

BABSON COLLEGE

PAYEE ONBOARDING REQUESTER JOB AID *Workday Strategic Sourcing*

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I. Getting Started

Purpose

This job aid provides step-by-step instructions for submitting and tracking onboarding requests for new suppliers and student/individual gift/award/prize recipients (“**Payee(s)**”) in Workday Strategic Sourcing.

Overview

Workday Strategic Sourcing (“WSS”) streamlines the Payee onboarding process by providing a centralized request and tracking tool for Babson employees. The process collects required information directly from the Payee, reducing manual follow-up and helping Accounts Payable process requests more efficiently.

When to Use This Process

When Babson employees need to pay a new Payee, the Payee must first complete onboarding (including required payment and tax verification steps) before payment can be processed.

II. Accessing Workday Strategic Sourcing

Step 1: Access from the Workday Menu

To access WSS, log into Workday and navigate to your **Menu** (see image 1 below).



Image 1: Workday Menu Location

Step 2: Add Workday Strategic Sourcing (if needed)

If Workday Strategic Sourcing is not already available in your Workday Apps:

- Scroll to the bottom of **Menu** and select **Add Apps** (see image 2 below).
- Search for **Strategic Sourcing** in the search bar (see image 3 below).
- Select the **+** button and add to your **Apps**.
- Return to your **Menu** and select **Strategic Sourcing** (see image 4 below)

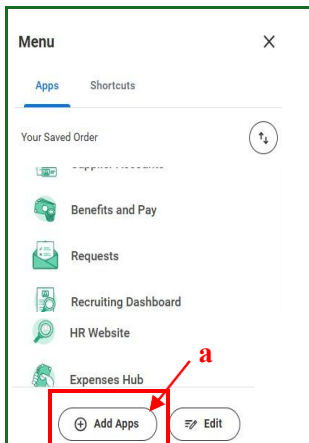


Image 2: Selecting Add Apps

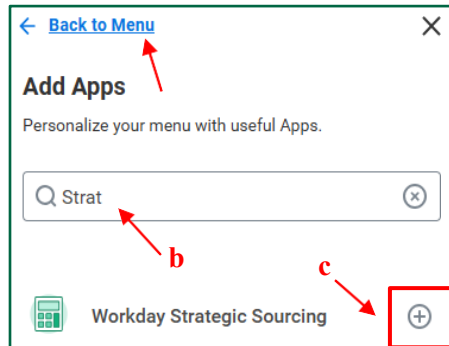


Image 3: Searching for Strategic Sourcing

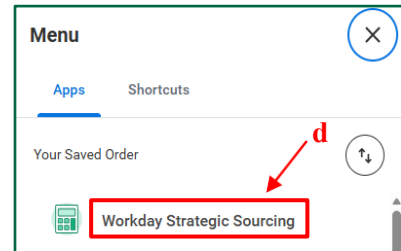


Image 4: Strategic Sourcing Added to Menu

Step 3: Open Workday Strategic Sourcing (Home Page)

Once you select WSS, you will be directed to the home page (see image 5 below).

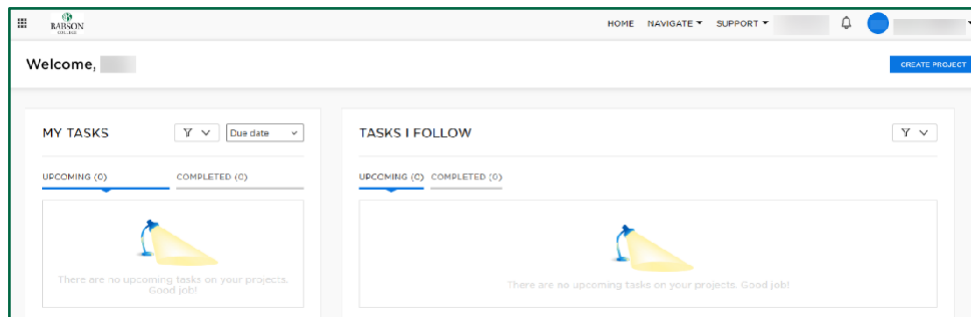


Image 5: Workday Strategic Sourcing Home Page - Starting Point

III. Creating An Onboarding Request

Step 1: Log in to WSS Home Page

Ensure you are logged into the WSS portal to begin the Payee onboarding process (*see image 6 below*).

