Strategic Sourcing

Product Summary

May 2023

This content is not part of the Workday Administrator Guide and is subject to further change.

Contents

Strategic Sourcing Admin Setup

Setup Considerations: Workday Strategic Sourcing

You can use this topic to help make decisions when planning your configuration and use of Workday Strategic Sourcing (WSS). It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

WSS is a platform that streamlines your sourcing-to-contract process. You can create and manage:

- Projects.
- Sourcing events.
- Contracts.
- Suppliers.

Business Benefits

- Visibility and reporting into ongoing and completed sourcing projects.
- Standardized process for sourcing teams and their business stakeholders.
- Enable stakeholders to stay informed of project status and progress.
- Quickly compare supplier prices and notify suppliers whether you award them business.
- Manage supplier communication and negotiation directly within WSS.
- Organize contract obligations including renewals in a centralized repository.
- Gain control of approvals with visibility throughout the sourcing process.
- Drive supplier onboarding and information gathering and approval in 1 place.
- Use reporting and the supplier directory to have a single view of all activities with suppliers.

Use Cases

- Manage procurement project processes from start to finish and collaborate with relevant teams.
- Automate contract approval flows and stay informed of upcoming renewal activities.
- Receive insight on key supplier information, such as risk, when onboarding a supplier.
- Collect feedback on vendors from stakeholders to drive sourcing improvements.

Questions to Consider

Subject	Questions	Considerations
Pipeline	How do you want to segment access to projects across users?	You can configure Team Settings for projects in your Pipeline to enable different levels of access for: • Licensed users.

Subject	Questions	Considerations
		• Stakeholders.
Pipeline/Contracts	What project and contract types and processes does your organization use?	You can define project and contract types and templated milestones for each type.
Pipeline	What project types do your stakeholders request?	You can have multiple project types available on intake or a general intake for multiple types of requests.
Pipeline/Contracts	What data on projects and contracts do you need to track and report on?	You can use default and custom fields on project and contract types that your stakeholders and licensed users can complete.
Pipeline	What current or future savings tracking do you need to track?	You can track savings on projects by setting up Savings Types in Company Settings.
Contracts	Do you need contracts approved by other parties before closure?	You can configure approval flows to occur before the contract becomes Active.
Sourcing	Are there RFx templates that your sourcing team uses today to standardize processes?	You can templatize entire sourcing events, questionnaires, and worksheets. Templatizing standard text or questions asked across your organization on RFxs helps create a foundation for sourcing managers to more quickly set up their events.
Sourcing	How are suppliers notified of awarded or rejected bids?	You can set up templates for awards and rejections. The Award Summary function can track awards in Strategic Sourcing for future traceability.
Supplier Management	What data do you need tracked on supplier profiles?	You can track and report on your configured custom field data on supplier profiles.
Supplier Management	What information do you gather for initial supplier onboarding?	You can build onboarding form templates in the template library to standardize what information you gather from suppliers.
Supplier Management	What is your approval process to onboard suppliers?	You can set up Supplier Forms to ensure that the correct parties review and approve form answers before finalizing.
Supplier Management	What performance areas do you evaluate suppliers on?	You can create a performance review template to run a performance review. The section headers in the master template

Subject	**Questions**	**Considerations**
		dictate the performance areas that you evaluate all suppliers on.
Supplier Management	How do you engage the supplier in the performance review process?	You can determine which suppliers you invite to participate in a performance review created by you or your team.

Recommendations

Pipeline and Contracts

- Create at least 1 team that has full access to all projects.
- Keep fields on an intake form minimal to make it simple and quicker for stakeholders to submit.
- You can choose to make multiple projects and contracts available on intake or create 1 intake form for their organization. For a small number of custom fields on an intake form or project, move all fields into Project Details.
- Use conditional fields to reduce the number of contract and project types needed.
- Minimize the number of Active (for projects) and In Progress (for contracts) statuses team members manually move projects through.
- Use milestones to indicate approvals that occur while a project is in an Active status or a contract is in an In Progress status.
- Use templated milestones to manage tasks that a stakeholder other than the owner needs to own or for reporting purposes.
- Manage categories and subcategories with single select, dependent custom fields rather than the default category field for reportability. The default category field doesn't force you to select a subcategory, and when a user selects a subcategory, the category field isn't reportable.
- Use the default two-way stakeholder sync for Strategic Sourcing projects unless there's a specific use case needing one-way sync or no sync.

Sourcing

- Track custom fields for an event on the project level to ensure availability of relevant sourcing data in project reporting.
- Create at least 1 event template that you share with **My Whole Company**. This template provides a foundation for users to edit and add to for their individual events.
- Use Conditional Sections and Conditionally Required Questions when building event templates to reduce the amount of information needed from suppliers.

	• Decrease the number of event templates shared with select groups of stakeholders to reduce administrative maintenance.
Supplier Management	• Use Conditional Sections and Conditionally Required Questions when building form templates to reduce the amount of information needed from suppliers. • Keep the number of supplier form questions that you map to a supplier profile at a minimum to make viewing supplier profiles easy and simple. • For onboarding information that you complete internally today, track in fields on a project rather than a form template. • Use custom fields rather than tags on a supplier profile. These fields enable standardization of terminology across suppliers and to update the data through data importers.

Requirements

No impact.

Limitations

No impact.

Tenant Setup

No impact.

Security

Domain	Considerations
In the Integrations functional area: • *Integration Build* domain • *Integration Configure* domain	You can transfer sourcing data between Workday and WSS using an integration.
Security Configuration domain in the System functional area.	You can set up Single Sign-On for WSS.

Business Processes

No impact.

Reporting

Report or Dashboard	Description
Pipeline Overview	The main projects dashboard that summarizes your projects and savings.
Events Dashboard	The main events dashboard that summarizes your events and spend.

Report or Dashboard	Description
Contracts Dashboard	The main contracts dashboard that summarizes your contracts.
Custom reports	The Reports page enables you to create reports based on the data you select.

Integrations

Integration Type	Description
Supplier Connector	Enables onboarding suppliers and transferring supplier information between WSS and Workday.
Award to Requisition Integration	Automates the process of creating requisitions in Workday from awards in WSS.

Connections and Touchpoints

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Steps: Set Up Strategic Sourcing

Prerequisites

Note: The solutions described in this section are not part of the Workday Service. See Legal Notice for details.

Context

You can configure your tenant settings to use Workday Strategic Sourcing for:

- Contract and project management.
- Sourcing events, including reverse auctions.
- Supplier onboarding and performance management.

Steps

1. Access **Settings**.
2. Configure **Global Settings**. As you complete this section, consider:

Option	Description
Categories	Strategic Sourcing includes a set of spend categories that you can add to, edit, or delete based on the spend of your organization. You can use custom fields instead of category fields for improved configurability and reporting.
Built-in Fields	Select which fields that you want to enable on events: • Public: Enable the event sharing on your website or via email.

Option	Description
	• Sealed Bids: You can't open bids until after the Bid Submission Deadline. • Construction Request: Enable construction request events to include square footage in worksheet calculations. • Commodity Codes: Enable adding commodity codes to events for event solicitation and bulk addition of suppliers. You must have Supplier Onboarding and the Data Importer enabled to use this functionality.
Attachments	Input in minutes the duration of inactivity before a checked out document is automatically checked in.
Currencies	See Enable Multicurrency Options on page 13. Workday doesn't convert bids from foreign currencies to your default currency. You can only run events in a single currency.

These settings apply throughout your tenant and for all users.

3. As you complete these sections, consider:

Option	Description
User List	Create and assign your internal users to roles, and export the user list.
Teams	Create and edit teams to help your organization maintain project visibility for sourcing managers in your company.
Company Profile	Upload your company logo, and optionally update your company profile information. Workday recommends that you use a PNG file with a transparent background for better image clarity.

Next Steps

Configure your settings for **Sourcing & Auctions**.

Related Information
Concepts

Concept: Event Spend Categories on page 72

Concept: Teams Overview on page 50

Tasks

Create and Activate Custom Project Fields on page 16

Reference

Reference: Strategic Sourcing User Roles and Permissions on page 54

Enable Multicurrency Options

Prerequisites

Create a sourcing event.

Context

You can set up a default currency for your sourcing events and enable other currency options for sourcing managers to select from.

Steps

1. Access **Currencies** from **Settings**.
2. Select your default currency from the drop-down menu.
3. Select the additional currency options from the list of currencies.
4. (Optional) If you don't see your desired currency, submit a support case to request the addition.

Result

You now have a default currency for your sourcing events, and sourcing managers can change the currency between the options you've enabled. Your supplier bid prices reflect the enabled currencies for your sourcing events.

Example

The default currency for your sourcing event is USD. Your sourcing managers can change the currency between these enabled currency options:

- Euro
- GBP
- Peso

Set Up Business Purchase Table

Context

Your business purchase table enables users to go to a single source for their procurement and sourcing needs. You can manage your business purchase table to help streamline the procurement and sourcing processes.

Some business purchase options require Workday Procurement. To use these business purchase options, enable Single Sign On (SSO) between Workday and Workday Strategic Sourcing:

- *Internal Catalog*
- *Supplier(s) Website*
- *Requisition*

Steps

1. Access **Business Purchase Table** from **Settings**.

2. As you complete the business purchase options, consider:

Option	Description
Custom URL	Enables users to navigate outside of Workday, if needed.
Intake Form	Navigates users to the WSS procurement intake form.
Internal Catalog	Navigates directly to your Workday Procurement catalog to manage items and pricing.
Supplier(s) Website	Navigates to a supplier website that's set up as a punchout in Workday Procurement. Example: Amazon Business.
Requisition	Navigates to Workday Procurement so users can start the requisition process.

3. Toggle the **Business Purchase Option** to *Active* so users can access the new option.

Related Information
Concepts
Concept: Single Sign On (SSO) for Workday Solutions
Concept: Custom Intake Links on page 17
Tasks
Steps: Configure Single Sign-On (SSO) for Workday Solutions
Automate Intake on page 24

Customize Projects and Contracts

Create Project Types

Prerequisites

Create sourcing projects and identify the types of project you want to create.

Context

You can categorize your projects according to **Project Types**, enabling you to manage the sourcing projects in your **Pipeline** more efficiently.

Steps

1. Access **Settings > Customize Projects > Manage Project Types**.
2. Add a project type name and **Project Type Short Code** and click the **Add New Project Type** button.
3. Select the new project type and click the **Customize** button.
4. Add an **Active Status** for the project type or **Edit** or **Delete** existing active statuses.
5. (Optional) In the **Milestone Template** section, add milestones for the project type. Strategic Sourcing adds milestones to the project in the order listed in the section.
6. In the **Customize Layout** section, select which fields you want to display on the project type for the project and the intake form.
7. Set a **Default Project Type** to control which project type initially displays when your users create a new project.

Result

You can customize and sort your sourcing projects in to types and manage project statuses.

Customize Contracts and Contract Intake Forms

Context

You can customize contracts and contract intake forms to fit the business needs of your company.

Steps

1. From **Settings**, access **Customize Contracts** > **Manage Contract Types**.
2. Click **Customize** on the contract type you want to edit.
3. (Optional) Select the **Require contract approval before signature** check box.

   When you select the check box, you can only send contracts in these statuses to DocuSign:

   - *Active*
   - *Approved*
   - *Expired*
4. (Optional) Access **Customize Contracts** > **Manage Contract Reasons**.

   Create reasons for when you:

   - Cancel contracts.
   - Mark contracts as *Needs Attention* or *Does Not Need Attention*.
   - Terminate contracts.

Related Information
Tasks
Create New Contracts on page 106

Steps: Add Custom Fields to Contracts and Projects

Context

You can add custom fields to your:

- Contracts.
- Intake.
- Projects.
- Reports.

Steps

1. Access **Field Settings** > **Custom Field Groups** from **Settings**.

   Create a custom field group to assign your custom field to.
2. Access **Field Settings** > **Custom Fields** from **Settings**.

   Create custom fields and assign them to your custom field group.

   To create conditional fields, select *Add Conditions* from the **Options** prompt.
3. Customize Contracts and Contract Intake Forms on page 15.

   In the **Customize Layout** section, select the fields you want to include from the custom field group you created.

Customize Project Type and Contract Layouts

Prerequisites

Create sourcing projects.

Context

You can customize the appearance of your **Project Types** and **Contracts** in **Pipeline** and **Intake**.

Steps

1. Access **Settings** and select **Customize Projects** or **Customize Contracts**.
2. Select the **Project Type** to configure.
3. On the **Customize Layout** section, drag and drop the field **Sections** to customize the order in which the fields display.

   Click the arrow icon to select specific **Custom Fields** to display in **Custom Field Groups**.

Result

Your customized fields and field groups display in **Project Types** and **Contracts**.

Create and Activate Custom Project Fields

Prerequisites

Create a sourcing project or contract.

Context

You can define a variety of fields by using our custom fields functionality and configure fields as conditional. Example: Control the list of available field options based on previous answers from suppliers.

Steps

1. Access **Settings > Field Settings > Custom Field Groups** from the **Settings** menu.
2. Enter a **Group Name** and click the **Add Group** button.
3. Access the **Custom Fields** section.
4. Complete the **Custom Fields** grid and click the **Add Field** button.
5. (Optional) Select **Add Conditions** from the **Select Option** drop-down menu to add conditions using **If** and **Then** statements.
6. To apply conditional fields to projects, access **Settings** > **Customize Projects** > **Manage Project Types**.
7. Select the custom conditional fields and how you want to include them in your projects.
8. To activate custom fields in **Project Types**, access **Settings** > **Customize Projects** and select the type of project for your customized fields.
9. Configure **Project Visibility**.

Result

You can see conditional fields in your **Projects.** For configuration in contracts or supplier profiles, navigate to similar sections in **Customize Contracts** and **Supplier Profiles**.

Create Milestone Templates

Prerequisites

Create sourcing projects and configure **Project Types**.

Context

You can create **Milestone Templates** to enable you to configure **Milestones** for any **Project Type** on Pipeline dashboard.

Steps

1. Access **Settings > Customize Projects**.
2. Select a **Project Type**.
3. On the **Milestone Template** section, enter a **Milestone Name** and click **Add**.
4. To use **Milestone Template**s, access your **Pipeline** dashboard and click the **Quick-Add** button.
5. Select **Project Type**.
6. On the **Project Milestones** section, complete the grid.

Result

You can use the template for all future milestones in the **Project Type**.

Concept: Custom Intake Links

Custom intake links are tailored URLs that route stakeholders to specific intake forms in Strategic Sourcing, skipping all interaction with the pipeline dashboard. With custom intake links, your team can break out project or contract type requests and send users directly to the intended form from any location, such as an internal database or intranet at your company.

To set up custom intake links, access your **Settings** and select the **Customize Projects** or **Customize Contracts** tab. You can select an option from the menu next to the link to customize the project or contract type that your default intake link will lead to. If your company has selected **Include on intake** for the custom fields, the default intake link displays on the customize projects and customize contracts pages.

Project and contract type links streamline which project or contract type stakeholders will begin drafting their request for when they select the custom intake link. You can configure a custom link for each project or contract type included on intake so that your stakeholders go directly to the correct request page.

You can share these links on any internally used company website or document.

Approvals

Create Approval Groups

Prerequisites

Company admins can create approval groups for your company.

Context

You can configure approval groups, which enable the correct members of your company to evaluate supplier review responses on your forms.

Steps

1. Navigate to **Settings** > **Approvals** > **Add Approval Group**.
2. Select **Add Approvers**.
3. Add approvers. You can only add approvers from the company users list.
4. Select one of these **Approval Options**:
    - **Any (1) Approver Can Approve**
    - **All Approvers Must Approve**

    If you select **All Approvers Must Approve**, you can set the order of the approvers for the group by selecting the **Set an Approval Order** check box. The approval order controls when approvers can approve or reject a supplier response, and when they receive notifications to review supplier forms.

Next Steps

You can select approval groups on supplier forms.

Related Information
Tasks
Create Supplier Form Templates on page 130

Steps: Approve Projects

Context

You can require project approvals from individuals and groups in your company. You can also:

- Set up approval groups and rules to automate the process.
- Send and monitor approval requests before project completion.
- Retract approval requests.
- Record approval details.

Steps

1. Create Approval Groups on page 17.
2. Access **Approvals** > **Project Approval Flows** from **Settings**.

    Create rules to define criteria for who approves projects in your approval phases.

    Approval groups in:

    - A single phase receive approval requests simultaneously.
    - Consecutive phases receive requests sequentially.
3. From a project, click **Preview**.

    Preview the approvers for the project before sending for review.
4. Set the **Project Status** to **Send for Approval**.

Result

Strategic Sourcing sends email notifications and project details to approval groups.

Next Steps

Use the **Approvals** section on your project to manage the status of approvals.

Steps: Approve Contracts

Context

During the contracting process, you can require approvals from individuals or groups in your company. You can:

- Set up approval groups and rules to automate the process.
- Send and monitor approval requests.
- Record approval details before executing a contract.

Steps

1. Create Approval Groups on page 17.
2. Access **Approvals** > **Approval Rules** from **Settings**.

   Create approval rules to manage who approves contracts and how Strategic Sourcing evaluates rules from top to bottom.
3. From a contract, set the **Contract Status** to *Send For Approval*.
4. (Optional) To retract an approval request, set the **Contract Status** to *In Progress*.

Result

Strategic Sourcing sends email notifications to approvers. The **Contracts** workbench now has an **Approvals** tab to track approvers and the status of approvals.

Related Information
Reference

Reference: User Roles in Contracts on page 55

Field Settings

Hide Fields on Intake and Projects

Prerequisites

Create sourcing projects and configure **Project Types**.

Context

You can hide fields on pipeline projects and intake forms, enabling you to simplify project views and forms.

Steps

1. Access **Settings** > **Customize Projects** and select the project type that you want to configure.
2. Access the **Customize Layout** section.
3. Clear the **Project** or **Intake** check box next to the field that you want to hide.

   You can hide all fields in a subsection by clearing the **Project** or **Intake** check box next to **Display all fields on**.

Result

Fields you exclude won't display on intake forms or projects.

Add Tooltip Hints to Default Fields

Prerequisites

Create **Default Fields**.

Context

You can add **Tooltips** hints to default fields in your projects to provide additional information and instructions when users create or edit **Project** fields.

Steps

1. Access **Field Settings > Default Fields** from the **Settings** drop down menu.
2. Select the **Default Field** you want to add **Tooltips** to and click the **Edit** button.
3. Add hints or instructions on the **Hint (Optional)** column.

Result

Hints display as hover text on configured **Default Fields**.

Create Conditional Lists for Custom Fields

Prerequisites

Create a project, contract, or supplier profile.

Context

Conditional lists enable you to control the list of available options in certain fields based on prior answers. You can create new conditional list options for any single-select custom field. You can report on dependent fields in the same way as custom fields.

Steps

1. Access **Field Settings** > **Custom Fields** from **Settings**.
2. (Optional) Add a new field.
3. Click **Add Options** on the field you want to add a conditional list to.
4. Enter your new options and click **Add**.
5. Click **Add Dependent Fields**.
6. Enter a name and click **Save**.
7. Click **Add Options** on each field you want to add dependent fields to.
8. Enter your dependent fields and click **Add**.

   You can further add dependent fields on dependent fields.

Result

In **Settings**, you can see which fields have dependent fields.

Example

Set up single-select custom fields for states and cities:

Field	Options
California	Los Angeles

Field	**Options**
	San Diego San Francisco
Chicago	
New York	Albany New York City

Next Steps

Test your custom fields in contracts, projects, and supplier profiles.

Configure Savings Trackers

Prerequisites

Create sourcing projects.

Context

You can manage and track company spending by setting savings goals and configuring savings types.

Steps

1. Access **Settings > Financial Details**.
2. As you complete the **Financial Details** grids, consider:

Option	Description
Fiscal Year	Set your company fiscal year start date.
Savings Goal	Enter the amount of savings you expect during the fiscal year. The **Savings Tracker** currency matches the default currency set for the company account.
Savings Types	Enter trackable savings types and select recognized or unrecognized savings using the **Recognized Savings** check box. Strategic Sourcing tracks both recognized and unrecognized savings and calculates **Recognized Savings** towards the savings goals defined by your company.

Result

You can determine how close your projects are to achieving savings goals.

Third-Party Integrations

Set Up DocuSign Sandbox in Workday Strategic Sourcing Sandbox

Prerequisites

Set up and log into a DocuSign Sandbox account at https://go.docusign.com/sandbox/productshot/.

Context

You can set up and test DocuSign for your contracts in your Workday Strategic Sourcing (WSS) Sandbox environment. You can't connect a DocuSign Production account to WSS Sandbox. Only connect your WSS Sandbox environment to a DocuSign Sandbox account.

Steps

1. Select **Settings**.
2. Click on the **Integrations** tab.
3. In the **Manage E-Sign Integrations** section, click **Connect** next to DocuSign.
4. Click **Allow Access** in the DocuSign permissions request pop-up.
5. Select your company from the drop-down list.
6. Access your user profile.
7. In the **Integrations** section, click **Authorize** next to DocuSign.
8. (Optional) Add additional users to DocuSign Sandbox to enable testing in WSS Sandbox.

   The users need to authorize DocuSign in their WSS user profiles after logging into DocuSign Sandbox.

Related Information
Reference
International Trade Administration (ITA) Data Services Platform

Set Up Supplier Sanction List Screening in WSS

Prerequisites

Sign up for the International Trade Administration's (ITA) Data Services Platform and subscribe to the Consolidated Screening List API.

Context

When you create or change the names of suppliers, you can compare supplier information with the Consolidated Screening List from the ITA. This screening helps you to:

- Comply with federal law.
- Detect and mitigate potential risk to your organization.

Steps

1. Access **Integrations** from **Settings**.
2. Click the **Enable Sanction List Integration** toggle.
3. As you complete this task, consider:

Option	Description
API Key	The API key that you retrieved from the ITA Data Services Platform.

Option	Description
Minimum Name Score Threshold	A value of 100 returns only names that exactly match the characters that you entered as the name of the supplier. A value of 50 returns all names that are 50% similar based upon the matching logic of the search tool. By lowering the threshold, you get a broader result set.

Result

Workday Strategic Sourcing (WSS) pages the name of a supplier against the sanction list when you:

- Add a new supplier.
- Edit the existing name of a supplier.
- Manually rerun the screening.

Sanction list screening results display in the Verifications section on the profile of a supplier. When a supplier matches a sanctioned entity, WSS notifies you through:

- A message on the supplier profile.
- Email.
- The notifications panel.

Create Supplier Profile Custom Groups and Fields

Prerequisites

Create sourcing projects.

Context

You can create custom field groups and fields on your **Supplier Profile** to help organize and report on your suppliers in your **Supplier Directory**.

Steps

1. Access **Supplier Profile** from the **Settings** menu.
2. Enter a name for the new group on the **Supplier Profile Custom Field Groups** section and add the group.
3. Drag and drop the groups you created to your preferred order.
4. To add custom fields to your **Custom Field Group**, enter a field name on the Supplier Profile Custom Fields section.
5. Select the **Group** for the new custom field.
6. Select **Add Field**.
7. Select **Edit** on **Supplier Profile Custom Fields** to change the **Field Type**.

Result

You can view and report on suppliers in your **Supplier Directory**.

Related Information
Tasks
Create Conditional Lists for Custom Fields on page 20

Automate Intake

Context

You can automate contract and project intake by setting up rules to assign requests to specific users. The assignee becomes the owner of the corresponding contract or project created.

Steps

1. Access:
   - **Automation** > **Projects Intake Routing** from **Settings**.
   - **Automation** > **Contracts Intake Routing** from **Settings**.
2. Click **Create New Rule**.

   You can assign contracts or projects to active users with a *Sourcing Manager* role or higher.

   When you disable users or update stakeholders responsibilities, rules might need reassignment. When Strategic Sourcing can't assign a request to a user, it comes in unassigned and notifies administrators.

   When you enter multiple users in the **Then Send To...** field, you must select a routing pattern to determine how Strategic Sourcing selects the sourcing owner.

Option	Description
Sequential	Assigns intake requests sourcing owners in the order listed in the **Then Send To...** field.
Even distribution	Assigns intake requests based on the number of projects or contracts they’re currently sourcing owner on.
Team allocation	Enables you to set permissions for all users you add to the rule.
3. (Optional) Drag and drop the rules to reorganize them.

   Strategic Sourcing checks rules from top to bottom.

Result

Intake forms that match your rules generate an assignment in pipeline and contracts, and notify the assigned user.

Import Data

Prerequisites

Submit a Customer Care Case to enable the **Data Importer**.

Context

You can create new contracts, projects, or suppliers in Workday Strategic Sourcing (WSS) and update existing data in WSS using the **Data Importer**. You can also upload the commodity codes you and your suppliers use.

Workday recommends testing data imports in your Sandbox environment because you can’t mass delete data in WSS.

Steps

1. Select **Navigate** > **Data Importer**.
2. Download the template for the type of data that you're importing:
   - Commodity Codes
   - Contracts
   - Projects
   - Suppliers
3. Enter and save your data in the downloaded template. As you complete this step, consider:

Option	Description
Data Dictionary Tab	Details settings configuration in the account for use as reference when filling tabs.
Commodity Codes Template	Each row represents a new record or updates to an existing record as you add data to import. When you have both Workday and Strategic Sourcing, Workday recommends configuring your commodity codes in Workday and exporting the list using EIB. You can then transfer your commodity codes to the data importer template to upload them into WSS.
Contracts Template	Each row represents a new record or updates to an existing record as you add data to import. This template contains additional tabs for: • Milestones • Stakeholders • Suppliers You can also import contracts in a hierarchy. See Import Contracts with a Contract Hierarchy on page 27.
Projects Template	Each row represents a new record or updates to an existing record as you add data to import. This template contains additional tabs for: • Milestones • Savings • Stakeholders • Suppliers When savings data is added or updated, savings amounts are added by line. You can’t change existing savings data using the **Data Importer**.
Suppliers Template	Each row represents a new record or updates to an existing record as you add data to import. When you have the standard onboarding form enabled, more tabs display. The **Countries** and **Regions** tabs function as data dictionaries for these tabs: • **Phones** • **Bank Accounts**

Option	Description
	• **Tax IDs** You only need to populate the tabs if you aren't integrated with Workday. You can use the Supplier Connector to populate this information from Workday into Strategic Sourcing.

- When you delete columns, validation errors occur. You can leave columns blank if there are no values to provide.
- When creating new records, leave the **Contract ID** or **Project ID** columns blank.
- We recommend contract and project names to be unique per record. No validation occurs on duplicate contract and project names.

4. (Optional) To add attachments to contract and project records, add the name of the file or folder to the **Attachments** column of the record row in the template. As you complete this task, consider:

Option	Description
Single attachment file	You can prepare single attachments in 2 ways: • Add the filename and extension to the **Attachments** column. Example: filename1234.pdf • Put a single file in a folder and add the folder name to the **Attachments** column.
Multiple attachment files	Put all files in a folder and add the folder name to the **Attachments** column.

Names in the **Attachments** column must be an exact match to the file or folder name you're importing. The name of each item being uploaded needs to be unique. Each file or folder size can only be 5GB. You can only upload 1 file or folder per record.

