

Workday Strategic Sourcing – Requesting a New Supplier

Overview

This job aid will cover the steps to request a new supplier using Workday Strategic Sourcing.

One of the benefits of the new system is that previously looking up to see if a supplier exists, you needed to start a **requisition** or start a **supplier invoice** request. If you type in the **supplier's** name and it does not come up, you need to get out of that system, into the **purchases** worklet, and use the **new supplier request** function.

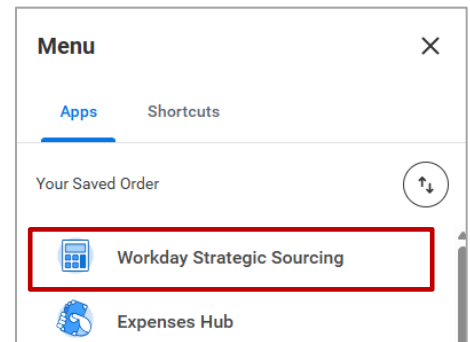
Now in the new system, because this is all on one screen, the process will be much shorter.

Accessing Workday Strategic Sourcing

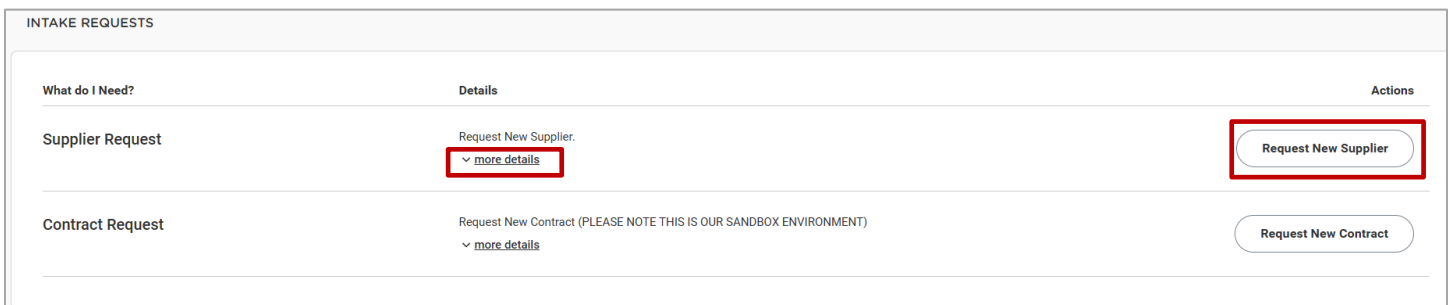
1. Click **WORKDAY** menu.



2. Select **WORKDAY STRATEGIC SOURCING** from the menu.



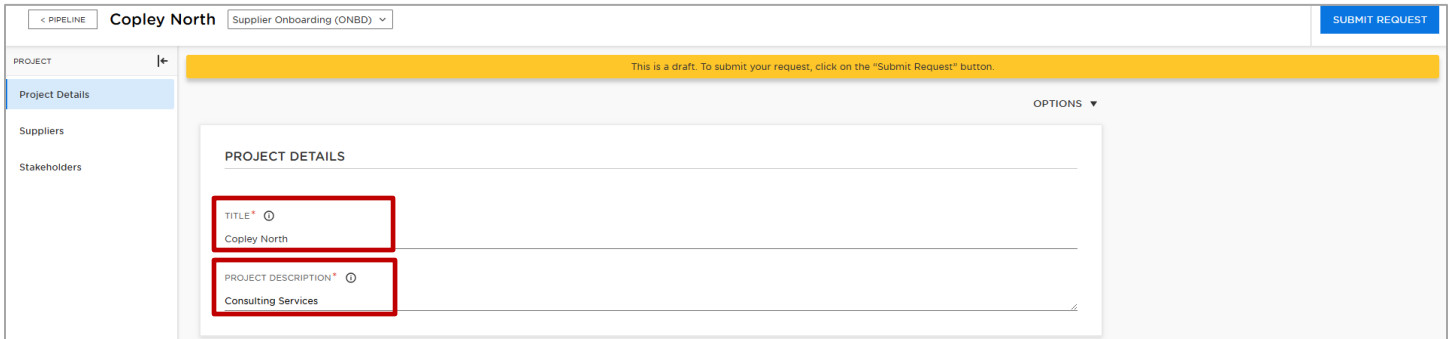
3. For **Supplier Request** you can click **MORE DETAILS** to see an **outline** of the steps to follow.