If it is your first time logging in, please follow the instructions above on accessing WSS.

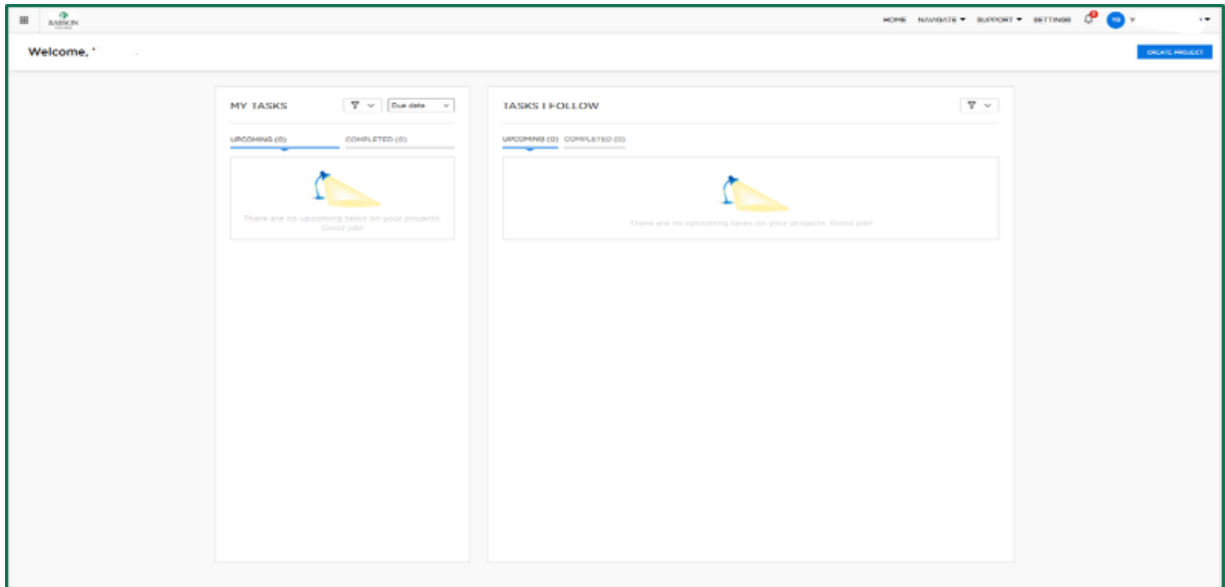


Image 6: Workday Strategic Sourcing Home Page - Starting point

Step 2: Navigate to Payee Onboarding

From the WSS home screen:

- a) Click **Navigate** in the top menu
- b) Then select **Payee Onboarding** from the dropdown menu at the top right of the screen (*see Image 7 below*).

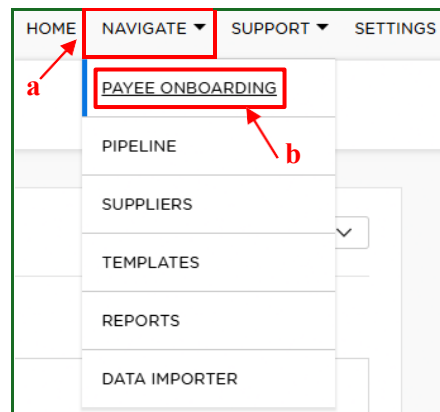


Image 7: Navigate to Payee Onboarding

Step 3: Create New Payee Onboarding Request

- a) Click **Create New Payee Onboarding Request** (see image 8 below)