5. To upload the data into WSS, click **Start New Import**. As you complete the upload, consider:

Option	Description
Upload Type	When you update existing data, WSS requests a Primary Data Key for edits. Use the System ID in WSS as the primary key.
Data Type	Select the data type you're importing.

6. To validate your data, click **Continue to Data Editor**.
7. Click **Start Validation** to validate all data in WSS before uploading the import data.
8. If the validation contains no errors, WSS displays a **Data Valid** check mark on the page.
   - WSS highlights rows with detected errors in red on the data table. Scroll through the columns to see the specific errors. When you click the red cell of a column, a window displays the error that occurred.
   - To address errors, you can directly edit the Excel file or click **Update Data** to export an Excel file. This export lists errors in a **Validation Errors** column in each tab that contains data.
9. (Optional) To attach documents to contract and project records as part of the import process, click **Upload Attachments**.
   a) Click **Download Flies Zip Template**.
   b) In the ZIP file, add attachments to each project folder for upload, and click **Upload Attachments** again. The file size of the ZIP file can't exceed 5 GB.
   c) Once uploaded, click **Start Validation** to validate attachments.

10. (Optional) After resolving validation errors, click **Update Data**.
    a) Click **Upload Revised Data**.
    b) Click **Start Validation** to identify any errors that persist.
11. When validation is complete, click **Begin Importing Data**. Then click **Begin Import**.
    - Workday recommends conducting a test import on a subset of data to ensure that it reflects accurately once imported into WSS.
    - The import process continues to run if you navigate away from the page or close your browser tab.
    - You can't import any rows with validation errors. The import displays as **Import Failed** in the **Data Importer**, but WSS still imports any valid rows.
12. (Optional) To review data as WSS imports it, select **Navigate** > **Reports** and view the dataset. New records display in the **Table** visualization as the import runs.

Related Information
Reference

Reference: Data Importer Validation Rules on page 52

The Next Level: Strategic Sourcing Data Importer Instructions

Import Contracts with a Contract Hierarchy

Context

You can import new contract records into Strategic Sourcing in a hierarchy if they're related to the same supplier. You need to format the **Contracts** template to indicate a hierarchy. In the Contracts tab of the template, use the **Hierarchy ID** and **Hierarchy Parent ID** columns to add a hierarchy.

If any row in the Excel file contains contracts that are in a hierarchy, you must fill the **Hierarchy ID** column in for every record. When you aren't importing a hierarchy, you can leave the **Hierarchy ID** and **Hierarchy Parent ID** columns blank.

Steps

1. Add all contracts into the template.
2. Number each contract consecutively in the **Hierarchy ID** column.

   Example: If there are 100 contracts in the template, start at row 2 and label them 1-100 in the **Hierarchy ID** column.

   The order of the rows in the template doesn’t affect the hierarchy.

   Strategic Sourcing only uses this ID to establish the hierarchy and doesn’t display anywhere in Strategic Sourcing once imported.
3. To indicate a child contract, add the hierarchy ID of the relevant parent contract to the **Hierarchy Parent ID** column.

   For any contracts that aren’t children, you can leave this column blank.

Example

Title	Hierarchy ID	Hierarchy Parent ID
ProTech NDA	1	
Catering San Francisco Office	2	
Field Events Vendor - Marketing EMEA	3	
Germany Marketing Event	4	3

Title	Hierarchy ID	Hierarchy Parent ID
Paris Marketing Event	5	3

Contracts 1 and 2 aren't in a hierarchy. Contracts 4 and 5 are children contracts to Contract 3. On any contract that is a child contract, you only need to denote the ID of its parent in the **Hierarchy Parent ID** column.

Related Information
Reference

Reference: Data Importer Validation Rules on page 52

Workday Integrations

Setup Considerations: Supplier Contract Connector Integration

You can use this topic to help make decisions when planning your configuration and use of the Workday Strategic Sourcing Supplier Contract Integration. It explains:

- Why to set it up.
- How it fits into the rest of Workday.
- Downstream impacts and cross-product interactions.
- Security requirements and business process configurations.
- Questions and limitations to consider before implementation.

Refer to detailed task instructions for full configuration details.

What It Is

Disposition: / Status:
We refer to the feature as the Supplier Contract Connector Integration above, but it's simply the Supplier Contracts Connector here, and "contracts" is plural here but not in the title. Are they the same? We probably need to use the same language.

Based on what I saw in the AG, it seems that setup for the integration is for the WSS side, and setup for the connector is for the Workday side. Is this correct? Do customers understand this? We might want to make the point more specifically here in the setcon if it applies. Side note: Is there a reason we have a setcon for the integration but not for Supplier Connector?

The Supplier Contracts Connector Integration enables you to synchronize supplier contracts between Workday Strategic Sourcing (WSS) and Workday.

Business Benefits

Disposition: / Status:
What are the benefits? Does it simplify or consolidate a process? In 1 of the Community topics, we mention that the integration helps provide a single source of truth and that WSS receives changes to supplier details on a regular basis (to ensure accuracy?). Both are great benefits to mention if they apply.

We can probably tighten up the language here. We still need the benefits, but we can start w/ something like: The Supplier Contracts integration enables you to:

- Act on contracts in WSS. [side note: what do we mean by "act on"?]
- Identify contract header information in Strategic Sourcing that you can pass into Workday.

The Supplier Contracts helps provide a single source of truth for your contract information, enabling WSS to receive changes to supplier details on a regular basis to ensure accuracy. The integration enables you to:

- Configure and edit contracts that originated in Workday in WSS.
- Identify contract header information in Strategic Sourcing that you can sync into Workday.

Use Cases

Disposition: / Status:
This looks like a list of customers who can use the Workday Strategic Sourcing Supplier Contract Integration, but we don't seem to mention how they can use it. In this section, we try to cite specific business problems that customers face and that the feature can help them solve. We want to help them envision themselves using the feature. To fill out the details, we can ask ourselves: What are the customers with the products doing? What are their roles? What process are they using?

In the Business Benefits section, we mention updating contact info, as well as creating purchase orders, invoices, and receipts. If possible, we can create use cases from those details. How can a customer use the integration for these items? We even have an example topic in this map. We can use some of those details in this section as well.

Also, this list hints at some features and products that we can include in the Connections and Touchpoints section. See the notes in that section.

We enable you to connect your supplier contracts between Workday Procurement and Workday Strategic Sourcing. We also better enable you to improve your error handling between developers and sourcers.

Questions to Consider

Questions	Considerations
Disposition: / Status: We don't typically ask yes/no questions in this section since it seems like customers can say 1 or the other, and we might not have anything to add. What conversation are we trying to start w/ customers re: SSO setup? What choices do they have, and what configuration decisions can we help them make? We can discuss in the meeting. Have you completed SSO setup steps in Strategic Sourcing?	**Disposition: / Status:** Line edit: Please use a colon instead of a period at the end of this phrase. Also, we need to use parallel structure here. If we use these points, we can say something like: As you complete the SSO setup, consider: • The Workday tenant name. • Which data center hosts your tenant. • The status of your tenant mapping in WSS. As you complete the SSO setup, consider. • Workday tenant name. • Which data center is your tenant hosted in? • Have you been able to complete tenant mapping in WSS? Check with your integration consultant.
Disposition: / Status: This looks more like a troubleshooting topic than a question to consider. Are customers still in the planning stage, or have they already set up the integration? If the latter, this might be a case for troubleshooting and not a setcon. Also, this is not a question or the format we use for this section of a setcon. I haven't done anything to the WSS contract (no direct updates and no revisions), but it seems to generate an amendment on the next integration run.	Workday updates WSS contract after they're imported. **Disposition: / Status:** Where do customers configure this field? This is borderline how-to info and might be more useful on a task topic. Also, this uses passive voice. Suggested edit (please confirm this is correct): When you configure the *external_id* field, Workday considers this as an update to the WSS contract and and uses the integration to create an amendment if the contract already includes transactions.

Questions	Considerations
	When you configure the *external_id* field, Workday considers this as an update to the WSS contract, and uses the integration to create an amendment if the contract already includes transactions. WSS updates the existing contract for Workday contracts with these statuses or that don't include transactions: • Approval • Draft • In Process You can expect Workday to create at least 1 amendment against the contract after the first import.

Recommendations

None.

Requirements

No impact.

Limitations

- Attachments on WSS contracts can't exceed 30MB in size.
- We recommend you name contract attachments without underscores.

Tenant Setup

No impact.

Security

Domains	Considerations
Integration Event in the Integration functional area.	Enables users to take related actions to launch and schedule an integration. Users need to have View and Modify report and task permissions.
Process: Supplier Contract - Create/Edit in the Supplier Contracts functional area.	Enables users to retrieve sets of companies and hierarchies they can access when they create contracts in WSS [using a Workday-owned contract type]. Users need to have View and Modify report and task permissions.
Process: Supplier Contract - View in the Supplier Contracts functional area.	Enables users to view spend transaction amounts on contracts. Users need to have View and Modify report and task permissions.
Self-Service: Account in the System functional area.	Enables the transfer of user information between Workday and WSS. Users need to have View report and task permissions.
Set Up: Account Provisioning Applications in the System functional area.	Enables users to activate account provisioning. Users need to have View and Modify report and task permissions.

Domains	**Considerations**
Workday Strategic Sourcing in the Procurement functional area.	Enables users to access the WSS worklet tile. Note that this domain only supports unconstrained security groups. We recommend you create a user-based security group that includes users that need access to WSS. Users need to have View and Modify report and task permissions.

Business Processes

Business Process	**Considerations**
Supplier Contract Amendment Event	Enables the WSS Connector to crate and update contract amendments in Workday. Use the *Submit Supplier Contract Amendment* web service to configure the *Business Process Policy* initiating action.
Supplier Contract Event	Enables the WSS Connector to create and update contracts in Workday. Use the *Submit Supplier Contract* web service to configure the *Business Process Policy* initiating action.

Reporting

Disposition: / Status:

On the overall WSS setcon, we list some dashboards. Do any of them apply here?

You can use the **Integration Errors** tab on the **Contracts** module in WSS to view all your contracts that have integration errors. Individual contract pages also include an **Integration Errors** section where you can view the details of any errors.

Integrations

Disposition: / Status: **We don't have guidelines on how to format this section, but in keeping with the other sections that use tables, let's say Web Services here.** **Web Service**	**Considerations**
Get Supplier Contracts *Submit Supplier Contract*	**Disposition: / Status:** We can probably simplify the language to something like: Enables Workday to create, verify, and integrate supplier contracts into WSS. WSS uses the information gathered from the Get web service to determine if a WSS contract already exists in Workday. Workday uses the Submit web services as an initiating action to create supplier contracts, which are then integrated into WSS.
Get Supplier Contract Amendments *Submit Supplier Contract Amendment*	**Disposition: / Status:**

Disposition: / Status: We don't have guidelines on how to format this section, but in keeping with the other sections that use tables, let's say Web Services here. **Web Service**	**Considerations**
	Similar suggestion here: Enables Workday to create, verify, and integrate supplier contract amendments into WSS. WSS uses the information gathered from the Get web service to determine if a WSS contract amendment already exists in Workday. Workday uses the Submit web services as an initiating action to create supplier contract amendments, which are then integrated into WSS.

Connections and Touchpoints

Connection	Considerations
Procurement	You can account for invoice price variances and how they impact the average cost purchase items and supplier items.
Supplier Accounts	You can onboard suppliers and transfer supplier information between WSS and Workday. You can use the integration to synchronize the onboarding of new suppliers. We enable supplier contacts to synchronize edits to their own information.

Workday offers a Touchpoints Kit with resources to help you understand configuration relationships in your tenant. Learn more about the Workday Touchpoints Kit on Workday Community.

Related Information
Reference
2022R2 What's New Post: Workday Strategic Sourcing Contract Handling

Steps: Set Up Supplier Connector for Strategic Sourcing

Prerequisites

In Workday:

- Enable OAuth 2.0 clients on the **Edit Tenant Setup - Security** task.

In Strategic Sourcing:

- As a company admin, generate and make a note of your company token and user token. See Create a Personal API Token on page 58.

Context

The Supplier Connector synchronizes suppliers and supplier information between Workday and Strategic Sourcing.

We recommend that you onboard new suppliers through Strategic Sourcing. You can use the standard onboarding form to easily capture supplier information such as addresses, bank details, and tax details. When you approve suppliers in Strategic Sourcing, the connector syncs them to Workday as inactive suppliers and initiates the approval process.

For best results, we recommend that you:

- Use the standard onboarding form to onboard suppliers.
- Enable suppliers to edit their own information on onboarding forms.

Once you approve a supplier, Workday is the source of truth. When you update any shared fields, update them in Workday, with 2 exceptions:

- You can edit supplier contact details in either Workday or Strategic Sourcing after the supplier is synced.
- Suppliers can edit their information in Strategic Sourcing. The connector can sync these changes to Workday and initiate the change approval process.

You run this integration twice on an ad hoc basis as part of the setup:

- Once with certain settings to verify the connection to Strategic Sourcing.
- A second time with different settings to synchronize all existing supplier information.

After these 2 runs, you set up a regular schedule to synchronize information that changed since the previous run.

Steps

1. (Optional) Configure Single Sign-On (SSO) for Strategic Sourcing.

   When you use the standard onboarding form to onboard suppliers, set up SSO.

   See Steps: Configure Single Sign-On (SSO) for Workday Solutions.
2. (Optional) In Workday, access the **Maintain Supplier Classifications** task.

   To sync supplier diversity information between Workday and Strategic Sourcing, set up diversity classifications in Workday.

   Note:

   Configure each diversity classification on a separate row in the **Classification Name** column with the *Diversity* classification category. If you configure multiple classifications in a single row using the **Supplier Classification Type** column, the integration won't sync correctly.

   When you set up diversity classifications for an existing integration, perform a full sync of all supplier data before running your normal integration schedule.

   See Steps: Set Up Supplier Diversity Discovery Board.
3. (Optional) Access the **Maintain Contact Types** task.

   Map configured contact types to the Supplier Contact role. After you run the integration, all contact types mapped to the *Supplier Contact* option assigned in Workday become available for use in Strategic Sourcing. When a contact type is in use, you can't remove it from **Maintain Contact Types**.

   Security: *Set Up: Supplier* domain in the Suppliers functional area.
4. Configure an Integration System User (ISU) and grant the integration Get and Put access to these domains:

   - *Integration Event* in the Integration functional area.
   - *Set Up: Supplier Contacts* in the Suppliers functional area.

   See Steps: Grant Integration or External Endpoint Access to Workday.
5. Create Integration System Security Groups.

   Create an unconstrained integration system security group. Add the ISU to the security group.

6. From the related actions menu of the security group, select **Security Group** > **Maintain Domain Permissions**.

   Assign these permissions:

Option	Description
Domain Security Policies Permitting Modify Access	*Reports: Supplier* *Set Up: Supplier*
Domain Security Policies Permitting View Access	*Reports: Supplier* *Set Up: Supplier*
Domain Security Policies Permitting Put Access	*Set Up: Supplier* *Set Up: Supplier Contacts* (when the domain doesn't inherit permissions from *Set Up: Supplier*)
Domain Security Policies Permitting Get Access	*Reports: Supplier* *Set Up: Currencies* *Set Up: Settlement* *Set Up: Supplier* *Set Up: Supplier Accounts* *Set Up: Supplier Categories*

   Security: *Security Configuration* domain in the System functional area.

7. Edit Business Process Security Policies.

   Edit the security policy for the *Supplier Event* business process definition.

   Give your security group access to the *Submit Supplier* web service as an initiating action.

8. Access the **Activate Pending Security Policy Changes** task.

   Security:

   - *Customer Central Security Administration* domain in the Customer Central functional area.
   - *Security Activation* domain in the System functional area.

9. Register API Clients for Integrations.

   From the **Scope (Functional Areas)** prompt, select *Integration* and *Suppliers*.

   Make a note of the **Client ID** and **Client Secret**.

10. From the related actions menu of the API client, access the **Manage Refresh Tokens for Integrations** task.

    From the **Workday Account** prompt, select your ISU.

    Generate a new **Refresh Token** and make a note of it.

    Security: *Security Administration* domain in the System functional area.

11. Create Integration System.

Select the *Supplier Onboarding (WSS)* integration template.

Enable optional integration services:

- **Supplier Onboarding (WSS) Change Detection** configures the integration to only transfer suppliers that are new or changed since the last integration run. To improve performance, we recommend that you enable this service on your regular scheduled integration runs.

  Workday doesn't recommend running the integration as back dated. If you back date the integration, it impacts the existing supplier data.
- **To WSS** transfers supplier information from Workday to Strategic Sourcing.
- **From WSS** transfers supplier information from Strategic Sourcing to Workday.

12. From the related actions menu of the integration system, select **Integration** > **Configure Integration Attributes**.

As you complete the grid, consider:

Integration Attribute	Description
Verify Connection and format WSS configuration	When you enable this attribute, Workday verifies the connection to the Strategic Sourcing endpoint and formats Strategic Sourcing custom fields for integration mapping. The integration doesn't transfer any supplier information. Enable this attribute when you run the integration for the first time. Disable this attribute for other runs.
Workday API Client ID	Enter the client ID that you generated on the **Register API Client for Integrations** task.
Workday API Client Secret	Enter the client secret that you generated on the **Register API Client for Integrations** task.
Workday API Refresh Token	Enter the refresh token that you generated on the **Manage Refresh Tokens for Integrations** task.
WSS API URL	Enter the API URL for your Strategic Sourcing tenant. For up-to-date URLs, see Workday Strategic Sourcing API Documentation.
User Email	Enter the email address from your user profile in Strategic Sourcing. The address must match the email associated with your user and company API tokens.
API-key	Enter your company API token from Strategic Sourcing.
User Token	Enter your user token from Strategic Sourcing.
segmentation_status	Enable this attribute to approve suppliers automatically in Strategic Sourcing if they're approved in Workday. We recommend that you enable this attribute.
description	Select a value from Workday to display in the **Description** field in the supplier directory and on supplier profiles in Strategic Sourcing.

Integration Attribute	Description
	We recommend that you select *Supplier ID*.
Enable Supplier Event BP	Select to initiate the *Supplier Event* business process in Workday automatically when you transfer suppliers from Strategic Sourcing. You can't enable this attribute and the **Save Supplier for Later** attribute at the same time. Don't enable this attribute when you want to transfer onboarded suppliers in *Approved* status.
Save Supplier for later	Select to create suppliers in *Draft* status when the integration transfers them from Strategic Sourcing to Workday. Don't enable this attribute when you want to transfer onboarded suppliers in *Approved* status.
Enable Supplier Change Event BP	Select to initiate the *Supplier Change Event* business process in Workday automatically when a supplier changes in Strategic Sourcing.
approval status	Select to only transfer suppliers that have certain approval statuses. For the initial supplier sync, we recommend that you only select the *APPROVED* option. After the first sync, we recommend you select the *DENIED* option also.
supplier status	Select to only sync suppliers that have certain statuses. For the initial supplier sync, we recommend that you only select the *Active* option. After the first sync, we recommend you select the *Inactive* and *Hold* options also.

Security: *Integration: Build* and *Integration: Configure* domains in the Integration functional area.

13. Launch an Integration .

    Run the integration once with the **Verify Connection and format WSS configuration** integration attribute enabled.

    Note: After verifying the connection, don't change any **Field Type** options in the **Onboarding Profile Fields** settings in Strategic Sourcing until you finish setting up the regular integration schedule.

14. (Optional) When you use the standard onboarding form to collect supplier data in Strategic Sourcing, access **Settings** in Strategic Sourcing.

    Access **Supplier Profile** > **Onboarding Profile Fields** and ensure that any fields required to create suppliers in Workday are also required on the onboarding form.

15. (Optional) When you use custom bank account validations in Workday, test that the validations synced to Strategic Sourcing.

    In Workday, edit the *Self-Service: Account* domain security policy and ensure that all users have *View* and *Modify* permissions for reports and tasks.

    In Strategic Sourcing, access the supplier directory. Create a new supplier record, then navigate to the **General Profile**.

    To test your custom validations:

    a. Approve the supplier.
    b. Access the **Banking Information** and select a **Bank Account Country**.
    c. Enter invalid values in fields for which you configured custom validations on the **Edit Payee Bank Account Validation Override** task in Workday. Ensure that the validations display.

    Ensure that Strategic Sourcing displays the same required and optional fields that you see when creating a supplier in Workday.

    Don't save the supplier.
16. Launch an Integration .

    After verifying the connection, perform an initial sync of supplier data:

    - Edit the integration attributes to disable **Verify Connection and format WSS configuration**.
    - Change the **approval status** and **supplier status** integration attributes to only transfer suppliers that are currently active and approved.
    - Run the integration a second time.

    After the initial sync of supplier data, configure the integration to run regularly:

    - For better performance, edit the integration to enable the **Supplier Onboarding (WSS) Change Detection** integration service.
    - Edit the **approval status** and **supplier status** integration attributes to include relevant changes in status, such as suppliers that you deny or set as inactive after the initial sync.
    - Set up your regular integration schedule.

    We recommend that you schedule the integration to run every hour when you enable suppliers to edit their own information.

Result

Once configured and scheduled, the integration regularly synchronizes new or changed supplier information between Workday and Strategic Sourcing.

Next Steps

To perform an ad hoc full sync of all supplier data, see Example: Synchronize All Supplier Data Between Workday and Strategic Sourcing on page 44.

Related Information
Reference

Setup Considerations: Integrations

Reference: Edit Tenant Setup - Security

2021R1 What's New Post: Centralized Supplier Onboarding with Strategic Sourcing

2021R2 What's New Post: Centralized Supplier Editing with Strategic Sourcing

The Next Level: Strategic Sourcing Connectors with Workday: Supplier Connector

Steps: Set Up Supplier Contract Connector Integration

Prerequisites

- Set up Workday Strategic Sourcing (WSS).
- Verify that Workday SSO configuration is complete and accurate.
- Synchronize suppliers between Workday and WSS.
- Set up these security domains. You can access and run the **Test Domain Permissions** task to check if the user belongs to a security domain. If not, configure these domains with the proper users who access WSS:
  - *Integration Event* in the Integration functional area.
  - *Process: Supplier Contract* in the Supplier Contracts functional area.
  - *Self-Service: Account* in the System functional area.
  - *Workday Strategic Sourcing* in the Procurement functional area.
- Set up these business process and security policies:
  - *Supplier Contract Event*
  - *Supplier Contract Amendment Event*

Context

When you create or revise supplier contracts in WSS, the associated contracts in Workday update during the next integration run.

Contracts only update in Workday when the supplier contract in WSS:

- Is active.
- Has a financial company or company hierarchy, Workday contract type, supplier, requester, and sourcing owner.

Steps

1. In Workday, Access the**Activate Account Provisioning** task.

   Select *Strategic Sourcing* as an **SSO Service** and check that the **Environment** column populates with the correct tenant environment, whether it's in an Implementation, Production, or Sandbox environment.

   Configure only 1 entry on the Strategic Sourcing grid. Disable incorrect entries, if there are multiple rows in the grid.

   Security: *Set Up: Account Provisioning Applications* in the System functional area.
2. In Strategic Sourcing, access the **User Profile** for the company you want to enable the integration for.
   - Select **Generate Token** from the **Personal API Token** section.
   - Copy the **API Token** and **User Token**.
3. In Strategic Sourcing, enable these feature flags:

Feature Flag	Functions
contracts	Enables the contracts module.
contracts_workday_connector	Enables the contract synchronization between both WSS and Workday, and enables companies and company hierarchies. Check in these fields for each contract type.
contract_multi_currency	Enables the ability to select a currency per contract.

Feature Flag	Functions
supplier_segmentation	Enables the Supplier Status, Segmentation, and Risk bar on the Supplier Profile.
Contract_revisions	Adds the **Revise** option to active contracts and enables you to make revisions in WSS to active contracts that sync to Workday.
record_notifications	Displays any errors encountered when importing the WSS contract through the integration.

4. Access the **View Integration Template** report.

Select the *Workday Strategic Sourcing Contract Integration* template.

5. From the related actions menu of the **Workday Strategic Sourcing Contract Integration** template that you just created, create an integration system for 1 or more services.

Note: Workday recommends that you create 3 integration systems for 3 services to:

- Send all eligible contract types into WSS.
- Pull all the new active contracts and amendments into Workday.

6. Access the **Create Integration System** task.

Workday recommends that you select *Yes* for both the **Auto Complete Contract** and **Submit Contract** integration attributes.

This configuration ensures that WSS creates supplier contracts in *approved* status.

Security: *Integration Build* domain in the Integration functional area.

Result

You can take action on your supplier contracts once you sync them with Workday, like adding lines, creating purchase orders, supplier invoices, and receipts in Workday. The spend transaction amounts that you maintain in Workday are then visible on the WSS contract. You can factor those amounts into your next contract renewal or extension in WSS.

Related Information
Reference

The Next Level: Strategic Sourcing Connectors with Workday: Supplier Contracts Connector

2022R2 What's New Post: Workday Strategic Sourcing Contract Handling

Steps: Set Up Award to Requisition Integrations

Prerequisites

In Workday:

- Configure Single Sign-On (SSO). Sourcing owners and requesters must be workers in Workday. See Steps: Configure Single Sign-On (SSO) for Workday Solutions.
- Synchronize suppliers between Workday and Strategic Sourcing. See Steps: Set Up Supplier Connector for Strategic Sourcing on page 32.
- Configure a user-based unconstrained security group for the integration owner. See Create User-Based Security Groups.

In Strategic Sourcing:

- Ask your Customer Success Manager to enable these feature flags:
  - **award_wd_requisition**
  - **project_line_items**
  - **projects_workday_connector**
  - **record_notifications**
- Create a Personal API Token on page 58

Context

To automate the process of creating requisitions from awards in Strategic Sourcing, you can set up and schedule integrations to:

- Check Strategic Sourcing for awards that are ready for requisition.
- Create corresponding requisitions in Workday, including any attachments from the award.

Steps

1. Edit Domain Security Policies.

   In Workday, grant the security group that the integration owner is part of View access to **Report/Task Permissions** for the *Worker Data: Public Worker Reports* domain in the Staffing functional area.
2. Edit Business Process Security Policies.

   Edit the security policy for the *Requisition Event (Default Definition)* business process definition in the Procurement functional area.

   Grant the security group access to the **Initiating Action** for *Checkout (REST)*.
3. Access the **Activate Pending Security Policy Changes** task.

   Security:

   - *Customer Central Security Administration* domain in the Customer Central functional area.
   - *Security Activation* domain in the System functional area.
4. Create an Integration System User (ISU) and grant the ISU Get and Put access to these domains:

   - *Integration Event* in the Integration functional area.

   See Steps: Grant Integration or External Endpoint Access to Workday.
5. Register API Clients for Integrations.

   From the **Scope (Functional Areas)** prompt, select *Procurement* and *Staffing*.

   Make a note of the **Client ID** and **Client Secret**.
6. From the related actions menu of the API client, access the **Manage Refresh Tokens for Integrations** task.

   From the **Workday Account** prompt, select your ISU.

   Generate a new **Refresh Token** and make a note of it.

   Security: *Security Administration* domain in the System functional area.
7. Access the **Maintain API Keys** task.

