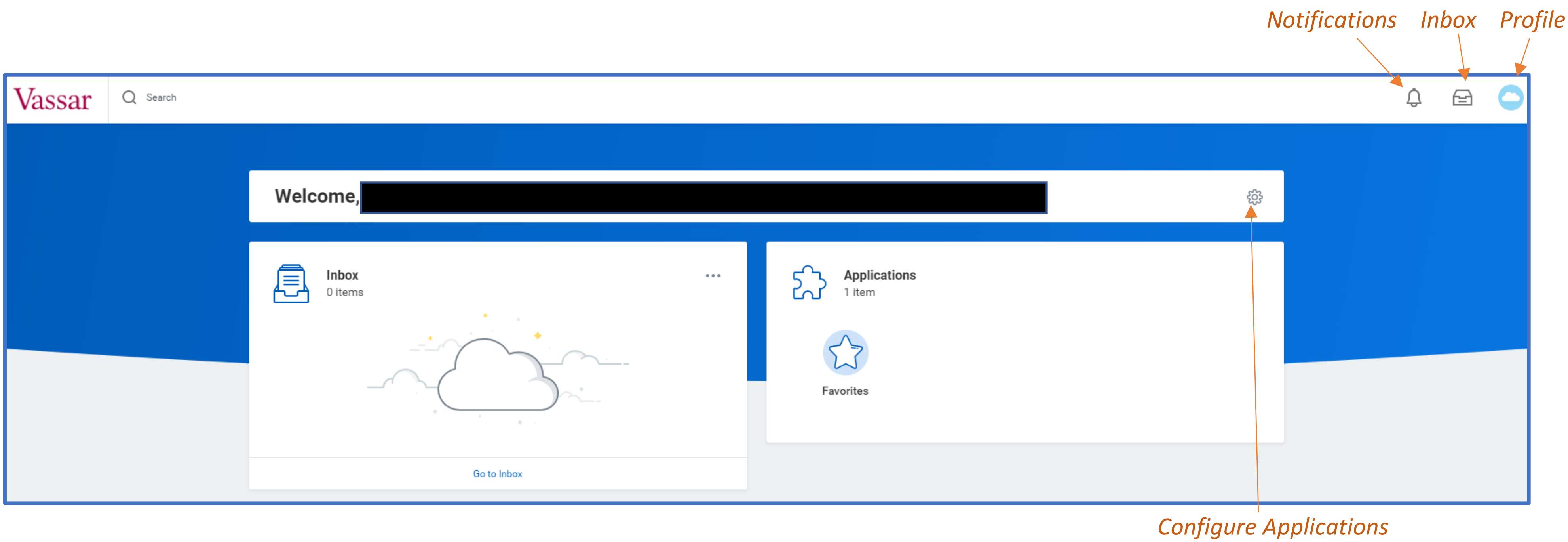
Setup Supplier Landing Page and Worklets

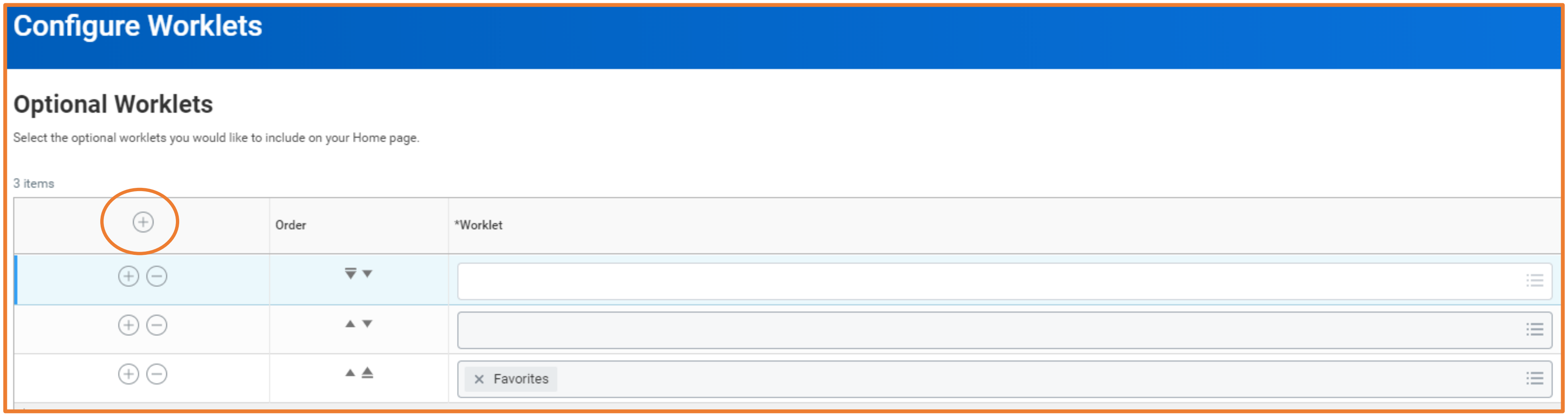
1) When you first log into Workday you will see the following screen:



