

How a PI Requests a New Supplier for a Stipend Payee

1. Log in to Workday using your **ID** and **Password**.
2. In the search bar, type in **Create a Requisition** ❶ and click enter.



Figure 1

3. After you click enter in **Figure 1** above, the **Create Requisition** screen will appear as shown in **Figure 2** below. Click on **Create Requisition** ❷.

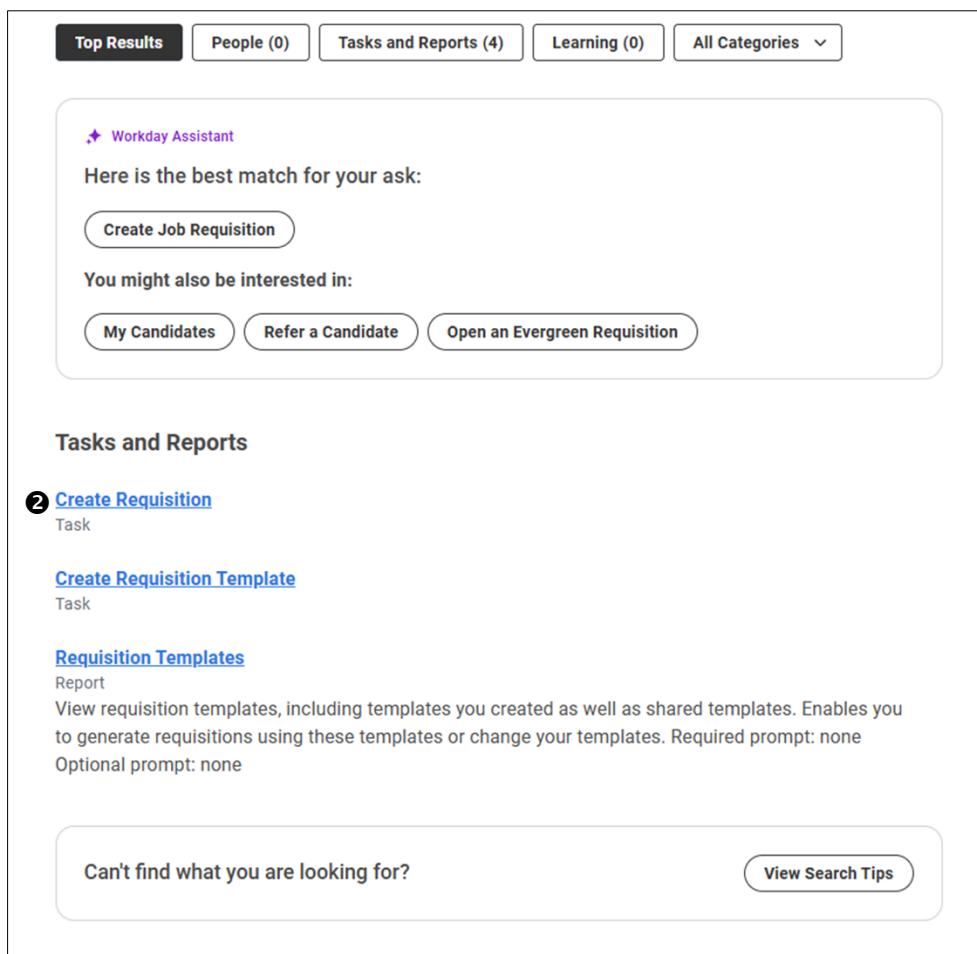


Figure 2

4. After clicking **Create Requisition ❶** in **Figure 2**, on **Page 1**, the **Requisition Details** screen will appear as shown in **Figure 3** below. Select **Connect to Supplier Website ❶**. The **Connect to Supplier Website** screen will be filled out as shown in **Figure 7**, on **Page 5**.

Requisition Details

Requesting for
Paul Price [C]

Company
RFCUNY

Currency
USD (\$)

Requisition Type
Office Supplies ❷

Ship-To
695 Park Avenue...

