

Workday @ Richmond

MAKING YOUR DAY WORK BETTER.

Supplier Registration Guide

This guide contains helpful information and advice to suppliers registering with Workday Strategic Sourcing (WSS), part of the University of Richmond's financial platform. WSS supports secured data transfer of supplier's sensitive information including SSN's, banking information, and related tax information. Registration is required only once.

Sections:

- [Accessing Your Forms](#)
- [Completing Your Forms](#)
- [Revising Your Forms](#)
- [Completing an Assigned Action Item](#)
- [Email Notifications](#)

Please note that registration requires two-factor authentication to safeguard supplier data. Suppliers authenticating using an iPhone will be able to complete the process with their pre-installed "Passwords" App. **It is recommended that suppliers using an android device to authenticate download an authenticator app, such as Google Authenticator before beginning this process.**

You can download an authenticator app by scanning the preferred QR code below:

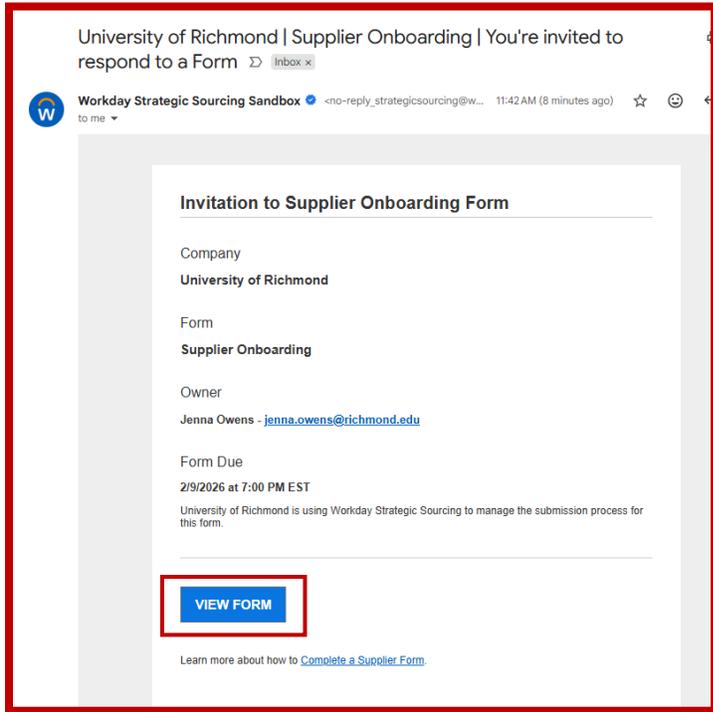


If you do not have a mobile device, you can use the following frequently used web browser authenticator apps:

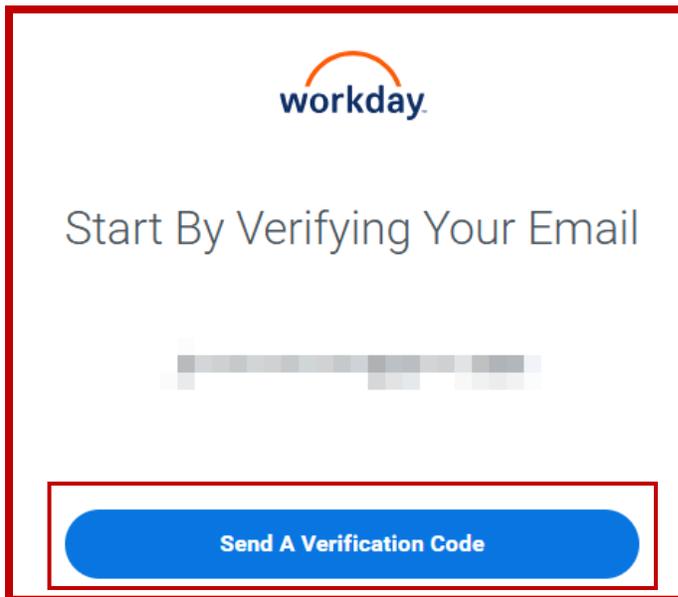
- [Authenticator](#) is a free web browser extension authenticator.
- [1Password](#) is a subscription-based application that can provide a web browser extension authenticator.