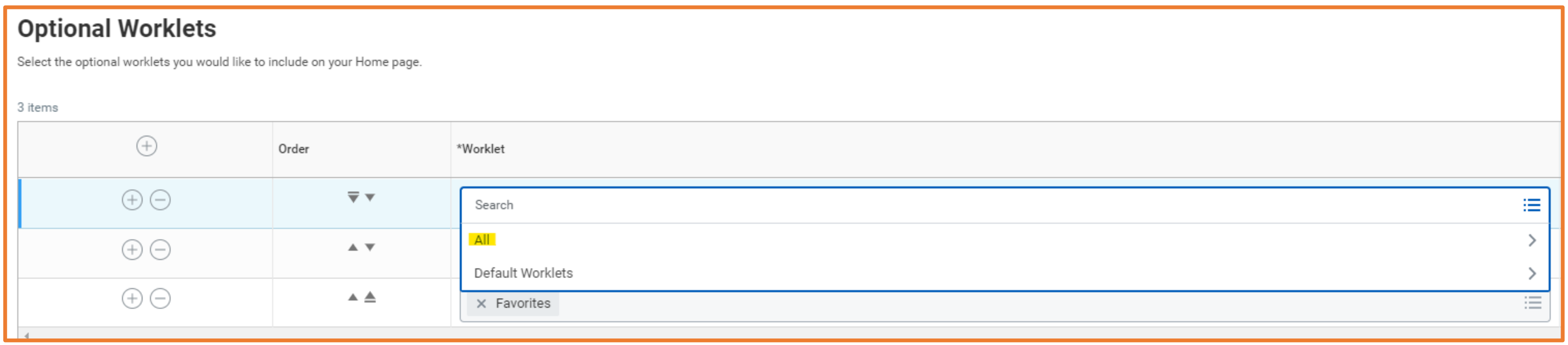
<u>Notifications</u> – This is where you will receive notifications kicked off by a business process. This box will be rarely used
<u>Inbox</u> – This is where you will receive communication from Vassar employees regarding changes or requests you have submitted.
<u>Profile</u> – You can change your password through here. When you want to get back to your Home screen, click the cloud and the Home.
<u>Configure Applications</u> – this is where you go to add Worklets to your home screen to view PO's, invoices, payments, contact information and banking.

