

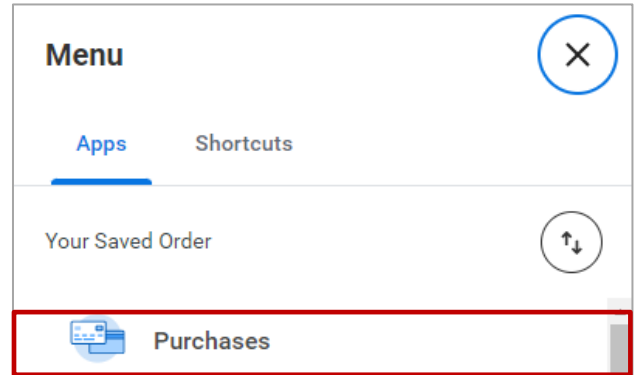
Workday - Onboarding a Supplier for Bentley Staff

Overview

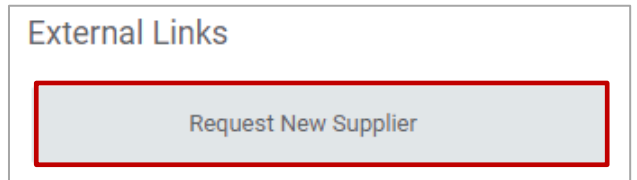
This job aid highlights the new process for requesting a supplier through Workday for Bentley Staff members.

Requesting New Supplier Process by a Bentley User

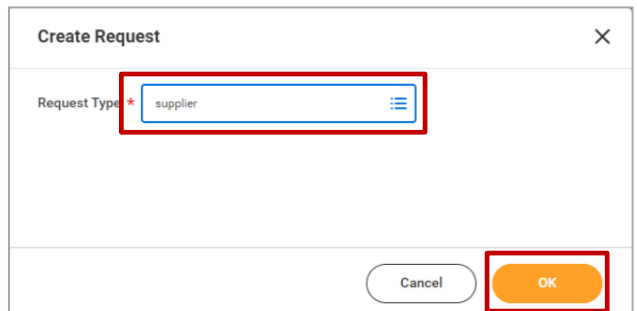
1. Click **Workday** menu and click the **PURCHASES** worklet.
2. Under **External Links** click **REQUEST NEW SUPPLIER**.
3. In the **Create Request** dialog box enter **SUPPLIER** and press **ENTER**.
4. Click **OK**.
5. This will bring up the **REQUEST NEW SUPPLIER** form that must be completed.



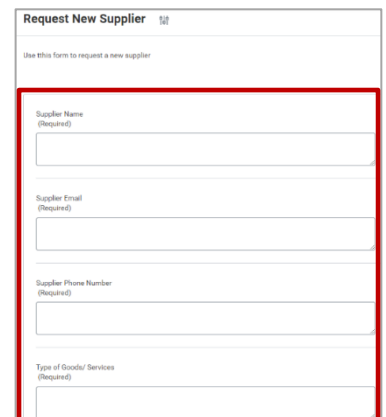
The screenshot shows the Workday 'Menu' interface. At the top, there are tabs for 'Apps' and 'Shortcuts'. Below the tabs, there is a section for 'Your Saved Order' with a refresh icon. The 'Purchases' worklet is highlighted with a red rectangular box.



The screenshot shows the 'External Links' section. A button labeled 'Request New Supplier' is highlighted with a red rectangular box.



The screenshot shows the 'Create Request' dialog box. The 'Request Type' field contains the text 'supplier' and is highlighted with a red rectangular box. At the bottom right, the 'OK' button is highlighted with a red rectangular box.



The screenshot shows the 'Request New Supplier' form. The form contains the following fields, all of which are highlighted with a red border: Supplier Name (Required), Supplier Email (Required), Supplier Phone Number (Required), and Type of Goods/ Services (Required).

Enter the following required information into the Form:

1. **SUPPLIER NAME.**
2. **SUPPLIER EMAIL.**
3. **SUPPLIER PHONE NUMBER.**
4. **TYPE OF GOODS/SERVICES.**

Each of these fields are required fields.

Supplier Name
(Required)

Supplier Email
(Required)

Supplier Phone Number
(Required)

Type of Goods/ Services
(Required)

enter your comment

Submit Save for Later Cancel

5. Click **SUBMIT.**

Save for Later will hold whatever the user has entered so far in their Workday inbox. Nothing will go through to Procurement until they complete it and click **Submit.**

By clicking **Submit** you will get a confirmation message that the submission was successful and is now being sent to the Supplier Administrator.

You have submitted ✕

Up Next: Supplier Administrator | Approval by Supplier Administrator | Due Date 04/12/2024

[View Details](#)

Checking Status of the Supplier Request

1. To check the status of the Supplier request, in the Search panel enter **MY SUPPLIER REQUESTS**.
2. Under Tasks and Reports click **MY SUPPLIER REQUESTS**.

×

Tasks and Reports

[My Supplier Requests](#)

Report

[Report Definition](#)

Returns all of the requests that the processing user initiated.

LOCATE the desired supplier request. In this example we see the status to be **IN PROGRESS**.

Request	Type	Request ID	Description	Status	Resolution	Initiation Date	Completion Date	On Behalf Of	Request Event	Request Resolution Details
Request : Request New Supplier : Robert Mullero	Request New Supplier			In Progress		04/17/2024 10:46:46.263 AM			Request Process : Request New Supplier : Robert Mullero	
Request : Request New Supplier : Robert Mullero	Request New Supplier			In Progress		04/17/2024 12:06:44.036 PM			Request Process : Request New Supplier : Robert Mullero	

3. Under Request Event, click **HYPERLINK** to see the details of your request.

Request Event

[Request Process : Request New Supplier : Robert Mullero](#)

This will bring you to a summary of your submitted information:

View Event Request Process : Request New Supplier : Robert Mullero

For [Request : Request New Supplier : Robert Mullero](#)

Overall Process [Request Process : Request New Supplier : Robert Mullero](#)

Overall Status In Progress

Calendars In Use Consecutive Days (No Calendars Selected)

Details Process

Request [Request : Request New Supplier : Robert Mullero](#)

Request Type [Request New Supplier](#)

Request Date 04/22/2024 12:45:31.524 PM

Request ID (empty)

Requester [Robert Mullero](#)

4 items

Question	Answers
Supplier Name	XYZ Training Company
Supplier Email	bob@training.com
Supplier Phone Number	781-555-5555
Type of Goods/ Services	Training

When your request has been approved the Status will have changed to say **SUCCESSFULLY COMPLETED**. You will also see it marked as **COMPLETE** under Request Resolution Details.

Request	Type	Request ID	Description	Status	Resolution	Initiation Date	Completion Date	On Behalf Of	Request Event	Request Resolution Details
Request : Request New Supplier : Robert Mullero	Request New Supplier			Successfully Completed	Done	04/23/2024 12:41:47.869 PM	04/23/2024 12:50:01.018 PM		Request Process : Request New Supplier : Robert Mullero	Complete - Supplier Created in Workday

Next Steps:

Once a Bentley staff member has submitted the onboarding information the Supplier receives an email with a link to self-register.

This will take the Supplier through a process containing a series of fields they are required to complete. These fields will include information such as their Address, Contact information, Remit-to-Address and Account Information. When complete they will submit the information.

The information is then received by the Bentley Supplier Administrator, reviewed, and checked for accuracy and then approved. The requestor will then receive confirmation the supplier is an approved Bentley Supplier.

