

Supplier Contracts

Job Aid



UL
OF

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1. INTRODUCTION

Objective

Teach departmental end users how to submit a procurement request in University of Louisville Workday (UofL Workday) and Workday Strategic Sourcing (WSS).

Introduction

This Job Aid (JA) walks end users through the following processes:

- How to create a procurement request in UofL Workday / Workday Strategic Sourcing



Please note: This training material was developed using a test tenant of UofL Workday, and while instructions are the same, visual elements may appear slightly different.

Initiator(s)

The employees who may initiate these processes have the following UofL Workday roles assigned to them:

- All Employees

Approver(s)

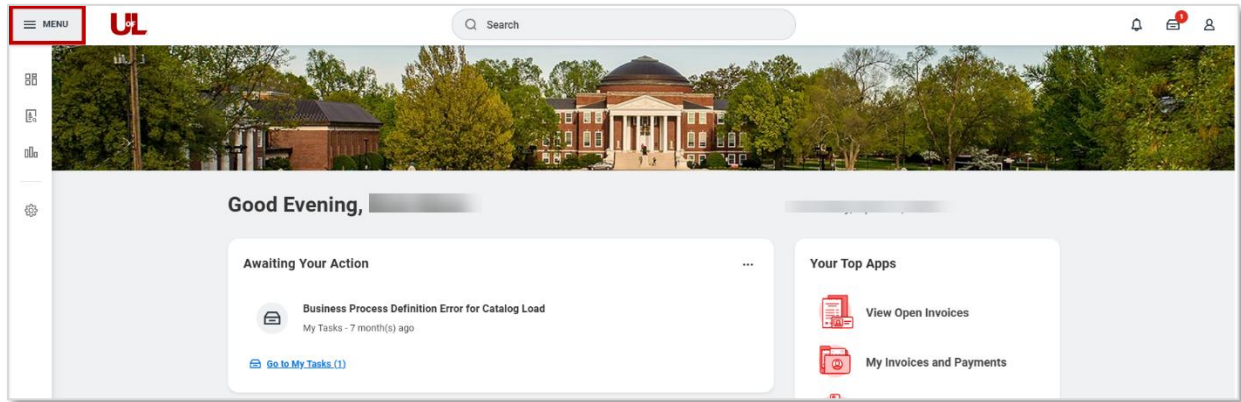
The potential approver(s) for these processes include:

- Information Security Compliance
- Information Technology Services (ITS)
- Legal
- Procurement Services
- Risk Management
- Fiscal Approvers (Program, Project, Gift, Grant, or Cost Center Manager)

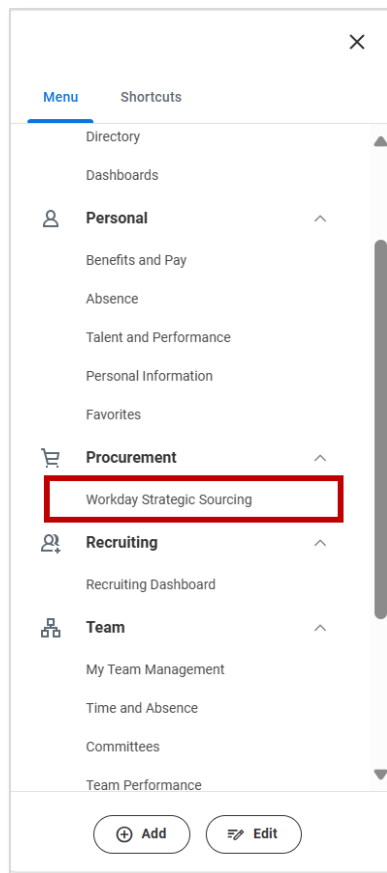
2. CREATE A PROCUREMENT REQUEST

The following steps assist end users in creating a procurement request for Department Agreements and Personal Service Contracts in UofL Workday/Workday Strategic Sourcing.