Setup Supplier Landing Page and Worklets

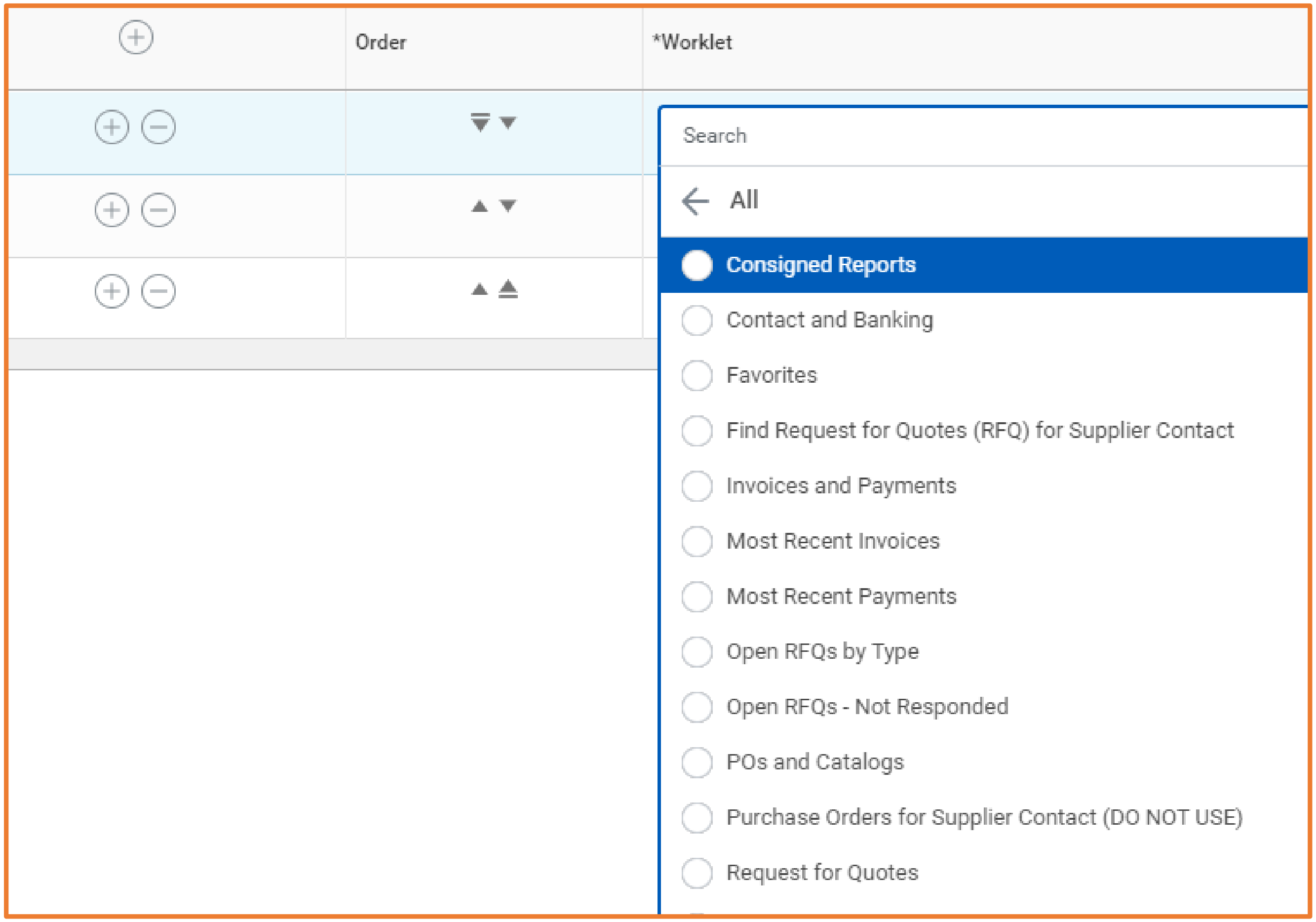
2)   Click on the Configure Applications cog to add Worklets to your home screen. On the following screen click the "+" to add more lines for worklets:



3)   Once you have added lines, click in the empty line to bring up worklets to add. You can add as many worklets as you like:

