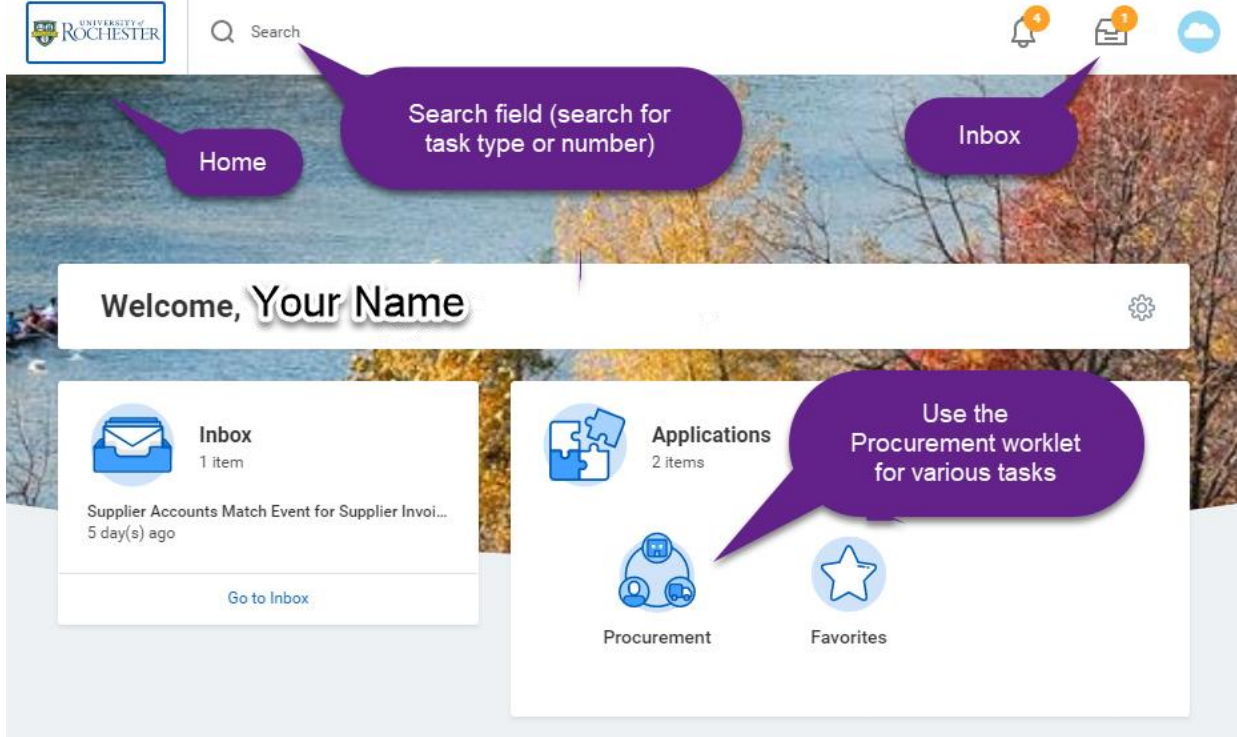
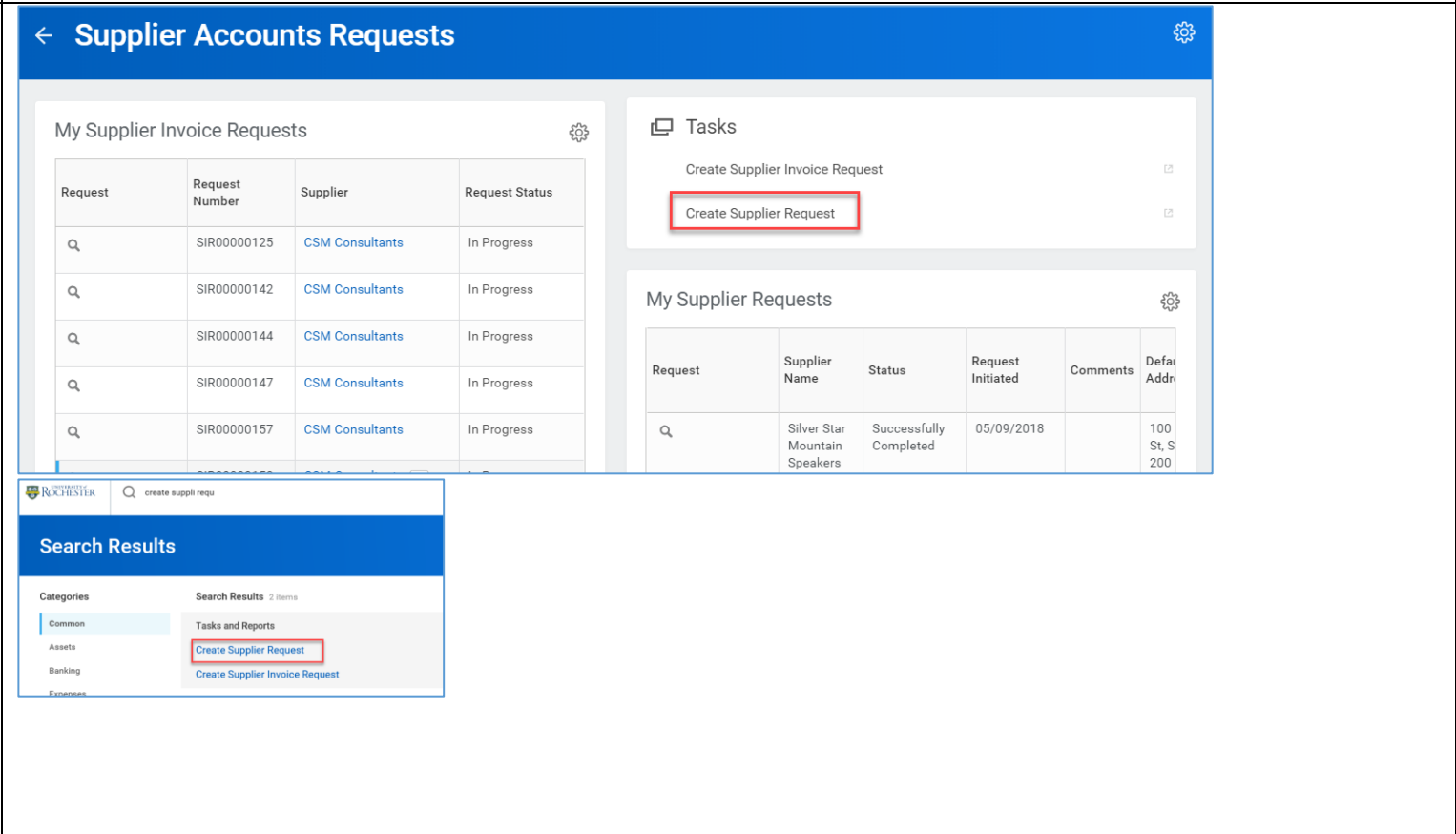
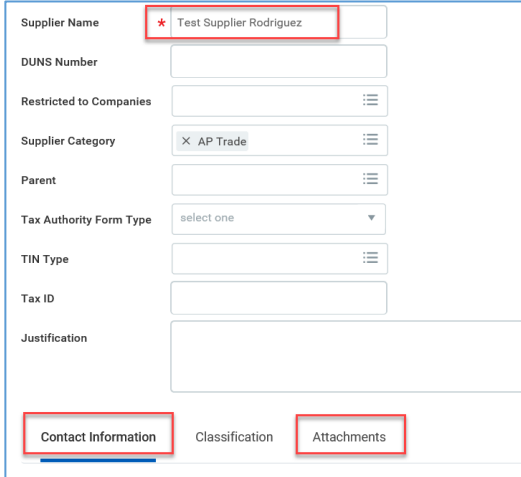
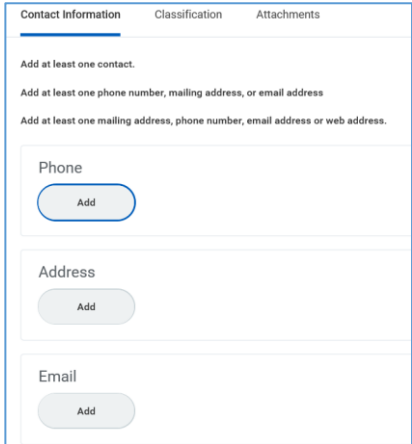



UR Procurement – Create Supplier Request

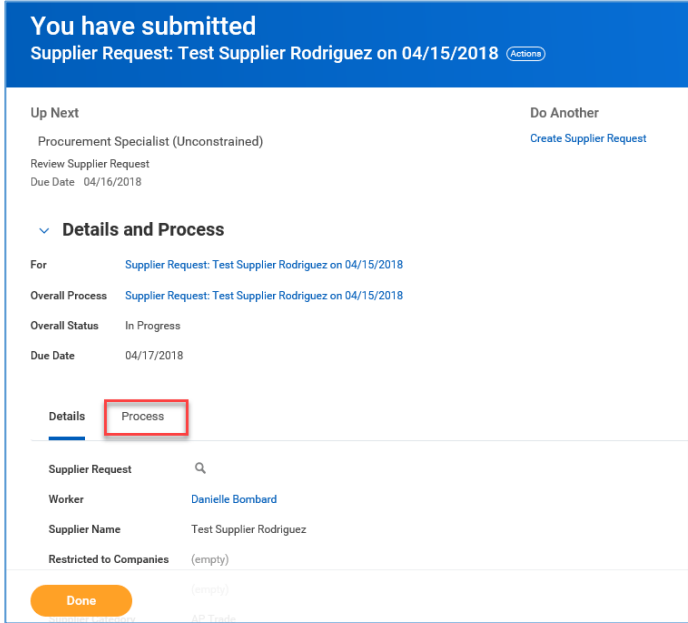
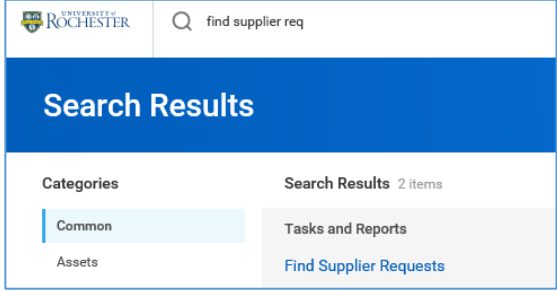
Implementation Tenant - <https://wd5-impl.workday.com/rochester3>

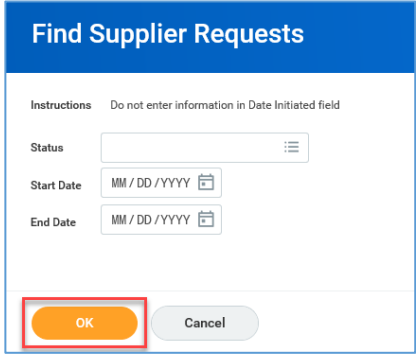
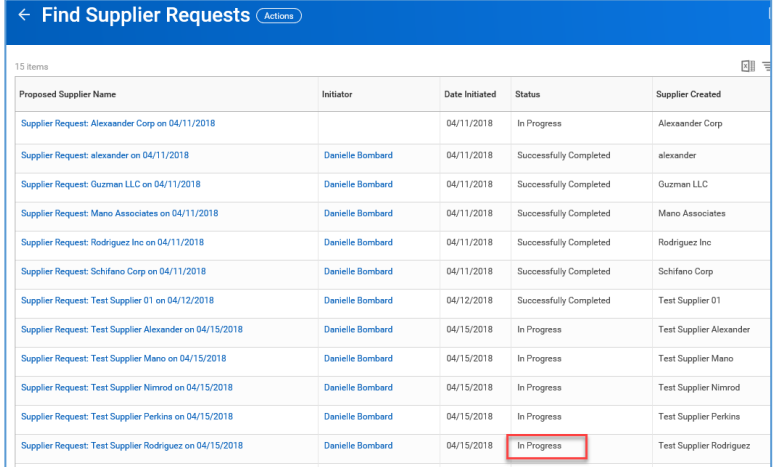
Instructions	Details and Screenshots
<p>Home page:</p> <ul style="list-style-type: none"> • Use the UR logo to return to this Home screen • Use the Search field with keywords <ul style="list-style-type: none"> ○ Create Supplier Request • Use the Inbox for Workday messages • Use the Procurement worklet for frequently used tasks and reports • Use the Supplier Accounts dashboard 	
<p>Rules</p>	<ul style="list-style-type: none"> • Before initiating the new supplier request, be sure you have checked if the supplier record is already set up in UR Procurement. <ul style="list-style-type: none"> ○ Search on the supplier using the following prompt: <code>supplier:[supplier name]</code> <ul style="list-style-type: none"> ▪ For example, <code>supplier:abcxyz</code> ▪ You may want to limit the search to the first 4-5 letters of the supplier’s name • New Supplier Requests require an attachment, justifying the request. Acceptable attachments: <ul style="list-style-type: none"> ○ Scanned copy of the supplier letterhead ○ Sample invoice from the supplier ○ W9

Instructions	Details and Screenshots																																				
<ul style="list-style-type: none"> • Use the Supplier Accounts dashboard and select Create Supplier Request> • Or you can search for 'create supplier request' in the global search box and select <Create Supplier Request> 	 <p>The screenshot shows the 'Supplier Accounts Requests' dashboard. It features a table of 'My Supplier Invoice Requests' with columns for Request, Request Number, Supplier, and Request Status. Below this is a 'Tasks' section with a button for 'Create Supplier Request'. Another section shows 'My Supplier Requests' with a table of request details. A search results overlay is also shown, displaying 'Create Supplier Request' as a search result under the 'Tasks and Reports' category.