Accessing Your Forms:

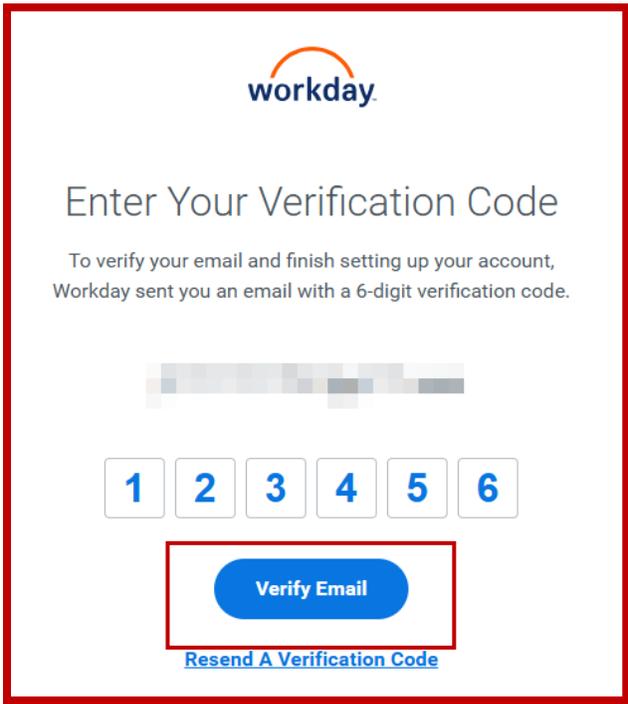
1. Login to your email account.
2. Click the View Form button from the Supplier Onboarding Form invitation email.



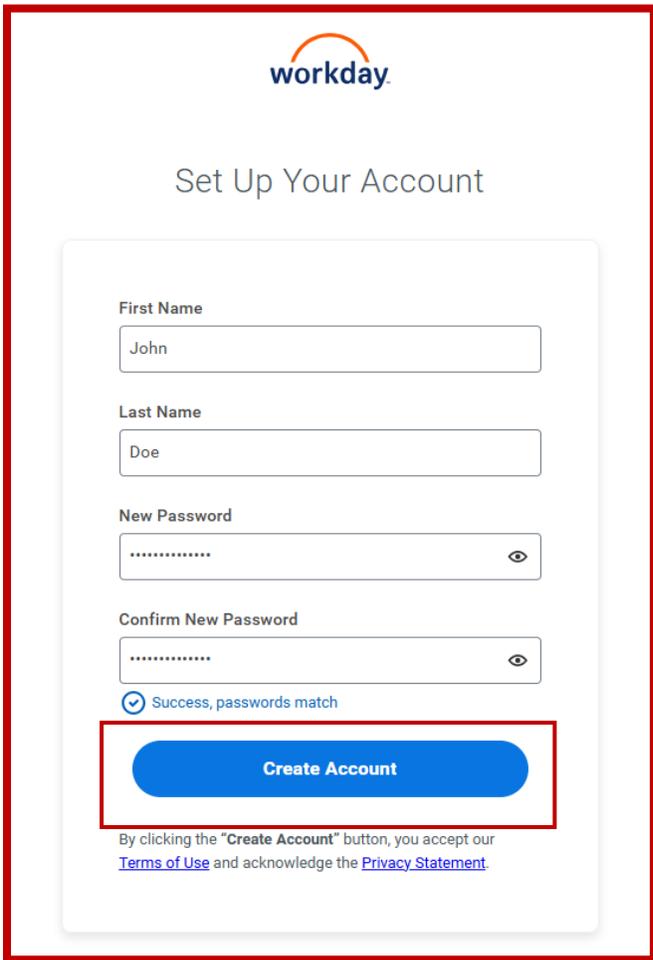
3. Click the Send A Verification Code button.



4. Enter the 6-digit verification code emailed to you and click Verify Email.



- 5. Enter your First Name, Last Name, and Password details, then click Create Account.



6. For the safety of your sensitive data, **Workday requires multifactor authentication for any new supplier profile. This will require the use of an authenticator application on your mobile device or desktop.**

workday

Set Up Authenticator App

A security code generated by an authenticator app, such as Google Authenticator or Microsoft Authenticator is required to sign into Workday Central Login. Ensure that the app is installed on your mobile device.

Step 1: Scan this QR code with your authenticator app

Once your authenticator app reads the QR code, you'll get a 6-digit code.