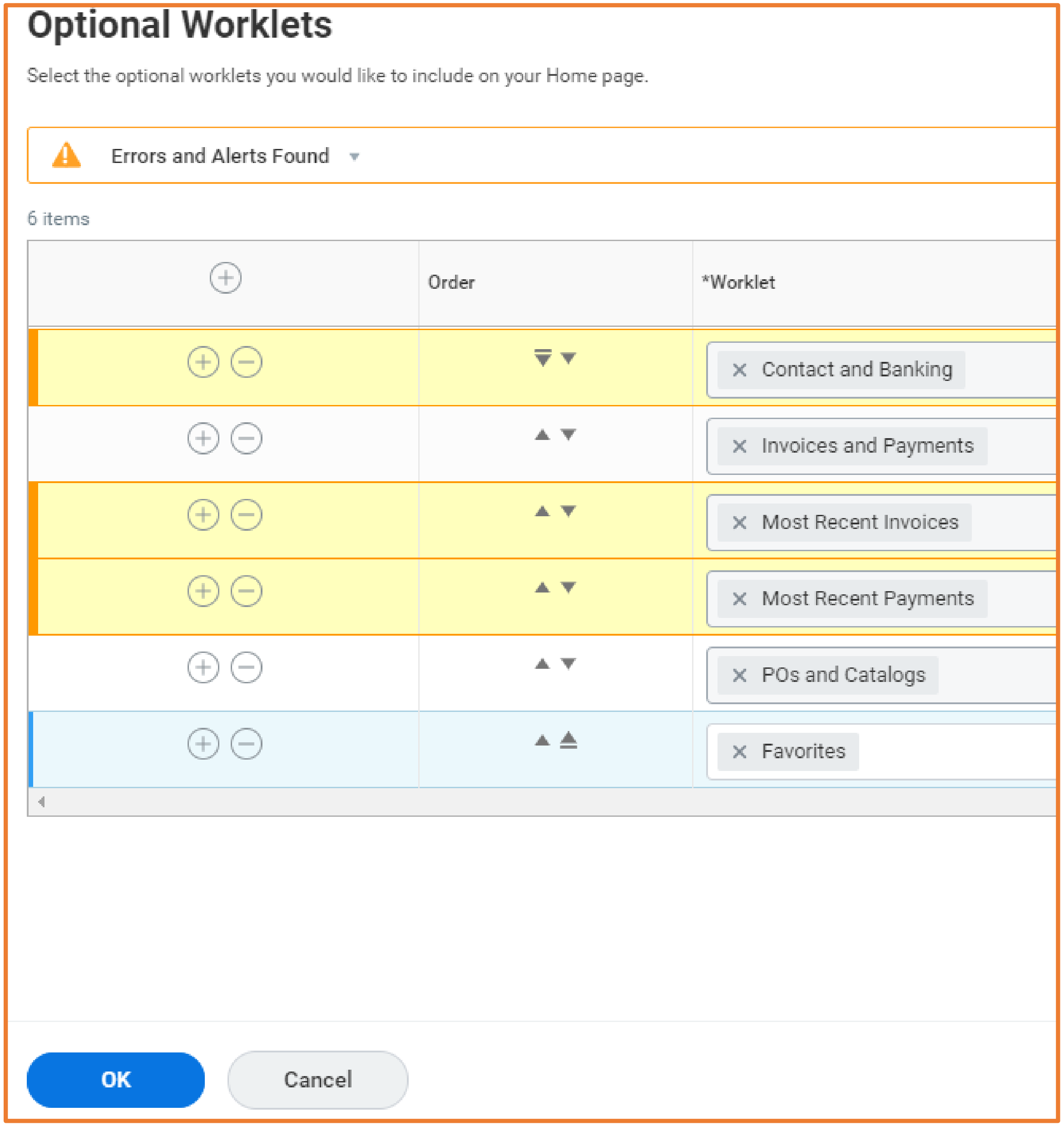


Setup Supplier Landing Page and Worklets



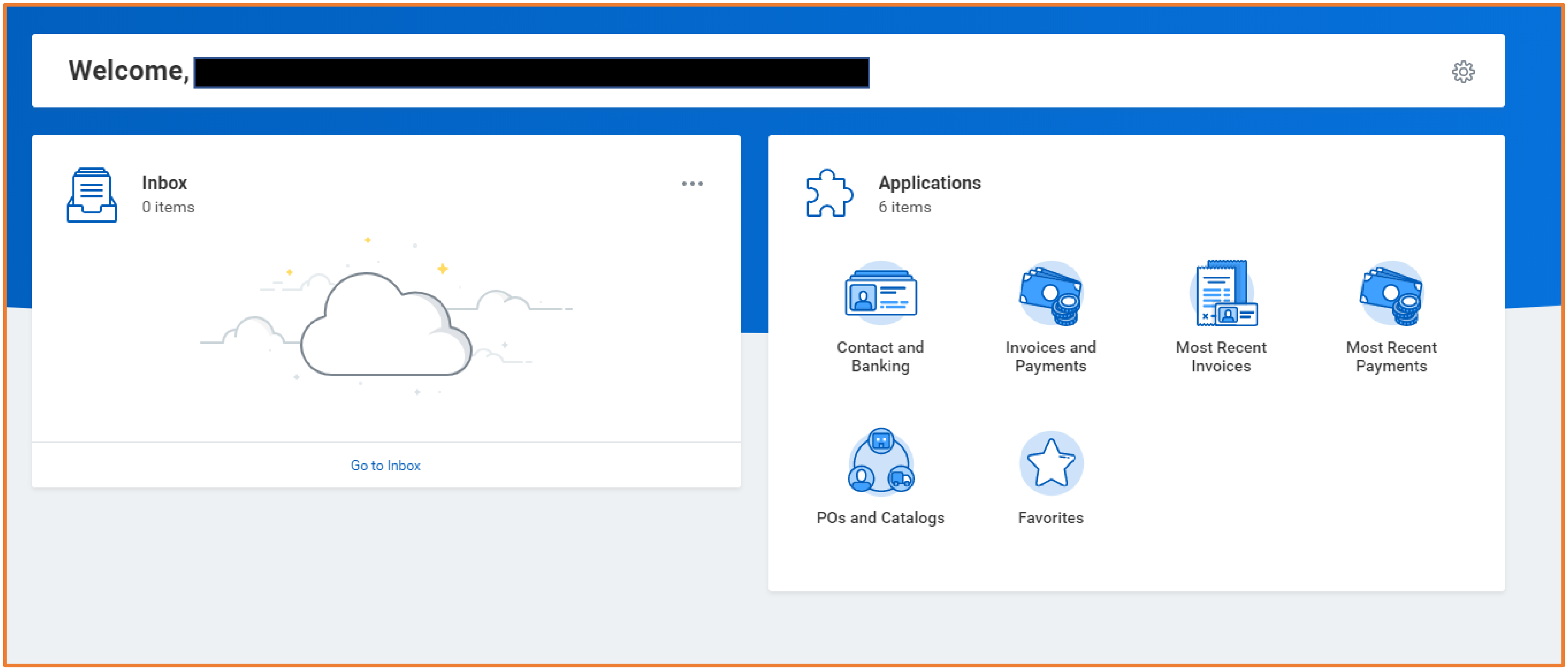
Setup Supplier Landing Page and Worklets

