Workday @ Richmond
MAKING YOUR DAY WORK BETTER.

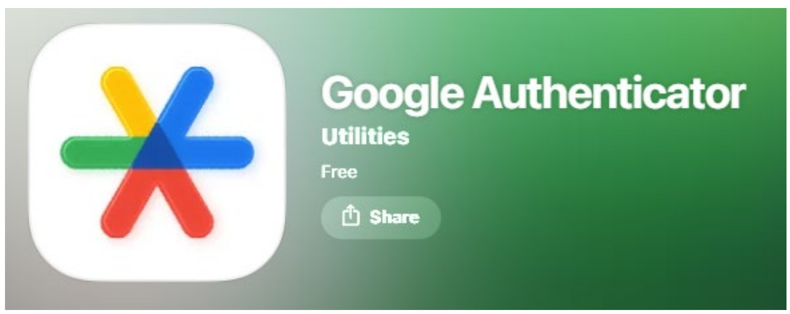
Supplier Registration Guide

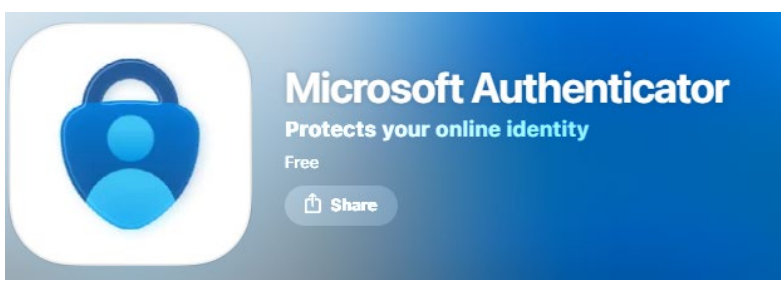
This guide contains helpful information and advice to suppliers registering with Workday Strategic Sourcing (WSS), part of the University of Richmond's financial platform. WSS supports secured data transfer of supplier's sensitive information including SSN's, banking information, and related tax information.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

Sections:

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:





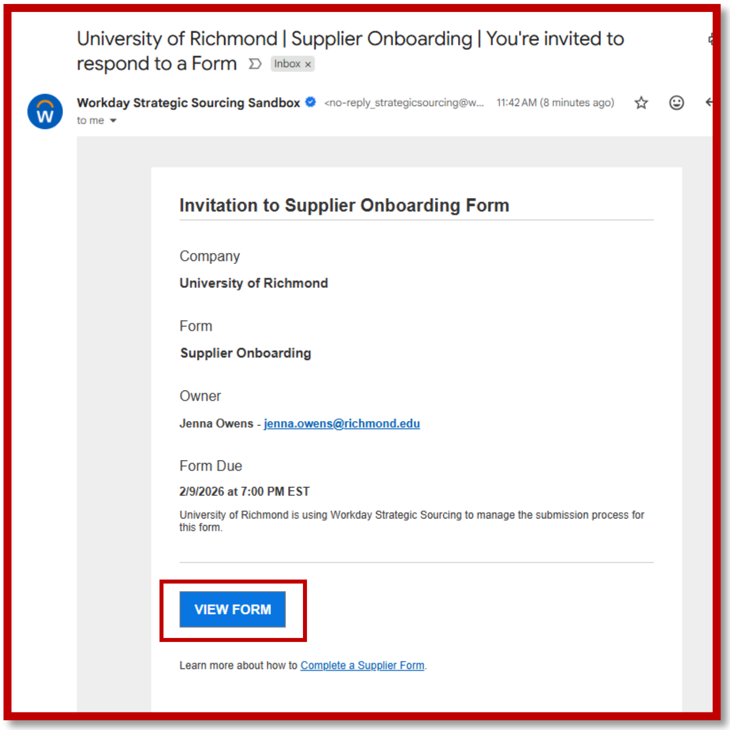
If you do not have a mobile device, you can use the following frequently used web browser authenticator apps:

- Authenticator is a free web browser extension authenticator.
- 1Password is a subscription-based application that can provide a web browser extension authenticator.

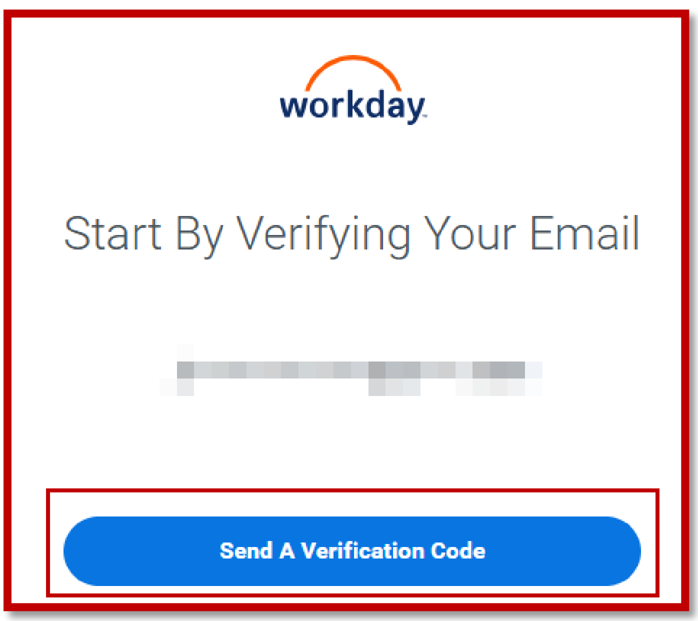
Accessing Your Forms:

1. Login to your email account.

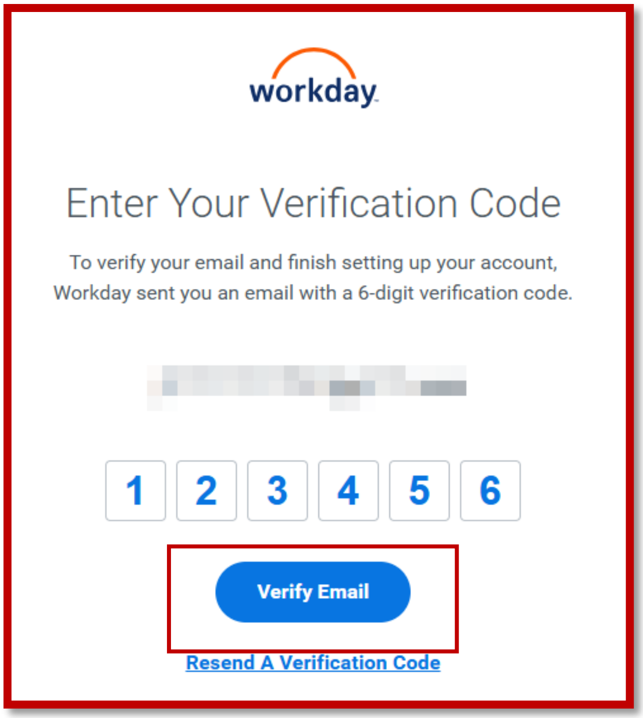
2. Click the View Form button from the Supplier Onboarding Form invitation email.



