

Guide – Supplier Self-Service in Workday

Overview

<i>This guide is for individuals in this role:</i>	<i>Supplier</i>
<i>This guide is associated with this Workday Task:</i>	<i>Onboarding to Workday Strategic Sourcing</i>

Workday Strategic Sourcing gives you a convenient self-service portal to manage and update your supplier information in one place. By using Workday, you can keep your business details current, respond to onboarding requirements more quickly and reduce back-and-forth communication that can slow down the process. This helps you save time and allows you to make edits and changes on your own supplier profile. Follow this guide to make updates to your supplier contact information, banking information and more.

Self-Service

Follow these steps to self-register your account in order to be able to verify and update your information associated with your Supplier Profile with Clemson. If you already have a Workday Strategic Sourcing account with another company or institution, you can proceed to the Login and Verify Your Information section of this training guide.

Account Registration Access

1. You will receive an email invitation with a unique link directing you to the Workday Strategic Sourcing portal.
2. **Click the Sign Up Button.** If you do not receive this email, refresh your email page and check your spam/junk folders.

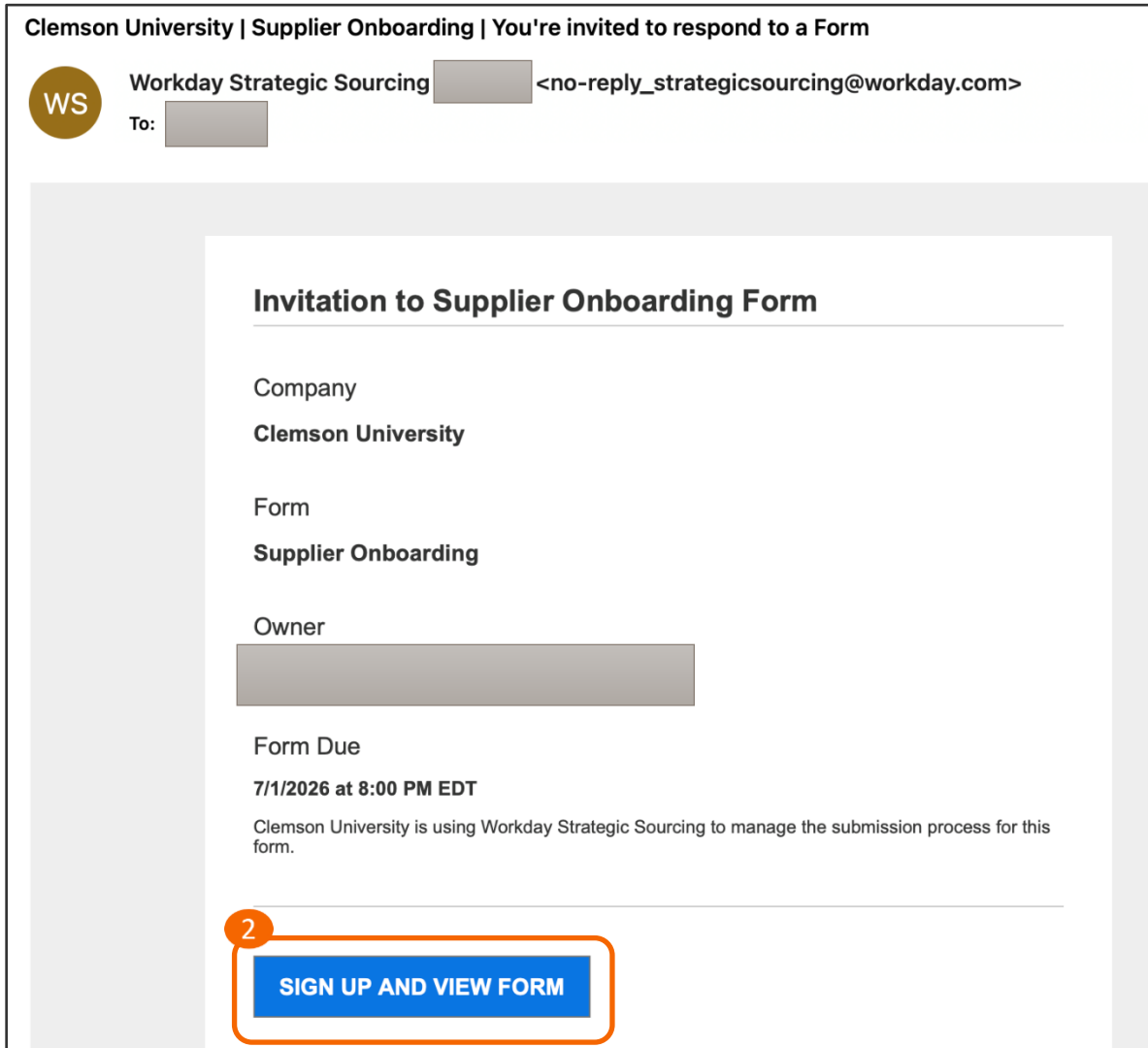


Image 1: Email from Workday Strategic Sourcing with Registration 'Sign In' Link. **Your initial email could look different than the email pictured above.**

3. Upon clicking the link, you will land on a registration page. The link will open in your browser and ask you to **verify your email address**, which is the same email address the invitation was initially sent to.
4. **Enter the supplier email address** and verify by sending a verification code to your entered email. **Click 'Send a Verification Code'**.