4) *Below are the Worklets we recommend. When you first add these, you will see an "Error and Alerts Found" message. This is to let you know that some of these worklets may not display properly when using the Mobile App. Once you have added all your worklets, click OK and then Done:*



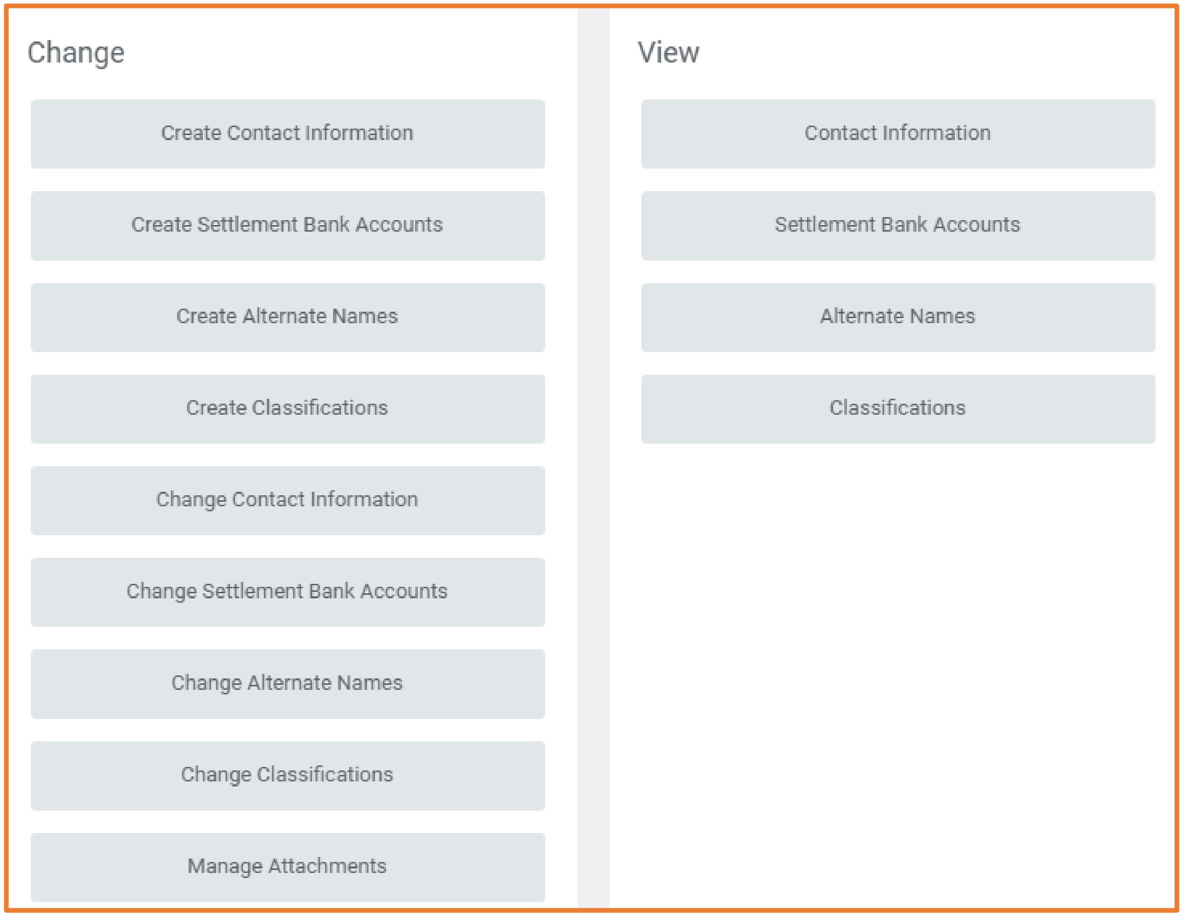
Setup Supplier Landing Page and Worklets

