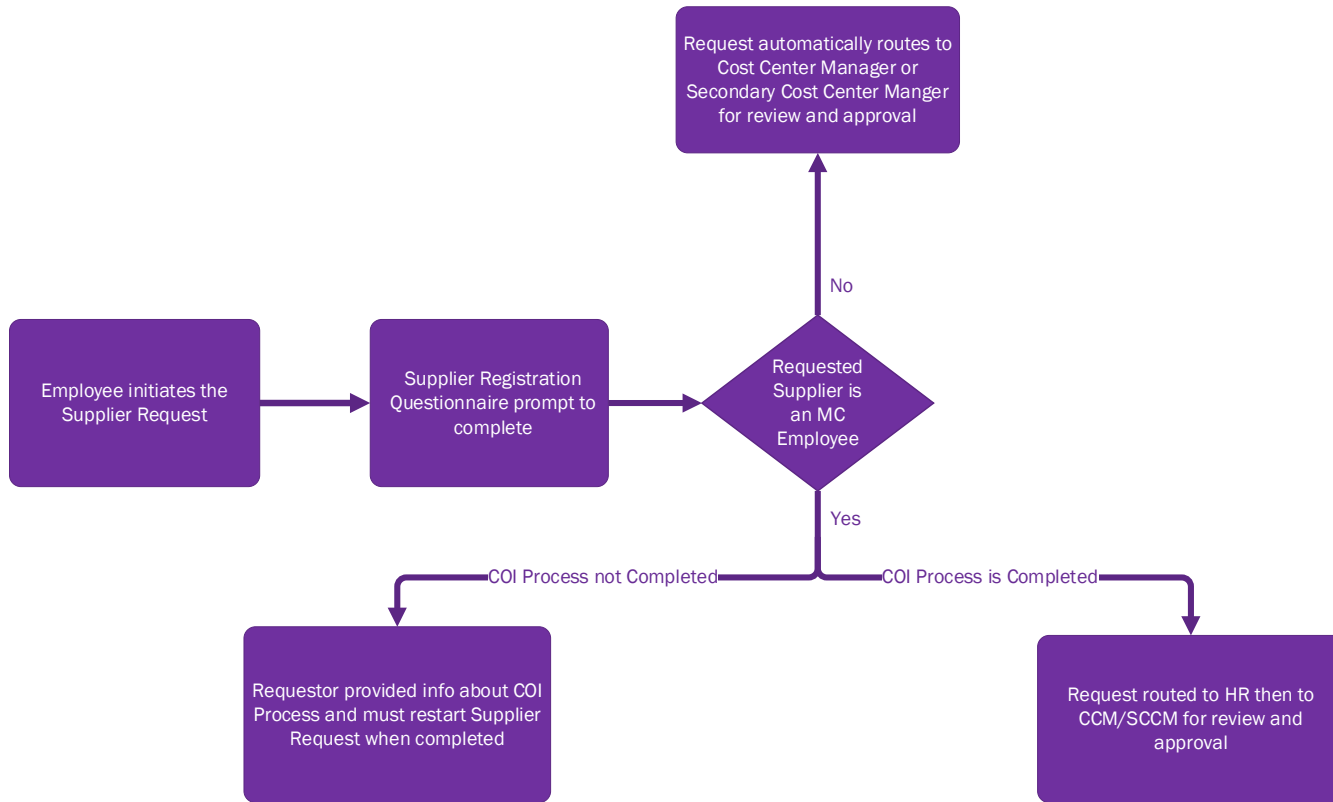


Overview

This job aid explains how to create a request for a Supplier yet to be set up in Workday. If the Supplier does not already exist in Workday, a Supplier Request must be created.

A Supplier Registration process is prompted to engage for COI awareness and compliance. Once the Supplier Request is created, the requestor receives a notification and can then submit the Requisition. Thereafter, Supplier invoices can be created by AP Data Entry Specialist or Project Manager AP Data Entry Specialist.

Process Flow: Supplier Request



Create Supplier Request

1. Using the Search field, enter and select **Create Supplier Request**.
2. The Worker field will automatically populate with your name.
3. Enter the **Supplier Name**.
Note: Supplier Name must be 40 characters or fewer.
4. Leave **DUNS Number** blank.
5. Leave **Unique Entity Identifier** blank.
6. Leave **Restricted to Companies** blank.
7. Select a **Supplier Category**, if applicable.
Note: Categories are assigned by the first letter of the Supplier Name. Select the letter category using the first letter in the Supplier's name.
8. Leave **Parent** blank.
9. Leave **Tax Authority Form Type** blank.
Note: Procurement Office will populate this field.
10. Leave **TIN Type** blank.
Note: Procurement Office will populate this field.
11. Enter the **Tax ID**.
Note: It is mandatory to enter a Tax ID.
12. Enter a **Justification**, if applicable.
13. Select the **Contact Information** tab. Enter either the Supplier's **Phone, Address, or Email** information by using the **Add** button.
 - **Phone:** Enter **Country Phone Code, Phone Number, Phone Device, Use For, Visibility,** and

any **Comments**.

- **Address:** Enter **Country, Address, City, State, Postal Code Use For, Visibility,** and any **Comments**.
- **Email:** Enter **Email Address, Primary Email Address Use For, Visibility** and any **Comments**.

Note: You must select **Primary**.

14. Select the **Attachments** tab.
15. Drag and drop the files into the field or click **Select Files** to browse files on your computer.
Note: The supplier's W-9 form is required to upload.
16. If you are not ready to submit your request, click **Save for Later**. If you are ready to submit your request, click **OK**.
17. Next, you will get a prompt to **Review** your request. **Click** on it.
18. Select an option for the **Supplier Group** category.
19. Select an option for the **Accepted Payment Types** category.
20. Select an option for the **Default Payment Type** category.
21. For the **Default Currency Payment** field, choose **Accepted Currencies** and enter or select **USD**.
22. Click **Approve**.
23. Then you will get a prompt to **Complete Questionnaire**. **Click** on it.
24. If the Proposed Supplier is not an Employee, reply '**No**' to the questionnaire prompt and click **Submit**.
Note: The process will route to the Cost Center Manager or Secondary Cost Center Manager for review and approval.
25. If the Proposed Supplier is an Employee, reply '**Yes,**' then follow the questionnaire prompts.