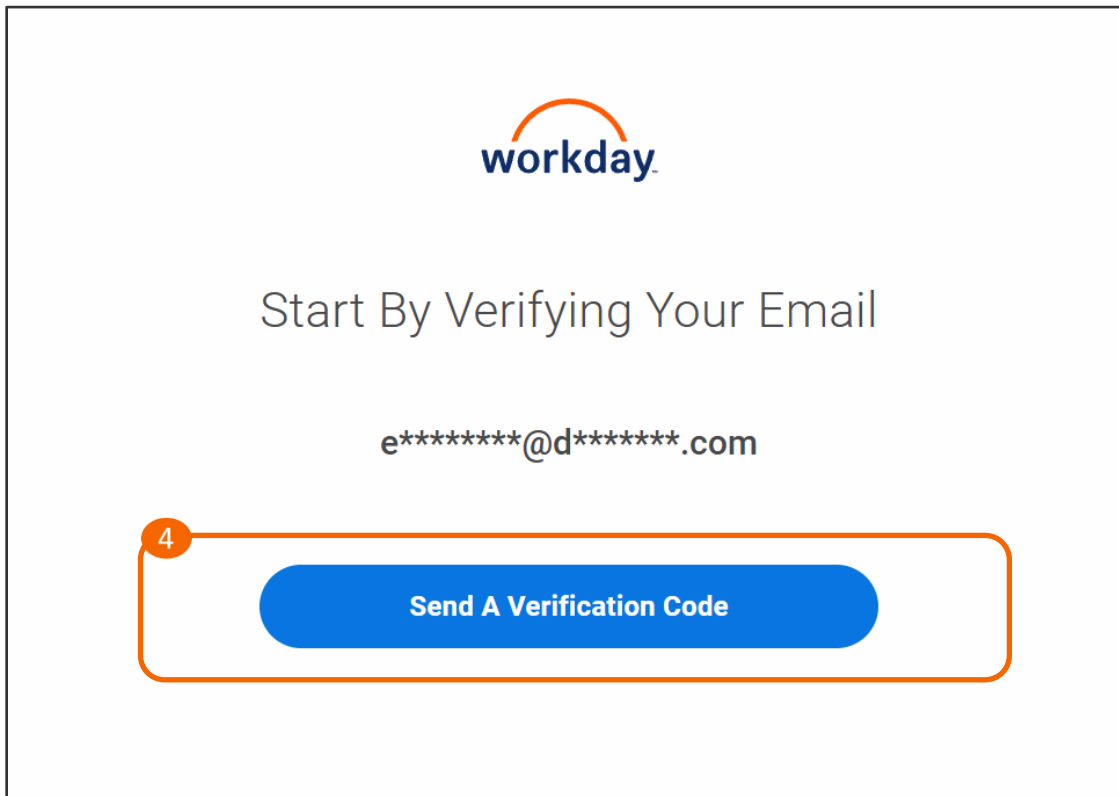


Image 2: Start by Verifying Your Email landing page through Workday

5. Check the email inbox (and junk folder) of the email account you entered into the Workday registration form.

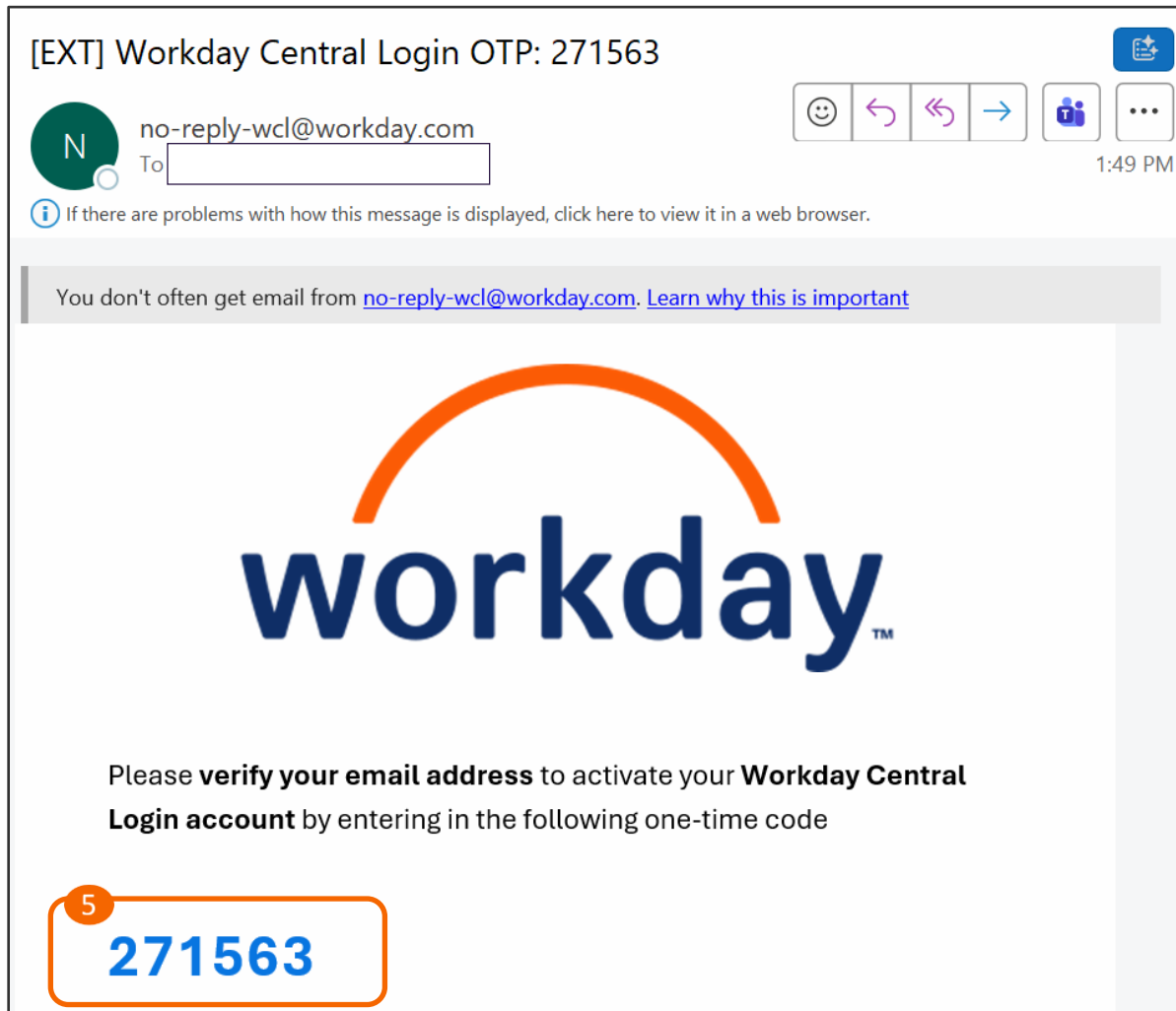


Image 3: Workday Email – Verification Code for Workday Central Login

- Once you receive this 6-digit verification code, go back to the Workday registration website and either type or copy/paste it to **verify your email and select 'Verify Email'**.

workday

Enter Your Verification Code

To verify your email and finish setting up your account, Workday sent you an email with a 6-digit verification code.

e*****@d*****.com

6

6

Verify Email

[Resend a Verification Code](#)

Image 4: Enter your Verification Code

Set Up Your Account

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Set Up Your Account

1 First Name
Enter your first name

1 Last Name
Enter your last name

1 New Password
Enter your password

1 Confirm New Password
Enter your password

1 Create Account

Image 5: Create and set up your account

1. **Enter the necessary information**, including First Name, Last Name, a New Password, and password confirmation. **Remember to write down this password/save it in a safe place!**
 - a. Password requirements are subject to change but should include uppercase letters, lowercase letters, numeric digits, special characters, and be at least 8 characters long.
2. **Set up your authentication methods.** You can select SMS (Phone) or an Authenticator App for multi-factor authentication (MFA).

SMS Setup

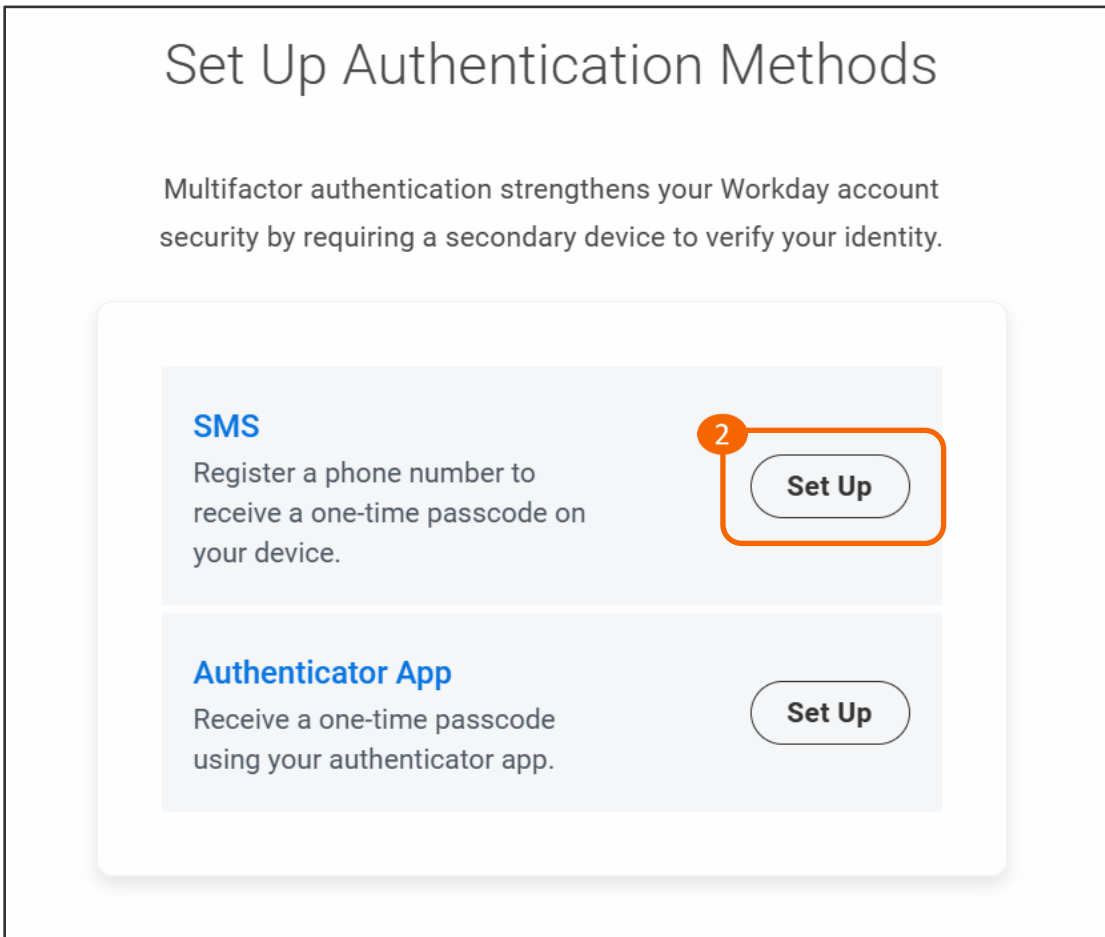


Image 6: Set up Authentication Methods (SMS or Authenticator App)

3. If you select **SMS** as the authentication method, **add the phone number** that you would like to be attached to the WSS account.

