
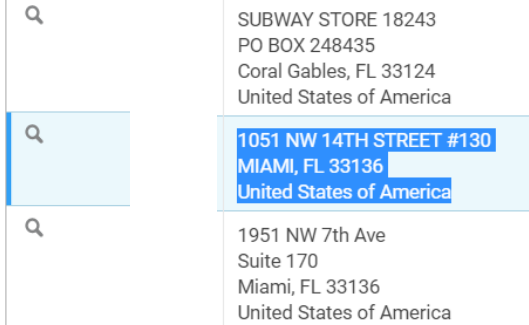
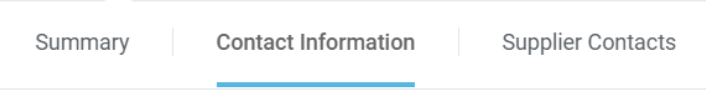
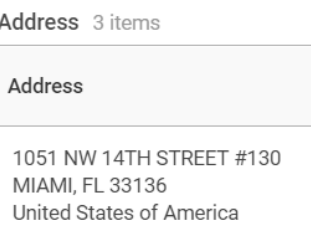
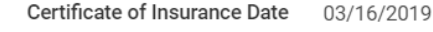


## Onboarding Tutorial extended details

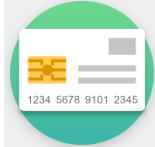
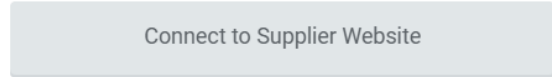
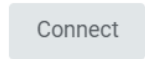

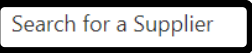


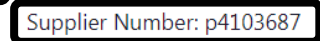

### Summary of Steps

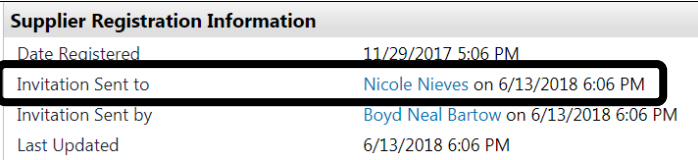
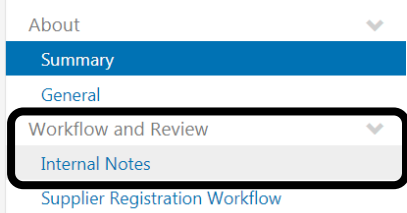
1. Check Workday to see if the supplier appears with the correct address and a current certificate of insurance.
2. Check UMarketplace to see if the supplier appears with a green checkmark and a P number. Supplier notes and contact information will also appear here.
3. If the supplier does not appear in either Workday or UMarketplace, submit a New Supplier Request Form.

Step 1 Breakdown - Check Workday Check if the supplier appears with the correct address and current certificate of insurance.	
a. In the search box, type <b>Find Suppliers</b> .	 <input type="text" value="Find Suppliers"/>
b. Click <b>All of Workday</b> .	Student <b>All of Workday</b>
c. Click <b>Find Suppliers</b> .	<b>Find Suppliers</b> View selected suppliers. Details include supplier name, supplier ID, status, supplier category, supplier group, customer account number, address information, parent supplier and 1099 applicability.
d. In the <i>Supplier Name</i> field, type the supplier's name. (ex "Subway")	Supplier <input type="text"/> Supplier Name <input type="text" value="Subway"/>
e. Click <b>OK</b> . <ul style="list-style-type: none"> <li>• If the supplier does not appear in Workday, skip to Step 2 below to check UMarketplace.</li> <li>• If the supplier does appear, continue to step f.</li> </ul>	<b>OK</b>


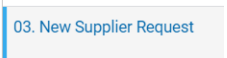

<p>f. Choose a supplier, and click the corresponding magnifying glass. Note there may be additional addresses in the supplier's profile.</p>	
<p>g. To check the corresponding addresses, click the <i>Contact Information</i> tab.</p>	
<p>h. Scroll down and view the addresses. If the correct location appears, copy the P# listed at the top left corner of the screen. This can be used to ensure the correct supplier is used when creating a requisition. <b>Do not use the P# listed on the right.</b> If the correct address does not appear, skip to Step 2.</p>	
<p>i. To view the certificate of insurance, click the <i>Summary</i> tab and review the <i>Certificate of Insurance Date</i>.</p> <ul style="list-style-type: none"> <li>If the certificate of insurance is expired, a requisition can be created, but may be held up in the approval process. Contact Jude Chery from Risk Management.</li> </ul>	


