

Supplier registration and update guide



This guide outlines the steps required to register as a new supplier on the Workday Strategic Sourcing (WSS) site for the University of Ottawa prior to providing any goods or services or issuing invoices.



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Introduction to Workday Strategic Sourcing

Workday Strategic Sourcing (WSS) is a cloud-based sourcing tool that is used to register suppliers who want to do business with the University of Ottawa. To create an account, you need to verify your email, set up a strong password, and pair your authenticator app.

Before you begin

- Allow all emails from no-reply_strategicsourcing@workday.com
- Check spam/junk folders
- Gather required materials
 - Banking information
 - Contact information

Creating your account

1

Click on this [link](#) to start the process of self-registration for new suppliers.

Add and confirm your email address in the provided fields and click **Continue**.

NOTE: The language selected at this stage will determine the one used across the onboarding interface. You may select your preferred language from the menu located in the upper-right corner. For French, use Français (Canada), for English, leave settings as-is.

2

The next screen will show that an email was sent to the email address provided.

If you don't receive the email, make sure to check your junk/spam folder. In 5 minutes, you will be able to re-send the email a second time.

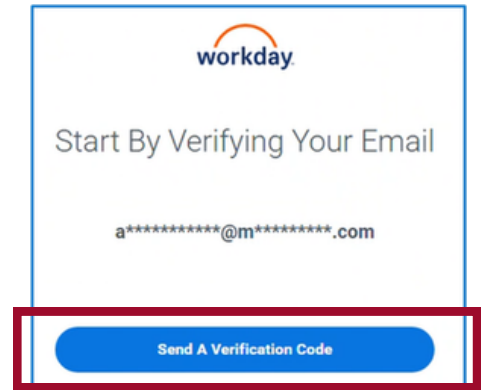
3

In your email, click on **Create Account** button.

You will then see a message that you are being redirected to continue your registration.

4

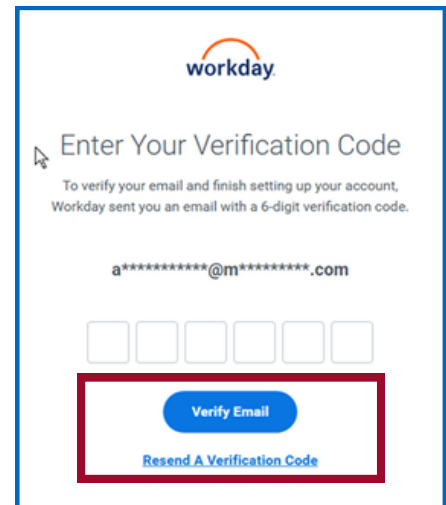
On the screen that appears next, click **Send a Verification Code**. This will send a 6-digit code to your email.



5

Retrieve the one-time verification code in your email, enter it and click **Verify Email**.

You can click **Resend a Verification Code** to send it again.

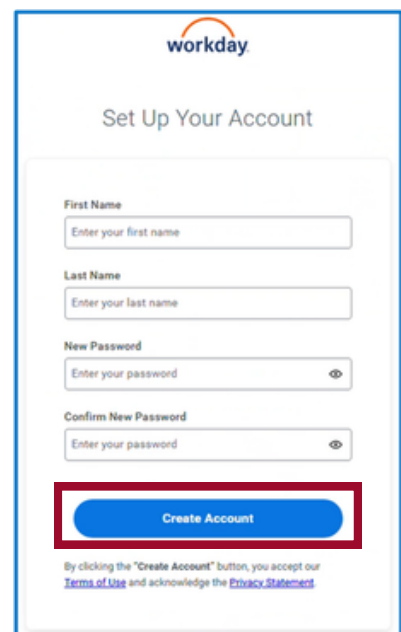


6

Complete the required fields.

Please enter the information of the person who will be the owner of the account. For businesses, companies, NPO or associations, this may be the business owner or a designated employee of the organization.

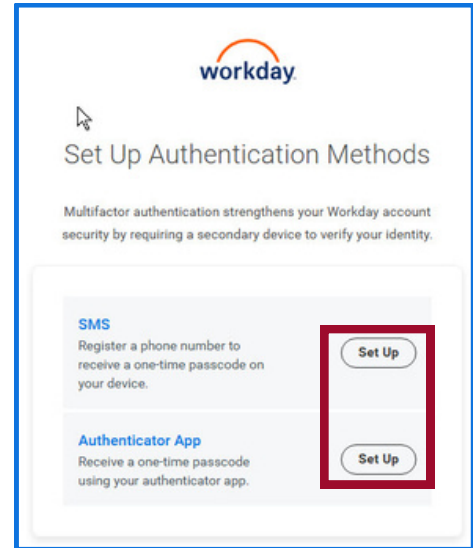
Password requirements will be listed as you enter the password. Click **Create Account**.