   Select *Strategic Sourcing [API key type]* and enter these values:

   - **Api Key**: Enter the company-wide API token that you generated on your Strategic Sourcing profile.
   - **User Token**: Enter the user-specific API token that you generated on your Strategic Sourcing profile.
   - **User Email**: Enter the email address that you used on your Strategic Sourcing user profile.

   Security: *Security Administration* domain in the System functional area.
8. Create Integration System.

   From the **New Using Template** prompt, select *Award to Requisition (WSS)*.

   Enable the **Requisitions from Workday Strategic Sourcing** optional service.

9. From the related actions menu of the integration system, select **Integration System** > **Configure Integration Attributes**.

   Enter the required integration attributes:

Option	Description
Requisition Submission Option	Select: • *Draft* to create requisitions in *Draft* status so you can edit in Workday before submitting. • *Submit* to submit requisitions automatically and initiate the *Requisition Event* business process. • *Auto Complete* to submit and approve requisitions automatically.
Workday API Client ID	Enter the client ID that you generated on the **Register API Client for Integrations** task.
Workday API Client Secret	Enter the client secret that you generated on the **Register API Client for Integrations** task.
Workday API Refresh Token	Enter the refresh token that you generated on the **Manage Refresh Tokens for Integrations** task.

   Security: These domains in the Integration functional area:

   - *Integration Build*
   - *Integration Configure*

10. Launch an Integration .

    Set up a schedule to run the integration.

11. In Strategic Sourcing, access **Settings**.

    Under **Customize Projects**, select **General Project**.

    In the **Customize Project** section, under **Project Information** > **Project Details**, select the **Financial Company** check box.

Result

The integration is ready to retrieve award data from Strategic Sourcing.

Next Steps

Create requisitions from awards in Strategic Sourcing.

Related Information
Reference

The Next Level: Strategic Sourcing Connectors with Workday: Award to Requisition Connector

Create Workday Requisitions from Awards

Prerequisites

Steps: Set Up Award to Requisition Integrations on page 39

Context

To automate the process of creating requisitions from awards in Strategic Sourcing, you can create projects and mark awards for retrieval by the Award to Requisition integration.

Steps

1. Create a new project to award to a supplier.

   Select the company to create requisitions for. If you can't see your companies from Workday, Single Sign-On might not be configured correctly.

   Note: The Award to Requisition integration doesn’t support segmented security for suppliers. Users who create projects can add suppliers that they don't have access to.
2. From the project, select the **Sourcing** tab, then build a request for proposal (RFP).

   To use the Award to Requisition integration, you must create sourcing events from a project.

   You can build the RFP using 1 or both of these methods:

   - Clicking **Create New RFX**, then clicking **Add a WD Requisition RFP**.
   - Adding goods and services lines directly in the **Line Items** section.
3. Edit the event and add a requisition-enabled worksheet.

   Select either:

   - **Add a Services Requisition Worksheet**
   - **Add a Goods Requisition Worksheet**
4. After the bidding process ends, award the RFP to a supplier.
5. Access the **Award Summary**.

   In the **Award Options Recommendation** section, click **Create Requisition**.

Result

When the Award to Requisition integration runs, Workday retrieves the award data and creates the requisition. Workday includes any attachments that are on the award.

After the integration creates a requisition:

- The **Award Summary** in Strategic Sourcing displays a link to the requisition in Workday.
- The requisition and any resulting purchase order in Workday display a link to the award in Strategic Sourcing.

When the integration fails to create a requisition, Strategic Sourcing displays a notification on the **Award Summary**.

To maintain consistency of data, Workday prevents you from changing some information on requisitions created from awards. You can't:

- Add or remove lines.
- Change line details.
- Change supplier or fulfillment source when sourcing.

Next Steps

Depending on how you configured your integration, continue processing requisitions in Workday:

- Edit and submit requisitions when the integration creates them in *Draft* status.
- Review and approve requisitions when the integration submits them automatically.

Related Information
Reference

Troubleshooting: Supplier Contracts Strategic Sourcing Integrations on page 46

Steps: Set Up Strategic Sourcing Savings Discovery Board

Prerequisites

In Workday:

- Steps: Set Up Tenant for Discovery Boards

In Strategic Sourcing:

- Create a Personal API Token on page 58

Context

You can view realized and projected savings information derived from sourcing projects using the **Spend - Strategic Sourcing Savings** discovery board. The discovery board enables you to view and customize visualizations (vizzes) using data from the **Strategic Sourcing Savings** report data source. You populate this report data source by integrating with Workday Strategic Sourcing.

Steps

1. Create Integration System.

   Select *Workday Strategic Sourcing: Savings* from the **New Using Template** prompt.
2. From the related actions menu of the integration system, select **Integration System # Configure Integration Attributes**.

   Enter these attributes:

   - **WSS API URL**: Enter the Strategic Sourcing endpoint URL for the WSS API. For up-to-date URLs, see Workday Strategic Sourcing API Documentation.
   - **User Email**: Enter the email address that you used in your Strategic Sourcing user profile.
   - **API Key**: Enter the company-wide API token that you generated on your Strategic Sourcing profile.
   - **User Token**: Enter the user-specific API token that you generated on your Strategic Sourcing profile.

   Security: These domains in the Integration functional area:

   - *Integration Build*
   - *Integration Configure*
3. Create an Integration System User (ISU) and grant the ISU *Get* and *Put* access to these domains:

   - *Integration Event* in the Integration functional area.
   - *Reports: Strategic Sourcing Savings* in the Procurement functional area.

   See Steps: Grant Integration or External Endpoint Access to Workday.
4. Launch an Integration .

   Set up a schedule for the integration to retrieve data from Strategic Sourcing.
5. Edit Domain Security Policies.

   Configure the *Reports: Strategic Sourcing Savings* domain in the Procurement functional area. This domain enables discovery board users to access the **Strategic Sourcing Savings** report data source.
6. Copy Workday-Delivered Discovery Boards.

   Make a copy of the **Spend - Strategic Sourcing Savings** discovery board.
7. Access your **Drive**.

   Open your copy of the **Spend - Strategic Sourcing Savings** discovery board and click **Edit**.
8. (Optional) Customize your visualizations and data.

   See Steps: Modify Visualizations.

Next Steps

- Create your own visualizations.
- Share the discovery board with other users.

Related Information
Concepts
Concept: Sharing Discovery Boards
Concept: The Discovery Board Workflow
Reference
The Next Level: Strategic Sourcing Reporting Overview

Example: Synchronize All Supplier Data Between Workday and Strategic Sourcing

This example illustrates how to to synchronize all supplier data between Workday and Strategic Sourcing on an ad hoc basis.

Context

Your *Supplier Onboarding* integration system syncs supplier data between Workday and Strategic Sourcing. The integration runs every hour and only syncs suppliers that are new or changed since the last integration run. To ensure data consistency before you start using new functionality, you want to sync all active suppliers in a single ad hoc integration run.

To perform a full sync, you:

- Suspend your existing integration schedule.
- Edit the integration to disable change detection and to sync active and approved suppliers only.
- Run the integration outside business hours to avoid performance issues.
- Restore the original integration settings and reactivate the hourly integration schedule.

Prerequisites

- Steps: Set Up Supplier Connector for Strategic Sourcing on page 32
  Create an integration system named *Supplier Synchronization* that only syncs suppliers that changed since the last run. Schedule the integration to run hourly.
- Security: *Scheduled Process Management* domain in the Tenant Non-Configurable functional area, and these domains in the Integration functional area:
  - *Integration Build*
  - *Integration Configure*
  - *Integration Event*
  - *Integration Reports*

Steps

1. Access the **Scheduled Future Processes** report.

   Suspend the existing integration schedule.

   a) From the **Process** prompt, select your *Supplier Synchronization* integration.
   b) Click **OK**.
   c) In the **Scheduled Process** column, access the related actions menu of the *Supplier Synchronization* process and select **Schedule Future Process** > **Suspend**.
   d) Click **OK** and **Done**.

2. Access the **All Integration Systems** report.

   To sync all active supplier data, edit the integration to disable the change detection service and exclude canceled, denied, and inactive suppliers.

   a) From the **Integration Template** prompt, select *Supplier Onboarding (WSS)*.
   b) Click **OK**.
   c) Find your *Supplier Synchronization* integration system in the grid.
   d) From the related actions menu of the *Supplier Synchronization* integration system, select **Integration System** > **Configure Integration Services**.
   e) Clear the **Enabled** check box for the **Supplier Onboarding (WSS) Change Detection** integration service.
   f) Click **OK**.
   g) From the related actions menu of the *Supplier Synchronization* integration system, select **Integration System** > **Configure Integration Attributes**.
   h) On the **approval status** row, clear *CANCELED* and *DENIED* from the **Value** prompt.
   i) On the **supplier status** row, clear *Inactive* and *Hold* from the **Value** prompt.
   j) Click **OK**.
3. From the related actions menu of the *Supplier Synchronization* integration system, select **Integration** > **Launch/Schedule**.

   Schedule the full sync to take place outside business hours.

   a) From the **Run Frequency** prompt, select *Run Once in the Future*.
   b) Click **OK**.
   c) From the **Start Date** prompt, select the current date.
   d) From the **Start Time** prompt, select *9:30 PM*.
   e) Click **OK**.
4. After the integration runs, access the **All Integration Systems** report again.

   To restore the original settings, edit the integration to enable the change detection service and include suppliers that you cancel, deny, or inactivate between runs.

   a) From the **Integration Template** prompt, select *Supplier Onboarding (WSS)*.
   b) Click **OK**.
   c) Find your *Supplier Synchronization* integration system in the grid.
   d) From the related actions menu of the *Supplier Synchronization* integration system, select **Integration System** > **Configure Integration Services**.
   e) Select the **Enabled** check box for the **Supplier Onboarding (WSS) Change Detection** integration service.
   f) Click **OK**.
   g) From the related actions menu of the *Supplier Synchronization* integration system, select **Integration System** > **Configure Integration Attributes**.
   h) On the **approval status** row, select *CANCELED* and *DENIED* from the **Value** prompt.
   i) On the **supplier status** row, select *Inactive* and *Hold* from the **Value** prompt.
   j) Click **OK**.
5. Access the **Scheduled Future Process** report.

   Reactivate the original integration schedule.

   a) From the **Process** prompt, select your *Supplier Synchronization* integration.
   b) Click **OK**.
   c) In the **Scheduled Process** column, access the related actions menu of the *Supplier Synchronization* process and select **Schedule Future Process** > **Activate**.
   d) Click **OK** and **Done**.

Related Information
Tasks

Manage Scheduled Future Processes

Troubleshooting: Supplier Contracts Strategic Sourcing Integrations

Disposition: / Status:

Single problem: Delete the <condition> element. When you have more to say about the problem, place the information in the first <p> element of <troublebody>.

Multiple problems: Place the problem statement in the <title> element of <condition>. Add more <condition> and <troubleSolution> elements as needed. When you need a navigation list, add it in an <ul> element in the first <p> element of <troublebody>.

Disposition: / Status:
6 problems; definitely need a navigation list (unless we remove 3 or more of them). Instructions here: https://sites.google.com/workday.com/doctraining/dita-ccms-how-tos/inline-links/navigation-links

I don't see anything to select in the Financial Company or Hierarchy field in Workday Strategic Sourcing (WSS).

Cause:

Disposition: / Status:
For troubleshooting in general, if we can prevent the problem when they're setting up the functionality, that's always preferable to fixing it after the fact.

Disposition: / Status:
Stated as a cause of the problem, we might say "Your security role doesn't have [enable?] access to those fields."

Only users (including implementers) that have the correct security role assignment are able to view selectable options for these fields.

Solution:

Steps

Process: Supplier Contract - Create/Edit domain.

1. **Disposition: / Status:**
   Solution steps should be distinct actions--usually accessing a task or report and changing something, so ensuring, checking, and reviewing things are not valid steps. We have to assume that they did their configuration correctly (and the "how-to" (superstep, task, example) topics) where we tell how to do that config is often where we can best help them avoid this trouble in the first place).

   Ensure that your Single Sign-On (SSO) configuration is complete.
2. **Disposition: / Status:**
   If there's any likelihood that this wasn't done, we need to give specific instruction how to do it. But if we've told how to do it, we have to assume the reader has done it. We don't want to get into the circular situation of sending them back to a task or superstep topic they've already done!

   Check that your WSS tenant authenticates using Workday SSO.
3. **Disposition: / Status:**
   Suggest we just go right to "Click the **Workday Strategic Sourcing** worklet tile."

   Initiate SSO authentication by clicking on the **Workday Strategic Sourcing** worklet tile.

   Disposition: / Status:
   If there's a chance this wasn't already done, it should be a step before we tell them to click the tile.

   You can add it as an optional worklet.
4. **Disposition: / Status:**
   To make this a concrete step, just instruct to add View privilege to the user.

   Review the security section above to verify role assignments for users in various domains. Your user must have **View** privileges.

5. **Disposition: / Status:**
Verifying is not an action. If there's a chance they need to add specific hierarchies or companies (we don't use slashes or backslashes to stand in for "and" or "or"), we need to instruct how to do it.
Access the **Create Supplier Contract** task and verify that you can see a set of companies\hierarchies.

My integration skipped some of my WSS contracts.

Cause:

Disposition: / Status:
Lowercase "contract." But the Solution implies that the responsible party's credentials are the cause of the problem, not any aspect of the contract. If it's just about your credentials, permissions, access, I wonder if we can't help the reader prevent this problem before it happens by addressing it specifically in the "how-to" topics.

WSS Contract isn't eligible.

Solution:

Disposition: / Status:
I haven't seen this "responsibleParty" element used elsewhere. It seems logical that IF we use it, we should be naming that party, but most often it's the usual assumed administrator or corporate "we"--the person(s) reading this. Recommend not using it throughout this topic.

Disposition: / Status:
"Verifying" isn't taking any action--if it was set up correctly, there would be no problem, and verifyingt wouldn't solve anything. If they're reading the Solution, we assume the Cause is true and the Solution is needed. If keeping this as troubleshooting, we should have a solution accessing a task or report, performing some action in WD that fixes the problem.

Verify that your credentials used to run the Integration have access to view the contract in WSS. We recommend that you configure your integration to run using administrator credentials.

Disposition: / Status: The first sentence isn't grammatically correct as presented. We might say something like "Integration fails with a processing error." Integration fails with a processing error occurred. The task submitted isn’t authorized.

Cause:

Disposition: / Status:
Again, if we can prevent this in the how-to topics, that is preferable to fixing it after the fact.

The user has incorrect security permissions.

Solution:

Disposition: / Status:
As in the previous condition, access a task or report in WD to grant the permission.

Check that the user running the integration has the right permissions to *Submit Supplier Contract* and *Submit Supplier Contract Amendment* web services. Also, check that the user has integration permissions on the *Process: Supplier Contract - View* domain.

Workday creates multiple amendments for contracts in Workday, even when there are no tangible changes against the WSS contract.

Cause:

Disposition: / Status:
This, too, argues for prevention in a topic where we show how to configure them correctly, if we can do so. But this may be too specific for the Launch an Integration topic, where I'm guessing they'd set the field in step 1.

You haven't configured your launch parameters correctly.

Solution:

Steps

1. **Disposition: / Status:**
   Need to access a task or report or something. **Launch / Schedule Integration**? Also: is this a prompt? I think it would be uicontrol rather than italic. You might say "From the **Value Type** prompt for the Last Successful Run, select *Determine Value at Runtime*:"
   On the **Last Successful Run** field, select *Determine Value at Runtime* as the value type.
2. **Disposition: / Status:**
   Replace "one" with "1." It looks like a prompt, so "From the **Value** prompt, select 1 of:
   Select one of these options as the *Determine Value at Runtime* value:
   - **Disposition: / Status:**
     Did they really do DateTime 2 different ways in the prompt? Both of the options should be in <i>.
     As Of Entry Date/Time of Last Completed Integration Event
   - As Of Entry DateTime of Last Completed or Completed with Warnings Integration Event.
3. **Disposition: / Status:**
   Prepositions: "in" the field, "from" the prompt. If it's a field, the verb should be "enter."
   On the Current Entry Date/Time field, select *Determine Value at Runtime* as the value type.
4. Select *Current Moment (Date/Time)* as the *Determine Value at Runtime* value.

Disposition: / Status: Suggest "Some users receive errors between Workday and WSS." I have multiple users access WSS and some are experiencing errors between Workday and WSS.

Cause:

Cause	Solution
Disposition: / Status: This is a problem statement. I'd break this out of the table to a separate Problem. The Cause would be something like "The user doesn't belong to appropriate security groups [on the *Workday Strategic Sourcing* domain]. The user can't access WSS using the Workday Strategic Sourcing tile on their dashboard.	**Disposition: / Status:** Solution should be steps (any of which might include links to other topics): 1. Enable(?) the *Workday Strategic Sourcing* domain. 2. Add the user to 1 of the security groups listed in the domain security policy. 3. Add the Workday Strategic Sourcing worklet tile to your [the user's?] dashboard. Enable the *Workday Strategic Sourcing* domain and verify that the user belongs to one of the security groups listed in the domain security policy. Then, add the Workday Strategic Sourcing worklet tile to your dashboard.
Disposition: / Status: Suggest removing qualitative "the right" (or if you like, replace with "sufficient"?): "Your Contracts Integration user doesn't have permissions to access supplier contract amendment web services." Your Contracts Integration user doesn't have the right permissions to access supplier contract amendment web services.	**Disposition: / Status:** 1. From the related actions menu of the **Supplier Contract Event**, business process, select **Business Process** > **Edit**. 2. Assign [?] security groups to the *Submit Supplier Contract* initiating action. Access the related actions menu of the **Supplier Contract Event**, business process and select *Business Process Policy -> Edit* to review security

Cause	Solution
	groups assigned to the *Submit Supplier Contract* initiating action. **Disposition: / Status:** No need to give another way to do the same thing. If keeping, it'd be something like "To modify security groups assigned to THE intiating action OF THE Submit Supplier Contract Amendment web service, select **x** > **y** FROM the related actionS menu of the **Supplier Contract Amendment Event**." You can also edit the business process policy in the related action menu of the **Supplier Contract Amendment Event**, to review security groups assigned to initiating action Submit Supplier Contract Amendment web service.
Your WSS contract creation user doesn't belong to the appropriate security groups.	**Disposition: / Status:** Make it into steps, using standard step formatting and with action steps as before. By the time we're at Solution, we assume they do need to add the user to the security group. Access the *Process Supplier Contract* domain and into domain security policy to review security group assignments.
Your user doesn't belong to one of the *Self-Service: Account* domain security groups listed in **Disposition: / Status:** "the"? security policy.	**Disposition: / Status:** As above, give steps to add the user to 1 of the security groups. The user must be in 1 of the security groups that have *View* privileges in the Report/Task Permissions of this domain. **Disposition: / Status:** No need to check, at this point. Run the **Test Domain Permissions for User** task and check if the user belongs to this security domain. If not, configure this domain to include users who need access to SSO.
Disposition: / Status: Cause shouldn't be a question. "The user running the connector doesn't have integration permissions." Does the user running the connector have integration permissions?	**Disposition: / Status:** (Sorry to harp on this!) As above, no need to check or verify. Just give instrux to give the user appropriate permissions. Access the *Process: Supplier Contract - View* domain and verify that the user has **Integration** permissions. We require this, because the Connector internally uses Get Supplier Contracts web service to determine whether to create (or) update an existing contract.

Disposition: / Status: We should shorten these condition titles as much as possible--ideally so they don't wrap in the nav list TOC at the top. We don't need the full exact errmsg, just enough of the unique-ish words that a reader copy/pasting the message into FT search will find this topic. If necessary, you can also put some of the key words in this topic's prolog metadata. Suggest "Can't retrieve attachments from Workday Strategic Sourcing contract." as the prob statement here.I'm

receiving a Can't retrieve attachments from Workday Strategic Sourcing Contract; Skipping Workday Strategic Sourcing Contract Number error message:

Cause:

Disposition: / Status:
Remove "likely." As always, though, try to help them avoid the problem by noting before they get here, in how-to topics where they're creating the document, that you can't use special characters (and what constitutes a special character).

The contract document attempting to sync to Workday likely has a special character in its name.

Solution:

Disposition: / Status:
The Condition and Cause got them here--that was the checking. The Solution is simply to rename the contract file.

Check the name of the contract and rename if necessary.

Disposition: / Status: Seems like we could merge this with the previous, since the Cause and Solution are the same. Otherwise, apply similar edits.I can't retrieve attachments from a WSS Contract or my deployment is skipping the WSS Contract Number.

Cause: The contract you're attempting to sync with Workday likely has a special character in the name.

Solution: Rename any contracts that contain special characters.

Is your Scout Supplier Connector Integration syncing inactive and holding suppliers into Strategic Sourcing?

Cause: The contract you're attempting to sync with Workday likely has a special character in the name.

Solution: You can verify this in the **Integration Attributes** section of the integration system. You can find additional instructions for how to change the attributes on Workday Supplier Status in Strategic Sourcing in Community. Strategic Sourcing doesn't prevent a user from adding an inactive supplier to a contract. However, contract with an inactive status, it won’t transfer into Workday.

Related Information

Reference

2022R2 What's New Post: Workday Strategic Sourcing Contract Handling

Strategic Sourcing Admin Concepts

Concept: Departments Overview

Departments enable you to add structure to sourcing events across your organization. You can manage departments by:

- Adding or removing stakeholders.
- Viewing a consolidated dashboard of all sourcing events that run through your department.
- Creating event spend categories for your department.

You can manage your departments on **Settings**.

After you create a department, you can manage the stakeholders and administrators by accessing the **User List** from **Settings**.

Concept: Teams Overview

Teams enable you to manage project and contract visibility for various roles across your organization. Team permissions persist in events when the event is linked to a project. Changing the **Stakeholder Sync Type** when customizing contract and project types doesn’t impact these permissions.

When you have no teams created in your tenant, stakeholders can only view contracts and projects they're stakeholders on. Sourcing managers and administrators can view and update everything except the contracts and projects that you add them to with *Read Only* permissions.

You can create these types of teams:

- Full access
- Read only

Full Access

Members of a full access team can edit the records available to the team. You can add these roles to a full access team:

- Company Administrator
- Department Administrator
- Sourcing Manager

You can mark these users as *Read Only* on a specific record available to the team. If you don’t put these users on a team, they can only access projects and contracts that they're the owner of, or are a stakeholder on.

Read Only

Members of a read-only team can view the records available to the team. You can add these roles to a read-only team:

- Company Administrator
- Department Administrator
- Sourcing Manager
- Stakeholder

When you add administrators or sourcing managers to a read-only team, you can mark them as *Read/Write* on a specific record available to the team.

Read-only team permissions overwrite full access team permissions. When you add a sourcing manager or an administrator to a full access team and a read-only team, they can view everything but can only update contracts and projects that you add them to as a stakeholder with *Read/Write* permissions.

Stakeholders that aren’t on a team can only access projects and contracts that they're stakeholders on. Stakeholders with read and write access to specific projects or contracts retain their access regardless of assignment to read-only teams. You can also enable a read-only view of the supplier directory for your stakeholders.

Create Teams

You need administrator access to your **Settings** page to create a team. You can create a team by accessing **Teams** > **Full Access** or **Teams** > **Read Only**, and selecting **Create New Team**.

When you create a new team, Strategic Sourcing automatically sets the visibility for projects and contracts to **View All**. You can change this configuration by adding filters through **Manage Visibility**.

Assign Teams on User Creation

You can assign teams to users upon user creation by accessing **Settings** > **User List**.

If the new user is a stakeholder, you can only select read-only teams. Before a user completes registration, you can adjust their membership by selecting **Edit** next to their name in **Settings** > **User List**. Once a user completes registration, their information displays in the **Team** view.

Concept: Message Templates

You can create message templates for:

- Award or rejection emails.
- Reminders to confirm before you publish an event.

You can manage these templates on **Sourcing & Auctions** in **Settings**.

Award and Rejection Emails

You can include awarded spend and mail merge fields to personalize emails to suppliers. Sourcing managers can edit email templates before sending award or rejection messages.

Prepublish Confirmation Messages

Workday displays a reminder message before you publish an event. You can customize the message to meet specific process requirements, such as:

- Adding all necessary stakeholders.
- Attaching RFx documents.
- Entering a baseline.
- Updating the RFx description.

Strategic Sourcing Admin References

Reference: Autofill Options

When creating or editing templates, such as the award or rejection email templates or terms and conditions documents, you can use autofill options. Example: you can insert the *|RECIPIENTS_FIRST_NAME|* option into the Award Email Template to personalize the email for the supplier with the awarded bid. These autofill options are available:

Autofill Option	Description
|RECIPIENTS_FIRST_NAME|	The first name of the supplier who's signing.
|RECIPIENTS_FULL_NAME|	The full name of the supplier who's signing.
|RECIPIENTS_COMPANY|	The supplier company.
|MY_FIRST_NAME|	The first name of the project owner.
|MY_FULL_NAME|	The full name of the project owner.
|MY_COMPANY|	The name of your company.
|EVENT_NAME|	The title of the event.
|DATE_PUBLISHED|	The original date of publication.
|SUMBISSION_DUE_DATE|	The current submission date when viewing.
|CURRENT_DATE |	The date of viewing or signing.

Related Information
Concepts

Concept: Message Templates on page 51
Concept: Gateway Documents on page 84

Reference: Data Importer Validation Rules

The **Data Importer** enables you to import bulk data to create new records or to update existing data. You can only use the **Data Importer** for projects and suppliers.

These validation rules apply to both projects and suppliers:

- For single and multiselect custom fields, errors occur if you supply a value other than the accepted list. Separate multiselect options with a semicolon and no space.
    - Example: IT;Marketing;Facilities
- Data in a currency field must not contain a currency symbol.
- Currency custom fields must not contain a decimal, and you should round to the nearest whole number.
- Data can't contain special characters, such as non-English characters.
- Date fields must be in either mm/dd/yyyy or yyyy/mm/dd format in Excel.

The **Data Importer** doesn't create new custom field options or custom fields that you add to the Excel file.

Workday Strategic Sourcing (WSS) doesn't validate the number of characters for short text custom fields. It's possible to import more than 140 characters into a short text custom field.

Contract Validation Rules

- If **Auto-Renewal** is *Yes* on an active contract, you must populate the **Renew Number of Times** field.
- If **Auto-Renewal** is *Evergreen*, **Contract End Date** must be blank.
- **Supplier Name** must be an exact match to the name in WSS when importing contracts tied to existing suppliers in Strategic Sourcing. For active Workday suppliers connected to your records, we recommend including the Workday ID of those suppliers in the **External ID** column of the **Suppliers** tab.
- You must include the **Supplier Contact Name** and **Contact Email** to connect a contract to a supplier.

Milestone Validation Rules

If you leave the **Assigned At Date** blank in **Milestones**, the **Assigned** date becomes the date of import.

Projects Validation Rules

- When importing projects tied to existing suppliers in WSS, Supplier Name must exactly match the name in WSS.
- If you populate Project Estimated Start Date, the date must be before the Estimated End Date.
- For active projects, you must populate the **Actual Start Date**.
- For completed projects, you must populate **Actual Start Date** and **Actual End Date**. The **Actual Start Date** must be before the **Actual End Date**.