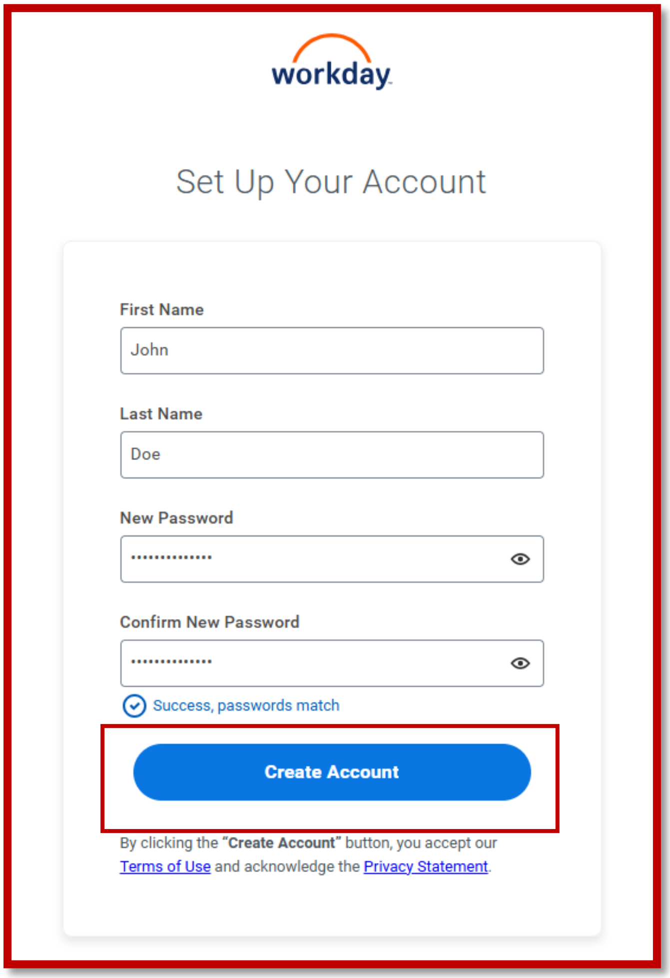
3. Click the Send A Verification Code button.



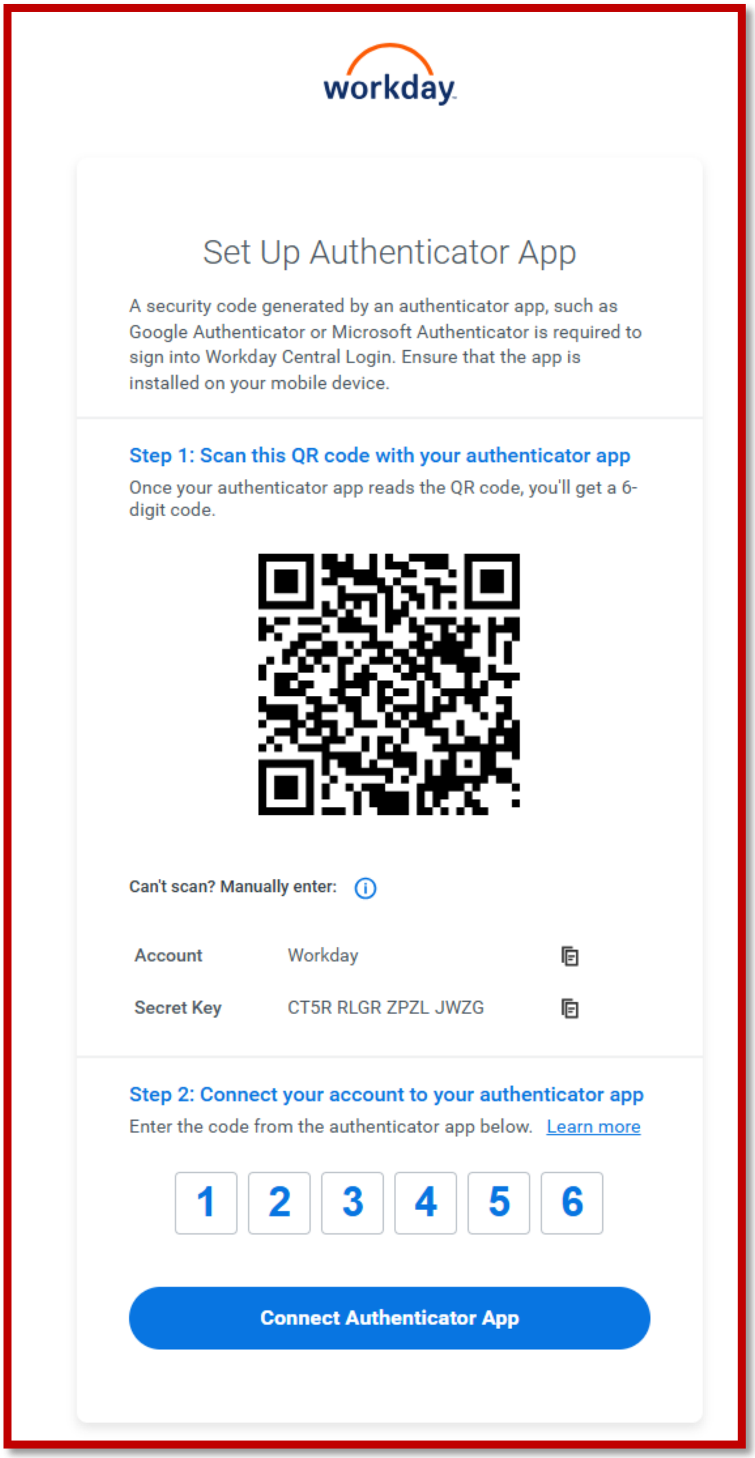
4. Enter the 6-digit verification code emailed to you and click Verify Email.