7

You have the choice of authentication methods between SMS and Authenticator App. Click on **Set up** beside your preferred authentication method.

NOTE: You may choose to set up only one or both methods. If you set up both methods, at time of authentication, you will have the option to request a one-time code on your mobile device or your authenticator app.

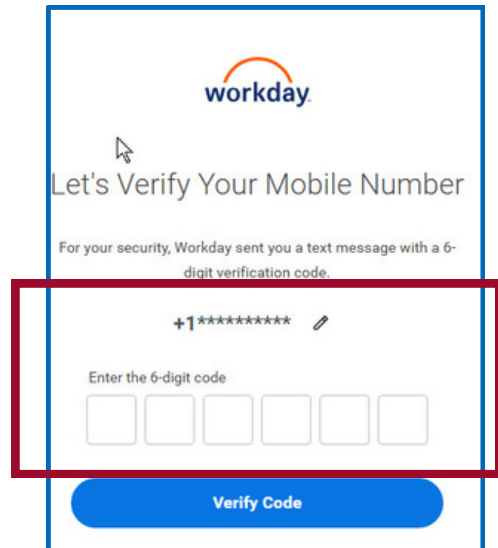
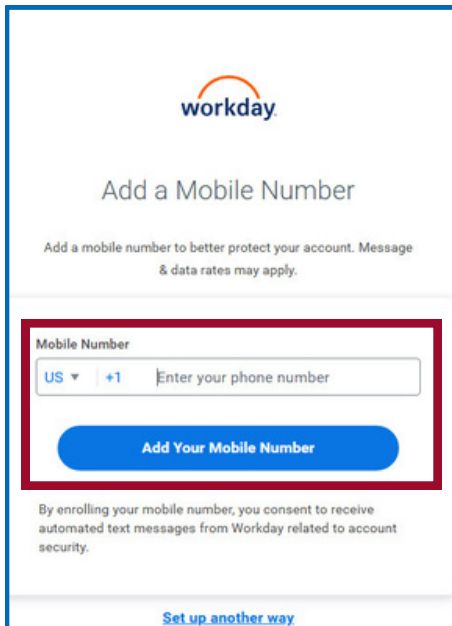


8

OPTION 1: SMS SET UP

If you select SMS, you will be asked to enter a mobile number where a one-time code will be sent. Then click **Add Your Mobile Number**.

Enter the 6-digit verification code received on your mobile device and click **Verify Code**.



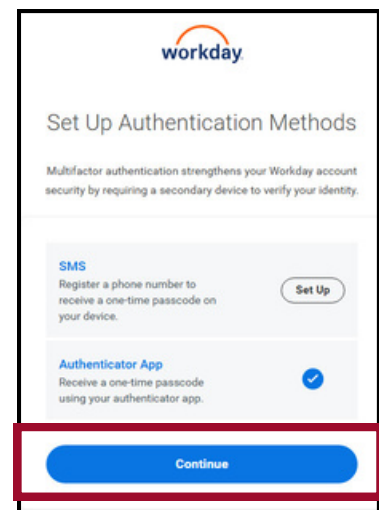
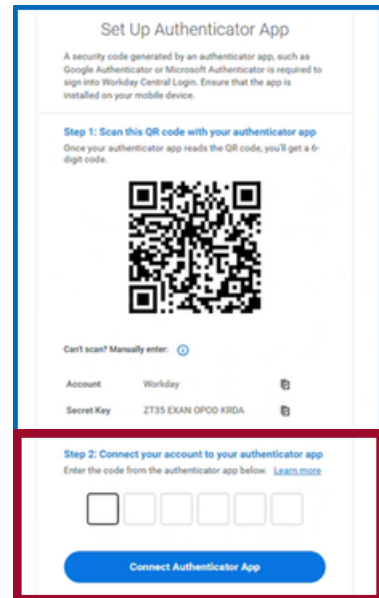
You will be brought back to the Authentication Set Up page. You can see that the SMS Authentication has been set up ✓. Click on **Continue**.

OPTION 2: AUTHENTICATOR APP SET UP

Connect your Authenticator App by scanning the QR code on the screen.

Then enter the 6-digit code from your authenticator app and click **Connect Authenticator App**.

