

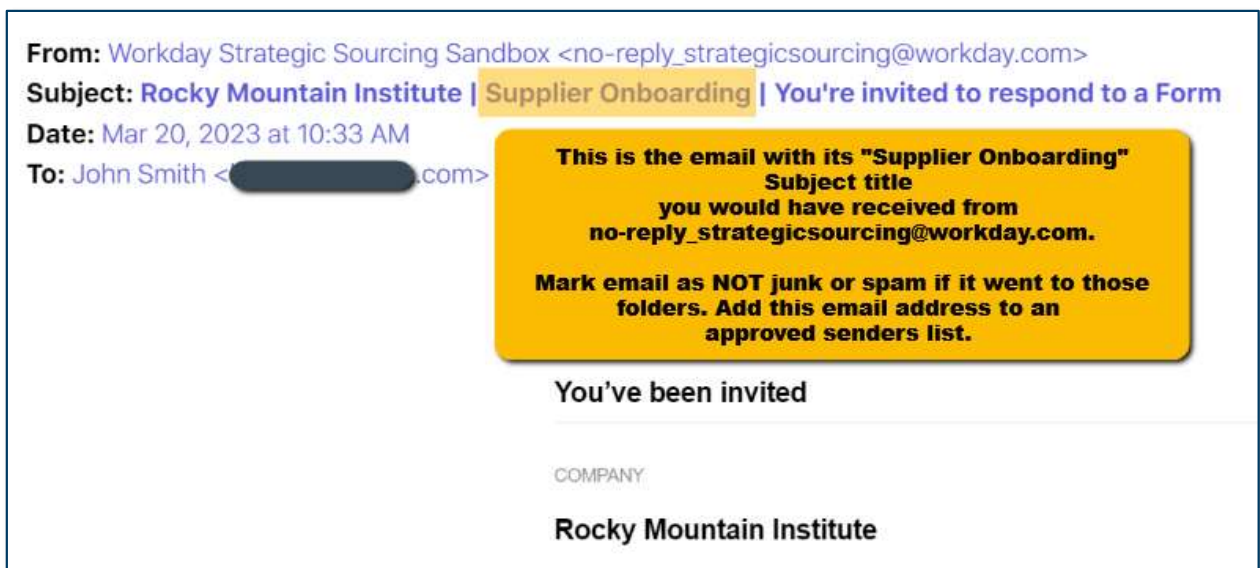
## RMI Suppliers: Instructions for Workday Strategic Sourcing

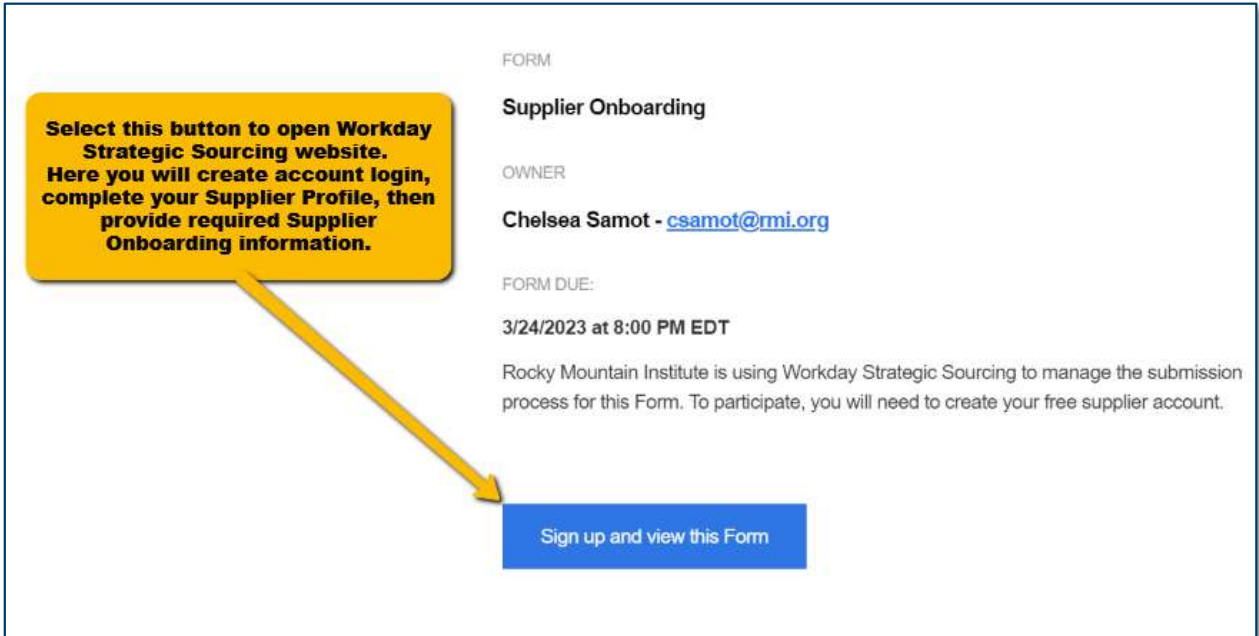
This instruction document details every action a new (or updated) supplier for RMI must take before their work or job invoices can be processed. The ‘supplier’ designation applies to all vendors providing goods and services, as well as contractors, and external business partners.