Can't scan? Manually enter: ⓘ

| | | |
|------------|---------------------|---|
| Account | Workday | 📄 |
| Secret Key | CT5R RLGR ZPZL JWZG | 📄 |

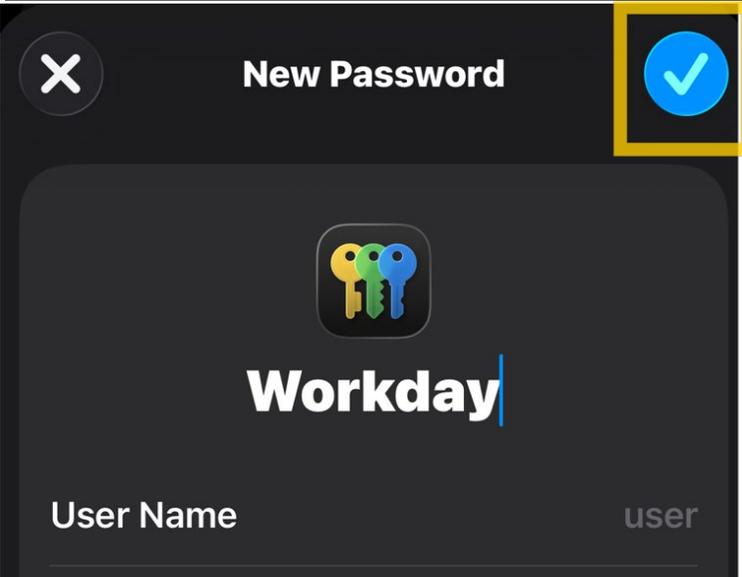
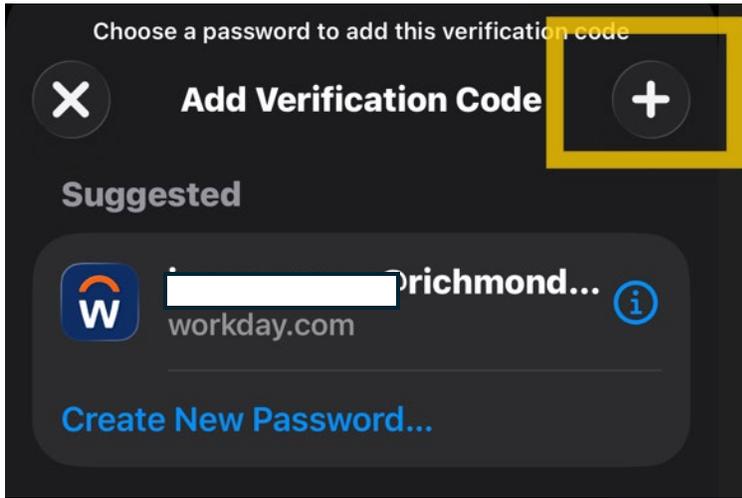
Step 2: Connect your account to your authenticator app

Enter the code from the authenticator app below. [Learn more](#)

1 2 3 4 5 6

Connect Authenticator App

Scan the QR code provided with your phone. If you have an iPhone, this will take you to your “Passwords” App. Click the plus sign to add this authentication to your password profile. Save the Password as “UR Workday” and it will provide the code to you in the next screen:



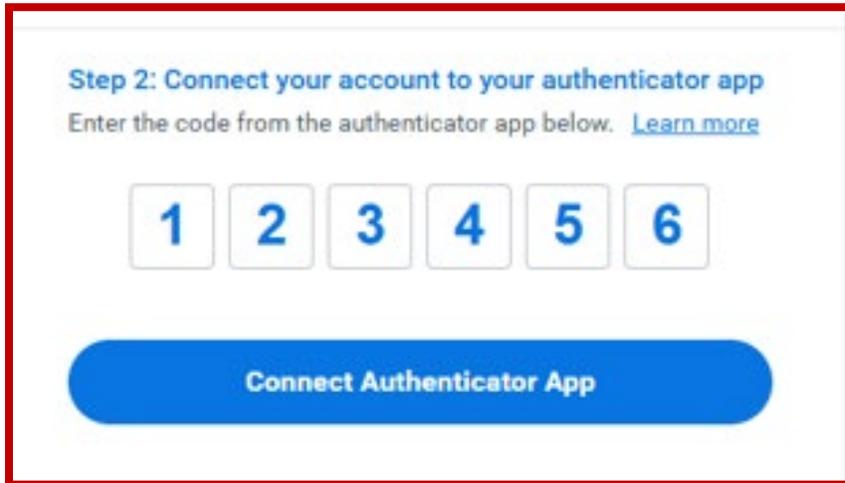
If you have an Android, the QR code will bring you to an authenticator app if you have one on your phone. If you run into issues, you can try an alternative authenticator app by scanning the preferred QR code below:



If you do not have a mobile device, you can use the following frequently used web browser authenticator apps:

- [Authenticator](#) is a free web browser extension authenticator.
- [1Password](#) is a subscription-based application that can provide a web browser extension authenticator.

7. Enter the 6-digit code from your authenticator app and then click the **Connect Authenticator App** button. Click the [Learn More](#) link for additional details and/or troubleshooting FAQs.



8. (Optional) Enter your phone number to better protect your account and then click the **Add Your Mobile Phone Number** button.

- If you complete this step, you will be sent a 6-digit verification code to verify your mobile phone number. Enter the code received and click the Verify Code button.*



Add a Mobile Number

Option to add a mobile number to better protect your account. Message & data rates may apply.

Mobile Number

*Limited countries supported at this time.

Add Your Mobile Number

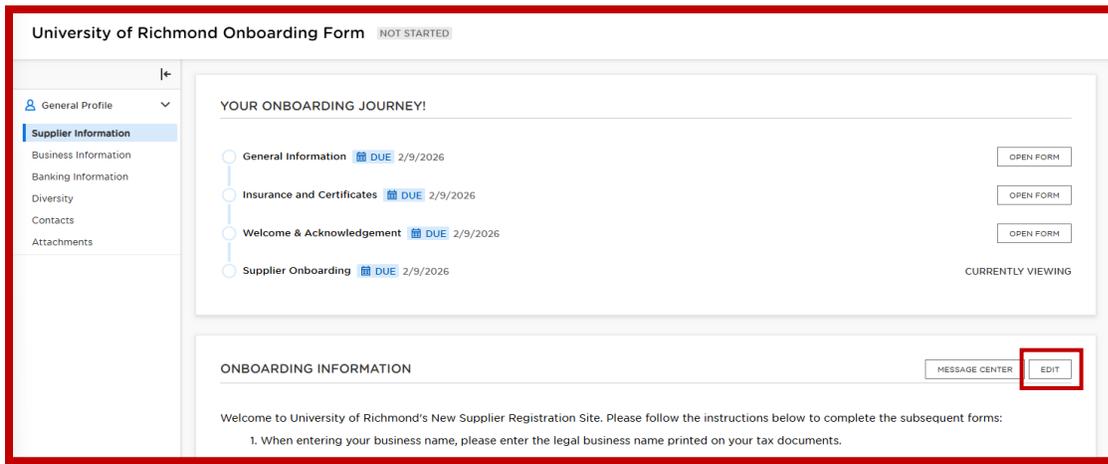
[Skip this Step](#)

By enrolling your mobile number, you consent to receive automated text messages from Workday related to account security.

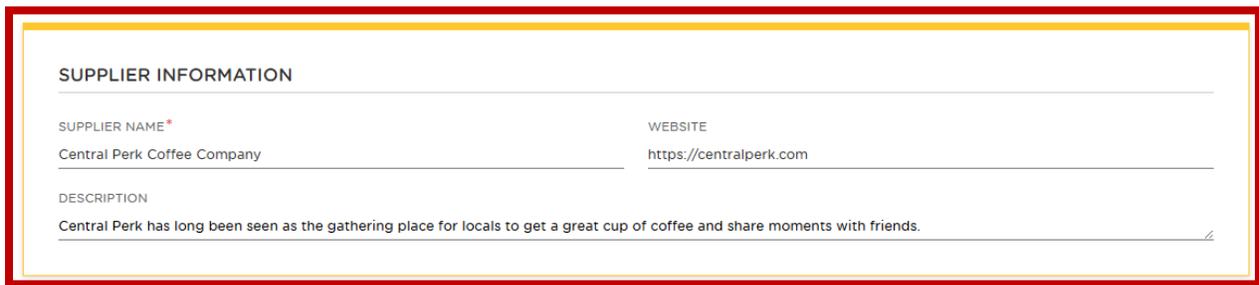
9. Click the **Create Account** button to complete the initial login.
10. Remember your login information for future use.