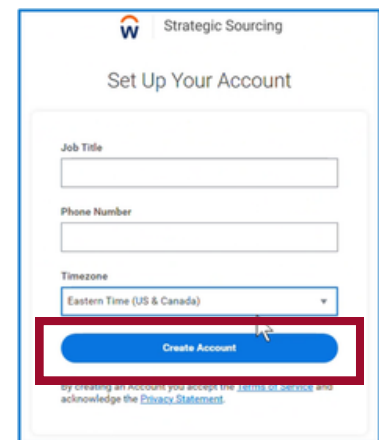
You will be brought back to the Authentication Set Up page. You can see that the Authenticator App has been set up ✓. Click on **Continue**.



9

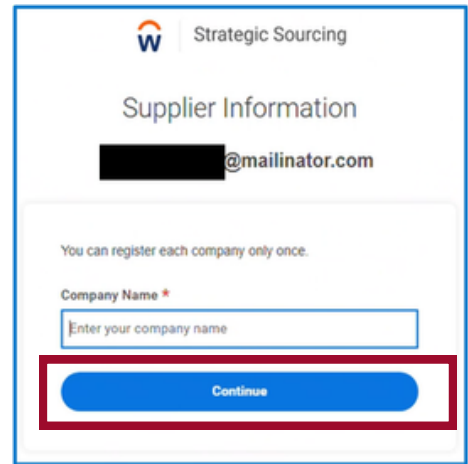
On this next screen, the fields are optional, but we do recommend choosing your time zone.

Select the appropriate **Time Zone** and click **Create Account**.



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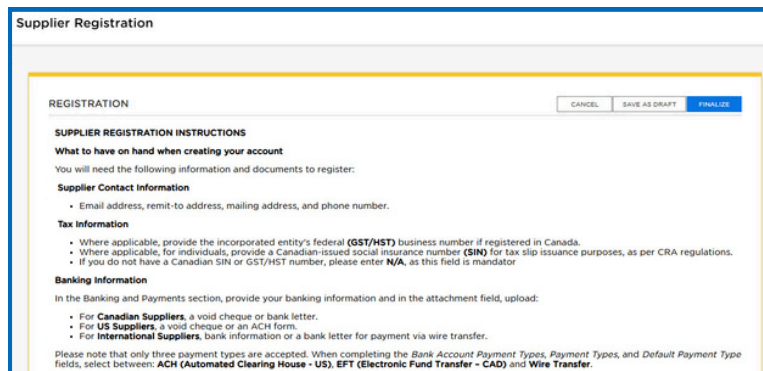
You will then be brought to the "Supplier Information" screen. Enter the **Company Name**. Individuals registering on the platform may enter their full legal name. Then click **Continue**.



11

Read carefully the **Supplier Registration** instructions on your screen.

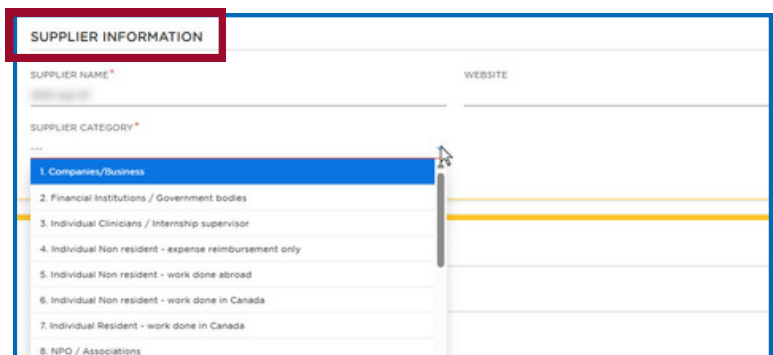
NOTE: The instructions in French are presented first, followed by the instructions in English.



12

Complete the required fields in the **Supplier Information** section as marked with *. All other fields are optional.

Select the appropriate **Supplier Category** from number 1 to 8, in the drop-down menu.



13

Complete the fields in the **Business Information** section, including **Address**, **Phone**, and **Tax Information**. The **Usage** field under **Address** must include all options that apply.

Tax information:

Tax Country must always be Canada.

- Where applicable, provide the incorporated entity's federal (GST/HST) business number if registered in Canada.
- Where applicable, for individuals, provide a Canadian-issued social insurance number (SIN) for tax slip issuance purposes, as per CRA regulations.
- If you do not have a Canadian SIN or GST/HST number, please enter N/A, as this field is mandatory.

14

Complete the fields in the **Banking Information** section, including **Bank Account** and **Payment**.

NOTE: For the **Bank Account Payment Types**, select only between ACH, EFT and Wire Transfer as the other types are currently not supported.

IMPORTANT: Based on the selected Country in the **Bank Account Country** field, the remaining fields in this section will adjust accordingly.

15

Complete the fields in the **Contact Information** section.

