

Request a New Supplier

Workday allows anyone to request a new supplier if an existing supplier does not carry needed items. The employee initiates the supplier request and then a manager must approve the request before it is forwarded to a Supplier Contract Specialist for final approval. Follow the steps below to initiate a request for a new supplier. The Approved Supplier List can be found here: Approved Supplier Guide.

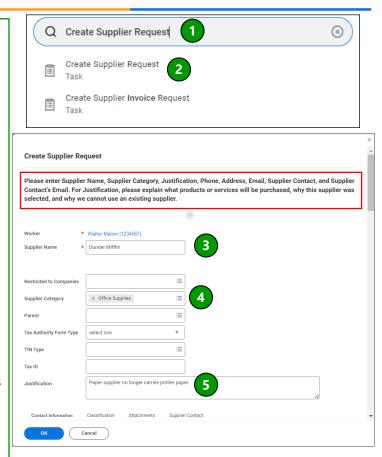
Form the Workday Homepage:

- 1. In the search bar, type Create Supplier Request.
- 2. Select Create Supplier Request Task.

Note: All fields that are required are listed at the top of the item. Be sure to double check that you have completed all of these fields before submission.

- 3. A new window will open with the Create Supplier Request Task. The initiator's name will be linked as the Worker. Type the new **Supplier Name**.
- 4. Select the **Prompt** icon next to **Supplier Category**. Then choose the appropriate category from the drop-down menu.
- 5. Provide a **justification** for the new Supplier Request. **Note:** Common justifications may include a specialty item needed from a specific supplier or current suppliers no longer carry a needed item.

Note: All other fields are optional. You can add the information in if available.

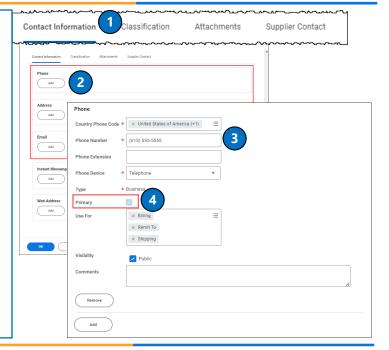


From Create Supplier Request:

1. At the bottom of the first page, select **Contact Information**.

Note: The only two items from this menu that are required are **Contact Information** and **Supplier Contact**.

- 2. In the request, you must provide contact information for the new supplier. The three that are required are **Phone**, **Address**, and **Email**. Select **Add** under **Phone**.
- 3. Type the **phone number** associated with the supplier.
- 4. Check the **box** next to **Primary**. If left unchecked, you will receive an error message.





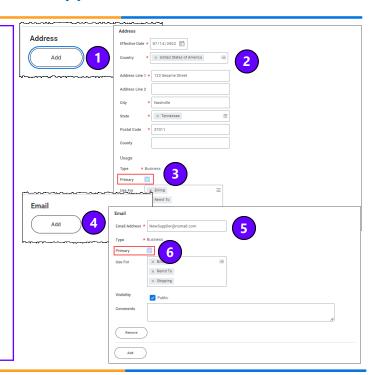




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From Contact Information:

- 1. Once a phone number has been entered, scroll down and select **Add** under **Address**.
- 2. Some information will populate for you. Type the **address of the supplier**, including the street address, the state, and the postal code.
- 3. Check the **box** next to **Primary**. If left unchecked, you will receive an error message.
- 4. Once an address has been entered, scroll down and select **Add** under **Email**.
- 5. Type the email address of the supplier.
- 6. Check the **box** next to **Primary**. If left unchecked, you will receive an error message.

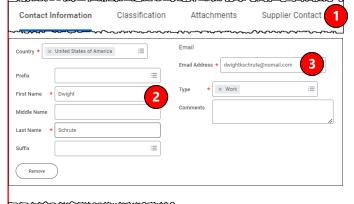


From Supplier Contact:

- 1. Select Supplier Contact.
- 2. In this section, you will add any information for a specific person you have been in contact with from the new supplier. Type in the Supplier Contact's **First** and **Last Names**.
- 3. Type in the Supplier Contact's **Email Address** and indicate whether this is a **Home** or **Work** email address.
- 4. Select OK.

Note: Your manager will receive an inbox notification and will have a To-Do task to approve or deny the request. The Supplier Contract Specialist will complete the same process.

Note: After approval from your manager, a Supplier Contract Specialist will need to review and approve the request before the Supplier is added to Workday.



In case of error message:

- 1. Any states listed in contact information must match the Postal Code provided.
- 2. The phone number area code must be valid.
- 3. Email addresses must contain both an @ symbol and domain (.com, .org, .net, etc.).

QUESTIONS?

Please email <u>BusinessEducation@vumc.org</u>.