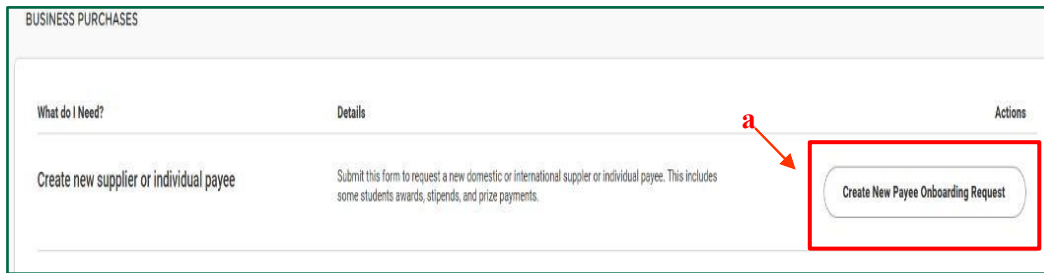


Image 8: Creating a New Payee Onboarding Request

- b) Once selected, a new project form will open in WSS.

Step 4: Fill Out and Submit the Request

Fill out all fields, then click **Submit Request** in the top right corner.

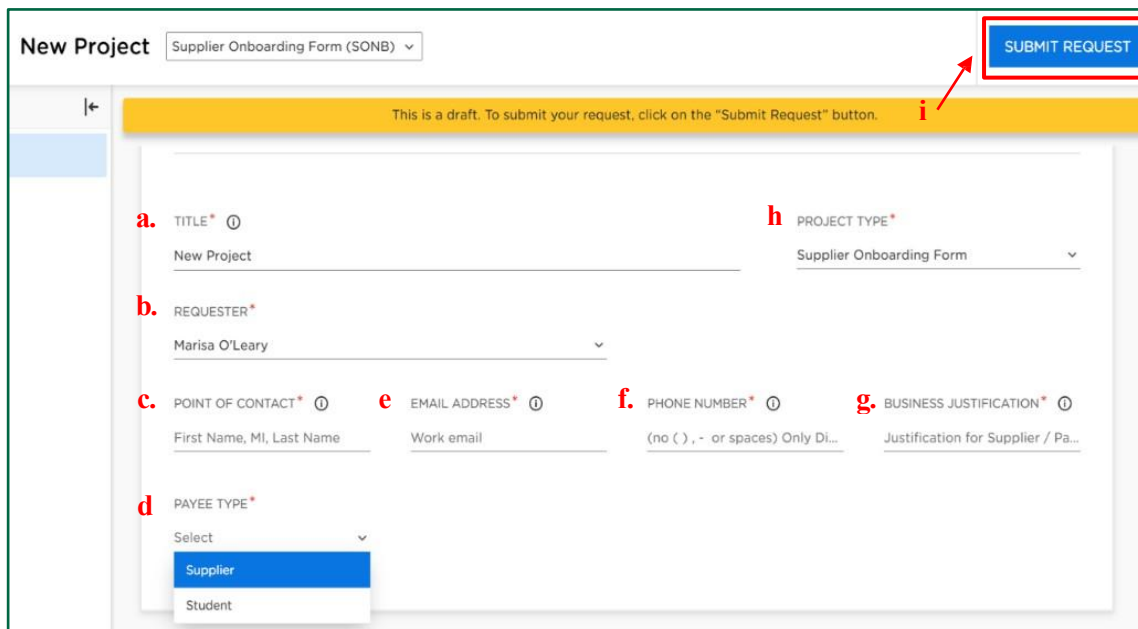


Image 9: Completing the Payee Onboarding Request

Enter the following information (*fields are labeled in image 9 above*):

- a) **Title:**
Enter the name of the Payee (either individual or business depending on Payee type)
- b) **Requester:**
This field defaults to you. If you are submitting the request on behalf of someone else, update this field accordingly.
- c) ***Point of Contact:**
Enter the Payee name.
- d) ****Payee Type:**

Select whether the payee is a **Student** or **Supplier**.