Completing Your Forms:

1. Click the **Edit** button in the right-hand corner of the Onboarding Information form.



2. Complete the **Supplier Information** section.
 - a. Ensure the **Supplier Name** matches your legal business name as printed on tax documents.
 - b. (Optional) Provide your **Website** and a **Description** of your business.



3. Complete the **Business Information** section.
 - a. **Addresses:** Provide at least one (1) Remit-To address. Use the **Add Address** button to provide as many addresses as needed.
 - b. **Phones:** Provide at least one (1) phone number. Use the **Add Phone** button to provide as many phone numbers as needed.
 - c. **Tax Information:** Provide your tax details.

BUSINESS INFORMATION

ADDRESSES ADD ADDRESS

REQUIRED *

| | |
|--|------------------------|
| ADDRESS COUNTRY* United States of America X v | USAGE* Remit To X v |
| ADDRESS LINE 1* 20 Times Square | ADDRESS LINE 2 |
| CITY* New York | STATE* New York X v |
| POSTAL CODE* 10036 | COUNTY |

DELETE

PHONES ADD PHONE

REQUIRED *

| | |
|--|----------------------------------|
| PHONE COUNTRY* United States of America X v | INTERNATIONAL CALLING CODE +1 |
| PHONE DEVICE TYPE* Landline X v | PHONE NUMBER* 2122047712 |

DELETE

TAX INFORMATION ADD TAX ID

REQUIRED *

| | |
|--|--|
| TAX COUNTRY* United States of America X v | TAX ID TYPE* Employer ID Number X v |
| TAX ID* 123456789 | |

DELETE

11. Complete the **Banking Information** section.

- a. **Bank Accounts:** This section is only required if you are looking to be paid by EFT/ACH. Provide your Account Details. Use the **Add Bank Account** button to provide multiple bank accounts.
- b. **Payment:** Select your default payment terms, currency details, and accepted/default payment type(s).

BANKING INFORMATION

BANK ACCOUNTS [ADD BANK ACCOUNT](#)

ACCOUNT DETAILS

BANK ACCOUNT COUNTRY*
 United States of America X v

ROUTING TRANSIT NUMBER* 🔒 BANK ACCOUNT* 🔒
 021000018 12345678

BIC 🔒 BANK NAME*
Bank of New York Mellon

[DELETE](#)

PAYMENT

DEFAULT PAYMENT TERM*
 Net 30 X v

Accept All Currencies

ACCEPTED CURRENCIES* DEFAULT PAYMENT CURRENCY*
 USD X X v USD X v

PAYMENT TYPES* DEFAULT PAYMENT TYPE*
 EFT/ACH X | Check X X v EFT/ACH X v

12. Complete the **Contacts** section. The contact that received the forms will be defaulted. Use the **Add Contact** button to add any other contact information.

CONTACTS [ADD CONTACT](#)

FIRST NAME* LAST NAME*
 Josh Breedon

✓ CONTACT INFORMATION

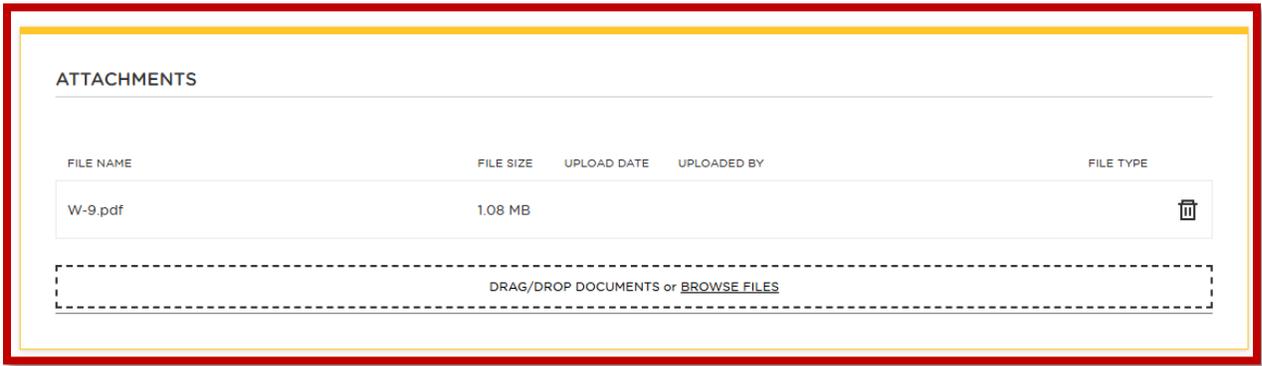
EMAIL* JOB TITLE
 joshuambreedon@gmail.com Enter contact title