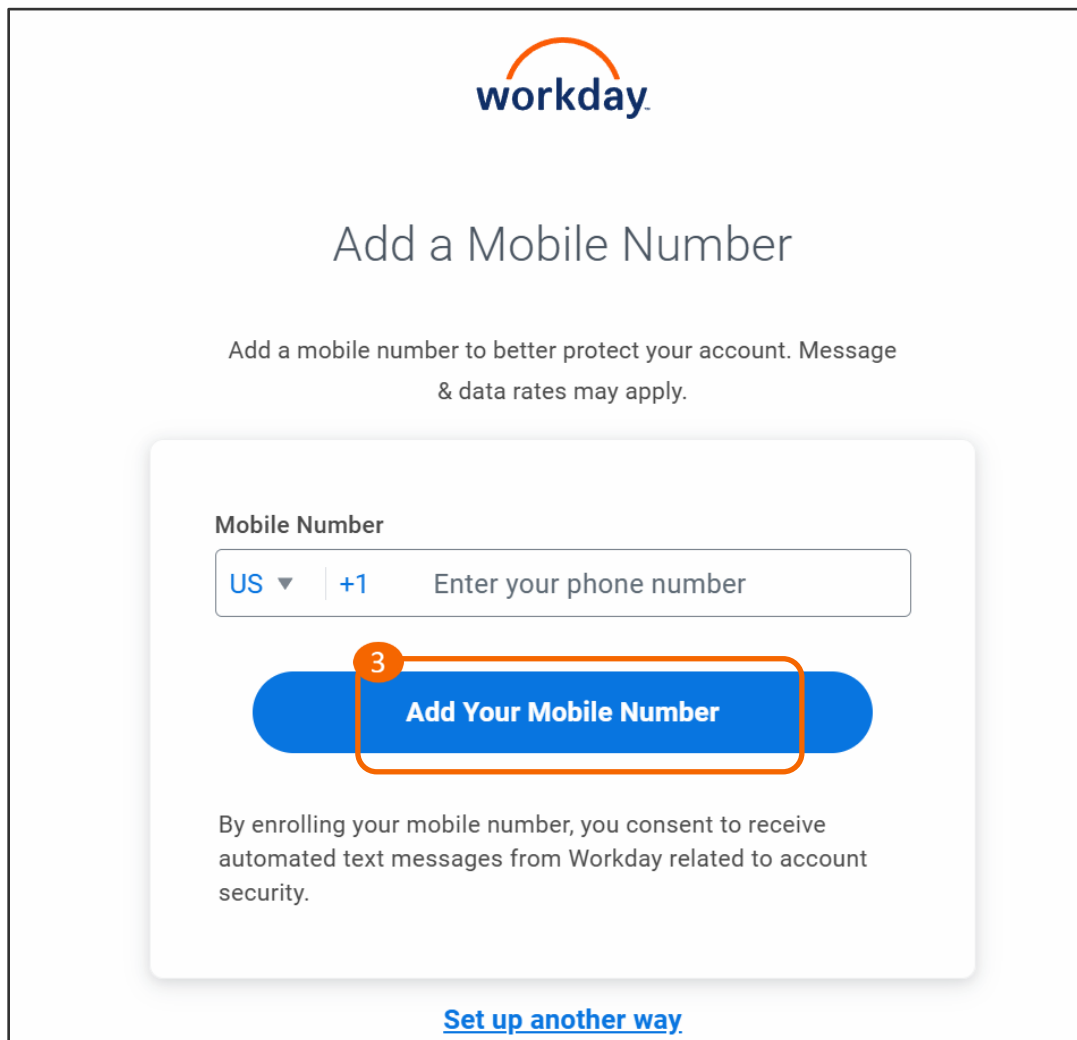


Image 7: Add Your Mobile Number

4. **Verify your Mobile Number.** WSS will text a 6-digit code to the phone number you entered; input that 6-digit pin in the verification field.

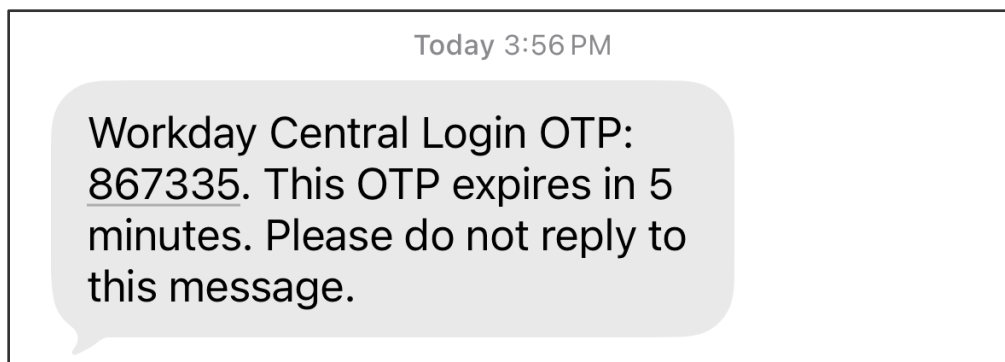



Image 8: Example 6-Digit Verification Code Received via SMS (yours will be different!)

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Let's Verify Your Mobile Number

For your security, Workday sent you a text message with a 6-digit verification code.

+1***** 

Enter the 6-digit code

4 [Verify Code](#)

[Resend a Verification Code](#)

Image 9: Authenticate Phone Number 6-digit verification code

Authenticator App Setup

5. If you select **Authenticator App** as the authentication method, ensure you have Google Authenticator or Microsoft Authenticator downloaded onto your mobile device as that is required to sign into Workday Central Login.
 - a. Step 1: **'Scan This QR Code with your Authenticator App'**. Once your authenticator app reads the QR code, you will receive a 6-digit code.
 - b. Step 2: **Connect Workday account to the Microsoft/Google Authenticator** by following the prompts on your mobile device.

Set Up Authentication Methods

Multifactor authentication strengthens your Workday account security by requiring a secondary device to verify your identity.

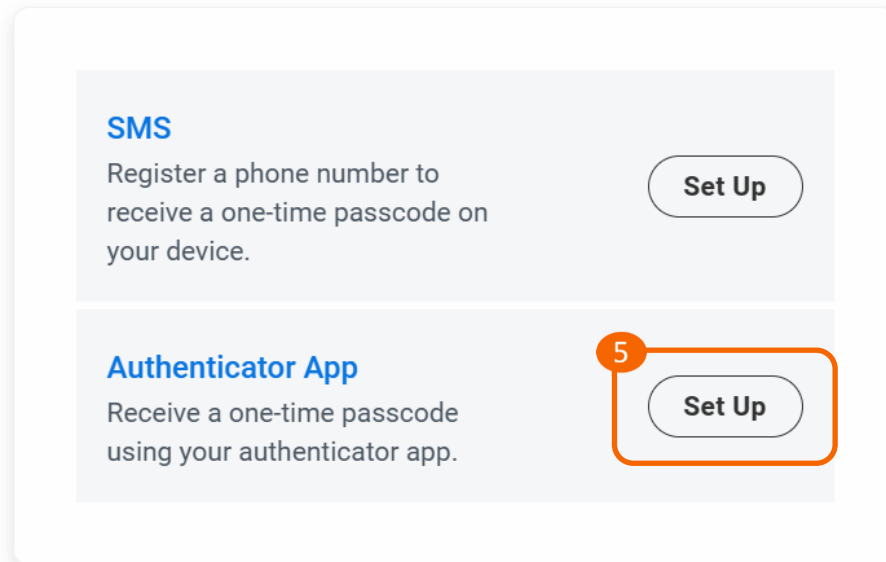


Image 10: Authenticate via Authenticator App

Note: For Authentication methods, you can set up both the SMS and the Authenticator App, but you must set up at least one of them as the multi-factor authentication and verification.

6. Once you have set up your multi-factor authenticator, **continue to Set up your Account**. Input Job Title, Phone Number and select your time zone, then click '**Create Account**'.