Worktags
Location: HUNTER COLLEGE

Start Requisition
Edit Details ❸

Ordering Methods

[Connect to Supplier Website ❶](#)
 Request goods and services from Supplier Websites

[Request Non-Catalog Items](#)
 Add a good or service that is not in the catalog

[Add from Templates and Requisitions](#)
 Select from Requisition templates and past Requisitions

[Select from My Procurement Favorites](#)
 Select from my Favorite items

Please Note: The **Requisition Type ❷** must be set to **Office Supplies**. If it is not set to **Office Supplies**, you will **not be able to Connect to the Supplier Website**.

If the **Requisition Type** needs to be changed:

1. Click **Edit Details ❸**. The **Edit Requisition Details** box will appear.
2. Click the **Drop-Down Menu** under **Requisition Type**.
3. Select **Office Supplies**.
4. Click **Save Changes**.

Figure 3

- After clicking **Connect to Supplier Website ①** in **Figure 3**, on **Page 2**, the **Connect to Supplier Website** screen appears as shown below in **Figure 4**.

Click **Connect ①**.

Connect to Supplier Website

Company
RFCUNY Research Foundation of the City University of New York

Requester
Paul Price [C]

Currency
USD

Requisition Type
Training Supplies

Supplier Websites 1 Item

Logo	Supplier Link Name	Multi-Supplier	Supplier	Description	Connect
	Jaggaer - Punchout	☒			Connect ①

Continue Shopping

Cancel

Figure 4

6. After clicking on **Connect 1** in **Figure 4**, on **Page 3**, the **Shopping Home Screen** will appear as shown below in **Figure 5**. Click on **Supplier Requester DB 1**. The **Supplier Requester Dashboard** will appear as shown in **Figure 6**, on **Page 5**.

Shop • Shopping Home

Shopping Home Supplier Management Supplier Requester DB 1

Shop

Go to:

Simple Advanced

Search for products, suppliers, forms, part number, etc.

Organization Message

Welcome to the RF CUNY TEST SITE

My Draft Carts

Showing Results 1 - 1 of 1

NUMBER	CART	CART TYPE	DATE ↓	TOTAL
4414670	2025-11-18 cw100025 02	My Drafts	11/18/2025	0.00USD

My Purchase Orders

Showcases

Office Furniture/Office Supplies

vari.
Hosted Catalog

S&B

Educational Supplies

KAPLAN

community playthings
Hosted Catalog

Lakeshore

Electronics

Apple

BH

BEST BUY

COWG

Figure 5

7. After clicking on and **Supplier Requester DB ❶** in **Figure 5**, on **Page 4** the **Supplier Requester Dashboard** will appear as shown in **Figure 6** below. On the right-hand side of the screen go to **Quick Links ❶** and the **Request New Supplier** screen will appear as shown in **Figure 7** below. Click on the drop-down menu ❶. There are two choices **Stipend Recipient Request** or **Supplier Request Form ❷**. We are choosing **Stipend Recipient Request ❷** then enter the name of the **Payee ❶** and click **Submit ❷** as shown in **Figure 8** below.

Company Name	Registration Status	Last Invitation Date	Registration Date
ALEXIS HARPER	Profile Complete	11/25/2025	11/25/2025
Benito Antonio Martinez Ocasio	Profile Complete	10/14/2025	10/14/2025
Bill Smith	In Progress	9/4/2025	9/4/2025
Celia Cruz	Invited	9/4/2025	9/4/2025
Cielo Gonzalez	Profile Complete		11/6/2025

Figure 6

Figure 7

Figure 8

8. After clicking on **Submit** ② in **Figure 8**, on **Page 5**, the **Instructions** screen will appear as shown in **Figure 9** below. The PI must complete all fields.

Questions - Company Overview
Print Request | History | ?

Potential matching suppliers have been found in your network based on information given. [Click here to view the list of potential matching suppliers.](#)

On This Page

Stipend Questions (8)
Guardian Information (3)

Stipend Questions

Payee Name *

Mike Mike

Payee Email *

testsite322Mike@gmail.com

Payment Type *

Fellowship

Program Name

Stem Fall 2025

Is teaching or any form of services required as a condition for receiving a scholarship/fellowship?

☐ Yes
☐ No

Does research, training, or other services rendered by the recipient(s) benefit the grantor?

☐ Yes
☐ No

Is Recipient a Minor?