- e) ***Email Address:**
Enter the Payee email address.
- f) ***Phone Number:**
Enter the Payee phone number.
- g) **Business Justification:**
Enter the business reason for the request. You may also attach supporting documentation, if needed.
- h) **Click on Submit Request**

***For students/individuals, this information may be the same as the individual being onboarded.**

****If you select “Student” as a Payee, An attachment field will appear. If this request is in reference to a student award, please attach the award letter or notification here.**

IMPORTANT

- **All fields are required and must be completed prior to submission.**

Step 5: Adding Stakeholders to the Request (Optional)

At your option, you can also add stakeholders to your request to provide visibility or assist with the onboarding process.

Stakeholders are internal members of the Babson community. You may want to add a team member for backup or to monitor status' in your absence. Stakeholders can view updates, respond to questions, and communicate using the Team Chat feature (see Section V. below).

To add stakeholders:

- a) Select **Stakeholders** from the left side of the request form.
- b) Click **Open Stakeholder Directory** (see image 10 below).

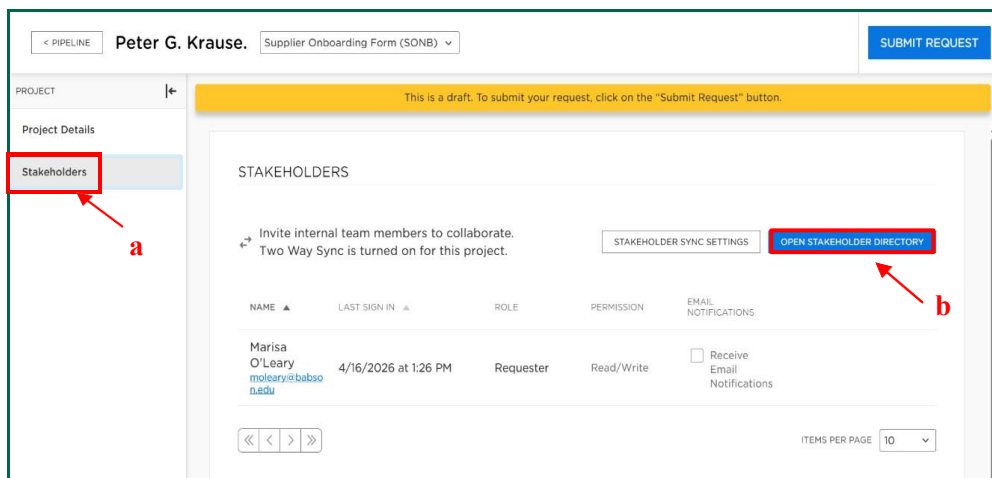


Image 10: Adding Stakeholders to the Project

- c) Search for and select the appropriate stakeholder(s) from the directory.
- d) Click **Add to Project**.
- e) Once all fields are completed (and stakeholders have been added), Click **SUBMIT REQUEST**. (see image 11 below).

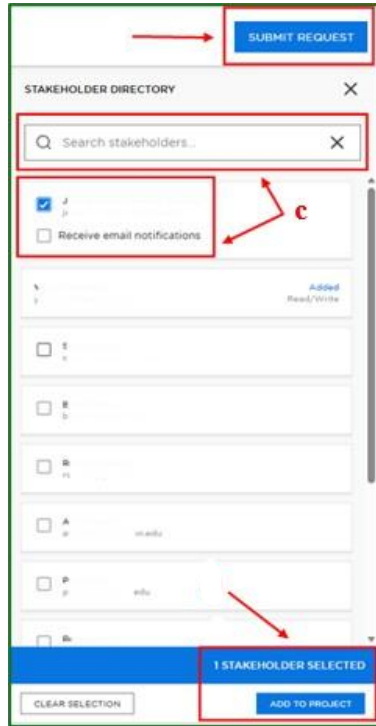


Image 11: Stakeholder Directory - Selecting Stakeholders

Step 6: Submit and Confirm Your Request

Once you click **SUBMIT**, a pop-up will appear confirming that your request was sent (See image 12 below). The pop-up will also display the current status of your request.