Suppliers Validation Rules

- Data import requires these fields at a minimum:
    - Supplier Contact First Name
    - Supplier Contact Last Name
    - Contact Email
- You can't import these fields:
    - Workday Accepted Payment Type
    - Default Payment Type
    - Supplier Category
    - Supplier Group
- When importing the Risk field, use these selection options:
    - High
    - Medium
    - Low
    - Any custom selection options that have been configured

- If you use the Workday Supplier Connector, you can update existing Suppliers in Strategic Sourcing with the Workday Supplier ID by populating the **External ID** column with Workday Supplier IDs.

The Contact Phone Number field doesn't have formatting validation. Enter phone numbers with country codes, and using parentheses and dashes.

Related Information
Tasks

Import Data on page 24

Import Contracts with a Contract Hierarchy on page 27

Reference: Strategic Sourcing User Roles and Permissions

We provide access levels to these roles:

- Company Administrator: Has full control over all information and data contained within a company as a licensed user.
- Department Administrator: Has full control over all information and data contained within a department as a licensed user.
- Sourcing Manager: Is a licensed user that has full control over all information and data contained within events, projects, and contracts that they've created.
- Stakeholder: Isn't a licensed user, but was invited to a specific event, project, or contract with set permissions.

Administrator, Department Administrator, and Sourcing Manager

This table illustrates actions available to department administrators and sourcing managers. Company administrators can perform all of these actions and set up company settings.

Actions	Department Administrator	Sourcing Manager
Add or disable users on the user list for the company.	No	No
View all data contained in any event in the company account.	Only data contained in any event in their department.	Only events you create or can access as a Read/Write stakeholder.
Create, publish, and delete events.	Yes, but can only delete events in their department.	Create and publish events.
Edit the public profile for your organization.	No	No
Invite stakeholders to events.	Yes	Yes

Stakeholders

When you invite stakeholders, you can set these permissions:

- Answer Q&A: Send answers to suppliers in the message center.
- Read Only: Only view the event and supplier responses.
- Read/Write: Perform all actions like a sourcing manager except adding new suppliers to the supplier directory.

For each event, you can enable stakeholders to submit evaluations and receive weekly reports.

Related Information
Reference

The Next Level: Strategic Sourcing Stakeholder Guide

Reference: User Roles in Contracts

This table illustrates actions available to department administrators and sourcing managers. Company administrators can perform all of these actions and set up company contract types, reasons, and statuses in settings. You can perform different contract actions based on the user role. Stakeholders can have different levels of permissions within different contracts.

Actions	Sourcing Manager	Stakeholder
Select and apply filters.	Yes	Yes
Create saved filter views.	Yes	Yes
Start new contracts.	Yes	Only when they send requests.
View contract requests.	Yes	Only on their own requests.
Edit and delete contract requests.	Yes	No
Add, edit, and delete contract statuses.	No	No
Manage template milestones for contract types.	No	No
Manage contract fields.	No	No
Add suppliers.	Yes	Only when they include the supplier in intake.
Change contract statuses.	Yes	Only when they have Read/Write permission.
Link related contracts.	Yes	No
Invite stakeholders.	Yes	No
Change stakeholder permissions.	Yes	No
Add or delete milestones.	Yes	Only when they have Read/Write permission.
View milestones.	Yes	Yes
Manage email notifications.	Yes	Only when they have Read/Write permission.
Authorize DocuSign for the company.	No	No
Attach documents in DocuSign.	Yes	No

Reference: User Roles in Supplier Performance

This topic describes actions that each user role can take in these areas of supplier performance:

- Performance Management Settings on page 56
- Performance Review Project on page 56
- Performance Review Scorecard on page 56
- Performance Review Survey on page 57
- Action Items on page 57
- Supplier Directory on page 57

Company administrators can perform all of these actions.

Performance Management Settings

Actions	Sourcing Manager	Stakeholder	Supplier
Set name of performance project type.	No	No	No
Add custom field groups and custom fields to a performance review project.	No	No	No
Add, edit, delete, and sort performance review project type statuses.	No	No	No

Performance Review Project

Actions	Sourcing Manager	Stakeholder	Supplier
Create and manage performance review template.	No	No	No
Create performance review project.	Yes	No	No
Receive email notifications.	Yes	Yes	Yes
Invite stakeholders	Yes	Yes, with Read/Write permission.	No
Change stakeholder permissions.	Yes	Yes, with Read/Write permission.	No
View performance review tab on supplier profile in supplier directory.	Yes	No	No

Performance Review Scorecard

Actions	Sourcing Manager	Stakeholder	Supplier
Edit scorecards in performance reviews.	Yes	Yes, with Read/Write permission.	No
Score suppliers.	Yes	Only when granted section visibility.	No
Invite stakeholders to evaluate.	Yes	Yes, with Read/Write permission.	No
Set stakeholder visibility.	Yes	Yes, with read/write permission, except sourcing managers.	No
Publish scorecard.	Yes	No	No

Actions	Sourcing Manager	Stakeholder	Supplier
View results	Yes	Only when granted section visibility.	No

Performance Review Survey

Actions	Sourcing Manager	Stakeholder	Supplier
Edit supplier survey in a project.	Yes	Yes, with Read/Write permission.	No
Set deadlines.	Yes	Yes, with Read/Write permission.	No
Invite suppliers.	Yes	Yes, with Read/Write permission.	No
Manage supplier options.	Yes	Yes, with Read/Write permission.	No
Publish survey.	Yes	No	No
View responses.	Yes	Only when granted section visibility.	Yes
Finalize performance review.	Yes	No	No

Action Items

Actions	Sourcing Manager	Stakeholder	Supplier
Create, assign, and complete action items.	Yes	No	No
View action items.	Yes	No	Only when assigned.
Edit action items assigned to me.	Yes	No	No
View action items tab on supplier profile in the supplier directory.	Yes	No	No

Supplier Directory

Actions	Sourcing Manager	Stakeholder	Supplier
Access supplier profile in the supplier directory.	Yes	When enabled on company settings by a company administrator.	No
Segment suppliers.	Yes	When enabled on company settings by a company administrator.	No

Strategic Sourcing User Setup

Change Default Language

Context

You can change the default language for your account.

Steps

1. Hover over your name and click **User Profile**.
2. Select your language on the **Language** prompt.
3. Save the change.

Related Information
Reference
Reference: Strategic Sourcing Supported Languages on page 63

Create a Personal API Token

Prerequisites

Create a user profile.

Context

You want to set up integration with your account to make public API calls or use third-party applications like Tableau and Power BI.

Steps

1. Access your user profile.
2. Click **Generate Token** to access the API tokens page.
3. Click **Generate New Token**.
4. Enter a description for the token.
5. Click **Generate Token**.

   Note: This is the only time that you can see your token, so copy and save it somewhere safe.

Result

You have 3 API tokens:

- Company
- Personal
- Reporting connector

You can use your reporting connector token to connect your data with Power BI or Tableau. Your company and personal API tokens are transactional tokens.

Next Steps

On the API Tokens page, you can delete existing tokens and create new ones.

Steps: Connect to Tableau

Prerequisites

- Create a Tableau account.
- Generate a personal API token in Workday Strategic Sourcing (WSS).

Context

You can use the Tableau Web Data connector in Tableau to connect your WSS data with other sourcing data across your organization. You can compare your WSS data with other applications in Tableau to provide an overview of your sourcing and procurement data.

Steps

1. Complete steps for using the Web Data Connector in Tableau: https://help.tableau.com/current/pro/desktop/en-us/examples_web_data_connector.htm. As you complete this step, consider:

Option	Description
URL	Copy and paste this link in the URL field: https://api.scoutrfp.com/tableau_web_data_connector/reports.
Report Type	Select the datasets that you want to pull in from WSS.
Page Size	Enter the number of records that you want returned.
Tableau API Token	Use the Power BI and Tableau Token generated from your user settings in WSS.

2. Click **Load Data**.

   This step opens the Tableau Workbook with your selected report data.

Next Steps

Create sheets or dashboards in Tableau to compare your report data across your applications.

Related Information
Reference
The Next Level: Strategic Sourcing Reporting Overview

Connect to Power BI

Prerequisites

Generate a personal API token for Power BI.

Context

Use the Strategic Sourcing Custom Data Connector to pull your data into Power BI.

Steps

1. Use the Workday Community to download the Custom Connector file at https://community.workday.com/articles/powerbiconnect.
2. Save the file to this folder on your local drive: **Documents/Power BI Desktop/Custom Connectors**.
3. Change your security settings on Power BI to **(Not Recommended) Allow any extension to load without validation or warning**.
4. Click **Get Data** > **More**.
5. Select **Scout (Beta)**.
6. Enter your Power BI API token.
7. Select which datasets you want to import into Power BI.
8. (Optional) Change your token in Power BI by clicking **Data Source Settings**.
   a) Select **Scout** and click **Edit (Feed Key)**.
   b) Enter your new token, then click **Save**.

Result

You can view and refresh your report data in Power BI.

Related Information
Reference
The Next Level: Strategic Sourcing Reporting Overview

Concept: Strategic Sourcing Home Page

The strategic sourcing home page enables you to manage what's due and what's coming up when working through multiple bids, projects, or contracts.

Note: Contact your Customer Success Manager to access **Home Page**.

Home Page is a landing page option available from the navigation panel for viewing tasks across the strategic sourcing platform. You can view tasks that you're:

- Directly assigned to using the *My Tasks* widget.
- A stakeholder of using the *Tasks I Follow* widget.

Along with **Home Page**, you can also set your landing page as:

- **Project Pipeline**.
- **Contracts Workbench**.
- **Events**.

Regardless of which option you select, you can continue to navigate to all pages.

Widgets

When viewing the widgets, consider:

Widget	Description
My Tasks	Includes assigned tasks for the person logged in. Only supports milestones as tasks. Displayed milestones: • Are ones you're the assignee for. • Must have a due date.

Widget	Description
Tasks I Follow	Includes tasks not assigned to the person logged in. Tasks are part of a project or contract you're a stakeholder of. Only supports milestones as tasks, and displayed tasks don't always have an assignee.

Both widgets also enable you to:

- View upcoming tasks and tasks completed within the past 30 days.
- Mark tasks as complete.
- Dismiss tasks that aren't relevant.

  Note: Dismissing a task doesn't change the status of the task. Example: An incomplete task remains incomplete after you dismiss it, but the task no longer displays on your list.
- Filter by specific calendar ranges or by preset date ranges, such as 30 days, 60 days, and so on.
- Undo an action if you mistakenly dismiss or complete a task.

Concept: Global Notifications Panel

The global notifications panel enables you to receive important updates about what needs your attention without having to navigate back to your email.

You can find the notifications panel on almost any page. The notifications:

- Alert you of actions you need to take in Strategic Sourcing.
- Contain contextual information and links that help you navigate to the appropriate page.

Notification types include:

Notification Types	Description
Team Chats Event Chats	In projects or contracts, teams are able to communicate in a chat window as well as directly mention a specific user. Users on the stakeholders list receive notifications for both team chats and event chats. When you receive notifications, the notifications panel: • Distinguishes between project chats and contract chats in the chat type. • Separates direct mentions (@mentions) from standard chat notifications.
Contract Approval State Changes	Strategic Sourcing notifies you of these state changes: • Approval Requests • Approval Rejections • Contract Approved

When accessing the notifications panel, consider:

Option	Description
Dismiss notifications.	You can dismiss individual notifications. Once you dismiss a notification, you can no longer view it.
Read notifications. Unread notifications.	New notifications are unread, indicated by the shade of the notification card. You can mark individual notifications as read or mark them all as read.
New notifications.	The notifications panel automatically loads new notifications. The notifications panel displays a red counter to indicate the number of new notifications.
Load previous notifications.	The notification panel limits the number of notifications displayed at a time. When you reach the limit, the notifications panel hides older notification cards. You can load previous notification cards to view them.

Related Information
Concepts

Concept: Team Chat on page 94

Reference: Supported Browsers

Strategic Sourcing supports the newest versions of these browsers:

- Chrome
- Firefox
- Internet Explorer
- Microsoft Edge
- Safari

In general, Strategic Sourcing doesn't support the third-oldest version of these browsers. Example: If browser version 5 is the newest version, Strategic Sourcing doesn't support browser version 3.

Supported Browsers

Browser	Supported Version
Chrome	The 2 latest versions.
Firefox	The 2 latest versions.
Internet Explorer	11 **Note:** Strategic Sourcing no longer supports versions 9 and 10.
Microsoft Edge	The 2 latest versions.
Safari	The 2 latest versions on Mac OS X.

Mobile Support

Strategic Sourcing supports mobile for Chrome and Safari. Mobile browsers aren't the focus of the quality assurance team and we recommend that you don't use them for normal use.

Reference: Strategic Sourcing Supported Languages

Strategic Sourcing supports these languages:

- Bulgarian
- Croatian
- Czech
- Danish
- Dutch
- English
- Estonia
- Finnish
- French
- French Canadian
- German
- Greek
- Hungarian
- Indonesian
- Italian
- Japanese
- Korean
- Latvian
- Lithuanian
- Malay
- Norwegian
- Polish
- Portuguese
- Romanian
- Russian
- Serbian
- Simplified Chinese
- Slovak
- Slovene
- Spanish
- Swedish
- Thai
- Traditional Chinese
- Turkish
- Ukrainian
- Vietnamese

Related Information
Tasks

Change Default Language on page 58

FAQ: Account Security

- How can I change the email address for my account? on page 64
- How can I confirm my account? on page 64
- How can I request a new confirmation email? on page 64

How can I change the email address for my account?

1. Hover over your name and click **User Profile**.
2. Enter your email address in the **Email** field.
3. Save the change.
4. Access your old email and follow the instructions in the email you receive.

Note: Users can't change their email address if your company uses an SSO (Single Sign-On) integration. If your company doesn't use SSO, changes to a user's email address are automatically reflected for any other company they work with in Workday Strategic Sourcing.

How can I confirm my account?

Access your email and click **Finalize Your Account** in the email you receive.

How can I request a new confirmation email?

Confirmation emails expire after 24 hours. To request a new one, access the sign-in page and click **Did not receive confirmation instructions?**.

What can I do when my session times out?

Your session times out when you're inactive for 30 minutes. To sign back in, click **Log In** or access the sign-in page.

What can I do when I receive a token invalid error?

You receive a token invalid error when you use an expired confirmation email. To resolve this error, access the sign-in page and click **Did not receive confirmation instructions?**.

Signing in with a Password

What can I do when I forget my password?

1. Access the sign-in page.
2. Click **Forgot Your Password?**.
3. Enter your email address.
4. Access your email and click **Reset Your Password** in the email you receive.
5. Enter your new password.

How can I unlock my account?

Your account locks when you don't sign in for 90 days. To unlock your account:

1. Access the sign-in page.
2. Click **Did Not Receive Unlock Instructions?**.

	3. Enter your email address. 4. Access your email and click **Access My Account** in the email you receive. You can also contact Strategic Sourcing Support to unlock your account.
How can I change my password?	1. Hover over your name and click **User Profile**. 2. Click **Change Password**. 3. Enter your current password in the **Current Password** field and your new password in the **Password** field. 4. Save the change.

Signing in with Magic Links

Why is there no password field?	Strategic Sourcing uses magic links for all users that don’t have Single Sign-On (SSO) set up. When you enter your email address and click **Sign In**, Strategic Sourcing sends you an email with a magic link. You can click the magic link to sign in to Strategic Sourcing. A magic link contains all the required information to log you into Strategic Sourcing without a password.
Will my suppliers use magic links?	Yes, unless they're using SSO.
How long are magic links valid for?	Magic links are valid for 5 minutes.
I didn’t receive an email when I clicked Sign In.	Check your Spam folder. Some email clients classify magic link emails as Spam. We recommend adding the email address that Strategic Sourcing uses to your allow-lists: no-reply_strategicsourcing@workday.com.
I received a message saying that the link expired, but it hasn’t been 5 minutes. What happened?	As soon as you click **Resend Email**, any previous magic links you have expire. Ensure you click the latest link in your inbox.
How can I unlock my account with magic links?	When you create 10 magic links without a successful login, your account is locked. To unlock your account: 1. Access the sign-in page. 2. Enter you email and click **Sign In**. 3. Access your email and click **Access My Account** in the email you receive. You can also contact Strategic Sourcing Support to unlock your account.

Pipeline

Create Pipeline Projects

Prerequisites

Create suppliers.

Context

You can build and manage a sourcing project pipeline with planned, active, and completed **Projects**.

Steps

1. Navigate to your **Pipeline** and click the **Create Project** or **Quick-Add** button.
2. Give your new project a name, and add details in the remaining columns.
3. As you complete the project details, consider:

Option	Description
Project Details	Identify the basics for your **Project**, such as: • **Category** • **Project Description** • **Project Type**
Attach Documents	You and your stakeholders can upload supplier records and documents, up to a 5GB per file limit.
Financial Details	Add an estimate of spending and savings for your project.
Sourcing Events	Create and manage all **Sourcing Events** related to your project. You can launch new **Sourcing Events**, such as: • **Auctions** • **RFIs** • **RFPs**
Related Projects	Link your project to an existing project or create a new project linked to your current project.
Stakeholders	Invite others from your sourcing team or other colleagues to collaborate in the project and sourcing events.

Result

You can create sourcing events from your pipeline projects.

Next Steps

Set and regularly update the **Project Status** of your project.

Related Information

Tasks

Configure Savings Trackers on page 21

Reference

The Next Level: Strategic Sourcing Pipeline Guide

The Next Level: Strategic Sourcing Stakeholder Guide

The Next Level: Strategic Sourcing Pipeline Charts Overview Deep Dive

Start Projects from Project Requests

Prerequisites

Receive an intake request form.

Context

You can enable your stakeholders to plan and create their own sourcing requests. Stakeholders can use intake to initiate projects and loop in sourcing and procurement teams for help at the appropriate stage. Using intake also enables you to standardize the way your business submits and executes internal requests.

Steps

1. Navigate to **Pipeline**.
2. In the **New Project Requests** section, click the project name of the request.
3. (Optional) Edit the details for the project.
4. In the **Stakeholders** section, add stakeholders to the project.
5. Change the status of the project on the action bar. As you complete this step, consider:

Option	Description
Canceled	The company administrator can customize the reasons for cancellation in the settings.
Planned	The start date for the project is in the future.
Active	You can select substatuses within an active project. The company administrator can set up these substatuses in the settings.
On Hold	The company administrator can set up the reasons for being on hold in the settings.

Result

The project no longer displays in the **New Project Requests** section and, instead, displays in the project status section that you assigned it to.

Add Savings to Projects

Prerequisites

- Configure Savings Trackers in **Settings**.
- Create sourcing projects.

Context

You can track your spend and savings by configuring **Savings Types** on your **Projects**.

Steps

1. From a project, access **Project Information > Financial Details**.
2. Enter savings details and estimates. **Estimated Savings** and **Recognized Savings** display on **Savings Trackers** when they're set up in the current fiscal year.
3. Click the **Add Savings** button to record actual savings.
    - Strategic Sourcing includes **Recognized Savings** in **Savings Trackers** and counts them towards company **Savings Goals**.
    - Strategic Sourcing doesn't include **Unrecognized Savings** in **Saving Trackers** but you can report on them separately.
4. Add **Savings Type**, **Frequency**, **Date**, and savings **Total**.

Result

Projects include savings and savings estimates.

Manage Attachments and Versions

Prerequisites

Create sourcing projects.

Context

You can upload, download, and manage versions of supplier documents.

Steps

1. Select **Navigate** > **Pipeline**.
2. Access your event.
3. Select **Attachments** from the **Project Information** menu.
4. As you complete this task, consider:

Option	Description
Drag/Drop Documents or Browse Files	You can add a new attachment and give it a **Record Name**. A **Record Name** is distinct from a **File Name** but can share the same name as the file. Strategic Sourcing associates **Record Name** with all versions of the document.
Check Out	Prevents other users from updating a new version of a document.
Check In	Enables other users to upload new versions of a document. Only the user who previously checked out the document or your Company Admin can check it in.

Option	Description
Download	Download a copy of the current document version. You can’t download previous versions of the document.

Add Project Milestones to Pipeline Projects

Prerequisites

Create sourcing projects.

Context

You can break a sourcing **Project** down into smaller components, set individual milestone deadlines, and assign them to **Stakeholders**.

Steps

1. Access **Milestones** in your project.
2. Click **Add Milestone**, and enter a milestone name, completion dates, and assign to a team member.

   Strategic Sourcing adds these **Milestone** statuses:

   - **Active**: Milestone remains active until the date in the **Date** field passes or you click the **Mark Completed** button.
   - **Completed**: **Milestone** grid turns green.
   - **Needs Attention**: **Milestone** grid turns red to signal to the stakeholder that they need to complete more steps.
3. Click the **Milestones** button on your **Pipeline** dashboard to access a list of upcoming **Milestones** assigned to you.

Result

You can track and manage **Milestones** in your sourcing projects.

Manage Filters and Views in Pipeline

Prerequisites

Create sourcing projects and configure **Project Types**.

Context

You can apply filters to your **Projects** and create project **Views**.

Steps

1. Access **Filters** from your project dashboard and select filter criteria.
2. Click the **Apply Filters** button.
3. Click the **Save As** button to save your filter and enter a **Saved View Name** and **Description**.
4. To share your **Saved View** with teams and teammates, select teammates from the drop-down menu.
5. Save the filter.

Result

You can access saved **Views** in **Projects**.

Add Project Dates to External Calendars

Prerequisites

- Create sourcing projects and configure **Project Types**.
- Create and save filter **Views**.

Context

You can add milestone dates and project sourcing event deadlines from your saved views in **Pipeline** to external calendars.

Steps

1. Access the **Views** tab at the menu bar at the bottom of the **Pipeline** dashboard and select a **View**.
2. From the filter card in the **Viewing** panel, select **Add to your calendar**.
3. Click the **Copy** button next to the link URL.
4. Use the URL to set up a link between your sourcing events and milestones and external email calendar providers.

Result

Project events, deadlines, and milestone dates display in the calendar of external providers.

Concept: Savings Trackers

Savings Trackers enable you to set goals and monitor financially recognized and unrecognized savings in your project **Pipeline**. Your company administrator can:

- Configure and schedule savings recognition.
- Create **Savings Types** such as:
  - **Cost Avoidance**
  - **Cost Savings**
  - **Hard Savings**
- Set a fiscal year start date and savings goal for the period.

As a sourcing manager, you can:

- Select a savings type when adding savings to a project.
- Set the recognition date of savings for a project.

Savings Trackers in Overview Charts

You can quickly view your savings against savings goals from the **Pipeline** page using the **Overview** tab.

Identified Savings

- **Active**: Displays estimated savings across all active sourcing projects. **Estimated Savings** must have a value. Estimated end dates must be in the current fiscal year. When there's no estimated end date, the **Actual Start Date** must be in the current fiscal year. **Estimated Savings** won't display if there's no start or end date.

- **Planned**: Displays estimated savings across all planned sourcing projects. Estimated dates must fall in the current fiscal year. The start date must be in the current fiscal year when there's no estimated end date, but there's an estimated start date. **Estimated Savings** needs start or end dates to display.

Realized Savings

- **Recognized**: Displays recognized savings across all completed projects based on the date or time range that you enter at the savings level.
- **Projected**: Displays projected recognized savings across all completed projects based on the date or time range that you enter at the savings level.

Savings Goal

Your Company Administrator sets the Savings Goal for the fiscal year.

- **Realized**: The total amount of **Recognized** and **Projected** savings.
- **Gap**: The difference between current **Realized Savings** and **Financial Year Savings Goal**.
- **Bonus**: The difference between **Realized Savings** and **Financial Year Savings Goal**.

Concept: Project and Contract Status Reasons

When you change the status of a project or contract, you can select a reason for the status and add notes. Your company admin can customize those reasons to fit business needs for projects and contracts.

These statuses can have reasons:

Project Statuses	Contract Statuses
Canceled	Canceled
Needs Attention	Termination
On Hold	Needs Attention
Does Not Need Attention	Does Not Need Attention

Adding more information about a status change in the **Notes** field provides an insight to change to the stakeholders of the project or contract.

When you change the status to Needs Attention, Strategic Sourcing sends an email to stakeholders who you set to receive email notifications. This email includes the reason and any notes that you add.

Events

Change Event Currency

Prerequisites

Your Company Admin enables additional currencies for your company.

Context

If your organization does business in currencies other than USD, you can update your sourcing events to use the applicable currency.

Steps

1. Access your event.
2. In the **Setup Your Event** section, expand **Event Options**.
3. Select a currency from the **Currency** prompt.

   Your selected currency applies to all currency fields in your event, including fields in your event worksheets.

Manage Events and Bids from Event Dashboard

Prerequisites

Create a sourcing event.

Context

Event dashboards enable sourcing managers, stakeholders, and evaluators to manage and monitor sourcing events.

Steps

1. Navigate to **Events** and select your event.
2. Select **RFP Options** to enable late bidding or revisions on bids after bid submission deadlines.
3. (Optional) Event Analysis subscribers can use the **Update Request** column in the **Bids Received** tab of the **Suppliers** table to go to **Event Analysis** to review supplier bids and start negotiations.
4. Click a supplier name on the **Suppliers** table to display a supplier action side panel that you can use to manage bids.

   You can use the action side panel to create proxy bids on behalf of suppliers.

   You can use **Supplier Chat** to communicate with suppliers.

Concept: Event Custom Fields

Event custom fields enable you to add unique fields to your sourcing events. You can also track these fields in your reports.

You can:

- Manage **Event Custom Fields** on **Settings**.
- Find your custom fields in the **Internal Data** section of any event.
- Pull the event custom fields into your report after a team completes the event.

Related Information
Tasks

Create Sourcing Reports on page 131

Concept: Event Spend Categories

You can track events by event spend categories and subcategories. The role of a user determines how they can interact with event spend categories:

Role	Actions
Company Administrator	Configure company-wide or department-level lists.

Role	Actions
Department Administrator	Configure department-level lists.
Sourcing Manager	Assign event spend categories and subcategories to their sourcing events from company-wide or department-level lists.

You can manage **Categories** on **Settings**. You can also perform these actions on the prepopulated categories. If you have 1 or more departments, a department administrator can manage categories on **Departments** on **Settings**.

Concept: Event Types

Event types enable you to identify the type of sourcing event and manage what event types best fit what your organization needs. You can customize the names of your sourcing events and corresponding supplier responses. Company administrators can create new event types in **Settings**.

There are 5 prepopulated event types with their corresponding response names:

Event Type	Response Name
General Bid	Quote
Request for Information (RFI)	Proposal
Request for Proposal (RFP)	Response
Request for Quote (RFQ) *General Inquiry*	Bid

You can manage your **Event Types** on **Settings**.

RFx Event Templates

Steps: Set Up Sourcing Event Templates

Context

You can set up sourcing event templates so that you don't have to start sourcing events from scratch. Sourcing event templates enable you to:

- Quickly and efficiently create sourcing events that contain standard questionnaires, price sheets, and files.
- Minimize mistakes, typos, and other errors throughout your sourcing events by making exact copies of existing sourcing events.