CONTACT TYPE
 Select contact types v

PHONE COUNTRY PHONE
 Select country v Enter contact phone

NOTIFICATIONS
 Receive email notifications for events that match your commodity codes

13. Add **Attachments** (e.g., W-9).

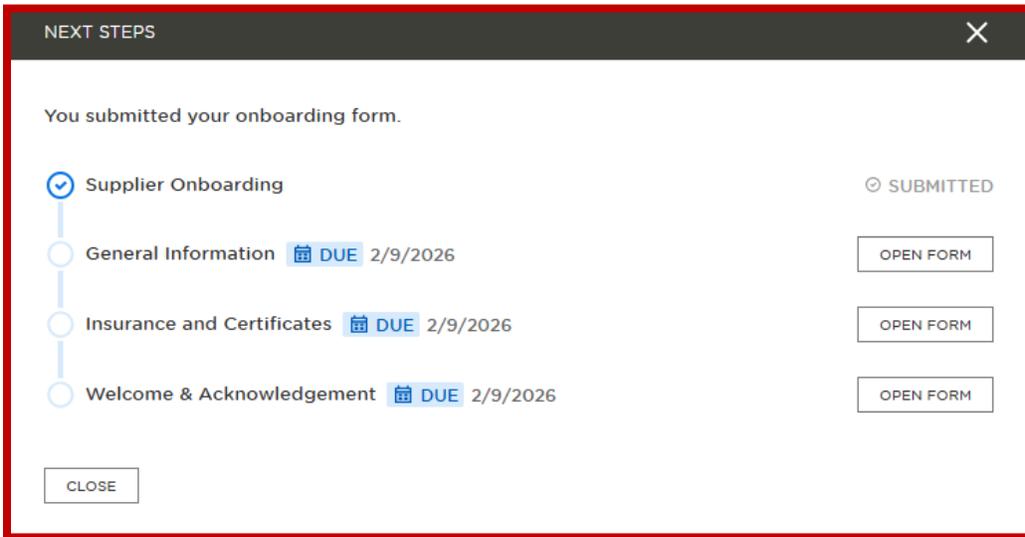


14. Review the form for accuracy.

15. Click the **Submit** button in the bottom right-hand corner of the screen.



16. Use the **Next Steps** (or **Success! What's Next?**) pop-up to continue through your onboarding journey by using the **Open Form** button.



17. Click the **Open Questionnaire** button.

FORM DETAILS

All times are displayed in the Eastern Time (US & Canada) time zone. You can change this in your [User Profile](#).

| SUBMISSION DEADLINE | ISSUING COMPANY | SUPPLIER COMPANY | PRIMARY CONTACT |
|---------------------|------------------------|-----------------------------|-----------------------------|
| 2/9/2026 | University of Richmond | Central Perk Coffee Company | Jenna Owens |

FORM

▼ QUESTIONNAIRE OPEN QUESTIONNAIRE

Fill out the questions in the Form below then submit your response.

| SECTION | DESCRIPTION | LAST UPDATED | STATUS | # OF FEEDBACK | ACTIONS |
|---------------------|-------------|--------------|---------------|---------------|--|
| General Information | | Never | (Not started) | -- | OPEN |

18. Complete all required fields on the questionnaire.

19. Click the **Review & Submit** button in the top right-hand corner of the screen once you have completed all required fields.

Changes save automatically

REVIEW & SUBMIT

20. Click the **Submit Form** button in the top right-hand corner of the screen.

Changes save automatically

PREVIEW **SUBMIT FORM** CHAT

21. Repeat steps 9 through 13 for each form.

Once all forms have been completed:

22. Click the **Go to Dashboard** button to return to your home screen or simply navigate away from Workday Strategic Sourcing.