Set Up Your Account

Job Title

Phone Number
Timezone

Select a timezone ▼

6 **Create Account**

By creating an Account you accept the [Terms of Service](#) and acknowledge the [Privacy Statement](#).

Image 11: Set up Your Account > Create Account

Login and Verify Your Information

1. From the supplier log-in screen, **enter your email address, password and multi-factor authentication.**
For Logging into Workday Strategic Sourcing for the first time, please refer to the steps at t

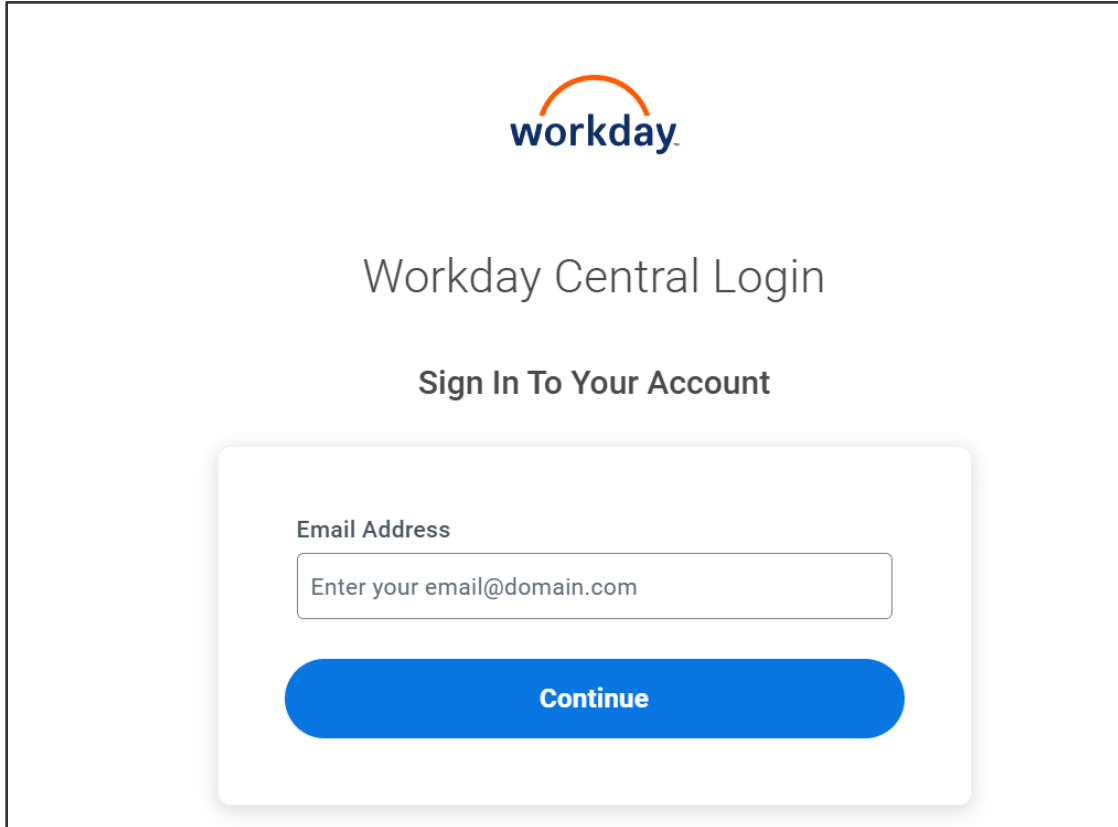


Image 12: Workday Central Supplier Login Screen

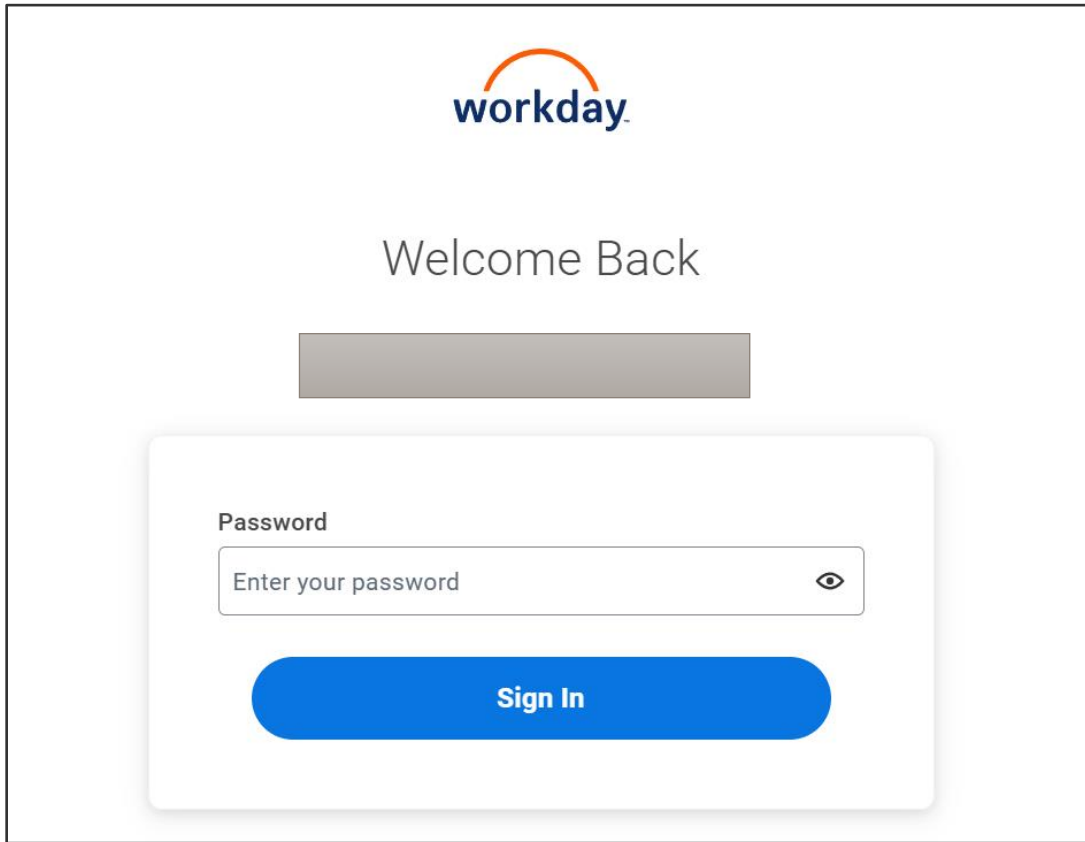


Image 13: Workday Central Supplier Login Screen Password

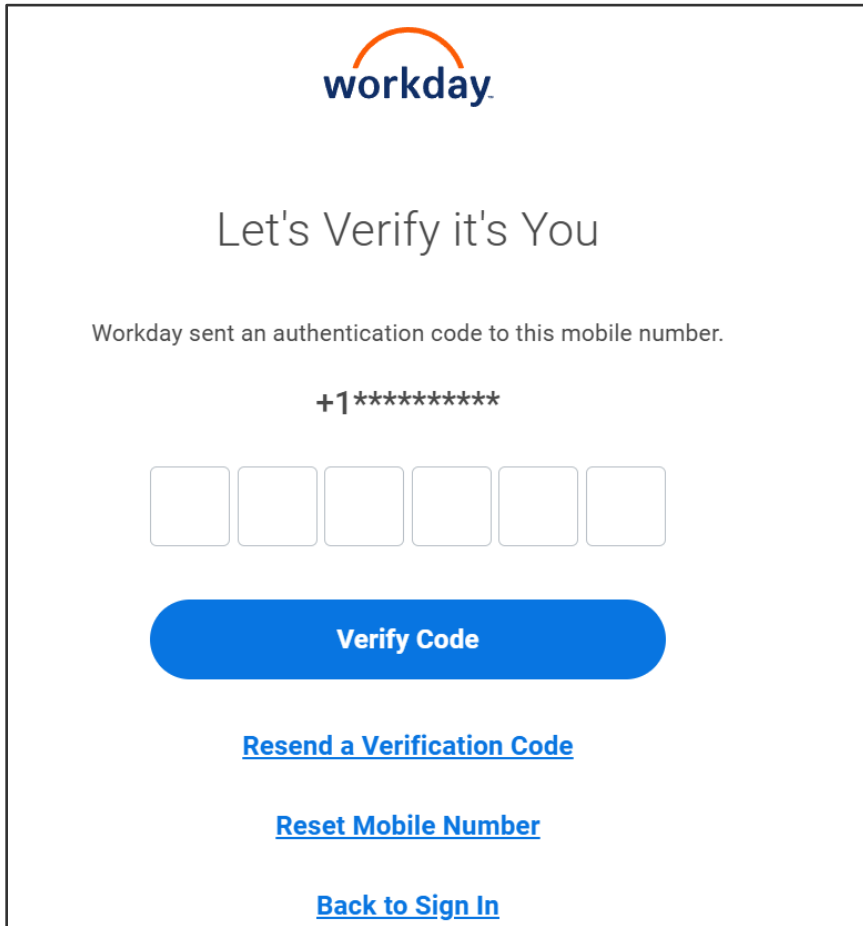


Image 14: Workday Multi-factor Authentication Screen

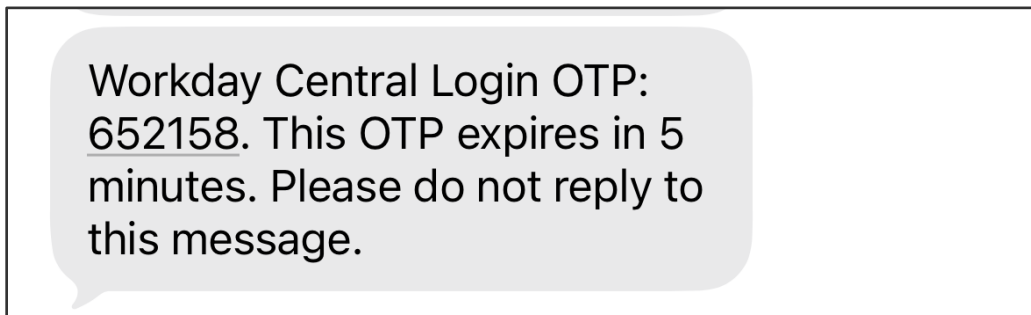