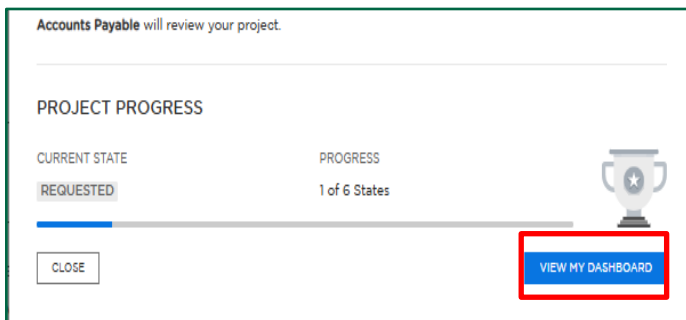


Image 12: Request Submitted Confirmation

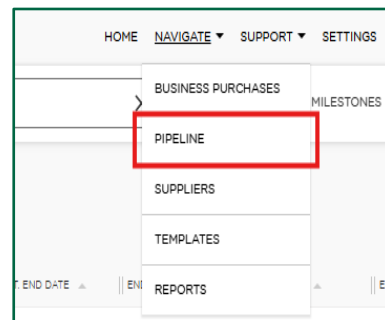


Image 13: Accessing the Pipeline

- a) Click **View my Dashboard** (See image 12 above)
- b) OR go to **Navigate** → **Pipeline** to monitor the request (See image 13 above)

TIP:
An email will be sent to the requester with the subject line: [EXT] Supplier Onboarding Form Request Submitted | '[Request#] [Request Name]'

IV. View and Manage Your Requests

Step 1: Access the Pipeline

In the Pipeline, you can view and manage your requests and monitor their current status throughout the onboarding process (*see image 14 below*).

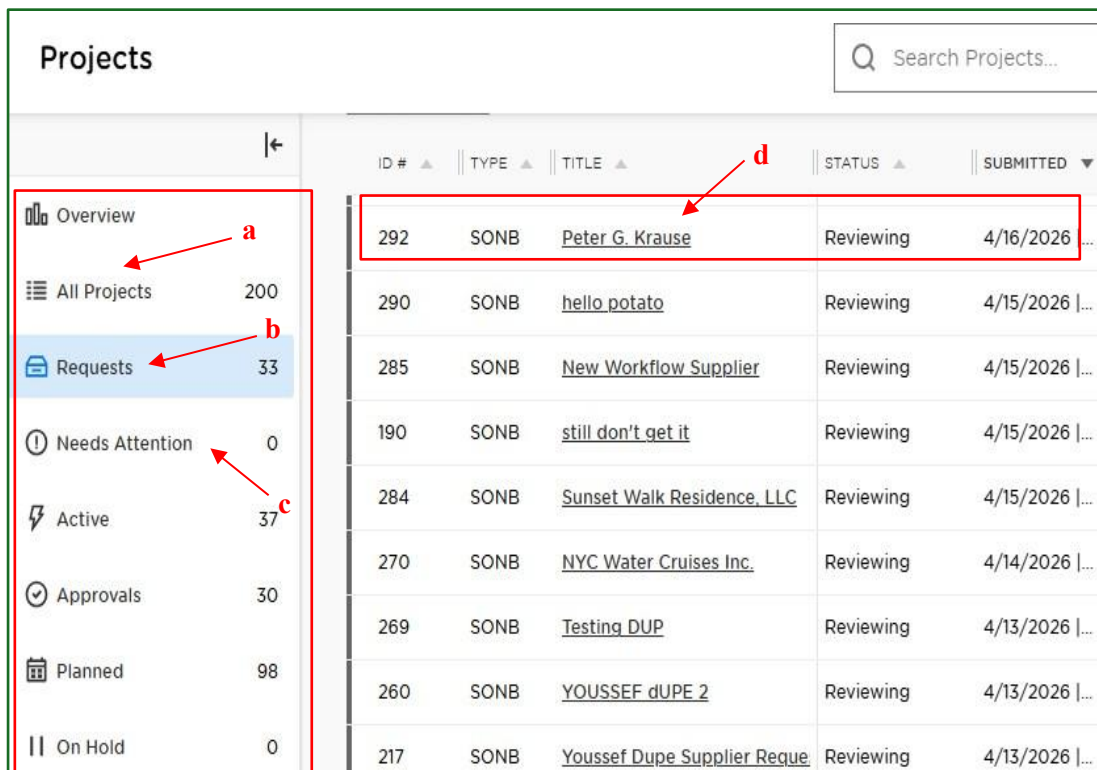
You can use the available filters to:

- a) View **All Projects**
- b) Narrow down your results to **Request only**
- c) Identify items that may need attention.

To view additional details and edit a specific request:

- d) Click on the **Request Title**

This will open the request and allow you to track progress through each stage of the onboarding process.



ID #	TYPE	TITLE	STATUS	SUBMITTED
292	SONB	Peter G. Krause	Reviewing	4/16/2026 ...
290	SONB	hello potato	Reviewing	4/15/2026 ...
285	SONB	New Workflow Supplier	Reviewing	4/15/2026 ...
190	SONB	still don't get it	Reviewing	4/15/2026 ...
284	SONB	Sunset Walk Residence, LLC	Reviewing	4/15/2026 ...
270	SONB	NYC Water Cruises Inc.	Reviewing	4/14/2026 ...
269	SONB	Testing DUP	Reviewing	4/13/2026 ...
260	SONB	YOUSSEF dUPE 2	Reviewing	4/13/2026 ...
217	SONB	Youssef Dupe Supplier Reque	Reviewing	4/13/2026 ...

Image 14: Pipeline Overview

TIP:

In the Pipeline, the request will appear in two places:

- a) Under **All Projects** with a **Requested** status (see image 15 below).

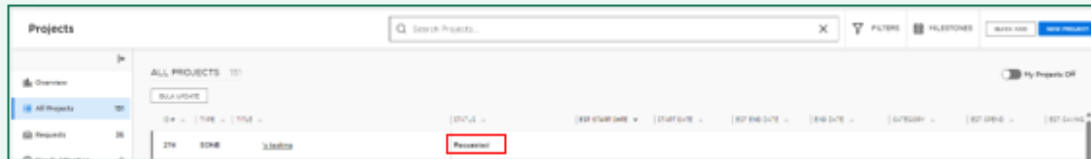


Image 15: Project View

- b) Under **Requests** with a **Reviewing** status (see image 16 below).

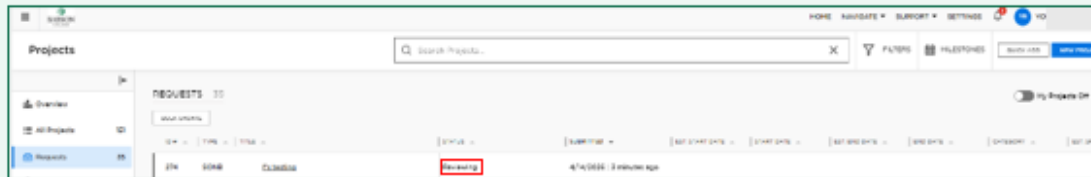


Image 16: Requests View

Once you have selected a request by clicking on the **Title** in your **Pipeline**, you can view detailed information, track the **current status** of the request, and follow its progress through each stage of the onboarding.