5) *Once you add all the worklets your home screen will look like this. You can then simply click in the section you want:*



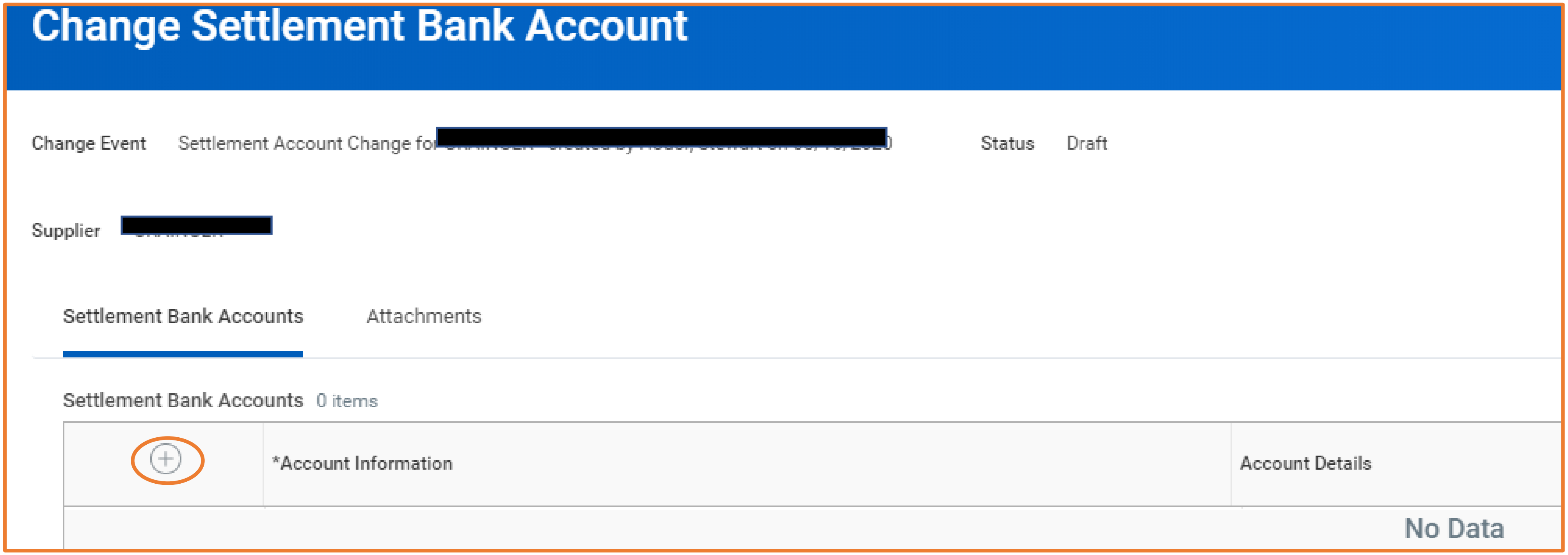
Setup Supplier Landing Page and Worklets

6) *The Contact and Banking worklet allows you to view all the current information we have on file and put in a change request for your contact or banking information. You can also add attachments, such as updated W-9 forms etc. If you do not have banking currently setup and you would like to add direct deposit, you can do so by clicking Change Settlement Bank Accounts:*