**Step 2 Breakdown - Check UMarketplace** Check UMarketplace to see if the supplier appears with a green checkmark and a P number. Supplier notes and contact information will also appear here.

a. From the Workday dashboard, click <b>Purchases</b> .	 Purchases
b. Click <b>Connect to Supplier Website</b> .	
c. Click <b>Connect</b> .	
d. Click the <b>Suppliers</b> icon (left hand column).	
e. Click <b>Search for a Supplier</b> .	Supplier Management Home  View Saved Searches
f. Type the supplier name (ex "Artstor") and click <b>Go</b> .  If the supplier does not appear in UMarketplace, skip to Step 3 below to complete a New Supplier Request Form.	
g. A requisitions can be initiated and submitted if a supplier has both a green check mark and a P#.  If the supplier appears and the green checkmark or P number are missing contact <a href="mailto:supplychain.supplierapp@miami.edu">supplychain.supplierapp@miami.edu</a> .	 <b>ARTSTOR INC</b>  Registration Status: Invited Registration Type: Complete Supplier Application
h. To view the contact information and notes, click the supplier name	 <b>ARTSTOR INC</b> Supplier Number: p4103687 Registration Status: Invited Registration Type: Complete Supplier Application

i. Scroll down to view the invitee's name	
j. For additional supplier notes, click <b>Workflow and Review</b> then <b>Internal Notes</b> . (left column)	

### Step 3 Breakdown - Check UMarketplace If the supplier does not appear in either Workday or UMarketplace, complete a New Supplier Request form and review the registration status.

a. Before completing the New Supplier Request Form, contact the supplier and obtain the following information: <ul style="list-style-type: none"> <li>Name, phone and email of the person that will be completing the supplier application. <b>If the application invite is forwarded to another employee, the link will become invalid.</b></li> <li>Has anyone at the requested company been an employee of the University of Miami in the last 12 months?</li> <li>Is this vendor owned directly or indirectly by a physician or immediate family member of a UM physician?</li> </ul>	
b. From the Workday dashboard, click <b>UM Quicklinks</b> .	
c. Click <b>New Supplier Request</b> .	
d. Click <b>New Supplier Request</b> .	
<ul style="list-style-type: none"> <li>Complete the form with the supplier's contact information from step 3a.</li> <li><i>Commodity Type</i> – click the magnifying glass. The pop up blocker may need to be disabled. Search for a corresponding commodity type. If the commodity does not appear, select "Other" and specify the commodity. Ex prescription drugs for human study. <i>Add Supplier to the Meperia System?</i> - If the item is disposable and will be purchased with a hospital account (not UMMG), check Yes.</li> </ul>	

<ul style="list-style-type: none"> <li>• <i>UM Hospital Vendor</i> - If the item will be shipped to UHealth Tower (formerly UMH), check <i>Yes</i>.</li> <li>• <i>Has anyone at the requested company been an employee of the University of Miami in the last 12 months?</i> Check <i>Yes</i> or <i>No</i></li> <li>• <i>Is this vendor owned directly or indirectly by a physician or immediate family member of a UM physician?</i> Check <i>Yes</i> or <i>No</i></li> </ul>	
e. Click <b>Order Now</b> .	
f. An RITM or REQ number will be issued. Save this in case there are issues with the request. This is the Supply Chain Services - Data Team's only way to look up the request.	
g. Check the status of the onboarding process using Steps 1 and 2 above.	

### Additional Resources

<b>Supply Chain Services</b> <ul style="list-style-type: none"> <li>• General Support Phone 305-284-5751</li> <li>• General Support Email <a href="mailto:supplychain.supplierapp@miami.edu">supplychain.supplierapp@miami.edu</a></li> <li>• Onboarding <a href="#">FAQs</a></li> <li>• <a href="#">Supplier Registration Steps</a> (UMarketplace)</li> <li>• Training Contact: Heidi Tyre <a href="mailto:htyre@miami.edu">htyre@miami.edu</a></li> </ul>	<b>Risk Management</b> <ul style="list-style-type: none"> <li>• <a href="#">Certificate of Insurance (COI) Example</a></li> <li>• <a href="#">Supplier Insurance Requirements</a></li> </ul>
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