Steps

1. Create Sourcing Event Templates on page 74.
2. (Optional) Create Templates from Existing Sourcing Events on page 74.
3. Start Sourcing Events from Templates on page 74.

Create Sourcing Event Templates

Context

You can create sourcing event templates to save you time when you start events in the future.

Steps

1. Navigate to **Events** and click **Start Sourcing Event**.
2. In the **Setup Your Event** section, expand the **Event Options** drop-down menu.
3. Select the **Template** check box.
4. Select who can use the template on the **Share Template With** prompt.
   The teammates you invite can't edit the template.
5. Save the template.

Create Templates from Existing Sourcing Events

Prerequisites

Create a sourcing event.

Context

You can create sourcing event templates from existing sourcing events instead of creating them from scratch.

Steps

1. Navigate to **Events**.
2. Click **Duplicate** from the **Options** menu of a sourcing event.
3. Open the duplicate sourcing event.
4. In the **Setup Your Event** section, expand the **Event Options** drop-down menu.
5. Select the **Template** check box.
6. Select who can use the template on the **Share Template With** prompt.
   The teammates you invite can't edit the template.
7. Save the template.

Start Sourcing Events from Templates

Prerequisites

Create a sourcing event template.

Context

You can start your sourcing event from a template instead of starting it from scratch.

Steps

1. Navigate to **Events**.
2. In the **Templates** tab, click **Start Event From Template** from the **Options** menu of a template.

Auctions

Create Auctions from Sourcing Events

Prerequisites

- Closed sourcing events and bid submissions must contain complete price lists.
- Map all required columns for relevant worksheets.
- Sourcing events must contain 2 or more bids.

Context

You can configure auctions from closed sourcing events.

Steps

1. Access **Events** and click **Start Auction** from the **Options** menu next to your sourcing event.
2. Add auction details for bidders in the auction in the **Add Your Auction Details** section.
3. Define the auction structure and rules.
4. Set the **Supplier View Options** for the auction.
5. Add or delete suppliers on the **Invited Suppliers** view.
6. Edit event worksheets for each lot.
7. Assign participating suppliers who have submitted bids on at least 1 of the item in the auction lot.

   Suppliers that failed to submit bids for any line items can't submit any bids during the auction.
8. Invite internal stakeholders to collaborate in the auction.
9. Review and publish the auction.

Result

Suppliers receive an invitation to the auction.

Related Information
Tasks

Create a Public Event on page 84
Edit Live Events on page 88
Analyze Completed Auctions on page 102

Configure Multi-Lot Auctions

Prerequisites

Create sourcing projects in Strategic Sourcing.

Context

You can use multi-lot auctions to create live bidding events where suppliers compete for your business by decreasing bids on their assigned lots.

Steps

1. Access the **Sourcing** tab on a project.
2. Click **Create New Auction** and access the **Build Auction** page.
3. Add auction details for bidders in the **Add Your Auction Details** section.

4. Define the auction structure and rules.
5. Set the **Supplier View Options** for the auction.
6. Invite suppliers to the auction.
7. Click **Edit Items** to open the event worksheet for each lot you've added. Invite suppliers only to the lots that are relevant to them.
8. (Optional) Invite additional stakeholders to the auction.
9. Review and publish the auction.

Result

Suppliers receive an invitation to the auction.

Configure Supplier View Auction Options

Prerequisites

Create a sourcing project and Auction in the Sourcing section.

Context

You can configure what information you want to make visible to auction bidders in relation to their competitors.

Steps

1. Access your auction from your project or **Events**.
2. On the **Supplier View Options** section, configure visibility options per **Lot** and **Item**. As you perform this step, consider:

Option	Description
Lot	Displays the total bid from a supplier for a specific lot. Example: Select **Lot** for **Lowest or Not** to enable bidders to see their lot bid ranking.
Item	Displays individual item bid price of a supplier in relation to other suppliers. Example: Select **Item** for **Numerical Ranking** to enable bidders to see whether their bid for an auction item ranks **1st Place**, **2nd Place**, or **3rd Place**.
Include Best Price	Displays the current lowest bid value for **Lot**, **Item**, or both **Lot** and **Item**.

Result

Auction bidders only see information you configured for the auction event.

Use Suppliers Chat During Live Auctions

Prerequisites

Start a live auction.

Context

Send direct messages to your suppliers during live auctions.

Steps

1. From the auction bidding page, access **Suppliers Chat** to view a list of online, participating suppliers.
2. Select a supplier you want to communicate with.

   Other suppliers can't view messages between the sourcing team and the individual supplier.
3. New messages display in the **Suppliers Chat** box and next to the supplier name on the **Overall Bids** section.
4. Strategic Sourcing sends email notifications for any messages you send to offline suppliers.

Result

You and your suppliers send and receive messages during live auctions.

Event Questionnaires

Create Multiple Choice Questions

Prerequisites

Create a sourcing event.

Context

You can create multiple choice questions in your questionnaires to streamline the sourcing process.

Steps

1. Access your event.
2. In the **Build Response Sheet** section, select **Build Questionnaire** or **Edit Questionnaire** if you've already started one.
3. Select **Add Multiple Choice** from the **Questions** menu.
4. Enter your questions and answers. You can configure the answer options for suppliers.

Next Steps

(Optional) Link questions from your questionnaires to your event evaluations.

Add Auto-Scoring

Prerequisites

Create multiple choice questions for your questionnaire.

Context

You can use auto-scoring to evaluate the quality and content of supplier responses to your multiple choice questions. Adding auto-scoring to your questionnaire can save you time and focus on making strategic assessments based on questionnaire responses.

Steps

1. Access your event edit page.
2. In the **Build Your Response Sheet** section, select **Edit Questionnaire**.
3. Select your individual multiple choice questions to add scoring for each answer.

Result

When you compare the bids you receive, you can expand the **Questionnaire Responses** section to view the auto-scores for supplier answers.

Sort Sections

Prerequisites

Add sections to your questionnaire.

Context

You can rearrange the sections, subsections, and questions in your questionnaires in any order you'd like.

Steps

1. Select the **Sections** button from the action bar to begin sorting.
2. In the **Sections** side panel, click and drag sections into your desired order.

   You can also sort sections directly from the main event page.
3. To move questions, select **Click to Edit**.

   - Within a section, select **Move**, and then select the new location for the question.
   - To another section, select **Move**, and then select a section from the menu. The question moves to the end of the section by default.

   You can also move entire subsections (including all the questions within) using these options.

Event Worksheets

Build an Event Worksheet

Context

You can collect supplier data, such as line item pricing, using event worksheets. You can also use event worksheets to compare and analyze supplier bid submissions at the conclusion of your event.

Steps

1. Select **Navigate** > **Events**.
2. Access your event.
3. In the **Build Your Response Sheet** section of your event, click **Add Worksheet**.
4. Name the event worksheet and add notes on the **Edit Worksheet Details** tab.

5. (Optional) Add new columns to the default event worksheet on the **Add Column** tab.

   In the **Column Names** section, copy and paste column headers from a spreadsheet, or enter them manually. Use a single-line break to separate column headers.

   Edit individual columns to define the type and supplier visibility. Column types set to *Text* accept any combination of characters and numbers. Columns set to *Number* or *Currency* only accept numeric values. Columns set to *Formula* calculate numeric values based on other the formula you input.
6. (Optional) Click and drag column headers to reorder columns.

Next Steps

Copy and paste in data from a spreadsheet, or enter data manually.

Configure your **Worksheet Supplier Visibility** for each worksheet and its sections that you create to enable suppliers to view only the items relevant to them.

Set Up Required Columns

Context

You can require responses for certain sections of your event worksheets, enabling you to collect all necessary information before suppliers can submit their bids. You can also set a range of values or prices that limit responses and influence suppliers to enter within an ideal range.

Steps

1. Expand the drop-down menu from the header of the column you want to require.
2. Select **Required** > **Yes**.

   When a supplier enters data in the event worksheet for any of the other columns, this column now also requires data entry for those rows.
3. (Optional) To make your entire column required regardless if suppliers enter data elsewhere, select the **Require Response On All Line Items** check box.

   Note: Ensure you set the visibility of your required columns to *Supplier Fill*.
4. (Optional) To set a specific range for a selected column, select **Edit Column** and enter your **Required Range**.

   Suppliers can only submit their bids if the values they enter are within the required range.

Result

Suppliers who haven't completed the required columns in your event worksheet receive an error message when attempting to submit their bids.

Concept: Linked Event Worksheets

Linked event worksheets enable you to collect and migrate data from 1 sheet to another. You can:

- Consolidate data from multiple sheets.
- Break out components of complex event worksheets into new sheets.
- Connect data across sheets.

Linked event worksheets help you run sourcing events with several sheets, as well as build more flexible bid sheets to capture supplier responses. Common use cases for linked event worksheets include:

Use Case	Description
Freight Costs	Collect freight costs per pound to various locations, and use pricing to calculate the fully landed cost of

Use Case	Description
	each item. Prices are the same across the different items.
Project Costs	Collect rate cards on 1 sheet, then select titles and quantities on a second sheet to build the cost of a project.
Facility Information	Collect general information about production facilities on 1 sheet, then use that information on a second sheet.
Currency Conversion	Store rates on 1 sheet and run conversions on a second sheet.

Reference: Event Worksheet Formulas

When gathering pricing information from suppliers, you can use formulas to calculate different outputs based on their provided data. You can create both simple and complex formulas.

Basic Formulas

Regular formula building supports these basic operations:

- Add
- Subtract
- Multiply
- Divide

You can build out formulas using these operations by referencing any column set as a numeric or currency field column.

When you begin building a new event worksheet, it automatically includes these columns:

Column	Field Type
Title	Text
Unit of Measure	Text
Quantity	Numeric
Price	Currency
Extended Priced	Formula (Quantity * Price)

You can edit and delete columns to customize your event worksheet.

You can also create calculated columns by setting your column type to *Formula*. Select column header names as variables to pull into the formula. Enter numbers and functions, or select from the function options.

Advanced Formulas

To perform more complex calculations, you can use advanced formula options in the Formula Builder, including these functions:

Function	Description	Format
ABS	Calculates the absolute value of the input.	ABS(value)

Function	Description	Format
AVG	Calculates the average of a set of values.	AVG(value1, value 2, …)
FLOOR	Rounds a number (towards zero) to the nearest specified multiple of significance.	FLOOR(value, significance)
IF Statements	Calculates a value based on specified conditions.	IF(something is true, then do something, otherwise do something else)
MIN	Calculates the smallest value from a supplied set of numeric values.	MIN(number1, [number2], …)
MAX	Calculates the largest value from a supplied set of numeric values.	MAX(number 1, [number2], …)
POWER	Calculates a value raised to a specified power.	Power(value, to the power of)
ROUNDDOWN	Rounds data down to a given number of digits.	ROUNDDOWN(value, number of digits)
ROUNDUP	Rounds data up to a given number of digits.	ROUNDUP(value, number of digits)
SQRT	Calculates the square root of the entered value.	SQRT(value)
SUM	Calculates the sum of a series of values.	SUM(value 1, value2, …)

You can also use these symbols in the Formula Builder:

Math Operators	Comparisons
+	<
-	>
*	< =
/	> =
%	< >
^	! =
|	=
&	

To ensure that your formulas are working properly, use the **Preview** button on your event worksheet. Preview mode enables you to enter supplier data and test your formulas.

Example: Build Linked Event Worksheets

This example illustrates how to build linked event worksheets to convert different currencies on to your bid sheets.

Context

You're a buyer in the United States running an event with suppliers in different European countries. You want to convert the currency of the supplier bids into USD.

Steps

1. Access your event.
2. Select **Add New Worksheet**.
3. Create an event worksheet.
4. To base the conversion rate in USD, manually enter that 1 EUR is equivalent to $0.89.
5. Create your bid sheet.
6. Add and edit a column for suppliers to fill out their quoted prices.
7. Add a column, and name it *Currency*.
8. Set the column type to *Lookup*.
9. Select *Conversion Rates* from the **Source Worksheet** prompt to link your event worksheet for conversion rates as the source sheet.
10. Select *Currency Type* from the **Source Key Column** prompt.

    Note: Give suppliers visibility of the source column in order for conversions to work properly. Suppliers need to see the currency values in the drop-down menu of this column.
11. Create another column, and name it *Price in US Dollars*.
12. Set the column type to *Formula*.
13. Select **Edit Formula**.
14. Enter this formula to convert the quoted price from the supplier currency into USD: quantity of the item multiplied by the quoted price multiplied by either source field, or by source value.

    Use source field if the value depends on a drop-down value in the spreadsheet.

    Use source value if the value is the same for the entire column.

Supplier Invitations

Invite Suppliers

Prerequisites

Start a sourcing event.

Context

You can invite suppliers to participate in your sourcing events.

Note: A supplier receives certain data when you invite them to RFx events, auctions, or reviews. Once you publish an event, the event data becomes available in the supplier portal. For example, if you:

- Change the due date of a published event, that event updates in the supplier portal.
- Remove an auction, that auction is removed in the supplier portal.

Remove the supplier from the event to stop sending this data. When you remove a supplier from an event, that supplier can no longer access the event data in the supplier portal.

Steps

1. Navigate to **Events** and access your sourcing event.

2. In the **Invite Suppliers** section, click **Open Supplier Directory**.

   When you have commodity codes enabled, you can add all suppliers that use that commodity code. Add the commodity code to your event in the **Commodity Code** section. After you add suppliers using commodity codes, you can modify the **Invite Suppliers** list by adding or removing suppliers.
3. (Optional) Add new suppliers to the supplier directory.
4. Add the suppliers that you want to invite to the event.
5. Publish the sourcing event.

Result

When you publish your sourcing event, all the invited suppliers receive an email invitation. The suppliers can use this invitation to sign up for Strategic Sourcing.

Run Test Events

Prerequisites

Create a sourcing event.

Context

You can duplicate and test your sourcing event before you publish it to gain insight into the entire supplier experience from start to finish. Alternatively, you can preview what your supplier sees by clicking **Preview** on the action bar as you build your sourcing event.

Steps

1. Navigate to **Events** > **Events** and access your sourcing event.
2. Click **Duplicate** from the **Options** menu of your sourcing event.
3. Access the duplicate sourcing event.
4. In the **Invite Suppliers** section, click **Open Supplier Directory**.
5. Add a new supplier to the event using a secondary email address that you can access.
6. Publish the duplicate sourcing event.
7. To test the duplicate sourcing event, use the email invitation sent to your secondary email address.

Send Customized Invitations

Prerequisites

Publish a sourcing event.

Context

You can send your supplier a customized invitation from your personal email account.

Steps

1. Navigate to **Events** > **Events** and access your sourcing event.
2. In the **Invited Suppliers** section, expand the drop-down menu for a supplier.
3. Click **Send Custom Invite**.
4. Send the email.

   Note: Don't edit the link address in the **To** field.

Send Introductory Emails

Prerequisites

- Start a sourcing event.
- Invite a supplier to the sourcing event.

Context

You can send an introductory email to your suppliers before you publish a sourcing event. Strategic Sourcing provides you with a default draft message that includes the most important information to share with your suppliers. You can customize the message to fit your needs.

Steps

1. Navigate to **Events** > **Events** and access your sourcing event.
2. In the **Invite Suppliers** section, click **Draft Introductory Email**.
3. Send the email.

Concept: Gateway Documents

Company Administrators can enable gateway documents like terms and conditions for organizational use. Sourcing managers can apply those terms and conditions to events. Suppliers must agree to the terms and conditions before they can access events.

You can enable gateway documents for organizational use by clicking **Add New Terms** on **Sourcing & Auctions** > **Terms and Condition** on **Settings**.

Live Sourcing Events

Create a Public Event

Prerequisites

Select the **Show "Public"** check box in the **Built-in Fields** section of your global settings.

Context

You can create and share a sourcing event publicly so any potential supplier can access it without an invitation from the sourcing team.

Steps

1. Access the Event edit page.
2. Select **Event Options** in the **Set Up Your Event** section.
3. From the **Public** prompt, select **Yes**.
4. (Optional) Select **Share RFP** to access the URL link for your event, as well as script code that you can embed on your website.

   Note: Once suppliers sign in to access your public event, they must reopen the event URL. It doesn't display on their homepage automatically.

Link to Existing Projects

Prerequisites

Have *Read/Write* permission on both the event and project.

Context

You can link an event to an existing project in pipeline.

Steps

1. Access your event.
2. Select **Link to Existing Project**.
3. Search your existing projects.
4. Select your project.

Result

You can now view the current project link on your event.

Next Steps

Select **Update Project Link** to update the link if necessary.

Set Up Sealed Bids

Context

You can seal bids on your event so you can't open them before the final submission deadline. A sealed bid event ensures a fair bidding process and is often a requirement for public and governmental institutions. When you seal bids:

- Suppliers can submit bids at any time.
- You as the buyer can't open them until your bid submission deadline passes.

Steps

1. Access the **Setup Your Event** page.
2. Select **Event Options**.
3. From the **Sealed Bids** prompt, select **Yes**.

   Your selection applies across all supplier bids.

Result

The bids you receive on your purchasing event won't be viewable by you or anyone on your team until the deadline has passed.

Add or Remove Suppliers

Prerequisites

Publish a sourcing event.

Context

You can add or remove a supplier from a published sourcing event.

Steps

1. Access your event dashboard.
2. Select the **View Event** tab.
3. In the **Suppliers** section, select **Add Supplier**.
4. In the **Invite Suppliers** section of the event, add or remove a supplier.

   To add a supplier:

   - Select **Open Supplier Directory**, then select the check box next to the name of the supplier you'd like to add to the event.

   To remove a supplier:

   - Select the **Delete From RFP** button next to the name of the supplier you'd like to remove from the event.

     Note: Deleting the supplier permanently removes all data associated with their bid for this event.
5. (Optional) In the **Build Your Response Sheet** section, click **Edit Supplier Visibility** to modify visibility to worksheets for new suppliers.
6. Click **Publish Updates**.

Request Documents

Prerequisites

Create an event.

Context

You can request suppliers to upload specific documents to their bids, such as:

- Signed contracts.
- Product information.
- Proof of insurance.

Documents will save to supplier bids for you, making them easily accessible and exportable.

Steps

1. When building a sourcing event, find the **Documents** area in the **Build Your Proposal** section.
2. To identify what documents suppliers should upload, enter a document name and description, as well as instructions if needed.
3. (Optional) Mark documents as required.

   Note: If you mark a requested document as required, suppliers can only submit their bids to you if they upload a file.
4. Select **Add** to save your document request to your event.

Next Steps

Once suppliers submit their bids, download the documents each supplier uploaded individually or in a zip file.

Invite Stakeholders

Prerequisites

Create an event.

Context

You can invite stakeholders from across your company to collaborate with you on your sourcing event. Stakeholders can access the buyer-side of your event. Often, stakeholders are people from other teams or departments who might be helpful in the event process. Stakeholders can help you:

- Build out your event.
- Answer questions from suppliers.
- Review and evaluate submissions.

You can invite stakeholders before and after you publish the event.

Steps

1. Access the **Invite Stakeholders** section of your event.
2. Enter the name and email address of the person you want to invite as a stakeholder.
3. Select permissions for the stakeholder. As you complete this step, consider:

Option	Description
Read Only	Stakeholder can view the sourcing event and corresponding supplier submissions, and can complete evaluations to submit to the sourcing manager.
Answer Q&A	Stakeholder has all the rights of a read only stakeholder. In addition, the stakeholder can answer assigned questions in the message center. **Note:** The event owner must approve the answer before sending to suppliers.
Read/Write	Stakeholder has the same permissions as the sourcing manager: full access to edit the sourcing event, invite suppliers, respond to questions, and so on.

   You can modify stakeholder permissions before, during, or after running an event.

4. Select **Add**.

Result

Stakeholders automatically receive an email invitation to set up their account and access the sourcing event.

Related Information
Reference

Reference: Strategic Sourcing User Roles and Permissions on page 54

Change Event Owner

Prerequisites

- Create a sourcing event.
- Add the new owner of the event as a stakeholder of any role.

Context

You can change the owner of a sourcing event after you've already created it. The creator of the event is the event owner by default.

Steps

1. Access the **Invite Stakeholders** section of your event.
2. Select the **Edit** button next to the name of the new owner.
3. Select **RFP Owner** from the drop-down menu.
4. Select **Save**.

   There must always be an event owner, and there can only be 1 event owner at all times.

Result

The previous event owner remains as a stakeholder on the event. They have read/write permissions instead of event owner permissions.

Related Information
Tasks
Invite Stakeholders on page 87

Edit Live Events

Prerequisites

Publish an event.

Context

You can make edits to an event you've already published. When you update an event, you can:

- Change the event name.
- Add new questions.
- Add new suppliers.
- Adjust deadlines.
- Reconfigure your event worksheets.
- Make any other desired edits.

Steps

1. Access your event.
2. Select **View RFP** from the bottom of the event page.
3. Select **Edit RFP** from the action bar.

   Note: Your suppliers can still access and update their bids while you're editing your event. Editing an event doesn't take it offline or prevent suppliers from accessing it.
4. Make your edits.

5. Publish changes using the **Publish Updates** button.

   Your event status changes from *Currently Editing* back to *Live* once you publish your updates.

Next Steps

Notify your suppliers of any updates you've made to your event.

Related Information
Concepts

Concept: Message Center on page 94

Tasks

Request Bid Updates on page 92

FAQ: Closed Events

How do I reopen a closed event?	With live editing, you can reopen a closed event. First open and begin editing your event. On the project timeline, edit the bid submission deadline. To reopen the event, change the deadline to a date and time in the future.
Can suppliers submit bids after the deadline?	You can enable suppliers to submit their bids past the deadline when you’re building out your event. Under the **Event Options** section, select either *Yes* or *No* from the **Late Bids** prompt. You can also change whether suppliers can submit late bids at any time. Select or clear the **Allow Late Bids** check box on the event dashboard. If you: • Select the check box, suppliers are still able to submit bids after the event closes. In this case, reopening an event might encourage more suppliers to submit bids, but it's not necessary. • Clear the check box, you must extend the submission deadline in order to enable additional submissions. Another way to give suppliers more time to work on their bids is by extending the submission deadline.

Provide Question Feedback

Prerequisites

Suppliers submit responses to your questionnaire.

Context

You can provide feedback to suppliers on your questionnaires when misunderstandings or mistakes occur. Question feedback enables you to communicate with suppliers and request updates question-by-question directly within their submitted responses. Giving feedback makes reviewing supplier submissions more efficient and accurate, and helps streamline the communication process.

Steps

1. Access the **Invited Suppliers** section of your event.
2. Select **View Bid** to open a supplier response.

3. View responses to your questionnaire in the **Response Sheets** section of the supplier bid.
4. Select the **Add Feedback** button from the panel.
5. Enter your requests for clarification into the fields next to each question, where applicable.
6. Select the **Prepare Summary** button to save and summarize your comments.
7. On the overview page, set a new submission deadline for the supplier and draft an email to provide further details or clarification of your update request.

Next Steps

View the history of supplier responses by accessing the questionnaire responses on their resubmitted bids.

Related Information
Tasks

Request Bid Updates on page 92

Manage Proxy Bidding

Context

You can use proxy bidding when a supplier is unable to submit their bid online. Proxy bidding enables you to submit or update a bid on behalf of a supplier. When you use proxy bidding, you can ensure that all data is available to compare in 1 location.

Proxy bidding is available for:

- All sourcing events.
- Supplier performance management.
- Supplier forms.

You can also use proxy bidding to update event worksheets and questionnaire responses on behalf of your supplier.

Steps

1. Import a new bid or update an existing bid by accessing the **Invited Suppliers** section of your event dashboard.

   The process for importing a new bid and updating an existing bid is the same.

   Note: When updating an existing bid:

   - If your supplier has already started working, the bid export file contains all of their currently entered work.
   - If you change bid information for your supplier, the import overwrites the supplier bid to match the current file that's importing. You retain a record of the previous supplier bid after import.
   - After updating a supplier bid, the supplier can see the most current bid information in their account upon logging in.
2. Select **Bid Actions** > **Import Bid For Suppliers**.
3. Select **Export Bid Sheet** > **Download Bid Sheet**.
4. Enter the answers for your supplier into the spreadsheet, then save the updated file to your computer.

   Only enter answers in light blue cells within the file.
5. When you're ready to import the bid, select the **Import** button.
6. Attach the completed spreadsheet file on your computer under the **Attach Bid Sheet** section. Attach additional documents if needed.

7. Select the **Submit Bid Sheet** button.

   Note: Importing a bid might take a few minutes. If the import process lasts longer than 5 minutes, contact support for assistance.

Resend Invitations

Prerequisites

Send an event invitation to a supplier.

Context

You can resend an invitation to a supplier during a live sourcing event if they're unable to locate the original invitation. Suppliers can only register for Workday Strategic Sourcing through an invitation. You can resend:

- The same invitation.
- A customized invitation.

If you click a supplier that has already registered for the event, we don't display options to resend the invite or send a custom invite. Instead, the company admin or sourcing manager can advise the supplier to log into the platform and click the event on their homepage.

Steps

1. In the **Suppliers** section of your sourcing event, select the supplier.
2. In the **Invited Supplier** side panel, select a resend option. As you complete this task, consider:

Option	Description
Resend Invitation	Automatically resends an invitation email from scout@scoutrfp.com.
Send Customized Invitation	Opens an email draft in your default email client for you to edit and send to the supplier using your email address.

Related Information
Tasks
Send Customized Invitations on page 83

Sync Event Dates to Calendars

Prerequisites

Publish a sourcing event.

Context

You can download event deadlines for a sourcing event and add them to your personal calendar.

Steps

1. Select the **Download Calendar Events** button from the confirmation page for the publication of your event.
2. Import the downloaded ICS file into your external calendar.

Result

The deadlines you've set on your event display in the calendar where you imported them.

Related Information
Tasks
Add Project Dates to External Calendars on page 70

Request Bid Updates

Prerequisites

Suppliers submit bids on your event.

Context

You can request bid updates from your suppliers. Bid updates are helpful when:

- Suppliers misinterpret requirements or provide incorrect information.
- A supplier needs to make edits after the bid submission deadline.
- You'd like to do a modified best-and-final round from a select group of suppliers.

In your request, you can also write a note to your suppliers, attach documents, and provide a timeline specific to the request.

Steps

1. Access your event.
2. In the **Invited Suppliers** section, either:
   - Select **Bid Actions** > **Request Bid Update**.
   - Select **Compare Bids**, then expand the **Actions** menu beneath your supplier and select **Request Bid Update**.
3. Complete the **Request Update** page.
4. Select the **Preview** button to view your drafted bid update request as your supplier will see it.
5. Select **Request Update**.

Result

Your bid update request sends to your supplier in an email that includes you.

Related Information
Reference
Reference: Autofill Options on page 52

Communications

Send Direct Messages to Suppliers

Prerequisites

Publish or close a sourcing event.

Context

You can use the supplier chat to send messages directly to a supplier to discuss a published or closed sourcing event. While the messages are private between the sourcing team and the supplier, the stakeholders for the buyer can view the messages. Stakeholders must have Answer Q&A or Read/Write permissions to send messages directly to suppliers.