</p> <p>My Supplier Invoice Requests</p> <table border="1"> <thead> <tr> <th>Request</th> <th>Request Number</th> <th>Supplier</th> <th>Request Status</th> </tr> </thead> <tbody> <tr> <td>Q</td> <td>SIR00000125</td> <td>CSM Consultants</td> <td>In Progress</td> </tr> <tr> <td>Q</td> <td>SIR00000142</td> <td>CSM Consultants</td> <td>In Progress</td> </tr> <tr> <td>Q</td> <td>SIR00000144</td> <td>CSM Consultants</td> <td>In Progress</td> </tr> <tr> <td>Q</td> <td>SIR00000147</td> <td>CSM Consultants</td> <td>In Progress</td> </tr> <tr> <td>Q</td> <td>SIR00000157</td> <td>CSM Consultants</td> <td>In Progress</td> </tr> </tbody> </table> <p>Tasks</p> <ul style="list-style-type: none"> Create Supplier Invoice Request Create Supplier Request <p>My Supplier Requests</p> <table border="1"> <thead> <tr> <th>Request</th> <th>Supplier Name</th> <th>Status</th> <th>Request Initiated</th> <th>Comments</th> <th>Defa Addr</th> </tr> </thead> <tbody> <tr> <td>Q</td> <td>Silver Star Mountain Speakers</td> <td>Successfully Completed</td> <td>05/09/2018</td> <td></td> <td>100 St, S 200</td> </tr> </tbody> </table> <p>Search Results</p> <p>Search Results 2 items</p> <p>Categories: Common, Assets, Banking, Expenses</p> <p>Tasks and Reports</p> <ul style="list-style-type: none"> Create Supplier Request Create Supplier Invoice Request 	Request	Request Number	Supplier	Request Status	Q	SIR00000125	CSM Consultants	In Progress	Q	SIR00000142	CSM Consultants	In Progress	Q	SIR00000144	CSM Consultants	In Progress	Q	SIR00000147	CSM Consultants	In Progress	Q	SIR00000157	CSM Consultants	In Progress	Request	Supplier Name	Status	Request Initiated	Comments	Defa Addr	Q	Silver Star Mountain Speakers	Successfully Completed	05/09/2018		100 St, S 200