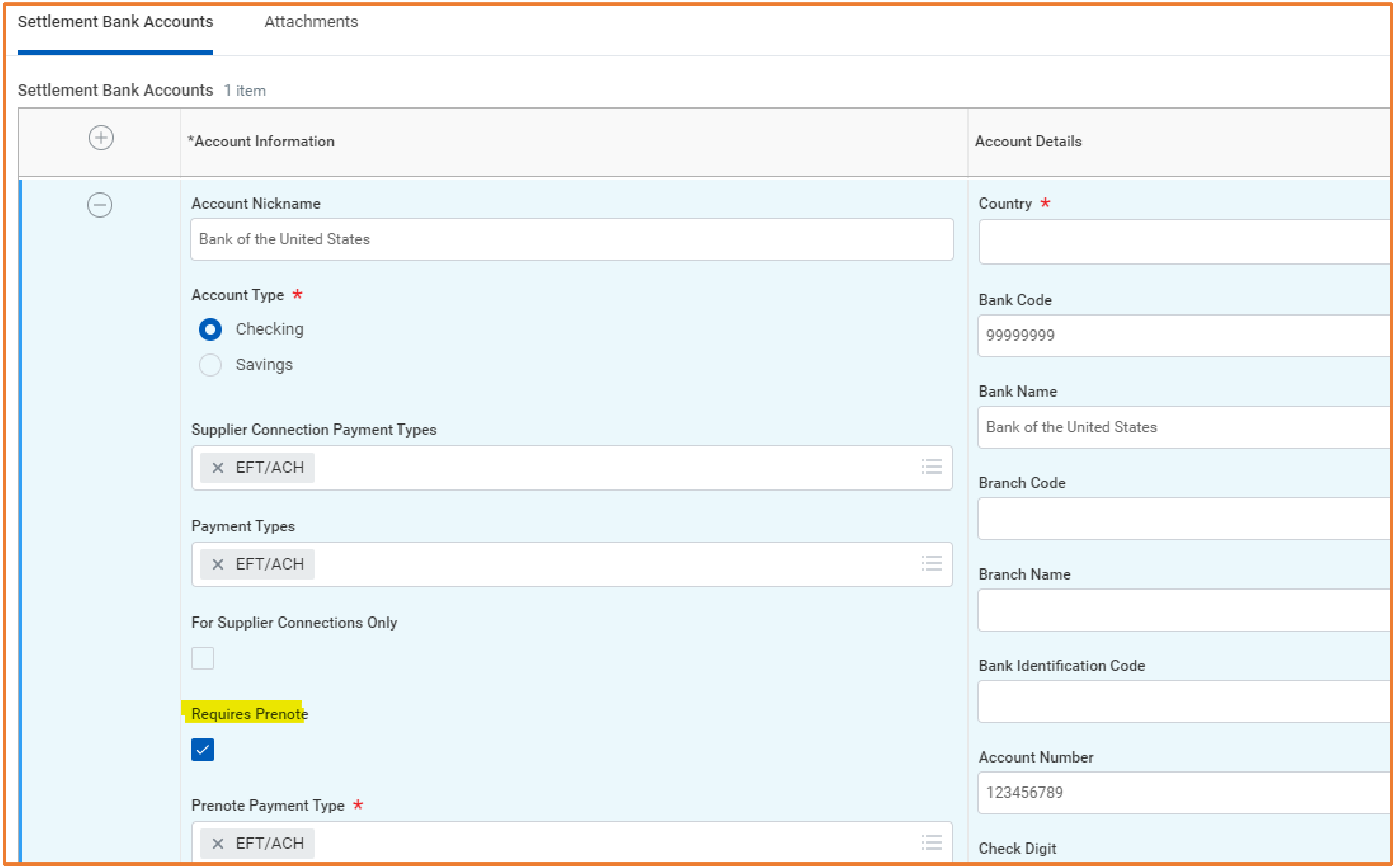
Setup Supplier Landing Page and Worklets

5a) To change or add Banking information click the Change Settlement Bank Account, then Click OK to create a draft change request:
If you already have direct deposit, the current banking information will populate, if you do not have banking on file then click the "+" to add it:



Setup Supplier Landing Page and Worklets

When filling out the information, make sure you check the "Requires Prenote" box. The "Bank Code" is your bank's routing number. There is an attachment tab, you can submit a copy of your canceled or voided check. When complete click Submit. This will go to the Accounts Payable department for review. If there is an error or questions the AP department will send it back and it will go to your inbox.



Setup Supplier Landing Page and Worklets

7) *The Invoices and Payments worklet will show all recent invoices and payments. You can also click "View More Details" to search for a specific invoice or payment.*

For the invoices, you can click on the invoice number to view more information (if an item is colored Blue, it means you can click on it to see more information). You can click on the cog to download the information into excel:

Most Recent Invoices

Invoice	Supplier Reference Number	Total Invoice Amount	Currency	Due Date	Invoice Status	Payment Status
SINV-044797	9613917658	549.12	USD	08/07/2020	In Progress	Unpaid
SINV-044799	9613978692	295.08	USD	08/07/2020	In Progress	Unpaid
SINV-044798	9613917666	527.04	USD	08/07/2020	In Progress	Unpaid
SINV-044791	9613432542	320.38	USD	08/06/2020	In Progress	Unpaid
SINV-044792	9613432534	326.76	USD	08/06/2020	In Progress	Unpaid
SINV-044793	9613190777	89.60	USD	08/06/2020	In Progress	Unpaid
SINV-044687	9611226276	296.40	USD	08/05/2020	In Progress	Unpaid
SINV-044688	9611707820	568.02	USD	08/05/2020	In Progress	Unpaid
SINV-044689	9611931479	37.16	USD	08/05/2020	In Progress	Unpaid
SINV-044653	9609832010	177.62	USD	08/04/2020	In Progress	Unpaid

View More Details...

