additional approvers. Select the desired individual(s) and add a **comment** for why you are sending this along for their approval.

      Note: Other cost center, grant, and/or project managers would be automatically sent this same request if their assigned worktag was selected on any line.
    - Select **Send Back** if the request is missing required information, incorrect worktags or values were input, and/or the supplier is incorrect. Add a **comment** to explain the reason for the return.
    - Click the three dot **More** button, then select **Deny, to** terminate the request. Only use this option if the invoice is **a duplicate** or **is not an allowable business expense**.
    - Use **Cancel** to dismiss the notification and leave the item in your **My Tasks** inbox for later.
11. Once all approvals are complete, the invoice request will be routed for final review by **Accounts Payable**. They can also **Send Bank** and **Deny** the request or approve them for payment processing.

12. If you want to review the status of an invoice request that you approved, navigate to your **My Tasks** icon. You can find and select a **Supplier Invoice Request** in the **Archive** section.
    a. Select the request. The Overall Status will display as **In Progress** or **Successfully Completed**.
    b. Use the **Process Tab** to see the next steps for an **In Progress** status.
    c. Scroll down under the Details tab, to see if a **Successfully Completed invoice request** has been **Paid**.



Have Questions? For assistance, please contact help@brynmawr.edu or 610-526-7440.