Steps

1. Navigate to **Events** > **Events** and access your sourcing event.
2. Click **Message Center**.
3. Click **Supplier Chat** and select a supplier.
4. Send your message.

Result

When you send your message, the supplier receives an email notification.

Related Information
Tasks
Send Messages to All Suppliers on page 93

Send Messages to All Suppliers

Prerequisites

Create a sourcing event.

Context

You can send messages to all the suppliers for a sourcing event using announcements.

Steps

1. Navigate to **Events** > **Events** and access your sourcing event.
2. Click **Message Center**.
3. Click **Send a New Message to Suppliers** on the action bar.
4. Send your message.

Related Information
Tasks
Send Direct Messages to Suppliers on page 92

Assign Questions to Stakeholders

Prerequisites

- Create a sourcing event.
- Add your teammates as stakeholders to the event.

Context

You can assign your stakeholders questions from suppliers to answer. Stakeholders must have Answer Q&A or Read/Write permissions to answer questions.

Steps

1. Navigate to **Events** > **Events** and access your sourcing event.
2. Click **Message Center**.
3. Select a stakeholder on the **Assign To** prompt for each question.

Result

The stakeholder receives an email notification that you assigned them a question to answer.

Related Information
Concepts

Concept: Message Center on page 94

Concept: Team Chat

Team chat enables you to communicate with your stakeholders within a sourcing event. You can keep everyone updated on the project and eliminate long and confusing email chains among teammates.

To access the team chat, access your sourcing event and click **Team Chat** on the action bar. Each sourcing event has its own team chat.

Team chat enables you to:

- @mention stakeholders to send email notifications to them. You can only mention stakeholders who have accepted their email invitation to participate in the sourcing event.
- Share files.
- Enter comments that link to the page you were on when you left your comment.
- Remove comments.

Concept: Message Center

The message center is the line of communication between sourcing managers and suppliers on any given sourcing event. The sourcing manager can send messages to suppliers, and suppliers can send questions to the sourcing manager. Each sourcing event has its own message center.

The message center eliminates the need for communicating with suppliers through email because you can:

- Answer a question directly or share the answer with all suppliers.
- Send messages to all suppliers.
- Attach files to your answers and messages to suppliers.

Answering Supplier Questions

When a supplier submits a question to you through the message center, you can answer the question yourself or assign it to a stakeholder with Answer Q&A or Read/Write permissions.

When you answer a question yourself, you can send the answer directly to the supplier that asked it or share the question and answer with all suppliers. When you share a question and answer, Strategic Sourcing makes the supplier that asked the question anonymous. You can edit the question before sharing it.

Stakeholder Permissions

Stakeholders with a permission level of:

- Read Only have no access and aren't able to answer questions.
- Answer Q&A have restricted access and can answer questions, but the sourcing event owner must approve the answers.
- Read/Write have full access and can answer questions independently. They're able to send their answer directly to the supplier or share the question and answer with all suppliers.

Supplier Question Deadlines

You can set a supplier question deadline when you build a sourcing event. After the deadline passes, your suppliers can no longer submit questions for the sourcing event.

To modify a supplier question deadline for a closed sourcing event, contact the support team.

Notifications

The sourcing manager and stakeholders with read and write permissions receive message center notifications through both email and Strategic Sourcing. These notifications ensure that they're aware of message center activity, such as a supplier sending a question or a stakeholder answering a question.

Strategic Sourcing sends email notifications in twice-daily intervals to limit the number of emails sent to your suppliers and stakeholders.

Related Information
Tasks
Assign Questions to Stakeholders on page 93

Submission Evaluations

Download Submitted Files

Context

You can download all the files submitted by your suppliers as a single consolidated file.

Steps

1. Navigate to **Events** > **Events** and access your sourcing event.
2. In the **Invited Suppliers** section, click **Compare Bids**.
3. Click **Download All Files** on the action bar.
4. Download the file.

Result

The file you download has a folder for each supplier that submitted bids on the event. The file includes any documents that your team has attached for your event.

Create and Manage Evaluations

Prerequisites

Start a sourcing event.

Context

Evaluations dashboards enable stakeholders and evaluators to manage the evaluation process for suppliers and their bids and view their own pending, draft, or completed evaluations. Evaluations enable you to:

- Define questions for stakeholders to evaluate bid submissions.
- Collect a standard set of evaluations from each stakeholder.
- Set a scale for numeric scoring and select weights for questions.

Steps

1. Navigate to the **Events** > **Events** tab and access your sourcing event from the list of events.
2. Select the **Evaluation** dashboard from the left side panel.

3. Draft your evaluation in the **Evaluation** section.

   Scoring questions are the only questions that you can assign a weight to. To assign a weight to a section, you must add a scoring question to that section. To enter a weight for each section, click **Sections** on the action bar.
4. Evaluate suppliers.
5. (Optional) Click **Hide Suppliers from Evaluation** button to select which suppliers to move forward for evaluation.

   Example: A sourcing manager can move forward a supplier for evaluation only if the supplier passes the minimum requirements for successful bids in an RFP.
6. (Optional) Click **Continue Evaluation** button to access a full-page evaluation.

   Full page evaluations enable you to:

   - Compare the bids of multiple suppliers relative to each other.
   - Score the suppliers accordingly and submit evaluations for multiple suppliers.
   - View answers to linked evaluation questions while scoring.
7. Publish your evaluations.

Result

Stakeholders begin their evaluation when a supplier submits a bid to the event.

Related Information
Concepts
Concept: Scorecard Scoring Logic on page 98

Submit Evaluations

Prerequisites

- The sourcing manager or a stakeholder with Read/Write permissions has created an evaluation form.
- One or more of your suppliers have returned their bids.

Context

You can use the evaluation form to submit evaluations for your suppliers.

Steps

1. Navigate to **Events** > **Events** and access your sourcing event.
2. Click **Open Evaluations** on the action bar.
3. In the **Evaluations** side panel, click **Start** on the supplier that you want to evaluate.
4. Submit your evaluation.

Result

Your sourcing manager receives your evaluations. You can revise your evaluations after you submit them, but not after the submission deadline.

Create Supplier Award Recommendation Summaries

Prerequisites

Complete a sourcing event.

Context

You can create award recommendation summaries for preferred suppliers using data from sourcing events. Award summaries enable you to send recommendations to internal stakeholders to build consensus on which supplier to use to fulfill the sourcing event.

Steps

1. Navigate to the **Events > Events** tab and access your sourcing event from the list of events.
2. Select **Event Analysis**.
3. Select preferred suppliers.
4. Select **Add to Award Summary** on the **Filter Table Columns** side panel.
5. (Optional) Select the **Add to Award Summary** option on the **Actions** side panel menu on suppliers.
6. Drag and drop your preferred suppliers to rank them on the **Award Options Recommendations** view on the **Award Summary** page.

   From the RFP dashboard, you can also select a supplier to add the supplier to the award summary and create an award summary.
7. (Optional) Edit the award summary to create a print preview in PDF or other file format to share with stakeholders.
8. (Optional) Create a new **Scenario** in **Event Analysis**, to add a scenario as an award option with multiple suppliers.

   You can associate suppliers with specific line items based on the information in **Event Analysis**.
9. (Optional) Navigate to your RFP dashboard.
10. itself, the user can click on a supplier and a supplier action side panel will open on the right hand side. From there, the user can take actions to award the supplier directly or add the supplier to the award summary **-** both actions will create the award summary.

Result

Stakeholders can review and approve recommendations on bids from suppliers.

Related Information
Reference

The Next Level: Foundations of Event Analysis for Strategic Sourcing

Award Bids

Context

You can select and notify suppliers of their winning bids, ensuring that your suppliers receive timely notifications.

Steps

1. Select **Navigate** > **Events**.
2. Access your sourcing event.
3. Click the winning supplier and select **Award** on the side window.
4. (Optional) Select the **Email supplier** toggle to notify suppliers when they win a bid.

   You can update the award email template, or enter a message if no template exists.
5. Confirm the award.

Next Steps

To onboard the awarded supplier, you can start a Supplier Onboarding project from the **Invited Supplier** side window.

Related Information
Tasks

Onboard Suppliers to Strategic Sourcing Only on page 114
Steps: Onboard Suppliers and Transfer to Workday Platform on page 113

Concept: Export Bid Submissions to Excel

When you export bid submissions from suppliers as an Excel spreadsheet, you can select between a side-by-side comparison or a pivot table. The only difference between these export options is how the spreadsheet organizes and displays the event worksheet data.

To export bid submissions to Excel, navigate to **Events** > **Events** and access your sourcing event. Click **Compare Bids** in the **Invited Suppliers** section, then click **Side By Side Comparison** or **Pivot Table** on the action bar.

Side By Side Comparison

The side-by-side comparison export enables you to view bid comparisons similar to how you view them in Strategic Sourcing. You can make adjustments, such as to the formatting and data.

This export option splits questionnaires and event worksheets into separate tabs. It groups all questionnaire questions into the **Response Sheet Comparison** tab and separates each event worksheet comparison into individual tabs.

Pivot Table

The pivot table export consolidates event worksheet data into a single pivot table in 1 tab.

Related Information
Reference

Reference: Bid Comparisons on page 100

Concept: Scorecard Scoring Logic

Evaluations enable you to solicit feedback from your stakeholders on the performance of your suppliers. You can customize the weighted scoring for each question and section in your evaluation. Strategic Sourcing automatically calculates and aggregates results from all your stakeholders.

Calculating Total Scores

To calculate the total section score, Strategic Sourcing:

1. Adds all the weighted section scores, rounding the total score up to the first decimal place.
2. Averages the total scores for each supplier to produce an overall score.

To calculate the weighted section score, Strategic Sourcing multiplies the section weight as a decimal by the total section score.

Section	Section Weight	Total Section Score	Weighted Section Score
Pricing & Financials	0.20	86.7%	0.20 × 86.7% = 17.3%
Quality & Level of Service	0.25	97.5%	0.25 × 97.5% = 24.4%

Section	Section Weight	Total Section Score	Weighted Section Score
Maintenance	0.25	90%	0.25 × 90% = 22.5%
Account Management	0.10	95%	0.10 × 95% = 9.5%
Innovation	0.20	80%	0.20 × 80% = 16%

In this example, the total supplier score is 89.7%. The total supplier score is the sum total of all the weighted section scores.

Calculating a Section Score with Equally Weighted Questions

To calculate the total section score of equally weighted questions, Strategic Sourcing:

1. Averages all the question scores of each of your stakeholders, excluding any N/A answers and unanswered questions.
2. Computes the average of the stakeholder average scores.

A section has 2 equally weighted questions. Your 4 stakeholders answer the questions with a numeric score of 1-5 out of 5:

Stakeholder	Question 1 Score	Question 2 Score
Stakeholder 1	No answer	2 out of 5
Stakeholder 2	2 out of 5	N/A
Stakeholder 3	4 out of 5	5 out of 5
Stakeholder 4	3 out of 5	3 out of 5

Strategic Sourcing drops N/A answers and unanswered questions from calculations and averages each stakeholder score:

Stakeholder	Calculation
Stakeholder 1	(No Answer + (2 ÷ 5)) ÷ 2 = 2 ÷ 5 = 0.4
Stakeholder 2	((2 ÷ 5) + N/A) ÷ 2 = 2 ÷ 5 = 0.4
Stakeholder 3	((4 ÷ 5) + (5 ÷ 5)) ÷ 2 = 0.9
Stakeholder 4	((3 ÷ 5) + (3 ÷ 5)) ÷ 2 = 0.6

Strategic Sourcing averages all stakeholder scores together to get the percentage: ((0.4 + 0.4 + 0.9 + 0.6) ÷ 4) × 100% = 57.5%.

Calculating a Section Score with Differently Weighted Questions

To calculate the total section score with differently weighted questions, Strategic Sourcing:

1. Averages all the question scores of each of your stakeholders and scales to 100%, excluding any N/A answers and unanswered questions.
2. Computes the average of the stakeholder average scores.

A section has 2 questions, one weighted 25% and the other weighted 75%. Your 4 stakeholders answer the questions with a numeric score of 1-5 out of 5:

Stakeholder	**Question 1 Score, Weighted 25%**	**Question 2 Score, Weighted 75%**
Stakeholder 1	No answer	2 out of 5
Stakeholder 2	2 out of 5	N/A
Stakeholder 3	4 out of 5	5 out of 5
Stakeholder 4	3 out of 5	3 out of 5

Strategic Sourcing drops N/A answers and unanswered questions from calculations and scales each stakeholder score to 100%:

Stakeholder	**Calculation**
Stakeholder 1	No Answer + (2 ÷ 5) × 100%= (2 ÷ 5) × 100% = 40%
Stakeholder 2	(2 ÷ 5) × 100% + N/A = (2 ÷ 5) × 100% = 40%
Stakeholder 3	(4 ÷ 5) × 25% + (5 ÷ 5) × 75% = 20% + 75% = 95%
Stakeholder 4	(3 ÷ 5) × 25% + (3 ÷ 5) × 75% = 15% + 45% = 60%

Strategic Sourcing averages all stakeholder scores together to get the percentage: (40% + 40% + 95% + 60%) ÷ 4 = 58.8%.

Calculating Question Scores

To calculate a question score, Strategic Sourcing uses this formula: (Average Score of Stakeholders ÷ Number of Stakeholders That Answered) × Weight Percentage.

Of your 4 stakeholders, only 3 provide answers with a numeric score of 1-5 out of 5:

Stakeholder	**Question Score**
Stakeholder 1	2 out of 5
Stakeholder 2	N/A
Stakeholder 3	4 out of 5
Stakeholder 4	3 out of 5

Strategic Sourcing averages scores by the number of stakeholders that answered: (((2 ÷ 5) + (5 ÷ 5) + (3 ÷ 5)) ÷ 3) x 100% = 66.7%.

Related Information
Tasks

Create and Manage Evaluations on page 95

Reference: Bid Comparisons

You can view comparisons of the view submissions you receive. You can view these comparisons in Strategic Sourcing or export them to Excel. To compare bids, navigate to **Events** > **Events** and access your sourcing event. In the **Invited Suppliers** section, click **Compare Bids**.

Option	**Description**
Questionnaire Responses	Compare the answers to your questionnaire.

Option	Description
Worksheets	Compare event worksheet responses from your suppliers. You can: • Limit the comparison to specific columns on your worksheet. • Highlight cells with the lowest cost.
Attached Files	If your suppliers have uploaded documents to include with their bids, you can download them all together in a single file.

Related Information
Concepts
Concept: Export Bid Submissions to Excel on page 98

Event Analysis

Analyze Supplier Bids

Context

You can do a side-by-side comparison of supplier bids on requests for proposal (RFP) or auctions using event analysis.

Steps

1. Select **Navigate** > **Events**.

   Access the sourcing event that you want to analyze.
2. Navigate to Event Analysis:
   - For auctions, click **Analyze All Bids**.
   - For RFPs, click the **Event Analysis** tab.
3. In the **Item Details** tab, click **Map Data** to set up the data used in each column.

   As you analyze the event, consider:

Option	Description
Item Details	You can only map your data in the **Item Details** tab.
Supplier Summary	You can organize your supplier bids by common data groups with the **Group By** prompt.
Scenario Summary	You can organize your scenarios by common data groups with the **Group By** prompt.
Item Pivot	Strategic Sourcing doesn't persist pivot tables when you export event data.
4. (Optional) Click **Filter Columns** to set up the reference columns you want to compare against your supplier bids.

   Suppliers can't see reference columns. You can add columns after you publish an event and before suppliers submit bids.

5. (Optional) Use the **Analysis Tools** to customize your data display. When using the **Analysis Tools**, consider:

Option	Description
Highlight By	Set up highlights for the lowest value and the highest value in specific columns. The **Item Details** tab highlights the highest or lowest value per item across all suppliers based on your parameters.
Feedback Ranges	Set up feedback ranges to help identify competitive bids on a per line item basis. The **Item Details** tab displays a summary of the results and highlights each supplier bid based on your parameters.
Outlier Analysis	Set up outlier ranges for the columns you want to find outliers in. The **Item Details** tab displays a summary of how many outliers were found per line item and flags outliers in each supplier bid.

6. (Optional) Access the **Scenarios** tab.

   Create new scenarios or manage existing ones in Event Analysis.

Next Steps

Request updates from your suppliers. To request updates from:

- All suppliers, click **Request Update** in the **Suppliers** section of **Filter Table Columns**.
- A specific supplier, click **Request** from the **Actions** menu of a supplier.

Add your suppliers and scenarios to the award summary.

Award or reject your supplier.

Related Information
Concepts

Concept: Filtering Bids on page 104

Concept: Scenarios on page 104

Reference

The Next Level: Foundations of Event Analysis for Strategic Sourcing

Examples

Example: Create a Manual Scenario on page 103

Analyze Completed Auctions

Context

After an auction event ends, you can use the Event Analysis module to compare:

- Auction bids.
- Savings calculations within your supply base.

Steps

1. Navigate to the project from **Pipeline**.

2. Access the completed auction event in the **Events** tab.
3. Click **Analyze All Bids**.

   If the auction has multiple lots, the first worksheet combines all the line items from each auction lot. You can analyze individual lots from their separate worksheets.
4. (Optional) To use the Side-by-Side comparison, click **Analyze Lot**.

   The Side-by-Side comparison view displays historical bid data instead of first and last bid only.

Example: Create a Manual Scenario

This example illustrates how to create a manual scenario from an automatic scenario in Event Analysis.

Context

You want a first place scenario for all items, and you want to work with Bluth Family Company for all Gulf Coast region items. Your suppliers provided responses based on region for:

- Hourly rate.
- Number of contractors available.

Prerequisites

Map event data used in each column, including baseline data if you would like to view savings for this scenario.

Steps

1. Access the completed sourcing event.
2. Click the **Event Analysis** tab.
3. Click the **Scenarios** tab.
4. In the **1st Place Scenario**, click the drop-down arrow next to **View**, and select *Copy to Manual Scenario*.
5. Enter these values:

Field	Value
Name	*1st Place with Gulf Coast Bluth Scenario*
Description	*All 1st place choices with incumbent Bluth Family Company in the Gulf Coast region.*

6. Click the **Positions and Rates** worksheet, and go to the **Item Details** tab. Click **Select Columns**.
7. In the **Filter Table Columns** panel, select:
   - *1st Place Scenario*
   - *1st Place with Gulf Coast Bluth*
   - *Region*
   - *Internal Cost for Position*
   - *Hourly Rate*
   - *Net Savings*
   - *Supplier*
8. Click **Update View**.
9. In the **1st Place with Gulf Coast Bluth** worksheet section, manually change the **Supplier** column to *Bluth Family Company* for the Gulf Coast region.

Result

You can compare the sum of your net savings between scenarios.

Related Information
Concepts
Concept: Scenarios on page 104

Concept: Filtering Bids

The Event Analysis module has several ways to organize your bids to make it easier for you to analyze the data.

Calculating Cell Data

If you select multiple cells, Strategic Sourcing will calculate these values at the bottom of the Event Analysis grid:

- Average
- Count
- Min
- Max
- Sum

Filter Table Columns

In Event Analysis, you can filter your data by:

- **Scenarios**
- **Suppliers**
- **Columns**

You can also request an update from all your suppliers in the **Suppliers** section.

Organizing Columns

When working with large amounts of data, Strategic Sourcing enables you to customize your view to make it easier to read. From the menu of a column header, you can:

- Pin columns to the left or right side of your page.
- Resize columns.
- Set up number filters within the column.

If you need to sort multiple columns, you can Shift-click multiple column headers.

Exporting to Excel

When you finish your analysis, you can export your data as an Excel file.

Note: If you have filters, the export excludes any hidden data.

Concept: Scenarios

You can use Strategic Sourcing Event Analysis to compare supplier bids in specific scenarios to determine their impact on savings targets. You can create your own scenarios or use scenarios provided by Strategic Sourcing.

1st, 2nd, 3rd Place Scenarios

These scenarios identify the first, second, and third lowest-priced supplier for each line item. The **Item Details** tab displays the net savings of each scenario and other response columns per line item. The **Scenario Summary** tab displays spend, savings, and other columns for each scenario either by supplier or another selectable parameter.

Historical Baseline Scenario

You can use this scenario to compare against how much you spent on items. This comparison includes the historic price within rankings and serves as the basis for defining savings.

To run the historical baseline scenario, you need to set up **Baseline Price Per Unit** and **Baseline Total Spend** column mapping and ensure values entered reference baseline columns.

Note: This scenario doesn't display outliers. If you want to include them, you can change the percentage in **Outlier Analysis**.

Incumbent Scenario

You can use this scenario to compare a new supplier against an incumbent. An incumbent can be who you purchased from last year or a preferred supplier.

To run the incumbent scenario, you need to set up the **Incumbent** reference column in the **Item Details** tab.

Manual Scenario

You can create manual scenarios to compare your suppliers in different, unique situations. When you create a manual scenario, you can refine your results to create a preferred award situation.

To create and run a manual scenario, you need to set up applicable references columns in the **Item Details** tab and select the supplier and quantity for each item.

Related Information
Reference

The Next Level: Foundations of Event Analysis for Strategic Sourcing

Concept: Edit Columns

Edit columns in the Event Analysis module enables you to add data and create unique columns for each supplier. You can add additional columns to your event data to analyze the bids that your suppliers submit. You can create calculated reference or bid analysis columns by setting the **Analysis Type** to *Formula*.

Reference Columns

You can add reference columns to your event data to compare outlier and feedback range functionalities. *Formula* based reference columns can pull information from other reference or event columns. After you create your reference columns and exit edit mode, you can view your column details and formulas by right-clicking a cell and selecting *View Cell & Column Details*.

Bid Analysis Columns

You can add bid analysis columns to your event data and use them to analyze responses by filling them with unique information for each supplier. You can view your bid analysis columns alongside submitted supplier bids information on the **Item Details** tab.

Related Information
Reference

The Next Level: Foundations of Event Analysis for Strategic Sourcing

Reference: Event Analysis Tabs

You can analyze event submissions you receive in Strategic Sourcing or export them to Excel. To analyze bids, access your sourcing event, and click the **Event Analysis** tab.

Tab	Description
Worksheets	Compare event worksheet responses from your suppliers. You can: • Limit the comparison to specific columns on your worksheet. • Use Analysis Tools to analyze bid data. • View item details. • View supplier bid summary and scenario summary. • Create an item pivot table.
Scenarios	Create additional scenarios or view the Workday built-in scenarios.
Questionnaire	Compare the answers to your questionnaire.
Attached Files	If your suppliers have uploaded documents to include with their bids, you can download all files from: • All suppliers. • A single supplier.
Export Bid Data	Configure how you want to export the event data into Excel.

Related Information
Concepts
Concept: Scenarios on page 104
Tasks
Analyze Supplier Bids on page 101
Analyze Completed Auctions on page 102

Contracts

Create New Contracts

Context

You can create new contracts with customizable fields and milestones in the contracts module.

Steps

1. Select **Navigate** > **Contracts**.
2. Click **New Contract**.
3. As you complete the task, consider:

Option	Description
Supplier	You can only have 1 supplier per new contract.

Option	Description
Contract Summary	If you don't select an **Auto Renewal** option, Strategic Sourcing populates *No*.
Attachments	You can download or check out attachments. To use DocuSign, you need to authorize your DocuSign account with your Strategic Sourcing account.
Contracts Documents	You can only use .docx files for contract negotiation.

Related Information

Concepts

Concept: Strategic Sourcing Contracts on page 109

Concept: DocuSign Integration on page 110

Tasks

Customize Contracts and Contract Intake Forms on page 15

Reference

Reference: User Roles in Contracts on page 55

The Next Level: Strategic Sourcing Contracts Guide

Revise Contracts

Prerequisites

Create a contract.

Context

You can revise active or expired contracts and view the history of previous versions of contract agreements.

You can revise a contract to:

- Make term changes.
- Renegotiate data changes.

A contract must be active or expired to make revisions. When revising a contract, you can edit these fields:

- Title
- Description
- Category
- End Date (Only when you set Auto Renew to No.)
- Final Spend
- Renewal Termination Notice
- Renewal Termination Reminder
- Custom Fields

You can't change the contract type or supplier company on an active contract.

Steps

1. Select **Navigate** > **Contracts**.
2. Access the active or expired contract that you want to revise.

3. Click the **Revise** button and confirm the creation of a contract revision.

   You can edit the contract revision without impacting the existing contract.
4. Send the contract revision for approval.
5. Once the contract revision is in *Approved* status, select **Complete Revision**.

Result

Workday Strategic Sourcing displays an additional line in the contract history with the creation date of the revision.

Related Information
Reference

2021R2 What's New Post: Contract Negotiation in Strategic Sourcing

Steps: Link Contracts

Prerequisites

Add a supplier to the contract.

Context

You can create relationship links between contracts with a supplier or link contracts to projects.

Steps

1. Access the **Related Contracts** tab from a contract.

   Create a parent or child relationship link to a new or existing contract. You can only have 1 parent per contract.
2. Access the **Related Projects** tab from a contract.

   If you create a new project from this tab, it's automatically linked to the contract.

Next Steps

Access the **Relationship Tree** from the **Related Contracts** tab of a contract to see how contracts are linked.

Related Information
Tasks

Create New Contracts on page 106

Bulk Update Contracts

Context

You can make changes to multiple contracts at once to save time and ensure consistency across contracts. Company administrators and sourcing managers can perform bulk updates. A sourcing manager can only bulk update contracts within their teams. You can't bulk update terminated or expired contracts.

If a stakeholder leaves your company and you need to remove them, you can bulk update all contracts that the stakeholder was on.

You can only bulk update fields common to all selected contracts.

When you bulk update contracts, we refer to sourcing owners as stakeholders when choosing a common field.

You can bulk add a stakeholder with 1 of these permissions to multiple contracts:

- Read
- Read/Write
- Sourcing Owner

When you add a stakeholder with Sourcing Owner as the permission, we update the previous sourcing owner to a stakeholder with Read/Write permission.

Steps

1. Select **Navigate** > **Contracts**.
2. Click **Bulk Update**.
3. Select the contracts that you want to update.
4. Click **Find Common Fields**.
5. Select all shared common fields from the side panel that you want to update.
6. Make and confirm the changes that you made.

Concept: Strategic Sourcing Contracts

You can manage contracts throughout the contract lifecycle. You can also set up approval workflows for contracts that display progress and status.

Workday Strategic Sourcing enables you to:

- Create new contracts and templates.
- Track contract negotiations with your supplier.
- Add start and end dates.
- Assign milestones.
- Add stakeholders.
- Change contract status.

Strategic Sourcing provides 4 contract types that you can customize:

- Contract Amendments
- Master Service Agreements
- Non-Disclosure Agreements
- Statement of Work

You can create and customize contract types to fit your business needs.

Contract Statuses

The status indicates where the contract is in the lifecycle. You can assign 1 of these statuses:

Status	Description
In Progress	Applies to open contracts. You can configure the *In Progress* statuses from **Settings**.
Approved	A contract moves to *Approved* once all approval groups approve it and you complete all required custom fields. When you designate a contract as evergreen, you don't have to approve the contract for renewal.