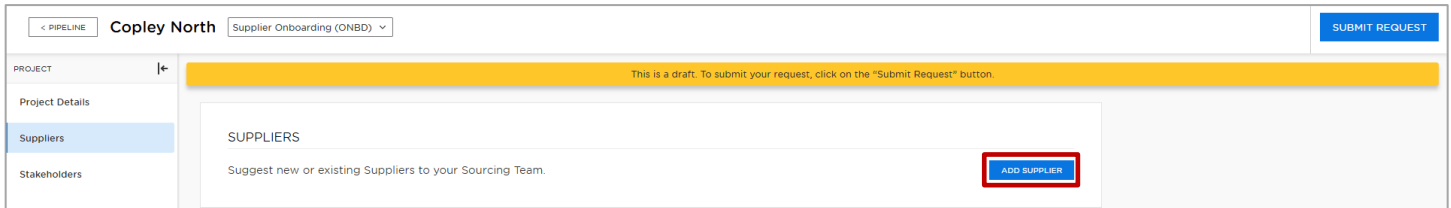
4. After reviewing the steps click **REQUEST NEW SUPPLIER** button located to the right.

Adding the Supplier

1. Under **Project Details**, just below **Title** enter the **NAME OF THE SUPPLIER**. In this example we are entering **Supplier Name** for the title.
2. Below **Title** add **PROJECT DESCRIPTION**. In this example we are entering **Consulting Services** for the project description.

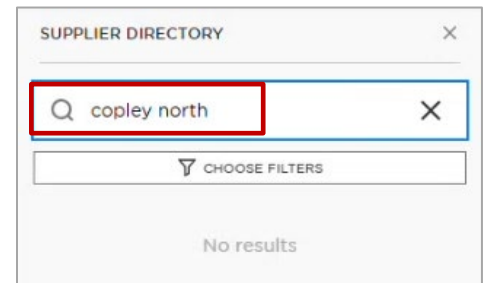


3. Click **SUPPLIERS** tab and then click **ADD SUPPLIER**.

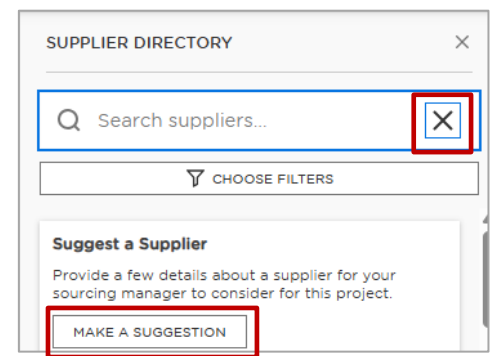


4. Under **Supplier Directory** type **SUPPLIER NAME** and press **ENTER** to perform a search. This is being done to prevent creating a duplicate supplier.

We next receive a message telling us that this supplier does not exist in the **Workday Strategic Sourcing** system.



5. Click the **X** button to close out of the **Supplier Directory** and right below that under **Suggest a Supplier** click **MAKE A SUGGESTION**.



6. Enter **SUPPLIER NAME** and **PRESS ENTER**.
7. Enter **CONTACT NAME**.
8. Enter **EMAIL ADDRESS**.
9. Click **SAVE & ADD**.

Step 9 is an important step.



Please be careful not to overlook this step and go straight to **Step 10 Submit Request**.

What happens if this step is overlooked, the **Contact Name** and **Email** information is not saved in the system.

Procurement then gets a request with no contact information and cannot add it. They then must cancel the request, and it needs to be re-entered.

SUPPLIER DIRECTORY

< BACK TO SUPPLIER LIST

SUPPLIER NAME
copley north X v

CONTACT NAME
Bob Muliero

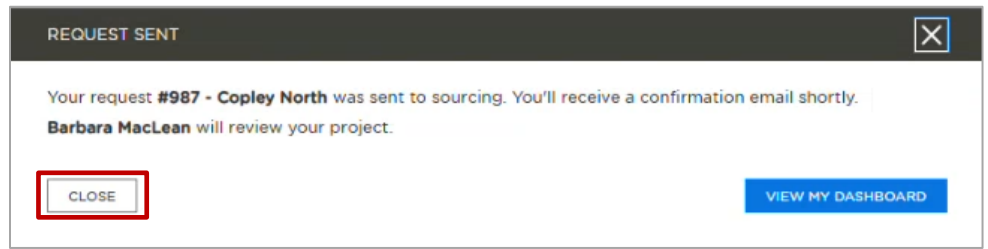
EMAIL
rmuliero@bentley.edu

CANCEL SAVE & ADD

10. In the top right-hand corner click **SUBMIT REQUEST**.



11. You will get a message saying that your request has been sent to **Sourcing**. Click **CLOSE**.



This completes the steps for requesting a new supplier.