Image 15: Workday Multi-factor Authentication Text Message

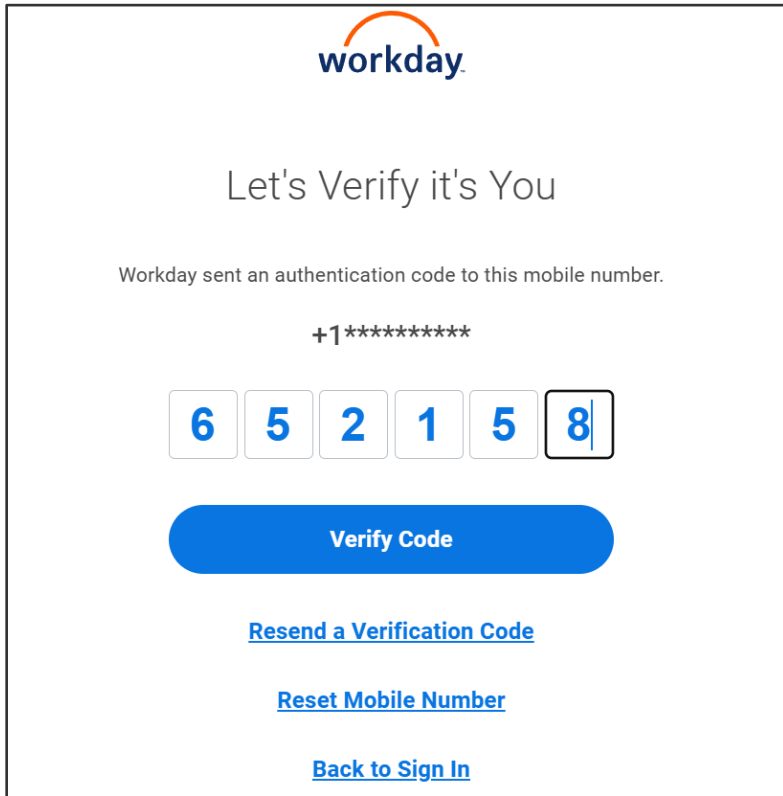


Image 16: Workday Multi-factor Authentication Screen Confirmation

2. Select your supplier portal.

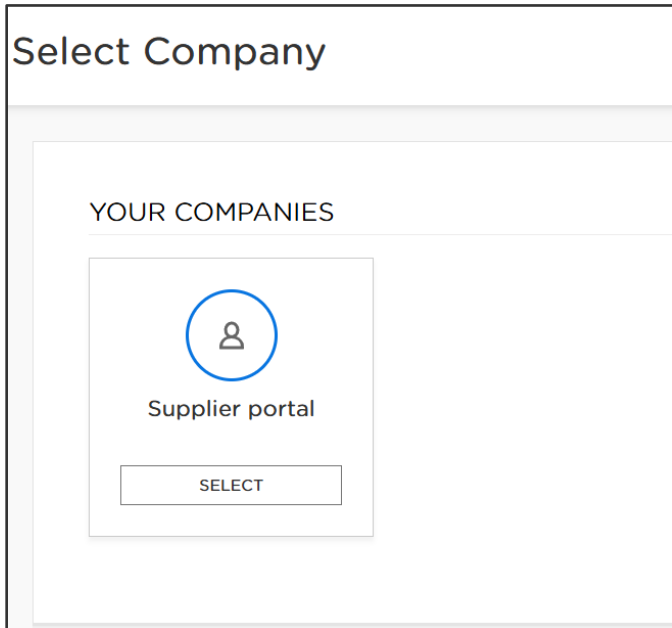


Image 17: Supplier Portal Screen

3. Your Dashboard (also known as the Unified Supplier Portal) is your main landing page where you can see your requests and form responses.

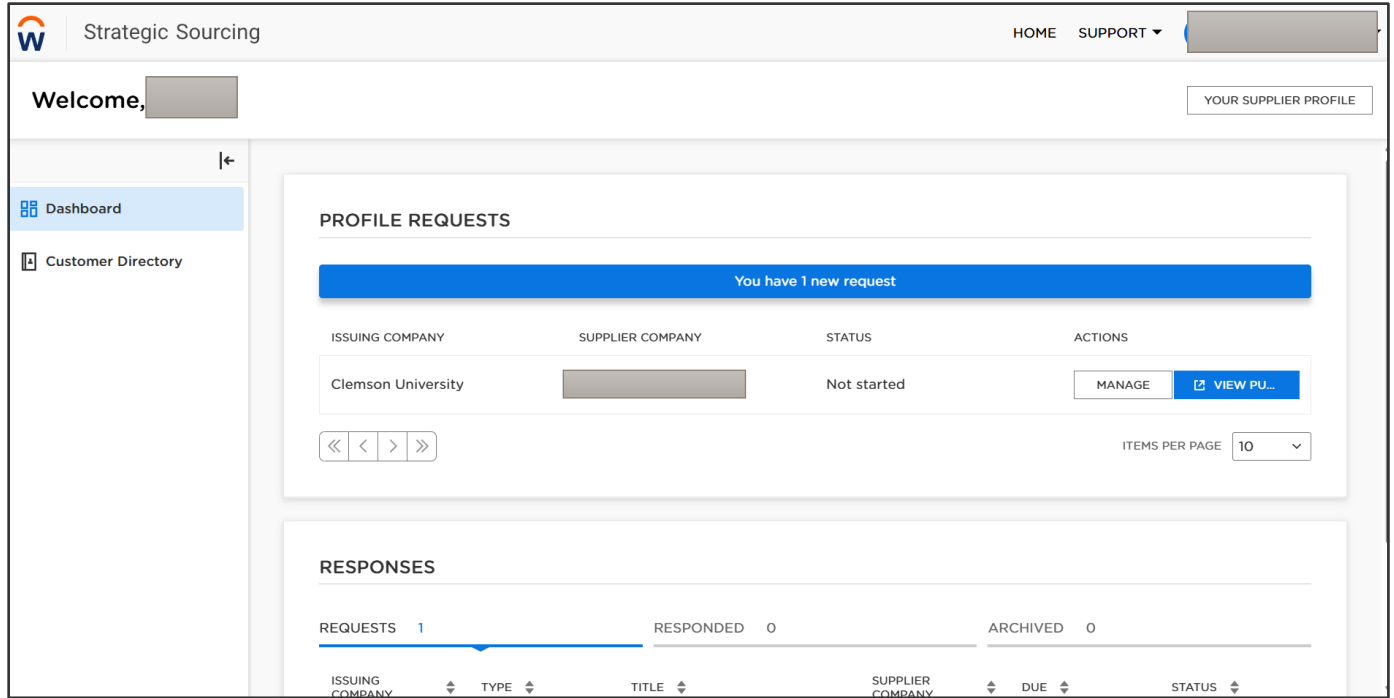


Image 18: Dashboard/Unified Supplier Portal

Unified Supplier Portal (Dashboard)

This is your central hub for managing all your activities and information across all the customers you work with who use Workday. It provides a single login to access a wide range of procurement and sourcing tasks. Think of it as your main operational dashboard.