SUCCESS! WHAT'S NEXT?



Workday Strategic Sourcing will notify the event owner of your submission.
If further action is needed, the event owner or Workday Strategic Sourcing will contact you.
You can retract your Form and edit it until the submission deadline.

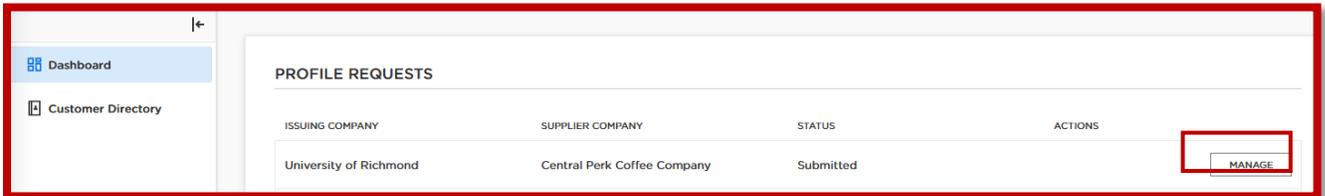
NEXT STEPS

- ✓ Welcome & Acknowledgement ⊙ SUBMITTED
- ✓ Supplier Onboarding ⊙ SUBMITTED
- ✓ General Information ⊙ SUBMITTED
- ✓ Insurance and Certificates ⊙ SUBMITTED

[GO TO DASHBOARD](#)

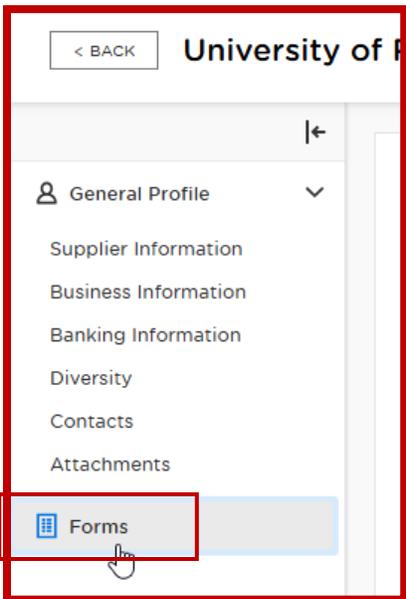
Revising Your Forms:

1. Login to Workday Strategic Sourcing using the login information previously setup.
2. Click the **Manage** button from your Profile Requests dashboard.



| ISSUING COMPANY | SUPPLIER COMPANY | STATUS | ACTIONS |
|------------------------|-----------------------------|-----------|------------------------|
| University of Richmond | Central Perk Coffee Company | Submitted | MANAGE |

3. Navigate to the **Forms** section of your profile.



< BACK University of R

- General Profile
- Supplier Information
- Business Information
- Banking Information
- Diversity
- Contacts
- Attachments
- Forms**

4. Click the **Open Form** button for the form in which you are seeking to update

| TITLE | STATUS | DUE | NOTIFICATIONS | ACTIONS |
|---|-----------|-----------|---------------|-----------|
| General Information | Published | 2/10/2026 | | OPEN FORM |
| Insurance and Certificates | Published | 2/10/2026 | | OPEN FORM |
| Supplier Onboarding | Published | 2/10/2026 | | OPEN FORM |
| Welcome & Acknowledgement | Published | 2/10/2026 | | OPEN FORM |

« < > »

ITEMS PER PAGE 25

5. For the Supplier Onboarding form, select the **Edit** button and then acknowledge that you want to Edit the form again. Once all edits have been made, click the **Submit** button.

ONBOARDING INFORMATION

MESSAGE CENTER **EDIT**

Welcome to University of Richmond's New Supplier Registration Site. Please follow the instructions below to complete the subsequent forms:

- When entering your business name, please enter the legal business name printed on your tax documents.

ONBOARDING INFORMATION

CANCEL SAVE AS DRAFT **SUBMIT**

For all other forms, select the **Revise Form** button and then click **Open Questionnaire**. Once all edits have been made, click the **Review & Submit** button, then click **Resubmit Form**.

HISTORY **REVISE FORM**

You are currently revising your Form. To submit your Form click Resubmit Form. "University of Richmond" will then be able to see all of your updates.