All available statuses are also shown for reference, allowing you to understand each stage of the onboarding process from submission through completion.

You can monitor updates, review request details, and follow progress directly from this screen (see image 17 below).

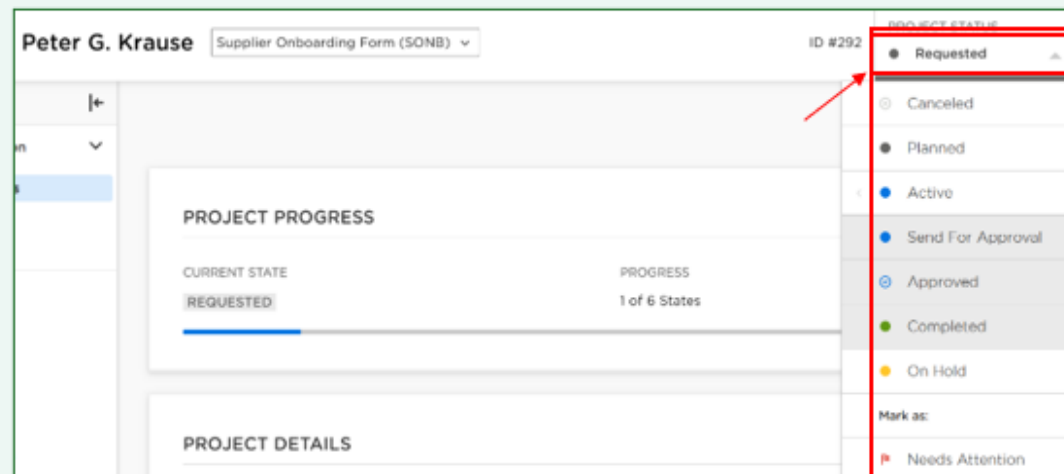


Image 17: Pipeline > Request Details – Status and Stages

V. Communicating Using Team Chat

You can use the **Team Chat** feature to communicate with stakeholders on the request, including Accounts Payable.

Step 1: Sending a Team Chat

- Team Chat** is located next to **Project Status** at the top right of the **Project**.
- To send a message, Select **All Stakeholders** to notify everyone or choose an individual to tag a specific person
- Enter your message in the chat box and, if needed, **Drop and drop documents** or select **Browse Files** to attach files to your message.
- Click **SEND** (*See image 18 below*).

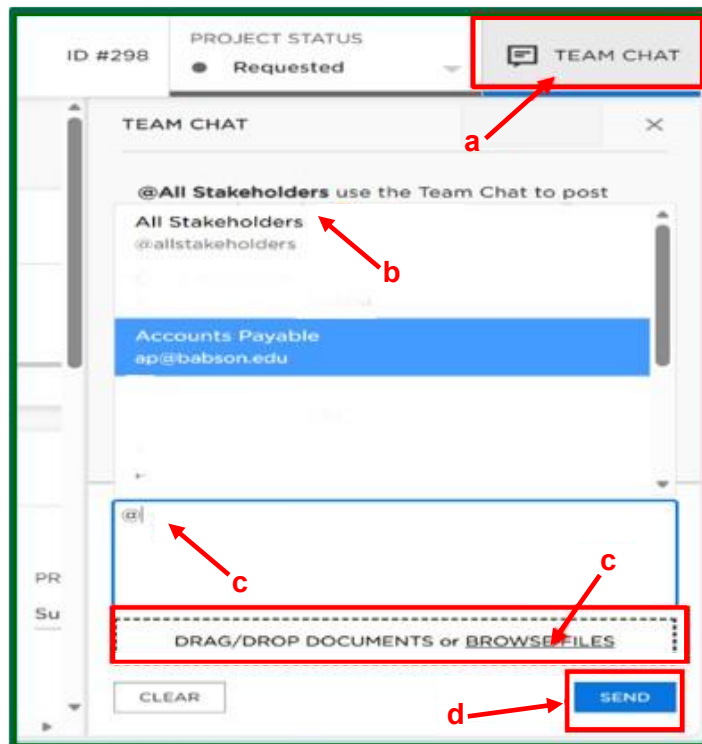


Image 18 – Pipeline – Request Details – Team Chat

Once approved, the request status will update to **Approved**. The Payee record will be visible in Workday and will then be available for use (e.g., invoice processing).