Key functions you can perform in the Unified Supplier Portal include:

- **Transactional Activities:**
 - Viewing and managing **Purchase Orders (POs)**
 - Submitting and tracking **Invoices**
 - Viewing **Payments**
 - Managing **Catalogs**
- **Relationship Management:**
 - Completing **Onboarding Forms**
 - Managing **your company's general profile and contact information**

Customer Directory

The **Customer Directory** is a specific page you can access from within the Strategic Sourcing section of the Unified Supplier Portal. Its primary purpose is to list all the individual customers (companies) that you have a relationship with through Workday Strategic Sourcing (including Clemson University).

Key features of the Customer Directory:

- **Customer-Specific View:** It displays a list of your customers. For each customer, you can see the number of sourcing events you are invited to.
- **Navigation:** It allows you to select a specific customer and then access the detailed information and tasks related to that customer, such as their contracts, events and forms.
- **Search:** You can search for a specific customer profile by name, contract, event or form name.

4. **Select Customer Directory from the left navigation menu and select Clemson University.** This is connected to the Unified Supplier Portal and is a hub to help you navigate to your Procurement Portal as well as view Purchase Orders, Invoices and Payments; and manage your Catalogs.

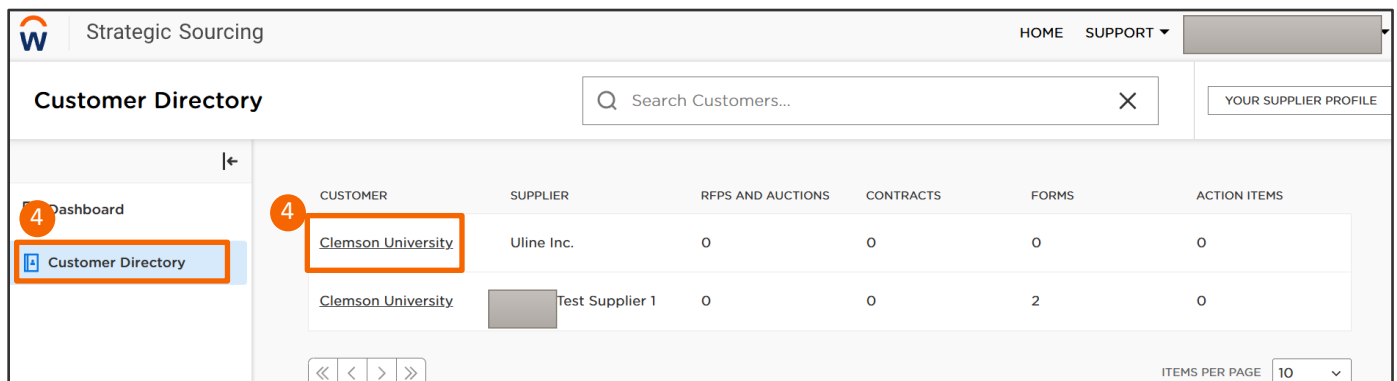


Image 19: Customer Directory

5. Ensure your page navigation is expanded. These links on the left-hand side will bring you to the Workday Supplier Portal. You can **select View Purchase Orders, View Invoices, View Payments, View Catalogs or the direct link to the Procurement Portal on the top right**. For example, if you click View Invoices, that will link to the Invoices and Payments page. **Click into any of these links to take you to the page where you will be able to review and update your contact and banking information.**