Status	Description
Active	Contracts within the start date and end date are *Active*. When a contract meets the start date condition, Strategic Sourcing automatically moves contracts from *Approved* to *Active*.
Expired	Applies to contracts that pass the signed contract end date and don't automatically renew.
Terminated	You can only terminate *Active* contracts.
Canceled	You can cancel contracts that have never been *Active* and are now inapplicable.
Archived	Applies to a completed revision record. Original contracts can’t be *Archived*.

Contracts Dashboard

The contracts dashboard displays contracts that need work, organized in tabs based on status.

You can also access all active contracts through supplier profiles in the **Supplier Directory**.

You can create filters to specify which contracts display and share those filters with other sourcing managers. You can also access a list of upcoming milestones on the contracts dashboard.

You can't add columns to contracts displayed in the **Request** tab.

Milestones

Milestones help you break up a contract into smaller components. You can add custom milestones to a contract and assign it to a user with a due date. You can assign these statuses to milestones:

- *Open*
- *Needs Attention*
- *Complete*

Contract Templates

Disposition: / Status:
This section is on the how-to side of things, and the instructional info belongs in how-to topics. In a Concept topic, we just want to explain what the templates can do and what you'd use them for. Is it possible to create templates in ways other than creating a contract and saving it as a template? Are there things that a template doesn't do that we should tell customers?

You can store contract documents for later use in Strategic Sourcing by selecting **Contract Templates** on the **Templates** menu.

You can use the **Add Contract Template** button on the *Contract Templates* tab to upload documents to create your new templates. You can also upload new documents to the templates to create new versions.

Concept: DocuSign Integration

DocuSign enables you to obtain digital signatures securely and efficiently.

You can enable DocuSign for:

- Your company on **Integrations** from **Settings**.
- An individual account from the **User Profile**.

You can only enable DocuSign for an individual account after you enable it for your company.

You can use DocuSign while working in a contract. As you prepare your files to send to DocuSign, you can:

- Select which files to include in your envelope.
- Prioritize your files by dragging them using the gray triangle.
- Flag important documents by clicking the gray triangle.
- **Check Out** documents to lock them for edit.
- **Check In** documents to enable other team members to check them out for edit.

If you can't click **Send to DocuSign**, ensure you have the proper DocuSign account authorization. Only company administrators and sourcing managers can send documents for signatures. Once you send files to DocuSign, you can select recipients for your envelope.

Stakeholders with access to the contract can click **Download** to view the signed contract even if you don't select them as envelope recipients.

Reference: Contract Email Notifications

This table lists which scenarios users will receive email notifications for. Administrators and suppliers don't receive email notifications about contracts.

Scenario	Sourcing Manager	Stakeholder
You receive an invitation to collaborate on a contract.	No	Yes
Someone @mentions you in team chat. Strategic Sourcing sends notifications in real time.	Yes	Yes
You have unread team chats. Strategic Sourcing sends notifications within 24 hours.	Yes	Yes
Someone assigns a milestone to you.	Yes	Yes
A milestone date or assignee changes.	Yes	Yes
A milestone completes.	Yes	Yes
Someone submits a contract request.	Yes	Yes
A contract needs attention.	Yes	Yes
Renewal termination notices at the 30, 60, and 90-day mark.	Yes	Yes
Renewal termination reminders. The sourcing team sets the date range.	Yes	Yes
A contract needs approval. If **Sourcing Manager** and **Stakeholder** are unchecked from	Yes	Yes

Scenario	Sourcing Manager	Stakeholder
contract notifications, they'll still receive emails for approvals.		
Approval reminders. Contract owners and stakeholders can customize these notifications.	Yes	Yes
A contract receives approval.	Yes	No
An approval group approves a contract.	Yes	No
Someone rejects a contract.	Yes	No
You select *Doesn't Need Attention* from the **Contract Status** prompt.	No	No

Supplier Management

Search and Filter Supplier Directory

Prerequisites

Create suppliers.

Context

You can search for and filter suppliers in your **Supplier Directory**.

Steps

1. Access **Suppliers** from the **Navigate** drop down menu.
2. Use the search bar to find individual suppliers.
3. Select **Filters > Supplier Filters** to access additional filtering options.
4. Select additional fields to filter from the **Choose Filters & Columns** panel and click **Save** to set the filter parameters.
5. Click the **Apply** button to create your filter.
6. To save and name your filter as a **Supplier Directory View**, apply your filters and click **Save As... > Save**.

Result

You can create and save filters for suppliers.

Steps: Onboard Suppliers and Transfer to Workday Platform

Prerequisites

Security:

- Configure the *Supplier Event* business process and security policy in the Suppliers functional area.
- Security: *Integration Build* and *Integration Configure* domains in the Integration functional area.

Context

You can use standard onboarding forms to onboard suppliers and transfer their information from Workday Strategic Sourcing (WSS) to Workday and automatically:

- Onboard suppliers from WSS to Workday using standard onboarding forms.
- Transfer supplier information from WSS to Workday.

Steps

1. Set up an integration that transfers supplier information between WSS and Workday.

   See: Steps: Set Up Supplier Connector for Strategic Sourcing on page 32
2. Create Pipeline Projects on page 66.
3. Create Supplier Profile Custom Groups and Fields on page 23.
4. (Optional) Create Approval Groups on page 17.

   Approval groups enable the approvers you appoint to evaluate supplier review responses on your forms.
5. To configure fields to share with your company suppliers, access **Settings > Supplier Profile > Onboarding Profile Fields**.

Result

Workday changes the supplier status to **Approved** in WSS and enables you to use them in procurement transactions.

Related Information
Reference

2021R1 What's New Post: Centralized Supplier Onboarding with Strategic Sourcing

2021R2 What's New Post: Centralized Supplier Editing with Strategic Sourcing

Mass Import Suppliers to Supplier Directory

Prerequisites

- Create custom field groups and fields on your **Supplier Profile** to add additional data points.
- Format a spreadsheet with 1 header row and at least 3 columns of supplier information.

  Note: The columns must include:

  - **Company Name**
  - **Contact Name**
  - **Email**
- Populate the spreadsheet with supplier data. Strategic Sourcing accepts all standard spreadsheet file types.

Context

You can mass import suppliers to Strategic Sourcing.

Steps

1. Access **Suppliers** from the **Navigate** drop down menu.
2. Copy the spreadsheet data and paste it to the **Import CSV Data** field.
3. Click the **Parse** button to prepare the data import.
4. Select field names from the drop-down menus on each column.
5. Click **Import** to mass import the supplier data.

Result

Supplier data from the spreadsheet transfers to Strategic Sourcing.

Manage Supplier Segmentation

Prerequisites

Create suppliers.

Context

You can assign information about suppliers in your **Supplier Directory**:

- **Supplier Status**
- **Supplier Segmentation**
- **Risk**

You company admin configures these field options in **Settings**.

Steps

1. Access **Supplier Directory** from the **Navigate** drop down menu.
2. Select a supplier and click **Edit Supplier**.
3. Select a status from the **Supplier Status** drop-down.
4. Select a tier level from the **Segmentation** drop-down.
5. Select a level of risk for the supplier from the **Risk** drop-down.
6. Add **Notes** related to the supplier contract.
7. Click the **Save & Exit Edit Mode** button to save your supplier contact categories.

Result

Strategic Sourcing saves the statuses, segments, and risk levels of your supplier contacts.

Onboard Suppliers to Strategic Sourcing Only

Prerequisites

Create suppliers.

Context

You can configure onboarding fields on standard **Supplier Onboarding** forms to capture essential supplier information, enabling buyers and sourcing managers to create supplier profiles in Strategic Sourcing.

Steps

1. Access **Settings > Supplier Profile > Onboarding Profile Fields**.
2. (Optional) Add approval groups.
3. Select the **Field Types** you want to include or exclude on the standard form.
4. Select the **Field Types** you want to display or require on supplier profiles from the **Profile Settings** options.
5. Select the **Field Types** you want to request or require from suppliers from the **Supplier Settings** options.

Result

Buyers and sourcing managers can access **Supplier Onboarding** standard forms in the **Forms** section on supplier profiles.

They can then send the form to Workday Strategic Sourcing suppliers to capture essential supplier profile information, including:

- **Banking Information**
- **General Business Information**
- **Tax Information**

When buyers or sourcing managers publish the **Supplier Onboarding** form, suppliers receive a **Request for Information** invitation to respond that contains the preconfigured fields for completion.

Example: Onboard Suppliers from Strategic Sourcing to Workday Platform

This example illustrates how to onboard new suppliers from Workday Strategic Sourcing (WSS) to Workday using standard onboarding forms.

Context

Your company, Regional Healthcare, plans to open new hospital wards and needs to source and buy a range of goods and services for the expansion. As a supplier administrator, you want to enable buyers to onboard suppliers from a sourcing event in Strategic Sourcing. You can then begin issuing purchase orders from Workday.

Prerequisites

- Configure the *Supplier Event* business process and security policy in the Suppliers functional area.
- Security: These domains in the Integration functional area:
  - *Integration Build*
  - *Integration Configure*

Steps

1. Access the **Create Integration System** task.
2. Configure these values:

Option	Description
System Name	*Ward Expansion Project*

Option	Description
New using Template	*Supplier Onboarding (Scout)*

3. Click **OK**.
4. Select the **Enable All Services** check box.
5. Click **OK**.
6. Select **Integration System** > **Configure Integration Attributes** from the related actions menu of the Ward Expansion Project integration.
7. On the **Configure Integration Attributes for Integration System** page, configure these values:

Option	Value
Only Verify Connection	Select the check box the first time you run the integration.
Scout API URL	Enter the endpoint URL for the Strategic Sourcing API.
User Email	Enter your Strategic Sourcing **User Profile** email address.
API-key	Copy the **Company Token** from Strategic Sourcing into the attribute **Value** field.
segmentation_status	Select this check box.
description	Select **Supplier Name** field.
Enable Supplier Event BP	Select this check box.
approval status	Select *Approved*.
supplier status	Select *Active*.

8. Click **OK**.
9. Access the **Launch / Schedule Integration** task.
10. Select the *Ward Expansion Project* integration from the **Integration** prompt.
11. Select **Run Now** from the **Run Frequency** options.
12. Click **OK**.
13. Enter a **Date**.
14. Click **OK**.
15. Access the **View Integration System** report.
16. Select *Ward Expansion Project* from the **Integration System** prompt.
17. Access the **Messages** tab on the integration.
18. To map any new fields, such as **DUNS Number**, to a corresponding field on the Workday platform:
    a) In Strategic Sourcing, access **Settings > Custom Fields > Supplier Profile Custom Fields**.
    b) Find the **DUNS Number** field.
    c) In Workday, select **Integration System > Configure Integration Maps** from the related actions menu on the **Ward Expansion Project** integration.
    d) Select **DUNS Number** from the **Internal Value** drop-down menu.
    e) Select the **From WSS** section of the **Map Provider**.
    f) Select **DUNS Number** from the **Internal Value** drop-down menu.
    g) Click **OK**.
19. Access the **Maintain Supplier Categories** task.
20. Add a row and enter *Ward Expansion* in the **Supplier Category Name** field.

21. Access the **Launch / Schedule Integration** task.
22. Select **Run Now**.
23. Click **OK**.
24. Access **Settings**.
25. Access **Supplier Profile > Onboarding Profile Fields > Supplier Category**.
26. In Strategic Sourcing, access **Settings**.
27. Access **Supplier Profile > Onboarding Profile Fields** to configure the **Supplier Onboarding** standard form.
28. Select the fields to request from suppliers and select required fields or optional responses.
29. Navigate to your project **Pipeline**.
30. Click **Create Project**.
31. Configures these values on the **Project Details** grid:

Option	**Value**
Title	Ward Expansion
Category	Ward Expansion
Project Type	Supplier Forms

32. Access the **Suppliers** tab and click **Open Supplier Directory**.
33. Click **Add New Supplier** and configure these values:

Option	**Value**
Supplier Status	*Approved*
Supplier Name	*Hospital Suppliers Corp.*
Supplier Category	*Ward Expansion*
Supplier Groups	*Suppliers A - L*
Banking Information	**Payment Type > Check**

34. Complete the **Contacts** section.
35. Click **Save**.
36. Access **Settings**.
37. Access **Approvals > Approval Groups**.
38. Click **Add Approval Group**.
39. Enter names and email addresses of approvers.
40. Select **All Approvers Must Approve**.
41. Click **Save**.
42. From the **Select Forms** menu on the Ward Expansion project, select **Standard Form > Supplier Onboarding**
43. Click **Add Forms**.
44. On the **Supplier Directory** menu, select *Hospital Suppliers Corp.* and click **Add to Form**.
45. Click the drop-down menu on the **Manage Suppliers** button and add stakeholders.
46. Click **Update Stakeholders**.
47. Click the **Calendar** icon and add a due date a week from today.
48. Click **Publish**
49. Click **Publish Supplier Review Form**.
50. When the supplier completes and submits the form, and after approval groups approve it, click **Finalize**.

Result

The integration displays new suppliers in both the Strategic Sourcing profile and on Workday.

Related Information

Reference

2021R1 What's New Post: Centralized Supplier Onboarding with Strategic Sourcing

Reference: Supported Fields for Workday and Strategic Sourcing Integration

The Scout Workday Connector supports these fields for integration mapping:

From Strategic Sourcing to Workday Supplier Records	From Workday Supplier Records to Strategic Sourcing
Accepted Payment Types (Required)	**Accepted Payment Types**
Approval Status	**Default Payment Term**
Default Payment Term	**Default Payment Type**
Default Payment Type (Required)	**Duns Number**
Duns Number	**FATCA**
FATCA	**Formatted Address**
Phone Number	**Phone Number**
Supplier Category (Required)	**Supplier Category**
Supplier Group	**Supplier Group**
	Supplier ID
	Supplier Name
	Web Address

Reference: Supported Fields for Strategic Sourcing Supplier Onboarding

Workday supports these fields on the Strategic Sourcing **Supplier Onboarding** standard form:

Fields	Required or Optional
Supplier Information **Supplier Name** **Supplier Category** **Description** **Website** **Supplier Groups**	Required Required Required Optional Optional Optional
Business Information **Addresses** **Address Line 1**	Optional Required Required

Fields	Required or Optional
Communication Usage Behavior	Optional
Postal Code	Required
Phones	Optional
Phone Country	Required
Phone Device Type	Required
International Calling Code	Optional
Phone Number	Required
Tax Information	Optional
Tax Country	Required
Banking Information	Optional
Bank Account Nickname	Optional
Bank Account Payment Type	Required
Bank Account Country	Required
Bank Account Type	Required
Bank Account Name	Required
Bank Name	Required
Default Payment Term	Optional
Accepted Currencies	Required
Default Payment Currency	Optional
Payment Types	Required
Default Payment Types	Required

Supplier Forms

Set Up Supplier Review Forms

Prerequisites

The company admin creates a supplier review form template.

Context

Set up forms for projects, enabling you to collect pertinent information about your suppliers in a convenient and streamlined way.

Steps

1. Access your project from **Customize Layout** in your **Company Settings**.
2. Enable **Forms**.

Result

You can select forms for projects.

Related Information
Tasks

Start Review Forms for Multiple Suppliers on page 121

Add a Scorecard to Supplier Forms

Prerequisites

Set up supplier forms with suppliers and stakeholders.

Context

Sourcing teams can:

- Include scorecards on supplier forms for suppliers to self-assess.
- Compare self-assessment scores from suppliers with stakeholder scores.

Steps

1. Access the **Forms** tab on a project.
2. On the **Manage Visibility** prompt, select *Include Scorecard for Suppliers*.
3. Click **Publish**.
4. To make the scorecard visible to the stakeholders, select a due date for the **Stakeholder Scorecard**, and click **Prepublish**.

   Pre-publishing automatically enables stakeholders to begin scoring supplier responses as soon as they receive them, eliminating the need for the sourcing team to send the scorecard to the stakeholders manually.

Result

The supplier can score themselves on the supplier form.

Next Steps

On the supplier form, the supplier can:

- Score themselves by selecting **Edit** in the **Scorecard** section.
- Submit the form for review by selecting **Submit Review**.

Related Information
Tasks

Compare Scorecards on page 123

Set Up Supplier Forms on Behalf of Suppliers

Prerequisites

Company admin creates a form template.

Context

If you have all the information you need from a supplier, you can set up supplier forms without sending them to the supplier.

Steps

1. Navigate to **Pipeline**, create a new project, and select *Supplier Forms* from the **Form** prompt.
2. In the **Supplier Review Forms** tab, select **Add Forms**.

3. Select the suppliers you want to add from the **Manage Suppliers** prompt.
4. Determine which supplier you want to submit for, and from the drop-down, sourcing managers or company admins can select *Submit on Supplier's Behalf*.

   Selecting this option prevents suppliers from receiving forms when they're published.
5. Sourcing managers or company administrators select a supplier review due date and click **Publish**.

Next Steps

You can fill in a supplier form on behalf of a supplier.

Start a Review Form for a Supplier

Prerequisites

The sourcing manager has created forms, such as security forms or worksheets, that they want to send to a supplier.

Context

You can set up a supplier so that they receive forms that you can use to assess their suitability.

Steps

1. Navigate to **Suppliers** and select a supplier in the Supplier Directory.
2. Access **Forms**.

   Strategic Sourcing stores all the forms linked to the supplier here, including finalized forms.
3. To add or rerun a form, click **Select Forms**.

   You can check the supplier review forms that you want to add to the profile of the supplier's.
4. Click **Add**.

   Clicking this option brings you to the pipeline project where you assign a due date for suppliers to complete the form, and you can also add other suppliers to the form or assign milestones for stakeholders.
5. Click **Publish**.

Result

Your supplier receives a notification to complete forms by a certain date.

Related Information
Reference

The Next Level: Strategic Sourcing Supplier Onboarding Guide

Start Review Forms for Multiple Suppliers

Prerequisites

The sourcing manager has created forms, such as security forms, questionnaires or worksheets, that they want to send to suppliers.

Context

When you've forms that you want to send to multiple suppliers, you can start a review form project.

Steps

1. Navigate to **Pipeline** and click **Create Project**.
2. Select **Supplier Forms** from the **Project Type** prompt.
3. Add suppliers to the project by selecting **Suppliers** > **Open Supplier Directory**, selecting suppliers, and clicking **Add To Project**.
4. When you want to add a supplier but they're not in the supplier directory yet, click **Add New Suppliers**, enter their profile description, and click **Save and Add to Project**.
5. To add forms to the project, select **Forms** and click **Add Forms**.
6. To add or rerun a form in the project, click **Select Forms**.

   You can check the supplier review forms that you want to add to the project.
7. Click **Add** and set a due date for suppliers in the project to return their forms complete.

Result

The suppliers in the project receive notifications to complete the forms before a certain date.

Update Project Details

Prerequisites

You've set up and published your supplier review form.

Context

You can specify detailed information about the project for your team.

Steps

1. Navigate to the project and select **Project Details**.

   You can add basic information such as project title, category, and estimated timeline for the project.
2. Select **Financial Details** for your project and you can enter estimated spend, final spend and estimated savings.
3. You and your stakeholders can attach files to your project in the **Attach Documents** section by dragging and dropping files or using **Browse Files**.
4. If you want to add more suppliers to the project, scroll to **Suppliers**, select **Open Supplier Directory**, and add suppliers to the project.
5. You can configure milestones so your team know when there are deadlines.
6. Click **Create a New Project** to link a related project to the current project.
7. You can invite team mates to collaborate by scrolling to the **Stakeholders** section, selecting a team mate from **Name**, and clicking **Add**.

   You can set read and write permissions for your stakeholders.

Complete a Supplier Form on Behalf of a Supplier

Prerequisites

Set up a supplier form on behalf of a supplier.

Context

When you set up a supplier form for a supplier, you can also complete the form for them.

Steps

1. Select *Submit Form* from the **Manage Contacts** prompt on **Supplier Review Forms**.

   This opens the form in a different tab.
2. In the **Fill Out Your Form** section, click **Edit**.

   You can complete the questionnaire for the supplier on the Strategic Sourcing platform or scroll to the **Take Your Form Offline section** and export the form to complete it in Excel offline using **Export Form**.
3. If you complete the form in Excel, import it back into Strategic Sourcing using **Import Form**.
4. Click **Return** to navigate to the main page of the supplier form.
5. Click **Submit Form**.

Next Steps

You can finalize supplier review forms.

Related Information
Tasks

Create Approval Groups on page 17
Finalize Supplier Review Forms on page 125

Compare Scorecards

Prerequisites

The sourcing manager adds a scorecard to a supplier form.

Context

The sourcing manager can view supplier and stakeholder scores in a side-by-side comparison.

Supplier scores aren't added to their total score.

Steps

1. Access the **Supplier Review Form**.
2. In the **Stakeholder Scorecard**section, select **View Scorecard** for a stakeholder.

   The supplier scores display in the last column on the scorecard.
3. To drill down into the responses, click the stakeholders total score.

   This displays more granular information, such as, why the supplier was awarded this score.

Result

The sourcing manager can gain a better understanding of the professional relationship between suppliers and stakeholders.

Related Information
Tasks

Add a Scorecard to Supplier Forms on page 120

Map Form Responses to Supplier Profiles

Prerequisites

Identify the response fields you want to map from the supplier forms.

Context

When you're onboarding your suppliers, company admins can map forms to the profiles of suppliers, saving you time and manual effort. It also ensures that all important information about the supplier is in their profile.

Steps

1. Access **Settings**.
2. Select the **Supplier Profile** tab, and scroll down to the **Supplier Profile Custom Field Groups** section.
3. Enter the form questions as custom fields. They don't have to be the same as on the form. Example: On the form, the question is **Company Diversity**. The custom field name can be *Supplier Diversity*.
4. Enter the responses in **Options**. They must match the responses on the supplier forms.
5. Scroll down to the **Supplier Profile Mapping** section.
6. Select the new supplier profile field. Example: **Supplier Diversity**.

   You can't edit mapped supplier custom fields.
7. Select a **Question** and click **Add Mapped Field**.

Result

You can see that the mapping is active as the section turns blue. A map icon also displays beside the field in the **Supplier Custom Fields** section. You can also see the map icon beside the supplier profile fields on the supplier profile.

Related Information
Reference
The Next Level: Strategic Sourcing Supplier Onboarding Guide

Rerun Supplier Forms

Prerequisites

- Suppliers have returned the completed form to the sourcing team, and completed scorecards, if applicable.
- The approval group have reviewed and finalized the supplier form.

  You can check form status in the **Supplier** section of a project.

Context

To manage and track historical supplier forms more efficiently, you can rerun finalized forms, enabling you to:

- Maintain a history of individual forms for each supplier.
- Make it easier for suppliers to resubmit forms.
- Provide visibility for the sourcing team of concurrently running forms.

Steps

1. Access the **Supplier Directory** on the **Forms** tab of the supplier's profile.

   You can also rerun forms by creating a new project.
2. Click **Re-Run Form**.

   Rerunning creates a new version of the form on the supplier's profile, while still retaining the existing completed form in the **Form History** on the **Supplier Directory**.

3. Select a due date and click **Publish**.

   The supplier receives the new form with the original form responses. They can edit the responses or submit the new form as it is.

Result

If your teammate reruns your form and adds it to another project, the same form is in 2 different projects. The secondary form syncs with the original form.

- If you're a stakeholder on the secondary project but not on the original project, you can only view the secondary project.
- The sourcing manager can transfer ownership of the form on the original project to the secondary project by removing the form or removing the supplier from the form. In this situation, the sourcing manager on the secondary form receives a notification, asking them to **Accept** and manage the form or to remove it from their project.

Finalize Supplier Review Forms

Prerequisites

You've published the supplier review form.

Context

When suppliers complete supplier review forms, approvers get an email notifying them that they can review the form.

Finalizing your form prevents:

- Suppliers from submitting any more responses.
- Stakeholders from submitting any more scorecards.

Steps

1. Navigate to the project, click Suppliers, and select the supplier.
2. Click **Review**.
3. When approvers complete reviews, Strategic Sourcing notifies the sourcing manager.
4. The sourcing manager, select the **Forms** tab on the project and click **Finalize**.

Result

Strategic Sourcing stores the existing scorecards on the profile of the supplier.

Next Steps

You can re-run the form.

Related Information
Reference

The Next Level: Strategic Sourcing Supplier Onboarding Guide

Supplier Performance Management

Create Supplier Performance Reviews and Surveys

Prerequisites

Create suppliers.

Context

You can:

- Assess and record supplier performance.
- Create and track **Performance Reviews** and **Action Items**.
- Standardized review templates.

Steps

1. Create a new **Project** and select **Performance Review** for **Project Type**.
2. Select **Project > Reviews** on the **Project** menu and click the **New** button.
3. In the **Performance Reviews** window, search for a **Performance Review Template** or select the **Add a Blank Review & Start from Scratch** check box.
4. Click the **Add** button.
5. Access **Supplier Survey** from the **Reviews** menu.
6. Your sourcing team can set up **Supplier Questions**, include a **Scorecard**, and add **Worksheets** for your supplier to complete on the **Build Your Supplier Survey** section.
7. To view supplier historical performance, navigate to **Suppliers** on the **Navigate** drop down menu and select a supplier.
8. Select **Performance Reviews** from the **General Profile** menu.

Result

You can view the past performance of your suppliers.

Related Information
Reference
The Next Level: Strategic Sourcing Performance Reviews Guide

Add Supplier Scorecards to Performance Reviews

Prerequisites

Create **Supplier Performance Reviews**.

Context

You can enable **Stakeholders** to assess supplier relationships and suppliers to self-assess their performance and compare scores.

Steps

1. Create a new project with the **Project Type**: **Performance Review (PERF)** and update the **Title**.
2. On the **Suppliers** section, add supplier for review.
3. Click the **Open Supplier Directory** button, select the **Supplier**, and click the **Add to Project** button.

4. Add sourcing team members on the **Stakeholders** section.
5. On the **Project** menu, click the **New** button on the **Reviews** option.
6. Click the **Add Scorecard** button to enable suppliers to self-assess as part of the review.
7. On the **Set Supplier Survey Timeline** section, set a **Supplier Response Deadline**.
8. Click the **Publish Survey to Suppliers** button.
9. Suppliers edit the survey by clicking the **Edit** button on the **Complete Your Performance Review** page and the **Submit Review** review button to submit the completed review.

   Note: Supplier must click both **Submit Scorecard** and **Submit Performance Review** to submit both.
10. Select **Project > Reviews > Results** and click the **Compare Stakeholder Reviews** button for a side-by-side comparison of performance scores.

Result

You can assess and compare supplier and **Stakeholder** performance scores.

Related Information
Reference

The Next Level: Strategic Sourcing Performance Reviews Guide

Configure Action Items

Prerequisites

Create suppliers.

Context

You can configure **Action Items** internally for your team and externally for your suppliers to complete.

Steps

1. Select **Suppliers** from the **Navigate** drop down menu to access your **Supplier Directory**.
2. Search for and select a supplier.
3. Click the **Action Items** tab.
4. Click the **Add Action Item** button to create an **Action Item**.
5. The **Assignee** drop down menu enables you to assign **Action Items** to teammates or to a contact in supplier companies.
6. Click **Save** to save the **Action Items** to the supplier **Action Items** tab.
7. Access the **Action Item** to:
   - Edit the components of the **Action Item**.
   - Complete the **Action Item** and automatically move to the **Completed Action Items** section.
   - Send Email to the **Assignee**.
8. Click the **Link Related Project** button to link the **Action Item** to an existing project. You can also create a new project with a link to the **Action Item** you created.