Suppliers having login issues may use the [scoutsupport@workday.com](mailto:scoutsupport@workday.com) email to contact Support and CC: [suppliers@rmi.org](mailto:suppliers@rmi.org). Additionally, users who ARE able to login can use the CONTACT SUPPORT button seen inside Workday to create a case with Support directly (also add [suppliers@rmi.org](mailto:suppliers@rmi.org) as an ADDITIONAL CONTACT). If you have questions about this process, please send email to [suppliers@rmi.org](mailto:suppliers@rmi.org).

### 6 Steps to Become an RMI Supplier: Using Workday’s ‘Strategic Sourcing’ Website

1. **Find the correct email:** sent to your supplier email address (see 2 images below)
  - a. **Sender (From):** Workday Strategic Sourcing Sandbox  
<no-reply\_strategicsourcing@workday.com>
  - b. **Look in Junk/Spam Folder:** mark email as NOT junk/spam if it went to those folders and add this email address to an approved senders list (whitelist)
  - c. **Subject: ensure the subject indicates “Supplier Onboarding”** (you can delete/ignore the additional email with the subject name as only “Onboarding”)
  - d. **Blue Button:** scroll down in the email then click on the blue button to open the link to “Sign up and view this Form”





2. After clicking link in email, **follow prompts for creating login** (see image below)
  - a. **Create Login:** once the site opens, you will create your Workday Strategic Sourcing Registration with your own sign-on credentials
  - b. **Your supplier email** – should auto-populate the Email field address
  - c. **Create a new password** for yourself based on the requirements that will be visible
  - d. Or just **Sign In** if you already use Workday as a supplier with other organizations

Workday Strategic Sourcing

## Register

Email\*

Your email here

Password\* [show password](#)

Create a new password here

PASSWORD STRENGTH

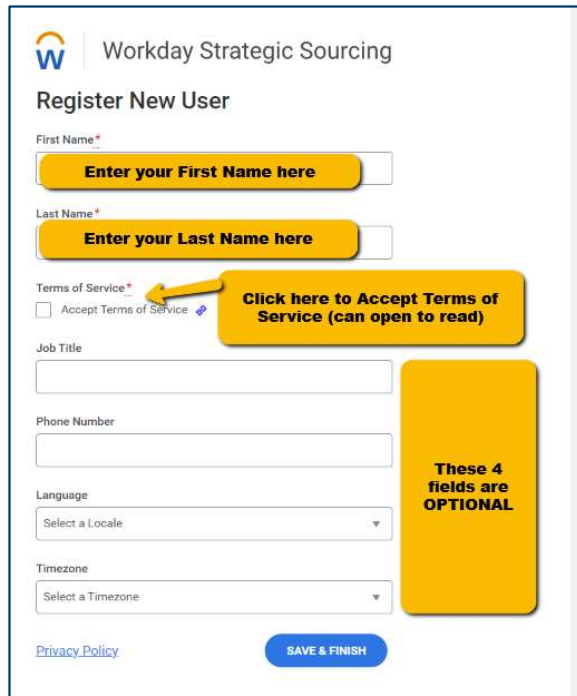
Continue

When Email & Password entered, click Continue

Already have an account? [Sign In](#)