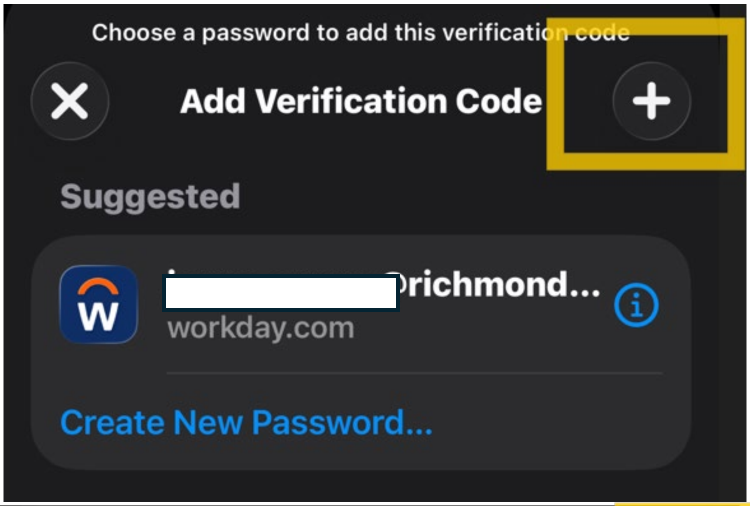
5. Enter your First Name, Last Name, and Password details, then click Create Account.



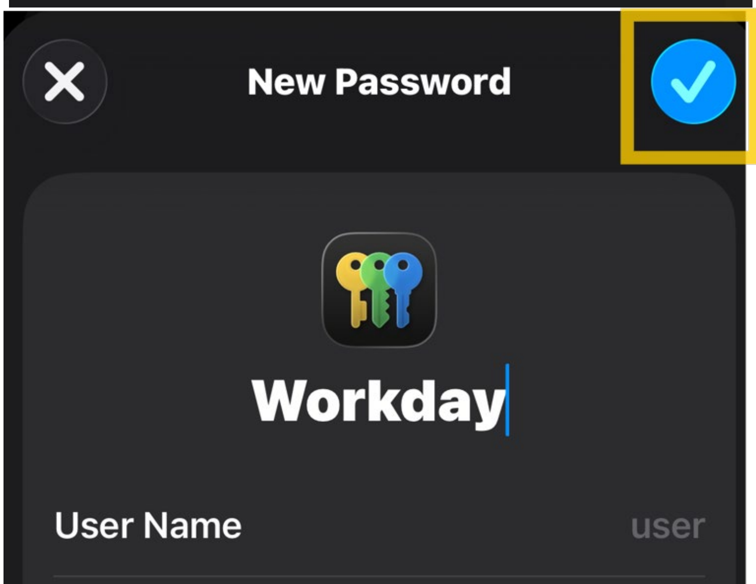
6. For the safety of your sensitive data, **Workday requires multifactor authentication for any new supplier profile. This will require the use of an authenticator application on your mobile device or desktop.**



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:



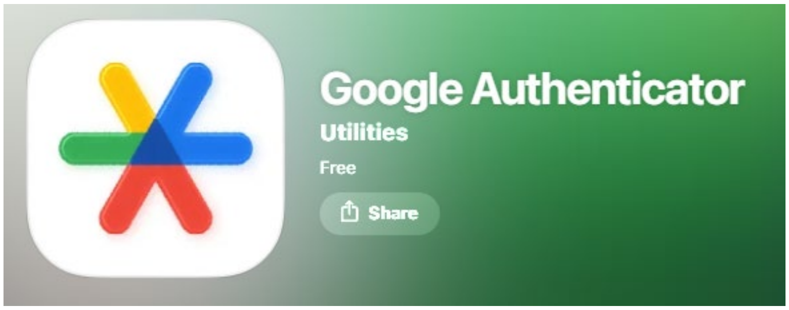
Choose a password to add this verification code
Add Verification Code
Suggested
workday.com
Create New Password...

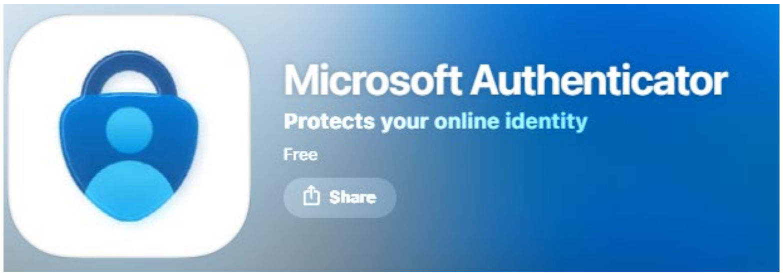


New Password
Workday
User Name
user

W
Workday
Password
Code
Modified
Today
Notes

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:

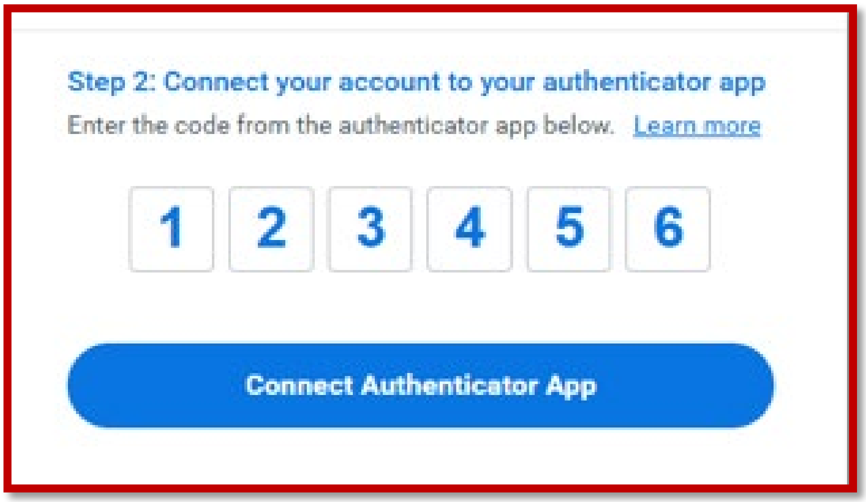




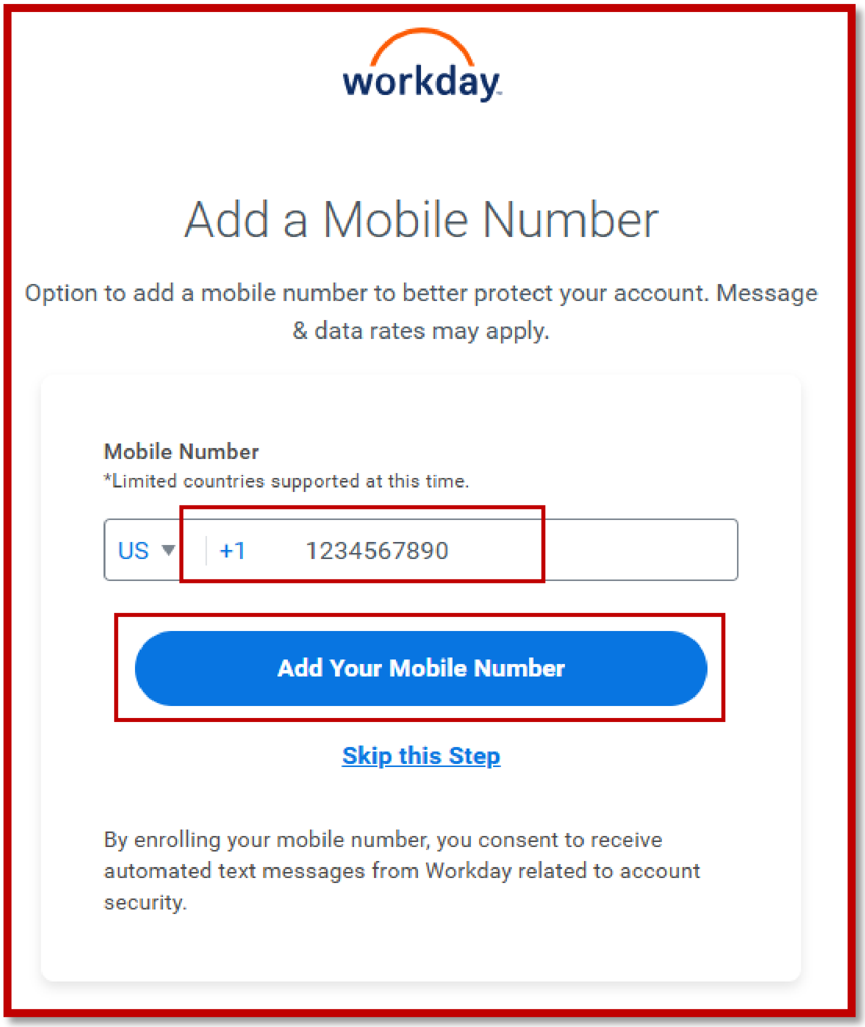
If you do not have a mobile device, you can use the following frequently used web browser authenticator apps:

- 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.
   a. *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.*

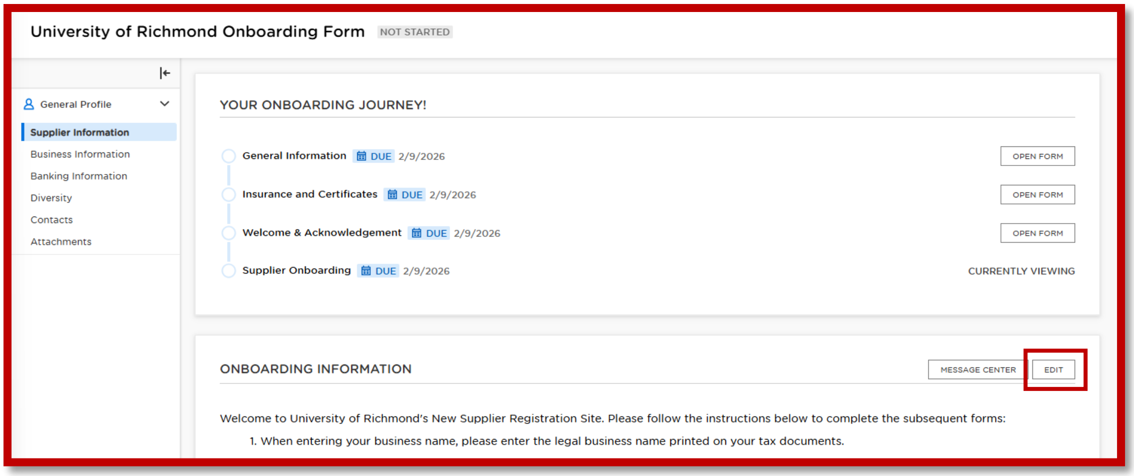


9. Click the **Create Account** button to complete the initial login.

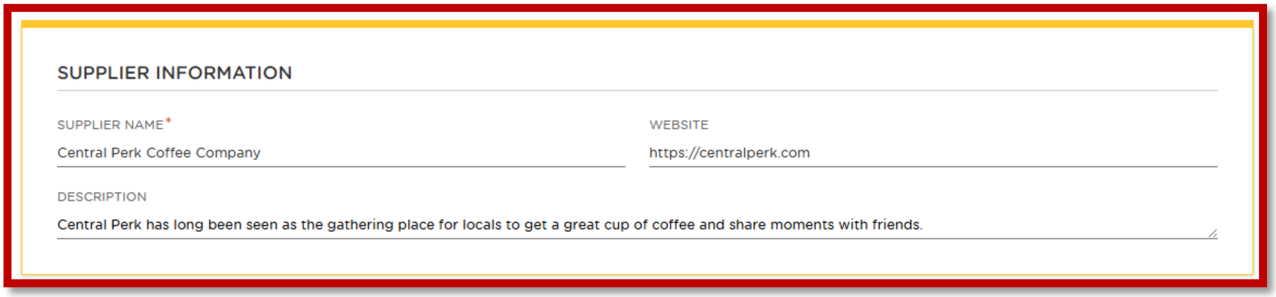
10. Remember your login information for future use.

Completing Your Forms:

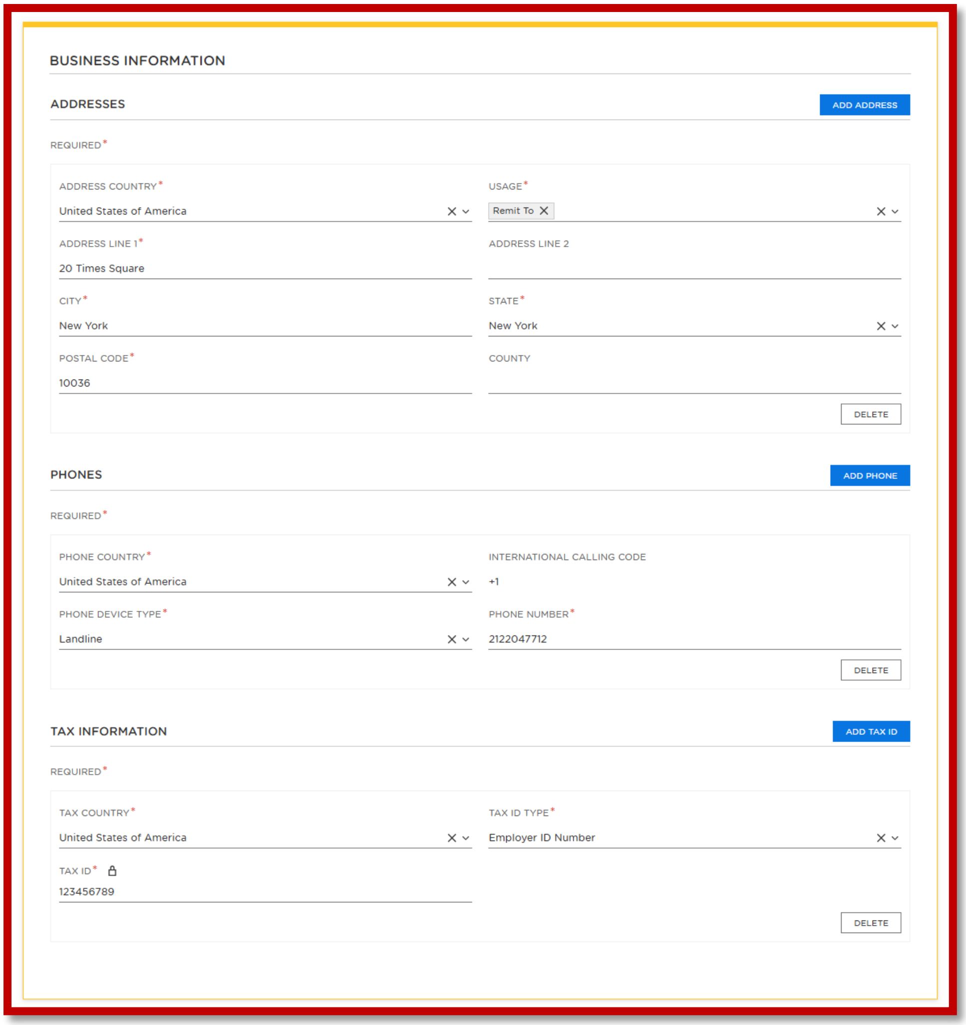
1. Click the **Edit** button in the right-hand corner of the Onboarding Information form.



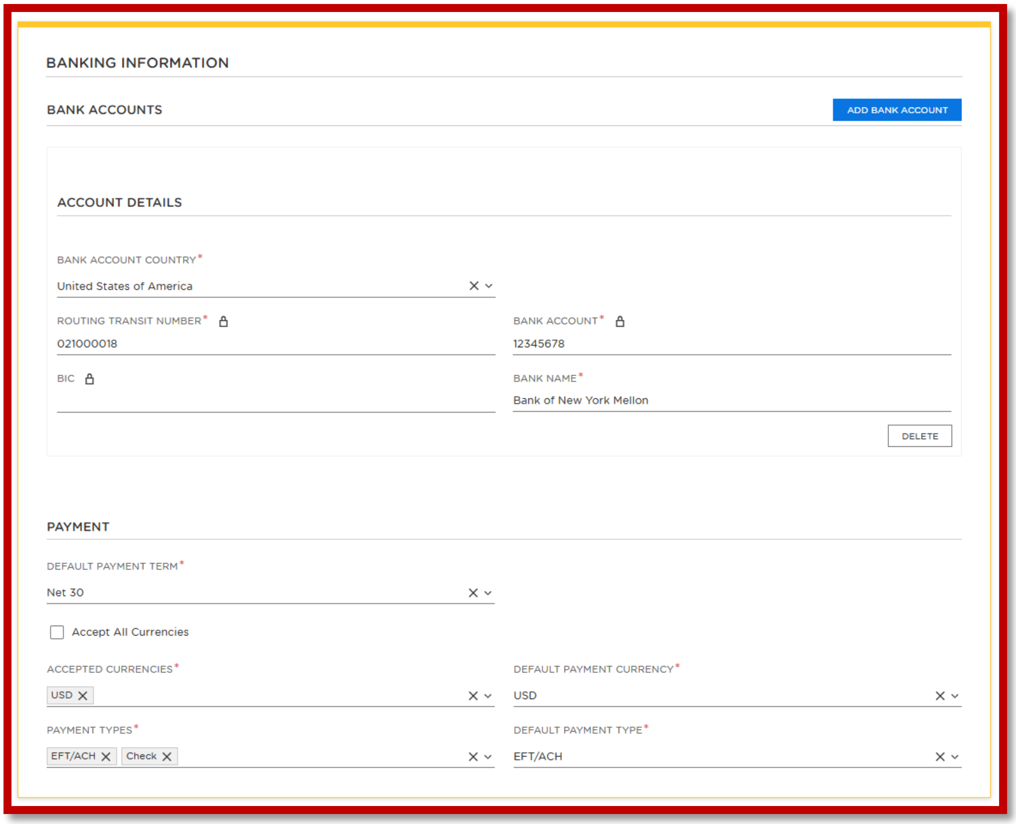
2. Complete the **Supplier Information** section.
    a. Ensure the **Supplier Name** matches your legal business name as printed on tax documents.
    b. (Optional) Provide your **Website** and a **Description** of your business.



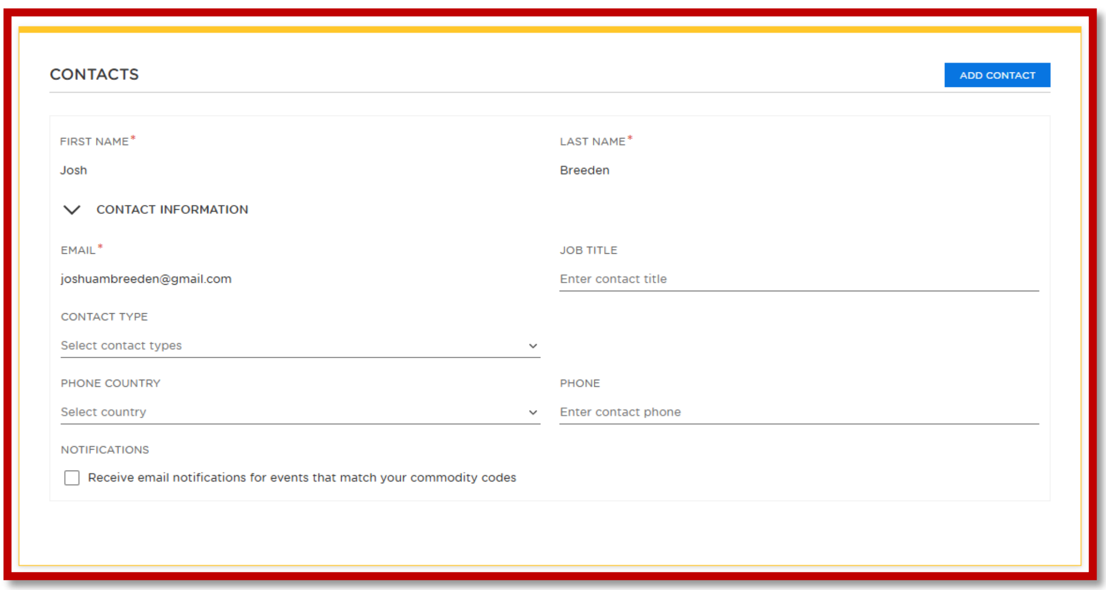
3. Complete the **Business Information** section.
    a. **Addresses:** Provide at least one (1) Remit-To address. Use the **Add Address** button to provide as many addresses as needed.
    b. **Phones:** Provide at least one (1) phone number. Use the **Add Phone** button to provide as many phone numbers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