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Instructions	Details and Screenshots
<p>After selecting <Create Supplier Request> you will be prompted to complete the request form.</p> <ul style="list-style-type: none"> • Supplier Name • Supplier Category [AP Trade] • Contact Information <ul style="list-style-type: none"> ○ Be sure to add a phone number, address and email address using the prompts. Add more than one address if needed (such as a different address for remit-to) • Attachments <ul style="list-style-type: none"> ○ Be sure to attach a copy of the supplier letterhead or sample invoice 	 <p>The screenshot shows a form with the following fields: Supplier Name (with a red asterisk and 'Test Supplier Rodriguez'), DUNS Number, Restricted to Companies, Supplier Category (with 'X AP Trade'), Parent, Tax Authority Form Type (dropdown), TIN Type, Tax ID, and Justification. At the bottom, there are three tabs: 'Contact Information' (highlighted with a red box), 'Classification', and 'Attachments' (highlighted with a red box).</p>  <p>The screenshot shows the 'Contact Information' section with the following prompts and buttons: 'Add at least one contact.', 'Add at least one phone number, mailing address, or email address', 'Add at least one mailing address, phone number, email address or web address.', 'Phone' with an 'Add' button, 'Address' with an 'Add' button, and 'Email' with an 'Add' button.</p> <p>When adding an address, if there is a separate Remit-to Address, enter that first and then add a second address for Procurement (for example). Specify the usage with the <Use For> section.</p>

Instructions	Details and Screenshots
	<div data-bbox="478 305 911 711"> <p>Phone</p> <p>Country Phone Code * <input type="text" value="X United States of America (+1)"/></p> <p>Phone Number * <input type="text" value="(585) 555-1212"/></p> <p>Phone Extension <input type="text"/></p> <p>Phone Device * <input type="text" value="Telephone"/></p> <p>Type * <input type="text" value="Business"/></p> <p>Primary <input