Additional contacts can be added by clicking **Add Contact** in the top-right corner of this section.

16

In the **Attachments** section, provide official proof of banking information.

- For **Canadian Suppliers**, a void cheque or bank letter.
- For **US Suppliers**, a void cheque or an ACH form.
- For **International Suppliers**, bank information or a bank letter for payment via wire transfer.

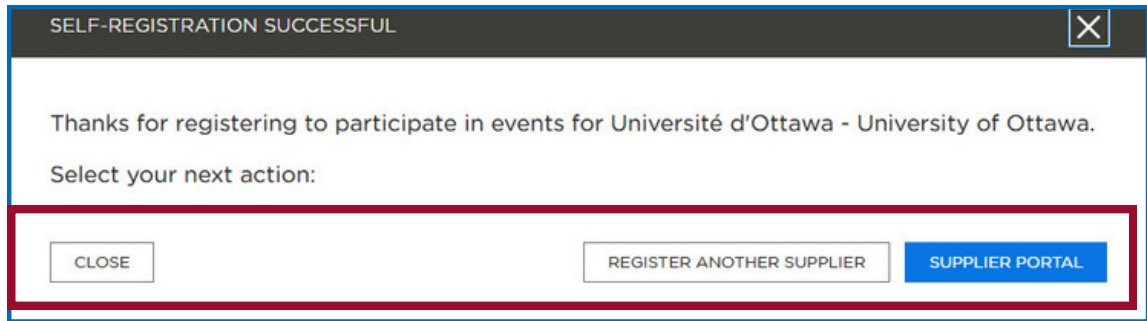
17

In the **Terms & Conditions** section, checking the box means that you accept the Terms and Conditions and took the time to read the **University of Ottawa's procurement policy.**

Please review this section carefully. Click **Finalize**.

18

A pop-up window will appear to confirm your self-registration. You may select your next action by clicking on **Close**, **Register Another Supplier** or **Supplier Portal**. You can also simply sign out.



An email will be sent to confirm your self-registration.

19

Once we receive your form, we will review it within five business days. You will receive an email from the University if:

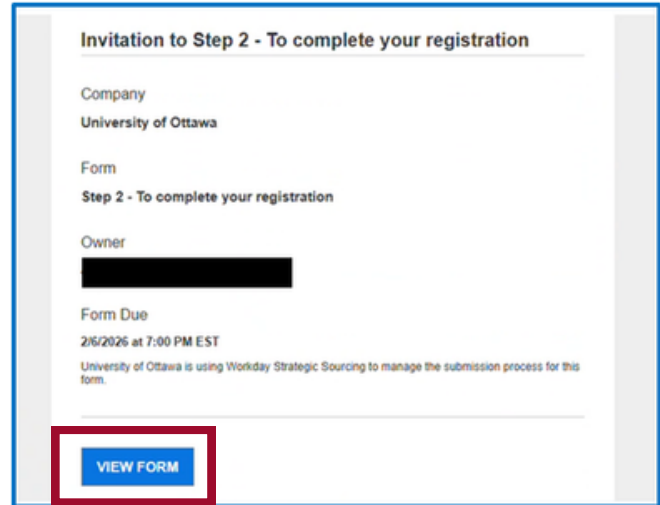
- You are a company/registered business that must complete the second part of the registration form.
- The registration is incomplete. In this case, the missing information will need to be added to the Supplier Registration Form and resubmitted.
- The registration has been denied. In this case, the reason will be provided.

Additional form (if required only)

1

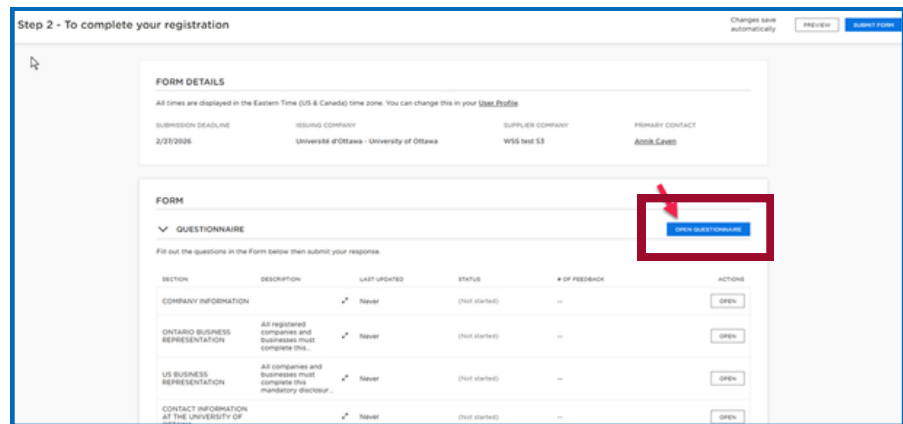
According to your supplier category, you may be required to complete the **Step 2 – To complete your registration** form.