VI. Confirmation Email Notifications

Confirmation 1: Onboarding Request Submission

Once a Payee has submitted the onboarding form in WSS, you will receive a confirmation email. (see *image 19 below*)

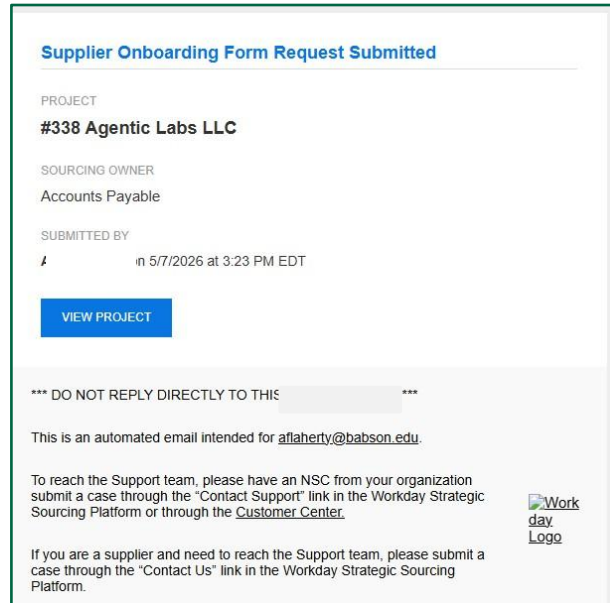


Image 19: Onboarding Form submission confirmation email

Confirmation 2: Approved Payee

Once a Payee is approved and active in Workday, you will receive a confirmation email. (see *image 20 below*).

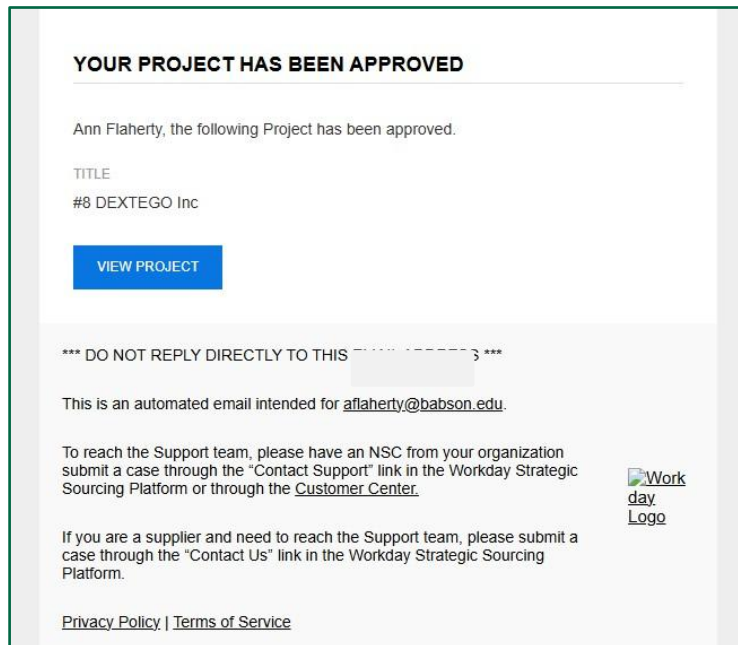


Image 20: Payee Approval Confirmation

VII. Summary

You now have completed the steps to submit and track a Payee onboarding request in Workday Strategic Sourcing. For questions, updates, or required actions, use the **Team Chat** feature within your request or contact [Accounts Payable](#).