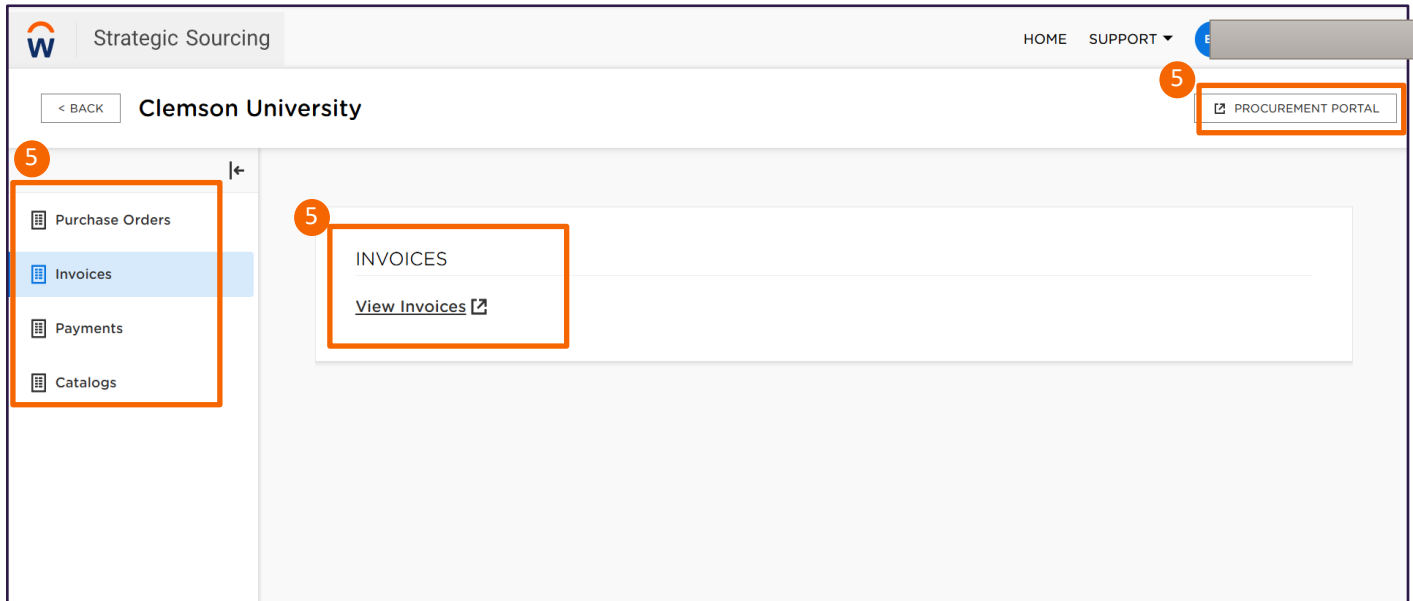


Image 20: Clemson University Links – Workday Supplier Portal

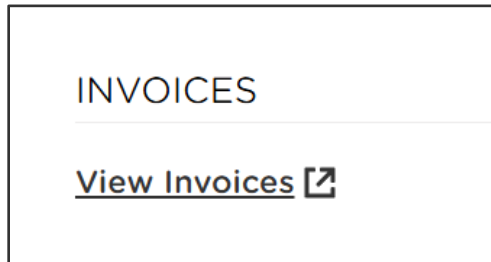


Image 21: Invoices Hyperlink

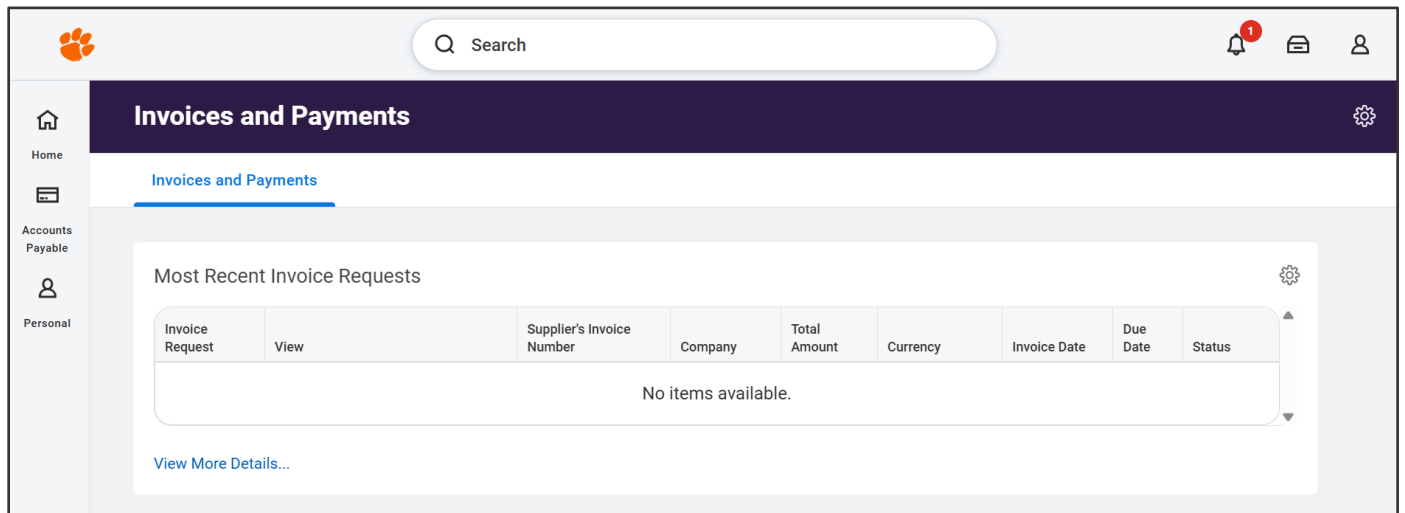


Image 22: Invoices and Payments Screen in Workday

- To make changes to any of your contact details or banking information, **go to the left navigation menu of the Supplier/Procurement Portal and select Accounts Payable and then select Contact and Banking.**

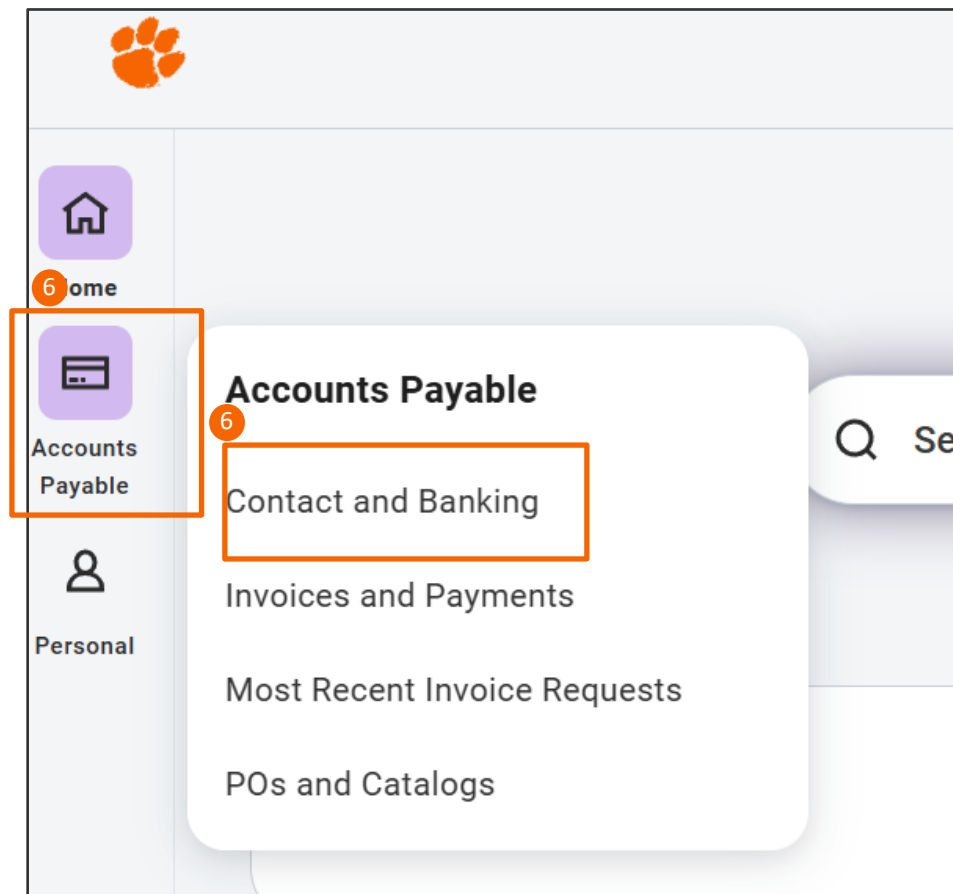


Image 23: Accounts Payable Contact and Banking Screen in Workday

- From the Contact and Banking landing page, you can **add additional contact information, create settlement bank accounts and create alternate names.** You can also change and view contact information, settlement bank accounts and alternate names; and manage attachments.
- Now you can enter and make changes to your Supplier Profile. **Click on the task you'd like to complete and follow the steps.**

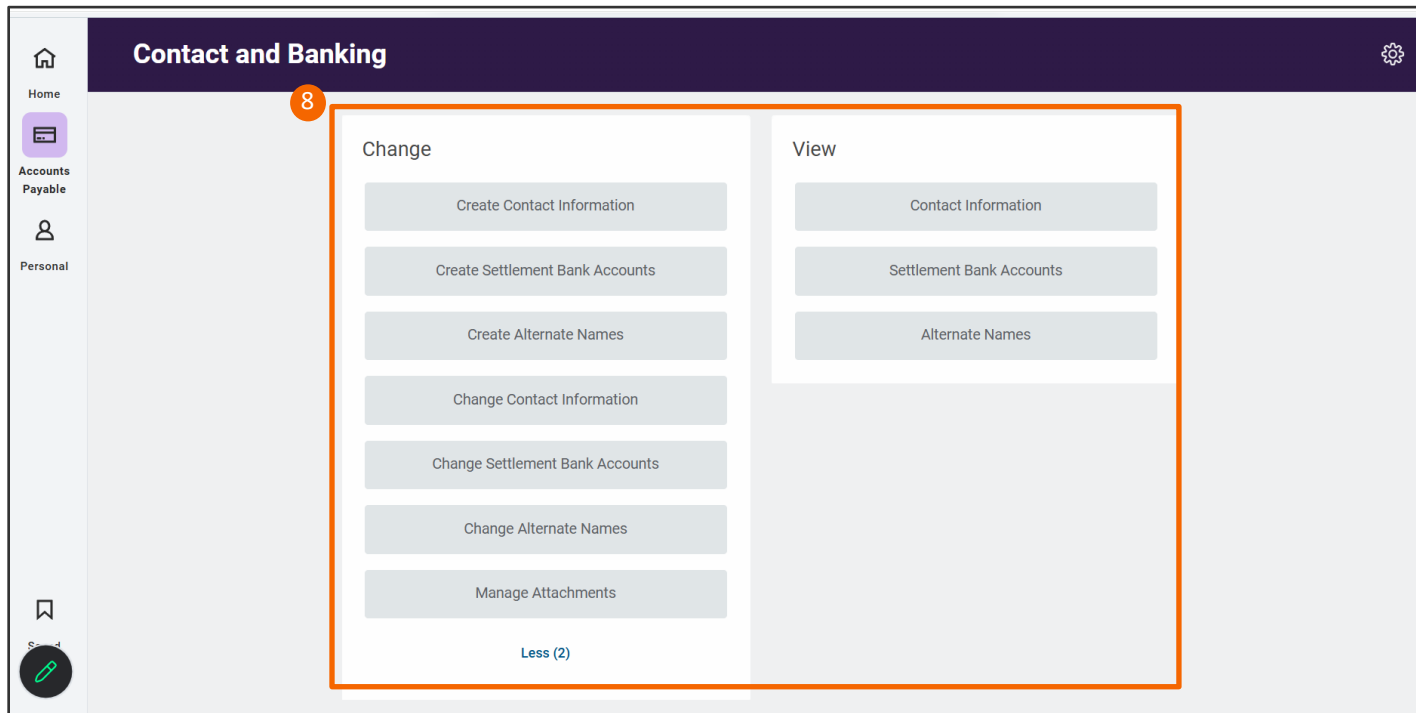


Image 24: Contact and Banking Screen in Workday

- To create a new settlement bank account, for example, **click Create Settlement Bank Accounts** in the Change area.