checked="" type="checkbox"/></p> <p>Use For <input type="text" value="X Billing X Remit To X Shipping"/></p> </div> <div data-bbox="957 136 1390 711"> <p>Address</p> <p>Effective Date * <input type="text" value="04/15/2018"/></p> <p>Country * <input type="text" value="X United States of America"/></p> <p>Address Line 1 * <input type="text" value="44 Celebration Dr"/></p> <p>Address Line 2 <input type="text"/></p> <p>City * <input type="text" value="Rochester"/></p> <p>State * <input type="text" value="X New York"/></p> <p>Postal Code * <input type="text" value="14627"/></p> <p>County <input type="text"/></p> <p>Usage</p> <p>Type * <input type="text" value="Business"/></p> <p>Primary <input checked="" type="checkbox"/></p> <p>Use For <input type="text" value="X Procurement X Billing X Remit To X Shipping"/></p> <p>Visibility <input checked="" type="checkbox"/> Public</p> </div> <div data-bbox="1425 282 1885 711"> <p>Email</p> <p>Email Address * <input type="text" value="testcompany@company.com"/></p> <p>Type * <input type="text" value="Business"/></p> <p>Primary <input checked="" type="checkbox"/></p> <p>Use For <input type="text" value="X Procurement X Billing X Remit To X Shipping"/></p> <p>Visibility <input checked="" type="checkbox"/> Public</p> <p>Comments <input type="text"/></p> </div> <div data-bbox="478 751 1068 1000"> <p>Contact Information Classification Attachments</p> <p>Attachments</p> <p>Drop files here</p> <p>or</p> <p>Select files</p> </div> <div data-bbox="1146 751 1581 1000"> <p>Contact Information Classification Attachments</p> <p>Attachments</p> <p> Required Attachment.pdf</p> <p>Comment <input type="text"/></p> <p>Upload</p> </div> <div data-bbox="499 1052 646 1101"> <p>OK</p> </div>

Instructions	Details and Screenshots
<ul style="list-style-type: none"> Once you have selected <OK> to submit, you will see a confirmation screen 	
<ul style="list-style-type: none"> To find your supplier request, use the global search box. <ul style="list-style-type: none"> Search on <Find Supplier Requests> 	