☒ Yes
☐ No

Supporting Information
2000 characters remaining

Guardian Information

First Name *

Dan

Last Name *

Mike

Email Information *

testdm@gmail.com

★ Required

Save Progress

Next >

Figure 9

The following is the details regarding the questions in **Figure 9**, on **Page 6**.

- ❶ Identifies how many questions are for the Stipend and for the Guardian Information.
 - ❷ **Payee Name:** Name of the individual getting the Stipend.
 - ❸ **Payee Email:** Email of the individual getting the Stipend.
 - ❹ **Payment Type:** There are three payment types:
 - Fellowship
 - Scholarship
 - Participant support payment
 - ❺ **Program Name:** Name of the program, semester, and year.
 - ❻ **Answer all three questions:** If the answer is **Yes** to the third question, you will need to fill out the **Guardian Information**.
 - ❼ **Supporting Information:** PI can add any additional comments.
 - ❽ **Guardian Information:** If the answer is **Yes, Is Recipient a Minor?** (Minor is under 18 years of age) The recipient's **parent/guardian must** provide their **first name, last name, and email address**.
 - ❾ Click **Save Progress** first, then **Submit**.
9. After clicking on **Save Progress** and then **Next** ❾ in **Figure 9**, on **Page 6**, the **Requester Contact Information** pop-up box will appear as shown in **Figure 10** below. Review the information and click **Next** ❶.

My Supplier Requests		Requester Contact Information		Print Request	History	?
Mike Mike		Requester Name:	Paul Price			
Template	Stipend Recipient Request	Requester Email:	None			
Request Status	Incomplete					
Questions	✓					
Requester Contact Infor...						
Review and Complete						
Supplier Request Workflow						
				◀ Previous	Next ▶	❶

Figure 10

10. After clicking **Next** in **Figure 10**, on **Page 7**, the **Review and Complete** screen will appear as shown in **Figure 11** below. Check the box stating: **I certify that the statements and information in this request are true and correct to the best of my knowledge and belief ①**. Click **Complete Request ②** to submit the request.

Please Note: Before clicking **Complete Request**, you may select **Previous ③** to make any changes.

Figure 11

11. After you click **Complete Request ②** in **Figure 11**, on **Page 8**, a confirmation message will appear asking, **Are you sure you are ready to complete your new supplier request ?** As shown in **Figure 12** below.

Select **Yes ①** to proceed. Your request will then be **submitted**.

Figure 12

12. After clicking **Yes ①** in **Figure 12**, on **Page 8**, the **My Supplier Requests Screen** will appear as shown in **Figure 13** below. This screen shows all your **Supplier Requests** submitted in the system. Use the Request Status filter to narrow down your search results.

Requested Supplier	Template	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Supplier Profile	Registration Status	Actions
Mike Mike	Stipend Recipient Request	Incomplete	-	-	12/4/2025 3:59 PM	12/4/2025 3:59 PM		-	Actions
Mike Mike	Stipend Recipient Request	Incomplete	-	-	12/4/2025 9:16 AM	12/4/2025 9:16 AM		-	Actions
Mike Mike	Stipend Recipient Request	Incomplete	-	-	12/3/2025 1:25 PM	12/3/2025 1:25 PM		-	Actions
Monte Pop Tarts	Supplier Request Form	Under Review	Supplier Review	-	11/29/2025 1:28 PM	11/29/2025 12:48 PM		-	Actions
acme	Supplier Request Form	Incomplete	-	-	11/18/2025 10:14 AM	11/18/2025 10:14 AM		-	Actions

Figure 13

Please Note: When you connect to the **Supplier Website**, you have a choice to select **Supplier Management ①** or **Supplier Request DB ②**. In this Job Aid, we demonstrated clicking on **Supplier Request DB ②**. If you choose **Supplier Management ①**, as shown in **Figure 14** below in the upper right corner, you will see **Quick Links ③**, which include two options:

- ④ {
 - **Request New Supplier:** Click this option to initiate a new supplier request.
 - **My Supplier Request:** Click this option to view all supplier requests you have previously submitted.

This is where you can also view all your **Supplier Requests** submitted in the system.

Form Name	Request Status	Template Name	Requestor	Submitted Date
Mike Mike	Approved	Stipend Recipient Request	Paul Price	12/5/2025 9:15:21 AM

Figure 14