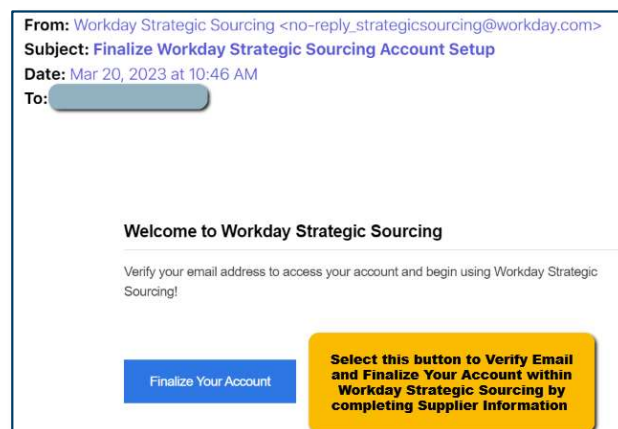
If you have an existing Workday supplier account, then Sign In

3. After Login, **register yourself** as a ‘New User’ (see 2 images below)
  - a. **Complete Required Fields:** First, Last Name, Accept Terms of Service
  - b. **Save & Finish:** click blue button at bottom of page when done



Please check your email to complete your registration.

4. Following the login & registration action, **verify your email to complete your registration in Strategic Sourcing** (see image below)
  - a. **Find exact email** sent to your supplier email address
  - b. **Select the blue button** in that email called “Finalize Your Account”



**5. Supplier User Profile & Supplier Information Forms**

- a. After click 'Finalize Your Account' blue button in email, the Workday Strategic Sourcing **login page will open**
- b. **Login** to account using your supplier email address and the password you just created
- c. Open and **complete required information fields on Supplier User Profile Form** (see image below) and submit
- d. Continue completing Supplier Information Form, **sections** will include:
  - i. Supplier Information
  - ii. Business Information
  - iii. Tax Information
  - iv. Banking Information
  - v. Contacts

## 6. Supplier Onboarding Form

- a. After completing and submitting form above, you will be able to **enter required information in the Onboarding Form** (see image below)

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HOME > EDIT FORM: ONBOARDING

### Onboarding

**To complete your required Onboarding form, scroll down this page...**

You are drafting your Form. To submit your hard work, click **SUBMIT FORM** in the Action Bar. Need Help? Use our Guides found in the Action Bar.

**FORM DETAILS** WALK ME THROUGH IT

Issuing Company: Rocky Mountain Institute  
 Supplier company: Test  
 Primary Contact: Chelsea Samot

**FILL OUT YOUR FORM** WALK ME THROUGH IT

Form

Fill out the questions in the Form below then submit your response.

SECTION	DESCRIPTION	LAST UPDATED	PERCENT COMPLETE	# OF FEEDBACK
<b>Onboarding</b>		Never	0% (0/16)	--

**TAKE YOUR FORM OFFLINE**

Download your Form to fill it out an excel: EXPORT BID

Upload your completed excel Form when ready: IMPORT FORM

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HOME SUPPORT

RETURN TO FORM Questionnaire | Onboarding

Section 1 of 1  
0/16 questions complete  
0/13 required questions complete

**1 ONBOARDING** **Complete 13 required fields (with asterisk) and possibly 3 optional fields (without asterisk)**

**\*1.1** Please provide your Certification of Insurance.  
FILE ANSWER

CURRENT RESPONSE  
DRAG/DROP DOCUMENTS or BROWSE FILES

**\*1.2** Certification of Insurance Expiration Date  
SHORT ANSWER (140 CHARACTERS MAX)

CURRENT RESPONSE  
Enter answer...

**\*1.3** Domestic or International?  
CHOICE ANSWER

**\*1.3** Domestic or International?  
CHOICE ANSWER

CURRENT RESPONSE

Domestic  
 International  
 Other

**\*1.6** If you selected "Other" for Domestic or International, please explain your tax status.  
LONG ANSWER

CURRENT RESPONSE  
n/a

**If you selected Domestic or International in Question 1.3 above, just enter text 'n/a' into this required field**