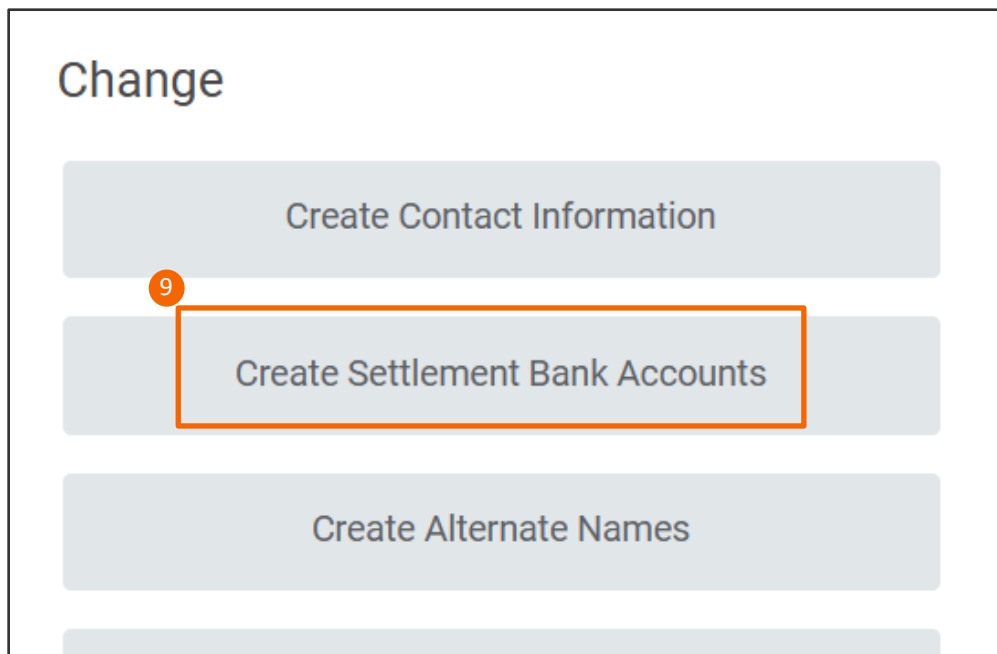


Image 25: Change Section in the Contact and Banking Screen in Workday > 'Create Settlement Bank Accounts'

10. Next, you can click **OK** to create a draft change request. On the next page, click the **Add Row** icon to include necessary information and click **Submit**.

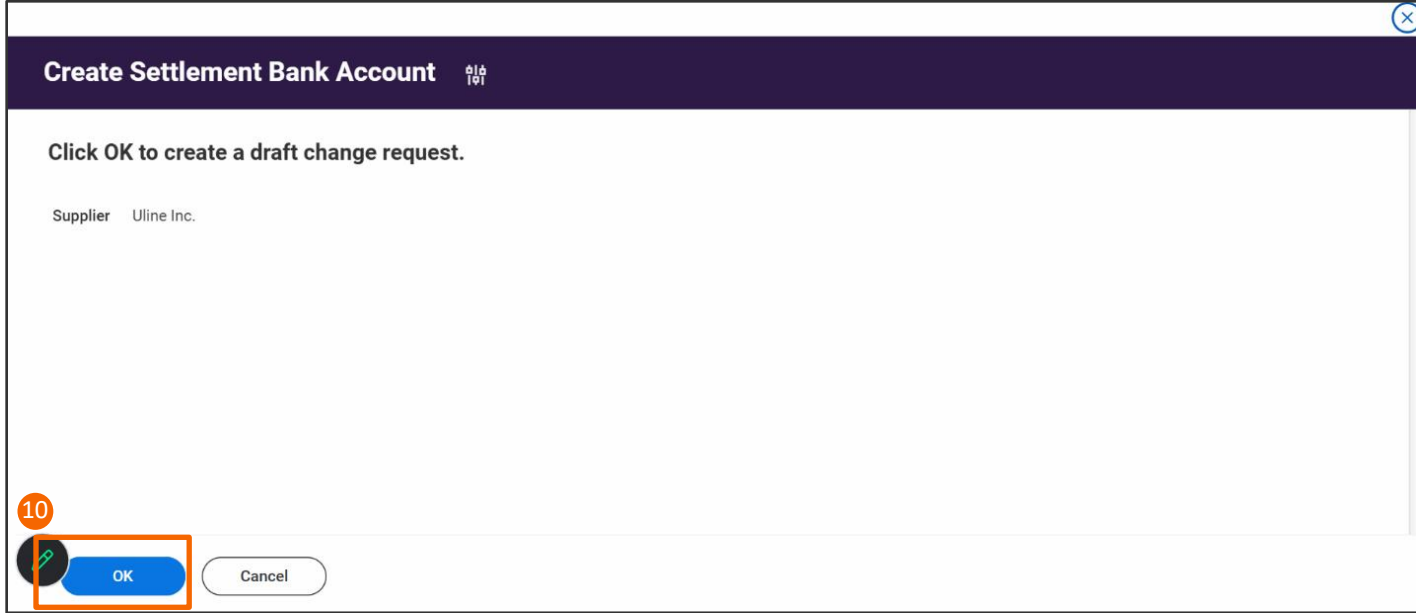


Image 26: Create Settlement Bank Account > 'Click OK to create a draft change request'

11. On the next page, click the **Add Row** icon to include necessary information and click **Submit**.

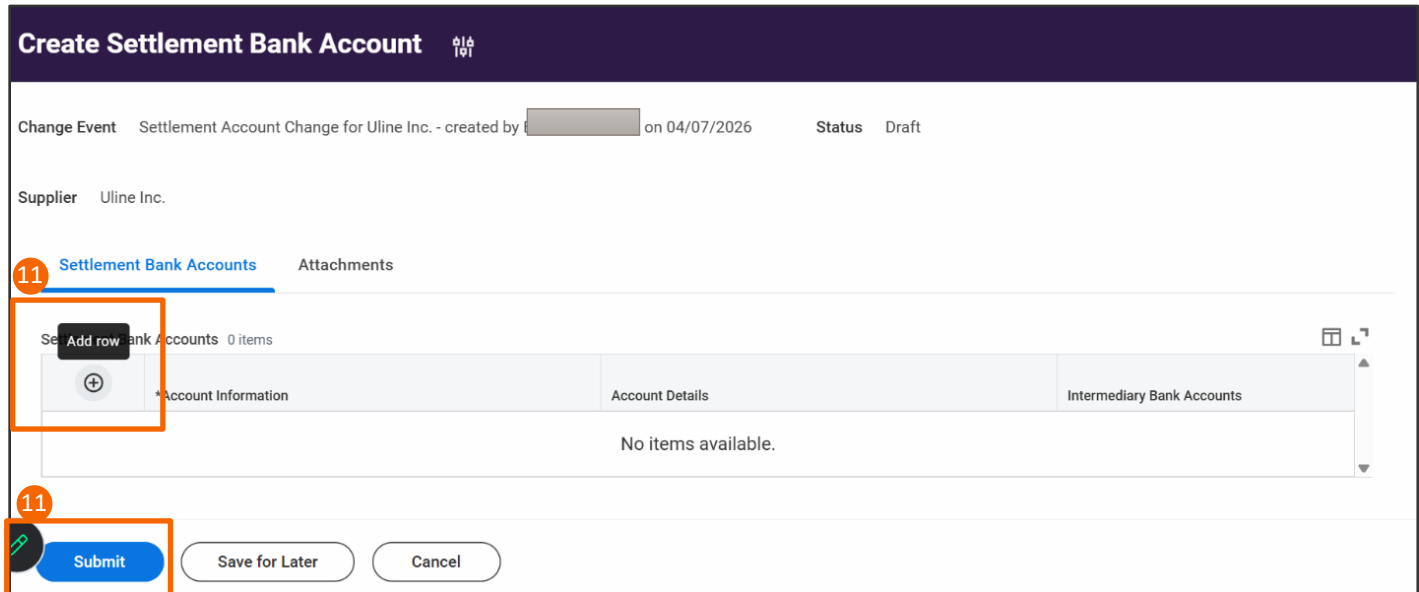


Image 26: Create Settlement Bank Account > Add Row where you Add Necessary Information > Submit



Questions about this process or about Workday? Send an email to workdaytraining@clmson.edu