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<ul style="list-style-type: none"> To see all your supplier requests, select <OK>. You can also narrow the search by filling in fields. 																																																																		
<ul style="list-style-type: none"> Locate the supplier request in question and notice the Status. If it's In Progress, you may select the supplier request record and view the <i>Process History</i> section. 	 <table border="1"> <thead> <tr> <th>Proposed Supplier Name</th> <th>Initiator</th> <th>Date Initiated</th> <th>Status</th> <th>Supplier Created</th> </tr> </thead> <tbody> <tr> <td>Supplier Request: Alexander Corp on 04/11/2018</td> <td></td> <td>04/11/2018</td> <td>In Progress</td> <td>Alexander Corp</td> </tr> <tr> <td>Supplier Request: alexander on 04/11/2018</td> <td>Danielle Bombard</td> <td>04/11/2018</td> <td>Successfully Completed</td> <td>alexander</td> </tr> <tr> <td>Supplier Request: Guzman LLC on 04/11/2018</td> <td>Danielle Bombard</td> <td>04/11/2018</td> <td>Successfully Completed</td> <td>Guzman LLC</td> </tr> <tr> <td>Supplier Request: Mano Associates on 04/11/2018</td> <td>Danielle Bombard</td> <td>04/11/2018</td> <td>Successfully Completed</td> <td>Mano Associates</td> </tr> <tr> <td>Supplier Request: Rodriguez Inc on 04/11/2018</td> <td>Danielle Bombard</td> <td>04/11/2018</td> <td>Successfully Completed</td> <td>Rodriguez Inc</td> </tr> <tr> <td>Supplier Request: Schifano Corp on 04/11/2018</td> <td>Danielle Bombard</td> <td>04/11/2018</td> <td>Successfully Completed</td> <td>Schifano Corp</td> </tr> <tr> <td>Supplier Request: Test Supplier 01 on 04/12/2018</td> <td>Danielle Bombard</td> <td>04/12/2018</td> <td>Successfully Completed</td> <td>Test Supplier 01</td> </tr> <tr> <td>Supplier Request: Test Supplier Alexander on 04/15/2018</td> <td>Danielle Bombard</td> <td>04/15/2018</td> <td>In Progress</td> <td>Test Supplier Alexander</td> </tr> <tr> <td>Supplier Request: Test Supplier Mano