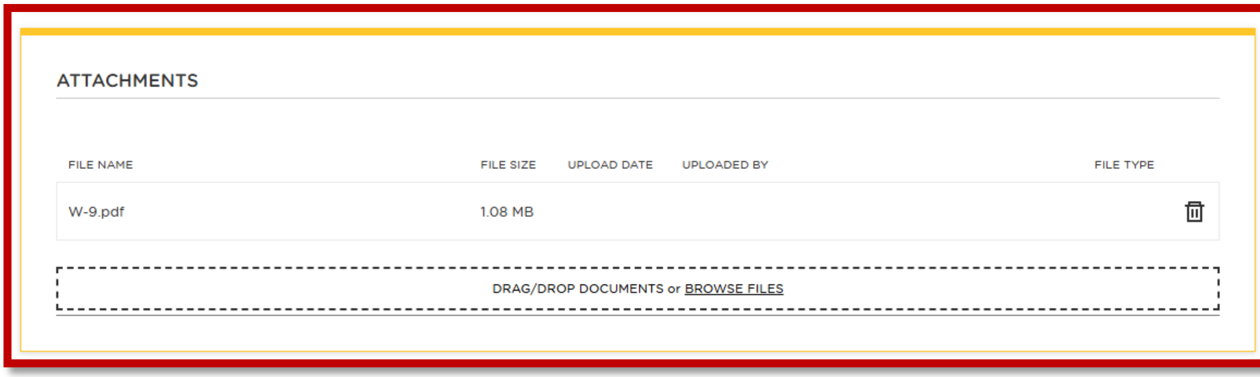
11. Complete the **Banking Information** section.
    a. **Bank Accounts**: This section is only required if you are looking to be paid by EFT/ACH. Provide your Account Details. Use the **Add Bank Account** button to provide multiple bank accounts.
    b. **Payment**: Select your default payment terms,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



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.

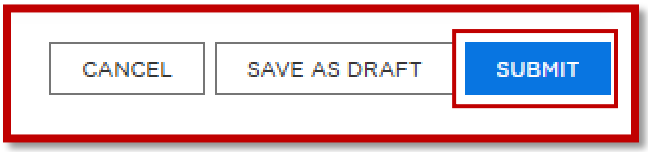


13. Add **Attachments** (e.g., W-9).

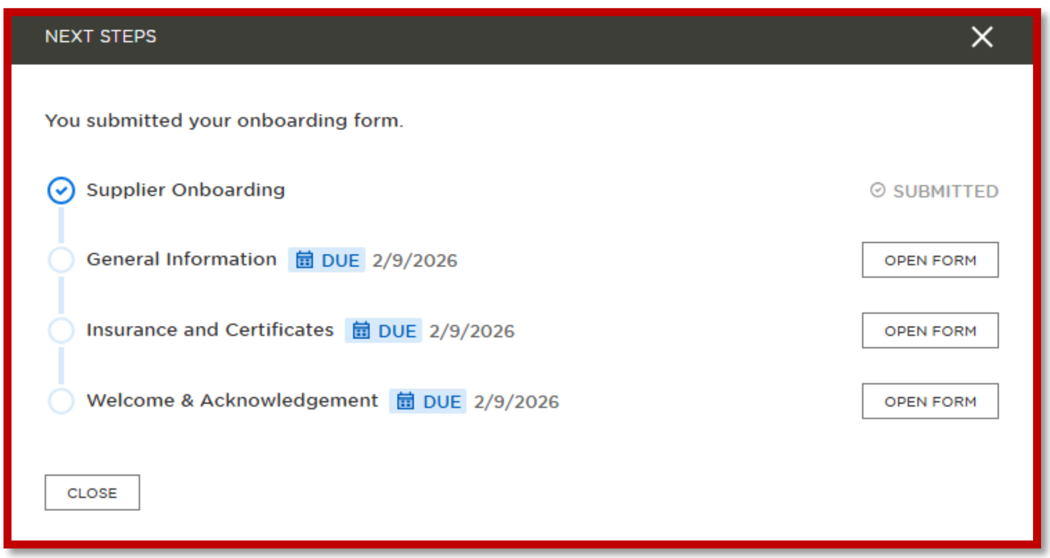


14. Review the form for accuracy.

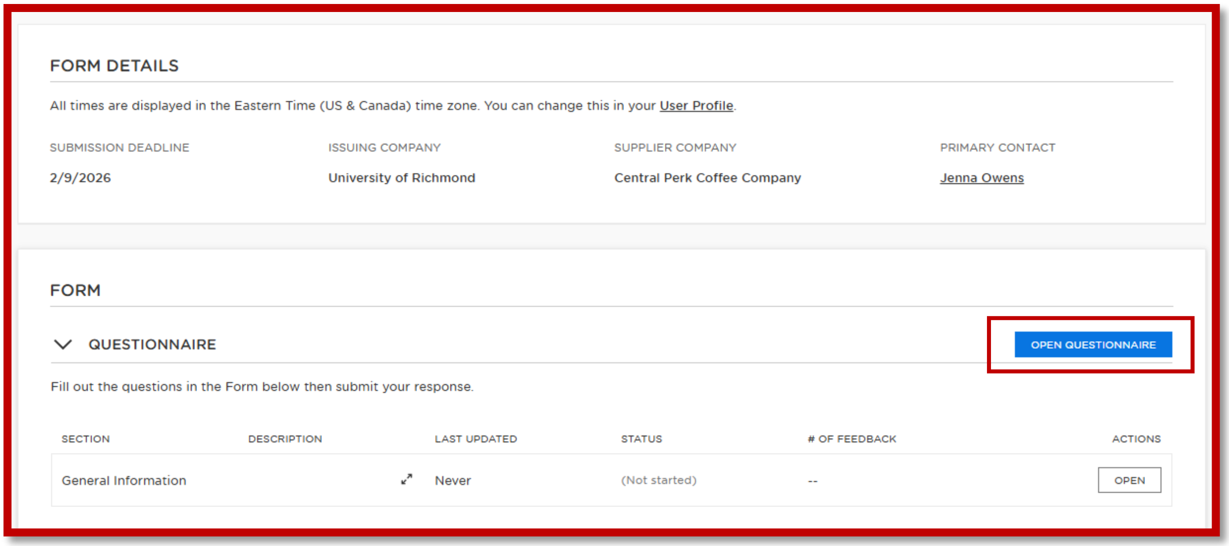
15. Click the **Submit** button in the bottom right-hand corner of the screen.



