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.

<table>
<thead>
<tr>
<th>a. In the search box, type <strong>Find Suppliers</strong>.</th>
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<tr>
<td>b. Click <strong>All of Workday</strong>.</td>
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<tr>
<td>c. Click <strong>Find Suppliers</strong>.</td>
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<tr>
<td>d. In the <strong>Supplier Name</strong> field, type the supplier’s name. (ex “Subway”)</td>
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<tr>
<td>e. Click <strong>OK</strong>.</td>
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<tr>
<td>• If the supplier does not appear in Workday, skip to Step 2 below to check UMarketplace.</td>
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<td>• If the supplier does appear, continue to step f.</td>
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f. Choose a supplier, and click the corresponding magnifying glass. Note there may be additional addresses in the supplier’s profile.

g. To check the corresponding addresses, click the *Contact Information* tab.

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. **Do not use the P# listed on the right.** If the correct address does not appear, skip to Step 2.

i. To view the certificate of insurance, click the *Summary* tab and review the *Certificate of Insurance Date*.
   - 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.
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 Purchases.

b. Click Connect to Supplier Website.

c. Click Connect.

d. Click the Suppliers icon (left hand column).

e. Click Search for a Supplier.

f. Type the supplier name (ex “Artstor”) and click Go.

   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 supplychain.supplierapp@miami.edu.

h. To view the contact information and notes, click the supplier name.
Supply Chain Services  7/23/18  M.R.

i. Scroll down to view the invitee’s name

j. For additional supplier notes, click Workflow and Review then Internal Notes. (left column)

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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:
   - Name, phone and email of the person that will be completing the supplier application. **If the application invite is forwarded to another employee, the link will become invalid.**
   - Has anyone at the requested company been an employee of the University of Miami in the last 12 months?
   - Is this vendor owned directly or indirectly by a physician or immediate family member of a UM physician?

b. From the Workday dashboard, click UM Quicklinks.

c. Click New Supplier Request.

d. Click New Supplier Request.
   - Complete the form with the supplier’s contact information from step 3a.
   - Commodity Type – 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. **Add Supplier to the Meperia System?** - If the item is disposable and will be purchased with a hospital account (not UMMG), check Yes.
- **UM Hospital Vendor** - If the item will be shipped to UHealth Tower (formerly UMH), check Yes.
- **Has anyone at the requested company been an employee of the University of Miami in the last 12 months?** Check Yes or No
- **Is this vendor owned directly or indirectly by a physician or immediate family member of a UM physician?** Check Yes or No

e. Click **Order Now**.

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.

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**Additional Resources**

**Supply Chain Services**
- General Support Phone 305-284-5751
- General Support Email supplychain.supplierapp@miami.edu
- Onboarding FAQs
- [Supplier Registration Steps](#) (UMarketplace)
- Training Contact: Heidi Tyre htyre@miami.edu

**Risk Management**
- [Certificate of Insurance (COI) Example](#)
- [Supplier Insurance Requirements](#)