Result

You can review:

- Attachments.
- Pending and completed **Action Items**.
- Project priorities.

Related Information

Reference

The Next Level: Strategic Sourcing Performance Reviews Guide

Templates

Create Questionnaire Templates

Context

Questionnaire templates help you standardize specific question groups for various event topics. You can use questionnaire templates as a starting point for creating sourcing events. You can create a new template or modify an existing template.

Different roles have different access to templates:

- Company and department administrators can create, edit, and delete any questionnaire templates.
- Sourcing managers can create and use templates. They can only edit templates that they own.
- Stakeholders can use any of the templates in an event and edit them.

Steps

1. Navigate to **Templates**.
2. Select **Add Question Template**.
3. When you select:
   - *Blank Template*, enter the questions you want to include.
   - *Copy Existing Questions*, select 1 or more questionnaire templates or events to copy.
4. Add or edit questions and section conditions as needed.

Add Templated Questions

Prerequisites

- Create a sourcing event.
- Create a questionnaire or questionnaire template.

Context

You can use questionnaire templates to reuse your questionnaires from past sourcing events, saving you time and effort when creating your next event.

Steps

1. Navigate to **Templates** to view the template library for your company.
2. (Optional) Select any questionnaire template to view more details to determine which questionnaire to use for your sourcing event.
3. Access your event and select **Build Questionnaire** from the **Build Your Response Sheet** section.
4. On the questionnaire builder, select **Add Template**.
5. Select 1 or more questionnaire templates to use in your sourcing event.

Result

You can now view your selected questionnaires when you open your event.

Next Steps

- Customize an added questionnaire template for your event by editing or deleting questions.
- (Optional) Link questions from your questionnaires to your event evaluations.

Create Performance Review Templates

Prerequisites

Create sourcing projects.

Context

You can configure performance review criteria to standardize **Performance Reviews**.

Performance Review Master Templates set the default **Sections** for every new **Performance Review** you create in Strategic Sourcing.

Steps

1. Select **Templates** from the **Navigate** drop down menu.
2. Click the **Performance Reviews** tab to create or edit your **Performance Review Template**.
3. Create a new template and name it **Performance Review Template**.

   Note: Any **Company Admin** can edit the **Performance Review Template** at any time.
4. Click the **Sections** button in the **Action Bar** to open up the **Sections** list.
5. Enter the **Weight** for each Section so that the **Sections Weight Total** equals 100%.
6. Click the **Questions** button in the **Action Bar** to open up the **Questions** list.
7. Enter the **Weight** for each Section so that the **Questions Weight Total** equals 100%.

Result

You can use the **Performance Review Template** to create future supplier performance reviews.

Related Information
Reference
The Next Level: Strategic Sourcing Performance Reviews Guide

Create Supplier Performance Review Templates

Prerequisites

Create sourcing projects.

Context

You can use the **Performance Review Template** to create templates to collect information from suppliers and evaluate supplier performance.

Steps

1. Access **Templates** from the **Navigate** drop down menu.
2. Click the **Add Performance Review Template** button.
3. Select the **New Performance Review Template** option to create a new template.
4. Enter **Template Information** and **Save**.
5. Complete sections 1 to 4 by clicking on the corresponding buttons on the **Scorecard** menu.

Result

You can use the **Performance Review Template** for supplier performance reviews.

Create Supplier Form Templates

Prerequisites

- You must be a company or department admin to create, edit, and delete form templates.
- Sourcing managers can use the form templates for projects or events but can't edit templates.
- Stakeholders that are collaborators can view templates.

Context

You can standardize supplier review forms for your company, enabling your team to:

- Quickly and efficiently apply supplier review forms.
- Have complete and up-to-date supplier forms, ensuring your suppliers are compliant with the latest standards in your company.

Steps

1. Navigate to **Templates** > **Supplier Review Forms**.
2. Select **Add Supplier Review Form**.

   You can add form information such as categories, which are configured in **Settings**, and automatic reminders to notify suppliers when the form is due for review.
3. Click **Save**.
4. Configure the **Supplier Review Form** using the **Manage Supplier Review** tab. As you complete the task, consider:

Option	Description
Invite Suppliers	Select the suppliers you want to review.
Supplier Options	Select **Manage Supplier Options** to configure whether suppliers can revise their responses after the submission due date.
Build a Scorecard for your Stakeholders	Select **Edit Scorecard** to create an evaluation that can include: • Scoring questions. • Feedback questions.
Flag for an Update	Select to let your team know when suppliers update the form.
Set Your Approvers	Company admins can add an approval group.

5. Select and complete the **Draft Supplier Review Form** tab to build the form to send to your suppliers.

6. You can build a questionnaire for your suppliers that helps you standardize specific questions.

Result

You have built a standardized supplier review form.

Related Information
Tasks
Create Approval Groups on page 17
Add a Scorecard to Supplier Forms on page 120

Create Event Worksheet Templates

Context

You can create standardized worksheet templates for sourcing events across all your RFx events. Worksheet templates enable you to capture pricing and other supplier information while preserving worksheet structures and formulas.

Steps

1. Navigate to **Templates**.
2. On the **Worksheets** tab, select **Add Worksheet Template**.
3. (Optional) To restrict editing on worksheets created from the template, select these check boxes when you add new columns:
    - **Cannot Change Settings**
    - **Cannot Delete**
4. Select a cell in the worksheet to edit the selected column.
5. Use Ctrl + click to select multiple cells.

    Column settings apply to all sections.

Reports

Create Sourcing Reports

Prerequisites

Publish or close a sourcing event.

Context

Use sourcing reports to build customized data tables and visualize them in charts.

Steps

1. Navigate to **Reports**.
2. Select a report type from the **Dataset** menu.
3. Click **Filters** and select the criteria you want to filter by.

4. Click **Choose Filters & Columns** to view the data fields you can report on.

   If you want to create a report from scratch, click **Uncheck All** to clear any checked data fields before selecting the fields you want to report on.

   For project, contract, and event type reports, you can additionally filter by:

   - The report status on the **Choose Filters and Columns** menu.
   - **Range** on the **Filters** menu.

   These additional filters help reflect the cycle time in the report.
5. Click **Save** to save the report fields selected.
6. Click **Refresh Report** to reflect the changes in the report.
7. (Optional) Click **Editor** to select and rearrange the columns to reflect on the report.
8. (Optional) Hover over any column head and click the arrow to sort in ascending or descending order.
9. (Optional) Click the settings icon on any column head to filter out a specific row.
10. (Optional) Click **Charts** and select the chart format that you want to view your report in.

    You can control what your chart displays using the **Editor** menu.
11. Click **Save As** from the **Filters** menu to save your report as a saved report.
12. Enter a name and description, then click **Save**.

    You can also save your report by clicking **Save As New Report** from the **Save** menu.
13. (Optional) Click **Saved Reports** from the **Filters** menu to view your saved report.
14. (Optional) To share your custom sourcing report, click the pencil icon to edit the saved report.

    a) Click **Export** and select the file format you want to download your report in.

Result

Your report downloads automatically.

Next Steps

Export or share your reports with users in your company.

Related Information
Reference
The Next Level: Strategic Sourcing Reporting Overview

Identified Savings Report

Prerequisites

- Configure Savings Trackers in **Settings**.
- Create sourcing projects and add savings.

Context

You can use reports to view your identified savings across your active and planned projects, enabling you to monitor unrecognized savings across your projects.

Steps

1. Select Navigate > Reports.
2. Select the Projects dataset.
3. Click **Filters**.

4. In the side panel, click **Choose Filters & Columns**.
5. Select the columns to view based on the report type:

Report Type	Columns
Identified Savings for Planned Projects	• *Estimated End Date FY* • *Estimated Savings* • *Estimated Start Date FY* • *Project State & Status* • *Project Title*
Identified Savings for Active Projects	• *Actual Start Date FY* • *Estimated End Date FY* • *Estimated Savings* • *Project State & Status* • *Project Title*

6. Add these filters from the column header:

Report Type	Column Filters
Identified Savings for Planned Projects	• **By Project State & Status**: Select *Planned*. • **Estimated End Date FY**: Select current FY and blanks. • **Estimated Start Date FY**: Clear blanks.
Identified Savings for Active Projects	• **By Project State & Status**: Select all *Active* statuses. • **Estimated End Date FY**: Select current FY and blanks.

If an Active project has no dates in the **Estimated Start Date FY** and **Estimated End Date FY** columns, and if the **Actual Start Date FY** is blank or not within the current FY, it displays in the **Identified Savings for Active Projects** report. To match the savings dials, manually filter projects that match this criteria out of report.

7. Add the sum of the **Estimated Savings** columns from the 2 reports to get your identified savings for all projects.

Related Information
Reference
2022R1 What's New Post: Strategic Sourcing Projects User Experience

Realized Savings Report

Prerequisites

- Configure Savings Trackers in **Settings**.
- Create sourcing projects and add savings.

Context

You can use reports to view your realized savings across your active projects, enabling you to monitor savings across your projects.

Steps

1. Select Navigate > Reports.
2. Select the *Savings* dataset.
3. Click **Filters**.
4. In the side panel, click **Choose Filters & Columns**.
5. Select these columns to view:
    - Projected Savings
    - Project State & Status
    - Project Title
    - Realized Date
    - Realized Date FY
    - Realized Savings
    - Savings Type
6. Add these filters for the columns:
    - Project State & Status: Select *Completed*.
    - Realized Date FY: Enter the current fiscal year for the *Range*.
    - Savings Type: Select *All*.
7. Click **Refresh Report**.

    You can save and share the report with the selected data.
8. (Optional) Click **Editor** to view the columns added to the report and ensure you select all columns needed.
9. Select the **Chart** visualization that you want to view.

Related Information
Reference
2022R1 What's New Post: Strategic Sourcing Projects User Experience

Concept: Sourcing Reports Overview

Use sourcing reports to build customized data tables and translate them into various chart types for visualization of your data.

You can create reports for these data types:

- Action Items
- Contracts
- Contract Milestones
- Events
- Performance Reviews
- Performance Review Answers
- Projects
- Project Milestones
- Review Forms
- Savings
- Suppliers

New data gets fetched every time you access a saved report. If the report library stops, click **Clear** to update the information.

You can export reports you create to:

- Excel

- HTML
- PDF
- Print

Suppliers

Supplier Account Setup

Sign up for Strategic Sourcing

Prerequisites

You can access Strategic Sourcing by email invitation only.

Context

Workday Strategic Sourcing is a cloud-based procurement tool that you can use to streamline your procurement process.

Steps

1. In the email, select **Sign up and View this RFP**.

   If you're expecting an email but don't receive it, ensure it's not in your Spam folder.

   We also recommend that you ask your IT team to enable the **amazonses.com.** domain.
2. Enter your contact details, create a password, and select **Next** to get your confirmation email.
3. When you open your confirmation email, select **Finalize Your Account**.
4. Sign into Strategic Sourcing to review the event that you've been invited to.

   You can view the event in the **Responses** section of your home page.
5. Select the title of the event to review and respond to the sourcing team.

   When you're reviewing the event, pay particular attention to the conditions of participation and statement of requirements.
6. (Optional) You can invite teammates to collaborate with you on the event by entering their name and email in the **Invite Team Members** section, and clicking **Add**.

   If your colleague registered in Strategic Sourcing previously, they can sign in and access the bid immediately. Otherwise, they receive an email invitation with a link to create an account on Strategic Sourcing.

   If you can't add them, it might be because they're already registered in Strategic Sourcing under a different company name. To fix, contact the sourcing manager and request that they put you and your teammate under the same company name in their directory.
7. (Optional) You can submit questions and view other messages from the sourcing manager using the **Message Center**.

   Your questions are confidential.
8. (Optional) You can access help and support by selecting the **Contact Support** option from the Support tab in the top navigation bar.

Result

You and your teammates are signed up. You can sign into Strategic Sourcing at any time.

Next Steps

You can now set your time zone and manage deadlines.

Complete an Onboarding Form

Prerequisites

- A buyer sends you an invitation to complete an onboarding form.
- You've signed up for Strategic Sourcing.

Context

You can complete an onboarding form that buyers invite you to, which enables them to gather critical business and banking information.

Steps

1. Access the onboarding form in the **Profile** section by clicking **Manage**.
2. Click **Edit** to make changes to the form and input the requested information.
3. Once completed and ready to submit, click **Finalize**. Then, click **Grant Access** so the buyer can see your responses.
4. (Optional) To revise the submission, click **Retract**. Ensure you finalize and grant access once you finish making changes.

Result

The form information that you submit to the buyer ensures a quick and accurate setup for your company.

FAQ: Sign-In

Signing in with a Password

What can I do when I forget my password?	1. Access the sign-in page. 2. Click **Forgot Your Password?**. 3. Enter your email address. 4. Access your email and click **Reset Your Password** in the email you receive. 5. Enter your new password.
How can I unlock my account?	Your account locks when you don't sign in for 90 days. To unlock your account: 1. Access the sign-in page. 2. Click **Did Not Receive Unlock Instructions?**. 3. Enter your email address. 4. Access your email and click **Access My Account** in the email you receive. You can also contact Strategic Sourcing Support at **scoutsupport@workday.com** to unlock your account.
How can I change the email address for my account?	1. Hover over your name and click **User Profile**. 2. Click **Change Email**. 3. Enter your email address in the **Email** field.

4. Save the change.
5. Access your old email and follow the instructions in the email you receive.

Note: Users can't change their email address if your company uses a SSO (Single Sign-On) integration. If your company doesn't use SSO, changes to a user's email address are automatically reflected for any other company they work with in Workday Strategic Sourcing.

How can I change my password?	1. Hover over your name and click **User Profile**. 2. Click **Change Password**. 3. Enter your current password in the **Current Password** field and your new password in the **Password** field. 4. Save the change.

Signing in with Magic Links

Why is there no password field?	Strategic Sourcing uses magic links for all users that don't have Single Sign-On (SSO) set up. When you enter your email address and click **Sign In**, Strategic Sourcing sends you an email with a magic link. You can click the magic link to sign in to Strategic Sourcing. A magic link contains all the required information to log you into Strategic Sourcing without a password.
How long are magic links valid for?	Magic links are valid for 5 minutes.
I didn't receive an email when I clicked Sign In.	Check your Spam folder. Some email clients classify magic link emails as Spam. We recommend adding the email address that Strategic Sourcing uses to your allow-lists: no-reply_strategicsourcing@workday.com.
I received a message saying that the link expired, but it hasn't been 5 minutes. What happened?	As soon as you click **Resend Email**, any previous magic links you have expire. Ensure you click the latest link in your inbox.
How do I unlock my account?	When you create 10 magic links without a successful login, your account is locked. To unlock your account: 1. Access the sign-in page. 2. Enter you email and click **Sign In**. 3. Access your email and click **Access My Account** in the email you receive. You can also contact Strategic Sourcing Support at **scoutsupport@workday.com** to unlock your account.

FAQ: Contacting Strategic Sourcing

How do I contact the sourcing manager?	Click the **Message Center** button to:

	• Ask the sourcing manager a question. Enter a question in the box, attach a file if applicable, and click **Send Question**. • Chat with the sourcing manager. If the sourcing team sends you a question using **Chat**, click the chat icon and enter your answer. • View questions you've asked and the answers that you've received from the sourcing team. When the sourcing team replies to your questions, you receive an email notification. • View questions and answers from other suppliers that the sourcing manager shares and general messages.
How do I get help before an auction?	Select the **Contact Support** option from the **Support** tab in the top navigation bar.
How do I get help during an auction?	Select the **Contact Support** option from the **Support** tab in the top navigation bar. Strategic Sourcing pays close consideration to support tickets during auctions and you can expect a rapid response.

Reference: Supplier Profile Update Emails

You can receive an email when updating your profile for these reasons:

- Approved
- Blocked
- Failed
- Overridden
- Rejected

Profile Update Approved

Your update was successful. You can log back in and manage your profile by clicking **Edit**.

Profile Update Blocked

Workday blocks the update you made in Strategic Sourcing because of an in-progress process. Try to make the update again later.

Profile Update Failed

Workday didn’t receive the update you made in Strategic Sourcing. This can occur when:

- A change comes from Workday at the same time as you have made a change in Strategic Sourcing.
- The buyer is editing your profile at the same time and attempts to push their edit to Workday.
- The integration service is down.

Try to make the update again later when the **Edit** button is active.

Profile Update Overridden

A change was already in progress and Workday didn’t receive the latest update you made in Strategic Sourcing. Review your profile, and try to make the updates again.

Profile Update Rejected

A change to your profile was rejected in Workday. To resolve the issue, contact the sourcing manager in Strategic Sourcing through email or the Message Center.

Proposal Events

Complete a Supplier Form

Prerequisites

- A buyer sends you an invitation to complete a form.
- You've signed up for Strategic Sourcing.

Context

You can complete required forms containing questionnaires that buyers send you.

Steps

1. Access the form you want to complete.
2. (Optional) To invite colleagues to edit the form, enter their name and email address in the **Invite Team Members** section and click **Add**. Your colleague receives an email invitation to access the form.
3. To answer questions, click into the sections of the form under **Fill Out Your Form**.
4. (Optional) To contact the buyer, you can click **Message Center** or email the primary contact.
5. Click **Submit** to send your completed form to the buyer. The form **Status** updates on your homepage.
6. (Optional) To revise the submission, click **Revise Form**. Ensure you click **Resubmit Form** to send your updates to the buyer.

Related Information
Tasks
Sign up for Strategic Sourcing on page 135

Manage Deadlines

Prerequisites

You’ve signed up to Workday Strategic Sourcing.

Context

The sourcing manager determines the event timeline, that consists of these possible deadlines:

- **Supplier RSVP Deadline**
- **Supplier Question Deadline**
- **Bid Submission Deadline**

Steps

1. To ensure you submit information to the sourcing manager on time, set your time zone in your **User Profile** that you can access under your user name on the **Home Page**.

2. When you receive a **Supplier RSVP Deadline**, you can inform the sourcing manager that you plan to bid by selecting **I Intend to Submit** on the invitation before the set time and date.

   If you don't receive an invitation, either:

   - You or 1 of your team have already responded to the invitation.
   - There's no requirement for you to respond.

   If you're not going to accept the invitation, select **I Do Not Intend to Submit** and you can either:

   - Select a reason why you don't want to participate, as well as provide additional comments.
   - Select **Submit RSVP**.

   If you change your mind about participating in a bid event, you can select **I Intend to Bid**, as long as the invitation hasn't expired.

   If the deadline has passed, you can submit a ticket to support by clicking **Support**, and they can help you change your response to the invitation.
3. If you receive a **Supplier Question Deadline** event, you can't submit questions to the sourcing manager from the **Message Center** after the deadline date and time.

   You can continue to view the questions and answers that you or your team submitted before the deadline.

   If you don't see the deadline, you can submit questions to the sourcing team at any time during the RFx process.
4. To submit a bid on the RFP to the sourcing manager, check the due date and time on the **Submission Deadline**, and click the **Submit Bid** button.

   The sourcing manager can set the submission deadline so that you can submit your response after the deadline.

Next Steps

You can start submitting your bid and invite team members to collaborate with you on the bid proposal.

Create Bid Proposals

Prerequisites

You've been invited to submit a bid proposal by the sourcing manager.

Disposition: / Status:
Crystal had a comment on the topic: Where are the steps for responding to the questionnaire part of the sourcing event? I don't see any additional doc related to that under Bid Submission

Context

You create bid proposals to submit to the sourcing team. Sourcing teams request suppliers to provide pricing and line item quotes.

Steps

1. Navigate to the **Build Your Proposal** section on your bid.
2. Answer Questionnaire questions, if applicable.
3. You can view details of any worksheets in the panel on the left.

   To view worksheet instructions and notes from the sourcing manager, click the **Supplier Instructions** button.
4. Click **Edit** to start creating your bid proposal.
5. Enter bids on the highlighted rows of the worksheets. To identify what you need to do to submit your bid, you can select **Validate** to highlight the cells you must complete. A side panel also displays

showing the line items and columns that need information. When you complete all highlighted cells, *Worksheet Valid* displays when you select **Validate**.

You can apply filters to view the items you want to bid on by clicking the 3 horizontal lines in the column header, selecting the conditions and values, and clicking **Apply Filter**. Calculated totals change as you apply filters.

You can also display or hide columns using **Show/Hide Columns** and clicking **Update View**.

6. In the **Requested Document** section, select the **Browse for File** button.

   Attach requested documents to submit your bid proposal.
7. In the Additional Documents section, drag and drop files from your PC to the box, or click the **Browse for Files** button.

   Attach additional documents for the attention of the sourcing manager.

   You can attach as many files as you want and each file can be up to 5GB.

   Wait for the upload to complete before navigating away from the page.
8. To finalize your bid submission, select **Submit Bid** on the bid event.

Result

The sourcing manager receives an email to notify them that you've submitted your bid. You can submit incomplete bids, however, it's up to the sourcing manager to determine whether to accept an incomplete proposal.

You can view the status of your submission on the bid event, including the date and time of the submission.

Next Steps

- If you want to change your bid and it's before the bid submission deadline, change your bid by clicking the **Revise Bid** button on the event. After you make your revisions, click the **Resubmit Bid** button.
- If you want to revise the bid proposal but it's after the deadline, contact your sourcing manager directly.
- Respond to requests from the sourcing manager.

  Depending on the bid proposal, the sourcing manager can request, by email or chat, further clarification on your bid submission. Use the **Revise Bid** button on the bid event to edit the proposal and respond to the update request.

Use Excel to Submit Bids

Prerequisites

You have accepted the invitation from the sourcing manager to submit bids.

Context

You can create your bid proposal using Excel.

Steps

1. Access the bid event on your home page.
2. In the **Take Bid Offline** section, select **Export Bid**.

   A copy of your bid proposal downloads to an Excel spreadsheet and it's organized into multiple tabs, including questionnaires, worksheets, required documentation and additional documentation. You can enter bids and information into any cells highlighted in blue.

   If you don't receive questionnaires or worksheets to complete, the sourcing team are probably going to ask you to submit specific documentation to complete your bid proposal.
3. Read the **Instructions** tab on the spreadsheet.

4. Save the file when you've fulfilled all the bid proposal requirements.

   Note: Strategic Sourcing can't unlock cells for editing as the format must match what is on the Strategic Sourcing platform. This is to ensure your information imports correctly. Only suppliers can edit the blue cells to provide details.
5. Click **Import Bid** from the **Take Bid Offline** section of your bid event, select your Excel spreadsheet manually using the **Browse for Files** button, or drag and drop the file into the box.
6. When the file finishes loading, click **Import Bid** again to complete the import operation.

Result

A Bid Import Successful message displays and you can view your bid using the **View My Response** button.

You can also view your responses on the Strategic Sourcing platform in their associated sections. Example: If you filled in a questionnaire on Excel, your responses populate in the questionnaire on the bid proposal.

Next Steps

If you want to change your bid proposal, we recommend that you export the Excel file each time you update to ensure you are working from the most up to date copy of your bid proposal.

Note: If the sourcing team makes any updates to the structure of the bid event, you must export the bid again, because you won't be able to import it back into Strategic Sourcing if the format doesn't match.

Download Terms of Participation

Prerequisites

You've been invited to participate in a bid event.

Context

When responding to a bid event on behalf of your company, your legal department may want a copy of the **Terms of Participation** for their records.

Steps

1. Accept the invitation to participate in the bid event.
2. Access the **Take Bid Offline** section and click the **Export Bid** button.
3. Open the Excel worksheet and click the **Terms of Participation** tab.

   The terms of participation include signatures, names, email addresses and time stamps.
4. Print or take a copy of the **Terms of Participation**.

Reverse Auctions

Steps: Set Up Auction Participation

Prerequisites

You must receive an invitation to participate in an auction.

Context

Workday Strategic Sourcing is a cloud-based procurement tool that you can use to easily and quickly streamline your procurement process.

When the sourcing manager invites you to an auction, in this case, a reverse auction, you can accept or reject the invitation, depending on whether your company meets the conditions of participation and statement of requirements.

A reverse auction is an auction where suppliers bid for the lowest prices they’re willing to sell their goods and services.

Steps

1. Sign up for Strategic Sourcing on page 135.
2. Manage Deadlines on page 139.
3. Create Bid Proposals on page 140.

   You can build a bid proposal online or using Excel.
4. (Optional) Set Auction Pre-Bids on page 143.
5. Participate in Auctions on page 143.

Result

You've competed in an auction.

Next Steps

If you won the auction, the sourcing manager will contact you to arrange payment for your goods or services.

Set Auction Pre-Bids

Prerequisites

The sourcing manager invites you to the auction and sets a start time and date.

Context

You can set up and enter initial bids before auctions, enabling you to concentrate on competing during the live auction.

Steps

1. Check the auction timer.

   If the timer displays the countdown to the auction starting, you can start drafting your bids.
2. Read the auction notes the sourcing manager posts on the auction event.
3. Enter your bids in the **New Bid** column.

   Your bids are your initial price offerings for each item in the auction. If the auction starts from a closed sourcing event, your starting price is the last submitted price on the sourcing event.

Participate in Auctions

Prerequisites

The sourcing manager invites you to participate in an auction.

Context

You can participate in reverse auctions that the sourcing manager sets up in advance, or with no notice.

If it's a scheduled auction, you can:

- Read the auction notes that the sourcing manager provides.
- Familiarize yourself with the tool.
- Draft your bids.

Steps

1. On the **Events** dashboard, select the auction you want to participate in.

   You can't invite team members to join you in the auction.
2. Review the auction details in the left hand panel.

   The sourcing manager can decide the expected duration of the auction, or whether they want to extend the duration. You can always view how much time remains in the auction using the timer at the top of the page.

   See Concept: Auction Rules on page 144.
3. If your sourcing manager has already set a date and time, you can enter pre-bids using **Set Draft Bid**.

   See Set Auction Pre-Bids on page 143.
4. When the auction starts, enter bids on the items you want to bid on, and click **Place Your New Bid**.

   Strategic Sourcing can inform you of your rank. Ranking feedback displays if you submit bids. If you don't submit a bid for a line item, feedback doesn't display.
5. To apply a percentage discount to all your bids, enter a number in the **Decrease New Bid By** field. You can also manually reduce prices by line item.

   Reduce your prices to improve your competitiveness.

Result

When the auction ends, your sourcing manager notifies you of your final ranking based on your configuration.

Concept: Auction Rules

When the sourcing manager sets up an auction, they can configure auction rules:

Auction Rule	Description
Minimum decrement	The sourcing manager can set an amount by which you must decrease your total bid each time you submit a new bid during the auction.
Extension	The sourcing manager can set time extensions for the auction. They use time extensions to extend the auction when a new bid is submitted near the end of an auction, ensuring that all suppliers have a fair chance to bid. Example: The sourcing manager extends the auction by 2 minutes if a new bid is received within the last 2 minutes of the auction.