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

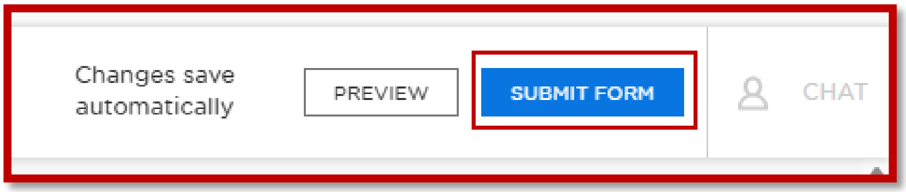


17. Click the **Open Questionnaire** button.



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.

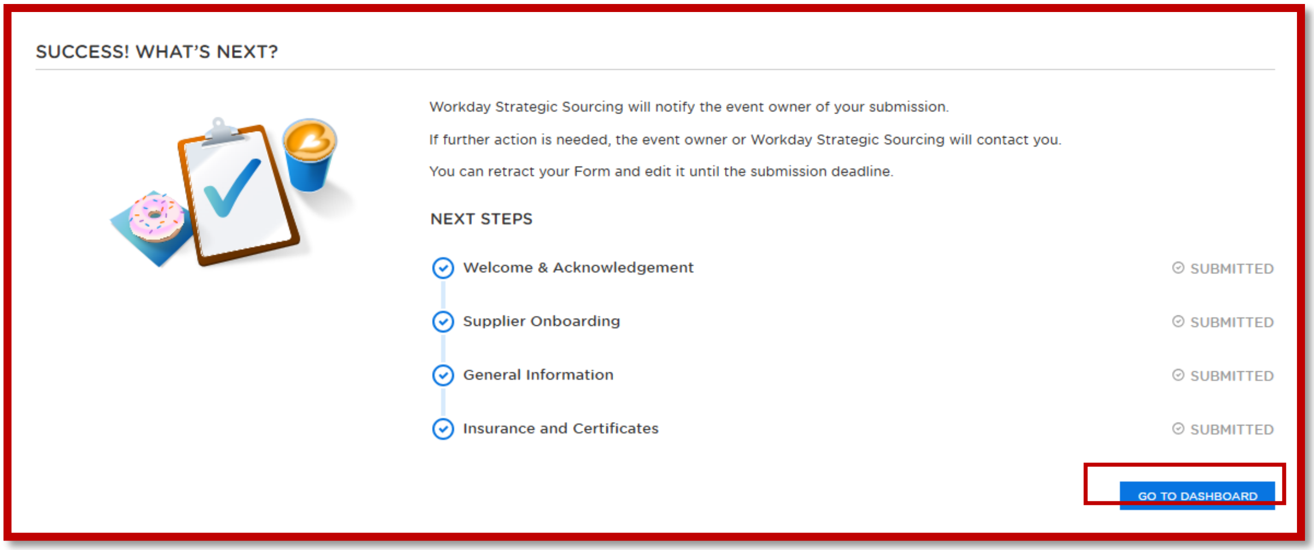
20. Click the **Submit Form** button in the top right-hand corner of the screen.



21. Repeat steps 9 through 13 for each form.

Once all forms have been completed:

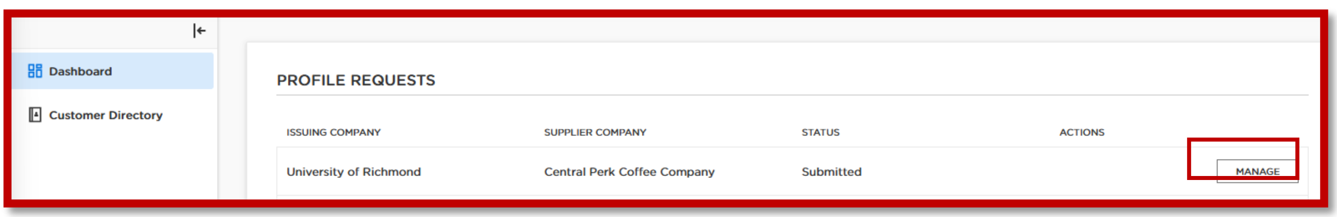
22. Click the **Go to Dashboard** button to return to your home screen or simply navigate away from Workday Strategic Sourcing.



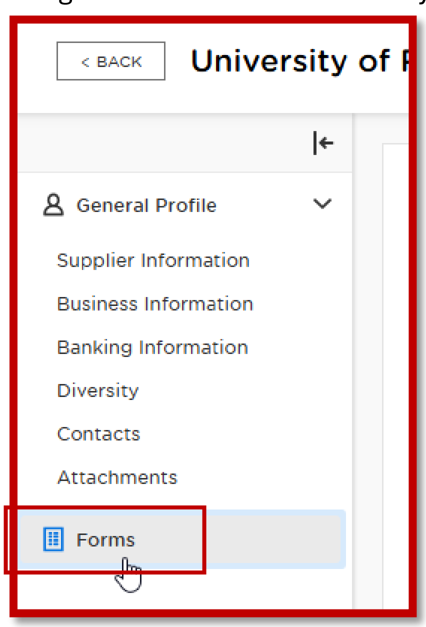
Revising Your Forms:

1. Login to Workday Strategic Sourcing using the login information previously setup.

2. Click the **Manage** button from your Profile Requests dashboard.

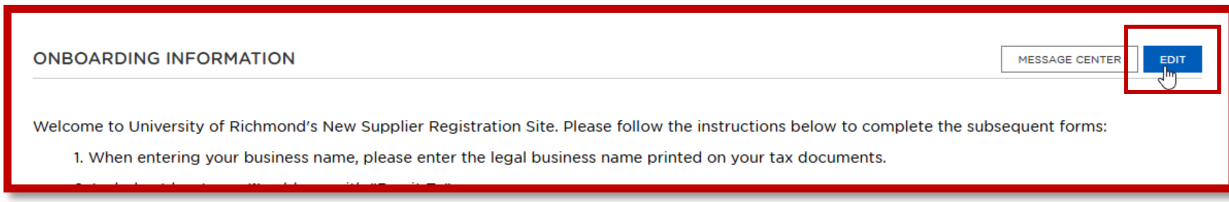


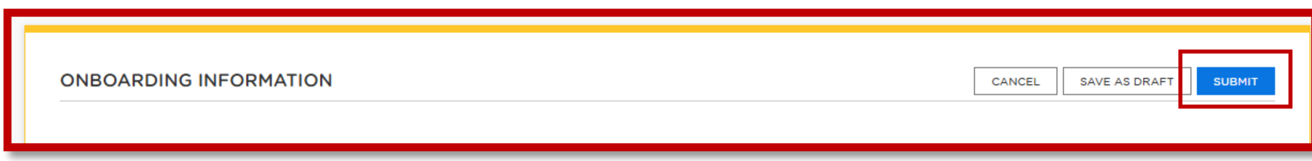
3. Navigate to the **Forms** section of your profile.



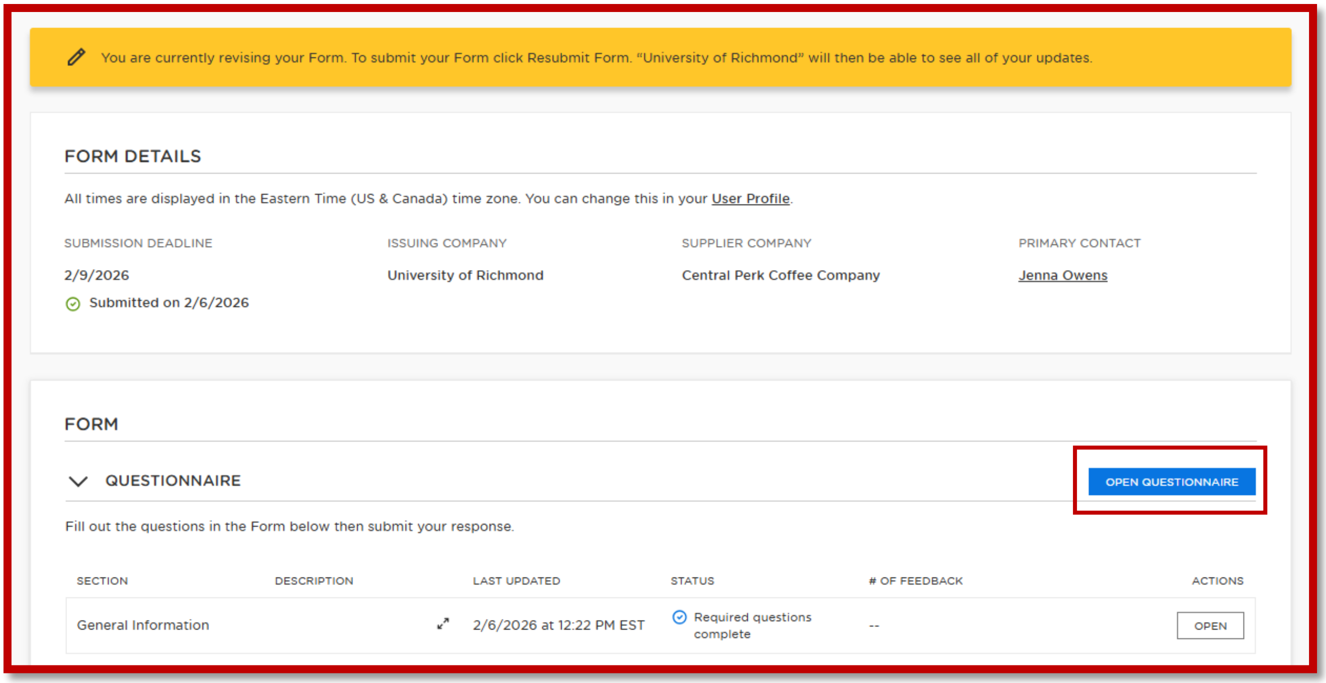
4. Click the **Open Form** button for the form in which you are seeking to update

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.





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**.

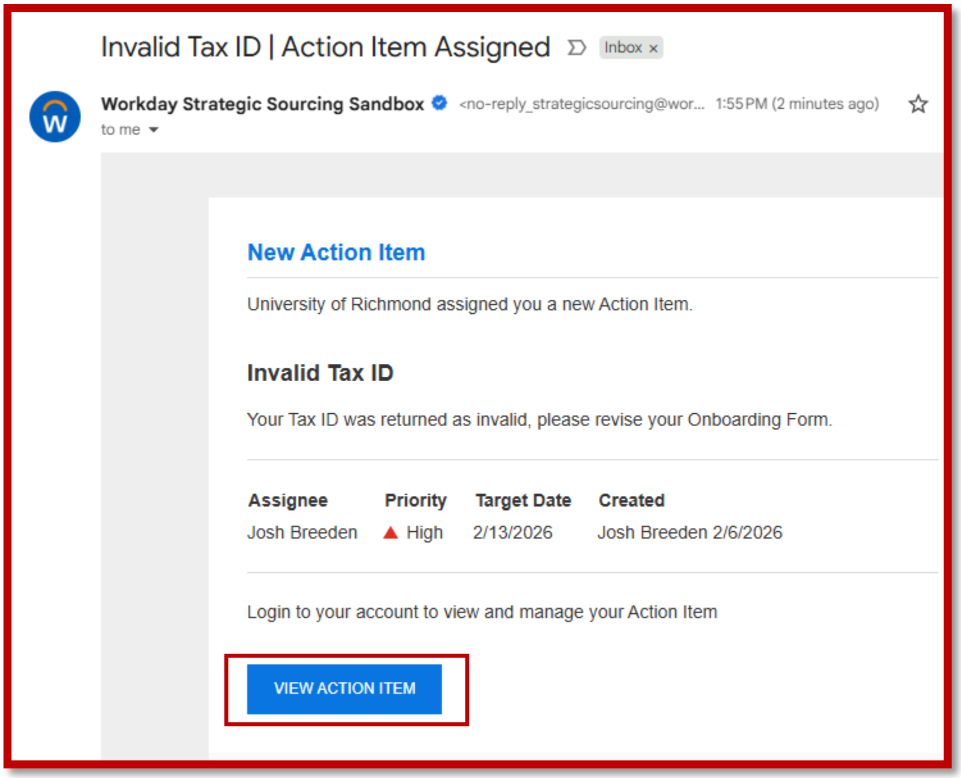


The Supplier Administrator will be notified that you have submitted revised forms.

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