FORM DETAILS

All times are displayed in the Eastern Time (US & Canada) time zone. You can change this in your [User Profile](#).

| | | | |
|-----------------------|------------------------|-----------------------------|-----------------------------|
| SUBMISSION DEADLINE | ISSUING COMPANY | SUPPLIER COMPANY | PRIMARY CONTACT |
| 2/9/2026 | University of Richmond | Central Perk Coffee Company | Jenna Owens |
| Submitted on 2/6/2026 | | | |

FORM

QUESTIONNAIRE [OPEN QUESTIONNAIRE](#)

Fill out the questions in the Form below then submit your response.

| SECTION | DESCRIPTION | LAST UPDATED | STATUS | # OF FEEDBACK | ACTIONS |
|---------------------|-------------|--------------------------|-----------------------------|---------------|----------------------|
| General Information | | 2/6/2026 at 12:22 PM EST | Required questions complete | -- | OPEN |

Changes save automatically

[REVIEW & SUBMIT](#)

Changes save automatically

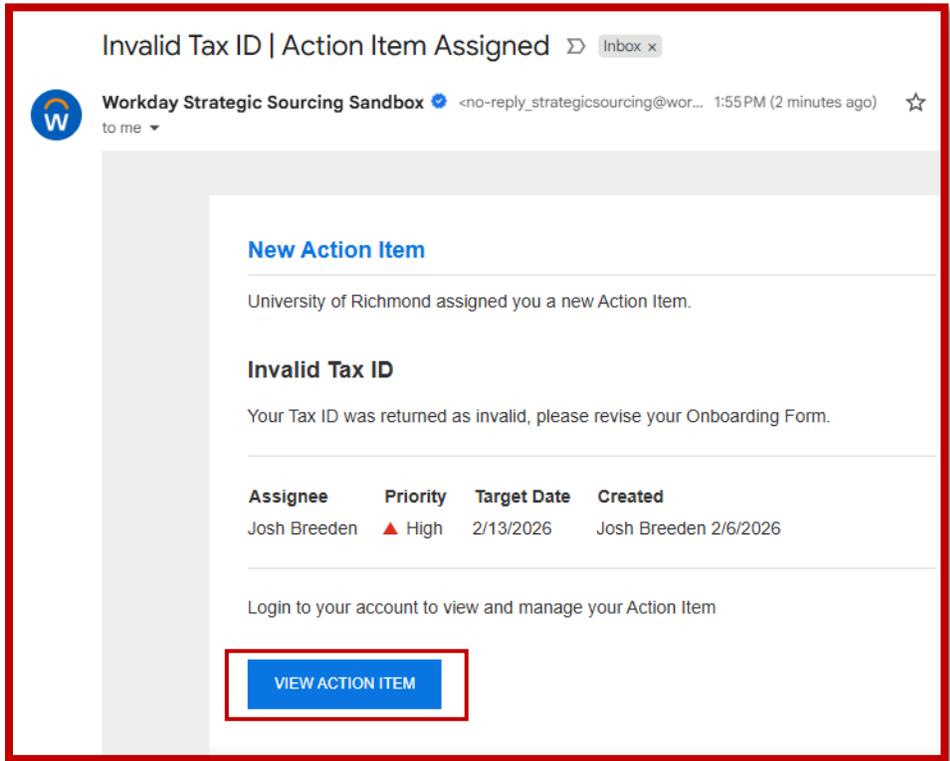
[PREVIEW](#) [RESUBMIT FORM](#)

The Supplier Administrator will be notified that you have submitted revised forms.

Completing an Assigned Action Item:

A Supplier Administrator may assign you an action item if they need revisions made to previously submitted forms.

1. Login to your email account.
2. Click the **View Action Item** button from the email you received.



3. Login to Workday Strategic Sourcing using the login information previously setup.
4. See the **Revising Your Forms** section of this document for details on editing and resubmitting the requested form.

The Supplier Administrator will receive an email notification that you have resubmitted a revised form, complete their review, finalize the forms, and mark the action item as complete.

Email Notifications:

Emails are received from Workday Strategic Sourcing when:

1. Invitation to complete onboarding forms
2. Reminder that the form is due at 30-, 7-, and 1-day intervals before submission deadline
3. Forms are submitted