on 04/15/2018</td> <td>Danielle Bombard</td> <td>04/15/2018</td> <td>In Progress</td> <td>Test Supplier Mano</td> </tr> <tr> <td>Supplier Request: Test Supplier Nimrod on 04/15/2018</td> <td>Danielle Bombard</td> <td>04/15/2018</td> <td>In Progress</td> <td>Test Supplier Nimrod</td> </tr> <tr> <td>Supplier Request: Test Supplier Perkins on 04/15/2018</td> <td>Danielle Bombard</td> <td>04/15/2018</td> <td>In Progress</td> <td>Test Supplier Perkins</td> </tr> <tr> <td>Supplier Request: Test Supplier Rodriguez on 04/15/2018</td> <td>Danielle Bombard</td> <td>04/15/2018</td> <td>In Progress</td> <td>Test Supplier Rodriguez</td> </tr> </tbody> </table>	Proposed Supplier Name	Initiator	Date Initiated	Status	Supplier Created	Supplier Request: Alexander Corp on 04/11/2018		04/11/2018	In Progress	Alexander Corp	Supplier Request: alexander on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	alexander	Supplier Request: Guzman LLC on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	Guzman LLC	Supplier Request: Mano Associates on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	Mano Associates	Supplier Request: Rodriguez Inc on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	Rodriguez Inc	Supplier Request: Schifano Corp on 04/11/2018	Danielle Bombard	04/11/2018	Successfully Completed	Schifano Corp	Supplier Request: Test Supplier 01 on 04/12/2018	Danielle Bombard	04/12/2018	Successfully Completed	Test Supplier 01	Supplier Request: Test Supplier Alexander on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Alexander	Supplier Request: Test Supplier Mano on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Mano	Supplier Request: Test Supplier Nimrod on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Nimrod	Supplier Request: Test Supplier Perkins on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Perkins	Supplier Request: Test Supplier Rodriguez on 04/15/2018	Danielle Bombard	04/15/2018	In Progress	Test Supplier Rodriguez
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