In this case, you will receive a link by email to access this form in your WSS account. In the email, click **View Form**.



2

After you have signed in your WSS account, click **Open Questionnaire**.



3

Enter the Company’s legal name, if it is different than the one provided in the Supplier Onboarding form. If it the same, leave the field blank and click **Next**.

4

Review the statement in related to Ontario Business Representation, select the option that corresponds to the accuracy of the statement, and click **Next**.

5

Review the statement in related to US Business Representation, select the option that corresponds to the accuracy of the statement, and click **Next**.

6

Provide your uOttawa Contact and click **Next**.

4 CONTACT INFORMATION AT THE UNIVERSITY OF OTTAWA

4.1. What is the name of your contact person at the University of Ottawa (i.e. the person you communicate with regarding payments)?
SHORT ANSWER

4.2. What is the email address of your contact person at the University of Ottawa?
SHORT ANSWER

7

Select the **Commodity Type** that corresponds to your offering.

If applicable, select the option that corresponds to the location where your Services are performed.

5 COMMODITY TYPE

5.1 *What commodity type do you offer?
 Goods
 Services

5.2 SERVICES

5.2.1 If you offer services, will they be performed in Canada
 Yes
 No
[Clear selection](#)

< PREVIOUS Section 5 of 5 NEXT >

8

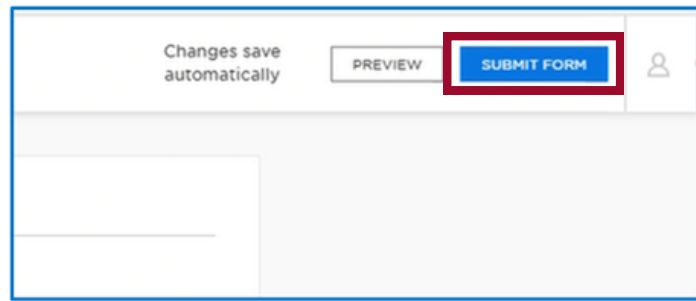
Once completed, click on **Review & Submit** in the top-right corner.

Saved at 11:19 AM

REVIEW & SUBMIT

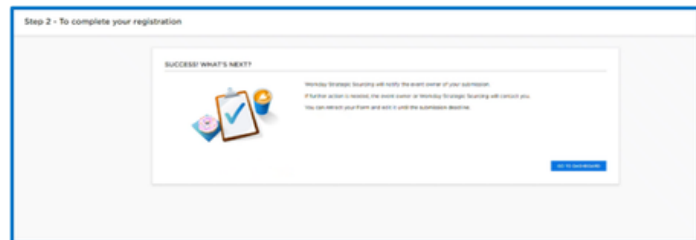
9

Click on **Submit Form** in the top-right corner.



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Once the form has been submitted, a confirmation message will appear on your screen. A separate confirmation email will be sent to your address.

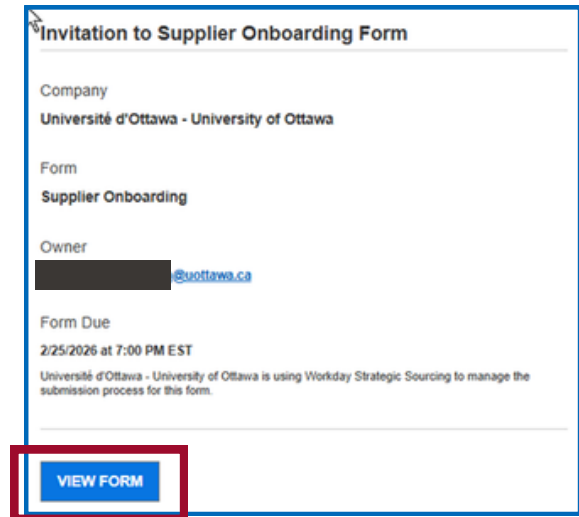


Editing your supplier information

Once approved, existing suppliers can submit changes through their supplier account on the Workday Strategic Sourcing (WSS) site. For first-time changes please request an editing link by contacting depotdirect-directdeposit@uottawa.ca.

1

Here is the email you will receive to enable the editing of your supplier information. Click **View Form** and log in to WSS.



2

Once logged in, you will see all the information you entered during your self-registration. Click **Edit** and you will have access to modify your information.

When done, make sure to **attach a document** supporting your change in the **Attachments** section.