Setup Supplier Landing Page and Worklets

For payments you can click on the View button to see more details or click the View More Details option to search for specific payments. You can click on the cog to download the information into excel:

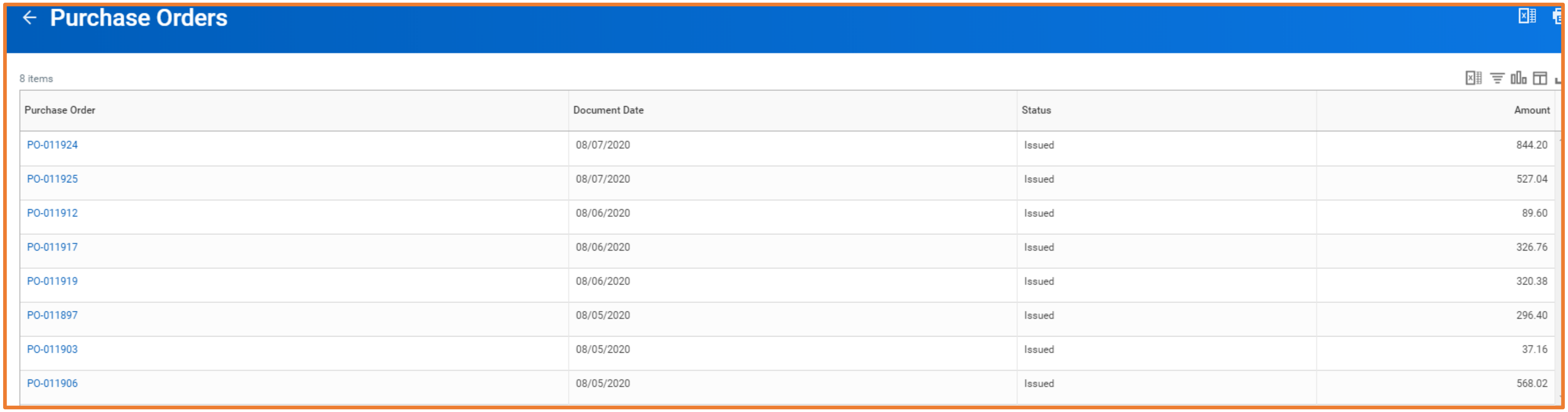
Most Recent Payments

Payment	View	Payment Amount	Currency	Payment Date	Transaction Reference	Invoices
Supplier Payment: [redacted]	View	1,026.32	USD	08/06/2020	[redacted]01 (Check)	7
Supplier Payment: [redacted]	View	282.65	USD	07/30/2020	[redacted]23 (Check)	1
Supplier Payment: [redacted]	View	2,691.45	USD	07/22/2020	[redacted]68 (Check)	8
Supplier Payment: [redacted]	View	5,199.86	USD	07/16/2020	[redacted]78 (Check)	11
Supplier Payment: [redacted]	View	201.69	USD	07/09/2020	[redacted]19 (Check)	1
Supplier Payment: [redacted]	View	1,736.55	USD	07/02/2020	[redacted]38 (Check)	5
Supplier Payment: [redacted]	View	1,205.03	USD	06/25/2020	[redacted]68 (Check)	3
Supplier Payment: [redacted]	View	2,874.05	USD	06/18/2020	[redacted]11 (Check)	7
Supplier Payment: [redacted]	View	2,164.58	USD	06/11/2020	[redacted]23 (Check)	4
Supplier Payment: [redacted]	View	3,155.88	USD	06/04/2020	[redacted]70 (Check)	10

View More Details...

Setup Supplier Landing Page and Worklets

8) *In the Pos and Catalogs worklet you can view all PO's issued to your company and their status. First search for PO by Document Date On or After, then you can select the PO to see the details. From the PO you can drill into the invoice, any item in blue can be clicked to see more information.*



Purchase Orders

8 items

Purchase Order	Document Date	Status	Amount
PO-011924	08/07/2020	Issued	844.20
PO-011925	08/07/2020	Issued	527.04
PO-011912	08/06/2020	Issued	89.60
PO-011917	08/06/2020	Issued	326.76
PO-011919	08/06/2020	Issued	320.38
PO-011897	08/05/2020	Issued	296.40
PO-011903	08/05/2020	Issued	37.16
PO-011906	08/05/2020	Issued	568.02