Cancel, Copy and Edit Supplier Invoice Request Overview

This Quick Reference Guide (QRG) is designed to walk a Procurement Shopper through the steps to cancel, copy and edit a supplier invoice request in Workday. By the end of this QRG, users will be able to successfully cancel or edit an existing supplier invoice request and copy an existing request to create a new supplier invoice request using the My Supplier Invoice Requests report.

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Procedure: Cancel a Supplier Invoice Request

On the Workday Home screen:

1. Type My Supplier Invoice Requests in the search field.
2. Select the My Supplier Invoice Requests report from the Search Results.

On the My Supplier Invoice Requests screen:

3. Select OK to display the results.

On the second My Supplier Invoice Requests screen:

NOTE
Specific criteria can be entered on the My Supplier Invoice Requests screen to narrow the search for the desired supplier invoice request.
4. Select the Related Actions (…) menu under the Supplier Invoice Request column for the supplier invoice request that you want to cancel.

5. Select Supplier Invoice Request > Cancel.

On the Confirm Supplier Invoice Request Cancel screen:

6. Select OK to confirm the cancelation of the supplier invoice request.

**Procedure: Copy a Supplier Invoice Request**

On the Workday Home screen:

1. Type My Supplier Invoice Requests in the search field.

2. Select the My Supplier Invoice Requests report from the Search Results.

3. Select OK to display the results.

On the second My Supplier Invoice Requests screen:

4. Select the Related Actions (…) menu under the Supplier Invoice Request column for the supplier invoice request that you want to copy.

5. Select Supplier Invoice Request > Copy.

On the Copy Supplier Invoice Request screen:

6. Type the new supplier invoice number in the Supplier's Invoice Number field. This is a free form field used for departmental tracking purposes. The supplier invoice number should have a unique departmental tracking number. The supplier invoice number must not be a duplicate for that particular supplier, so develop a supplier invoice numbering system that has unique supplier numbers, using such items as name, department, date, etc. If a duplicate number is used, you will receive an on-screen validation notice that this supplier invoice number has already been used and that a unique number is required. This is a required field.
The fields in the supplier invoice request auto-populate (copy) based on the copied supplier invoice request. Make changes to the supplier invoice request as needed.

7. Select **Submit** to submit the supplier invoice request.

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**Procedure: Edit a Supplier Invoice Request**

On the Workday **Home** screen:

1. Type **My Supplier Invoice Requests** in the search field.
2. Select the **My Supplier Invoice Requests** report from the **Search Results**.

On the **My Supplier Invoice Requests** screen:

3. Select **OK** to display the results.

On the second **My Supplier Invoice Requests** screen:

4. Select the **Related Actions (...)** menu under the **Supplier Invoice Request** column for the supplier invoice request that you want to edit.
5. Select **Supplier Invoice Request > Edit**.

On the **Edit Supplier Invoice Request** screen:

6. Make the necessary edits/updates to the supplier invoice request, as required.

7. Select **Submit** to submit the supplier invoice request.