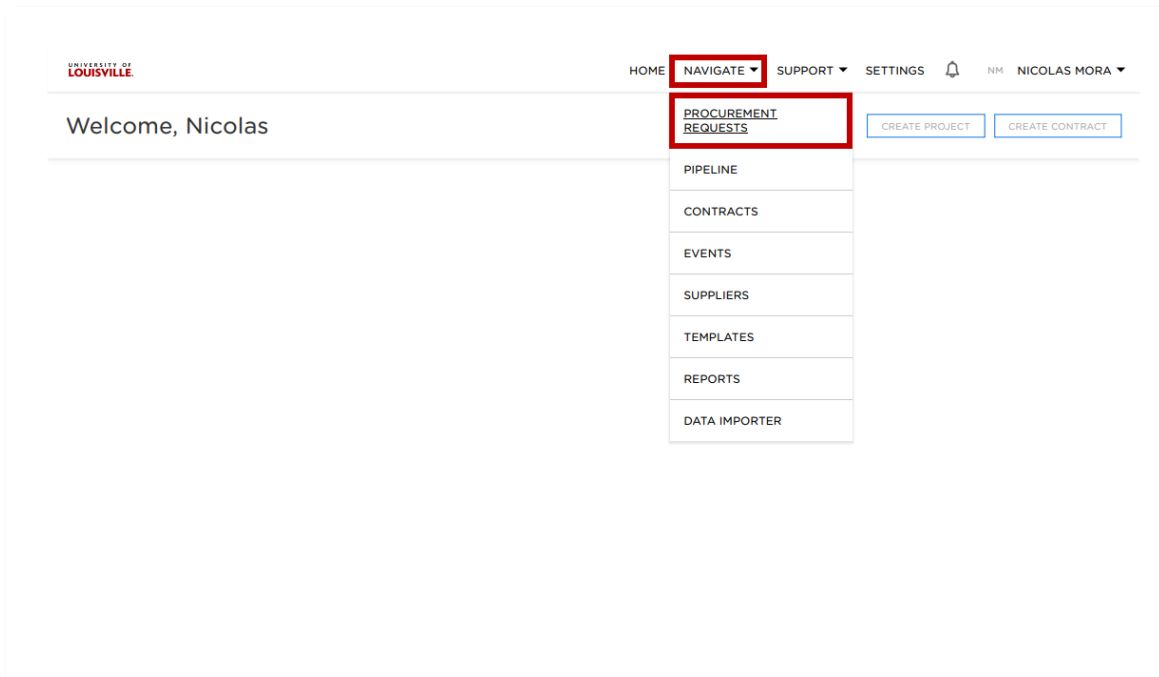
1. On the *UofL Workday Homepage*, select the **Menu** icon.



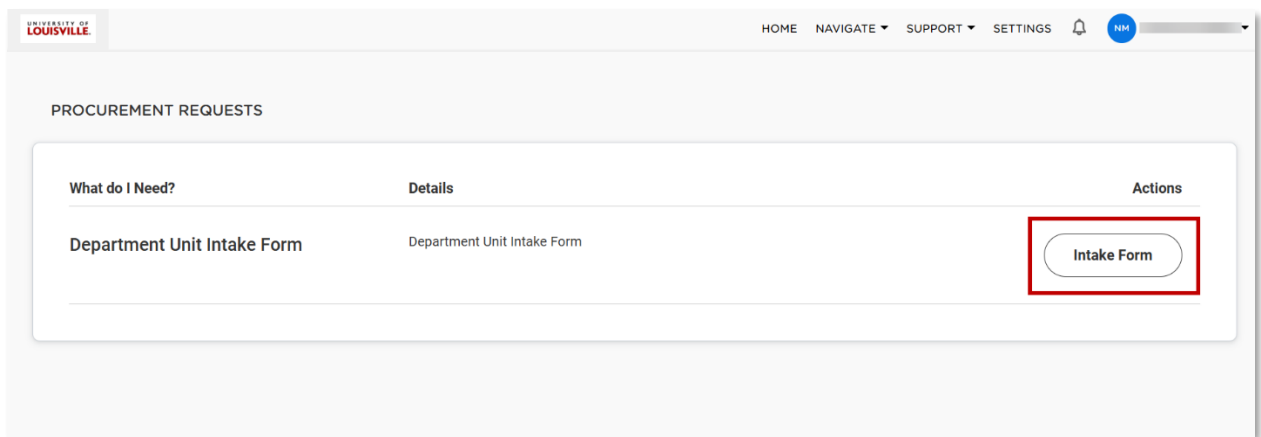
2. On the *Menu* pop-up screen, select **Workday Strategic Sourcing** under the *Procurement* dropdown.



- On the *Workday Strategic Sourcing* home screen, select the **Navigate** dropdown menu and click **Procurement Request**.



- On the *Procurement Request* pop-up screen, **Intake Form** to open the New Project screen.



5. On the *New Project* screen, enter the following information:

- **Title:** Format the title of each project as: **Full Supplier Name – Requestor Last Name**.
- **Category:** The type of purchase for the Project.
- **Project Type:**
 - **Department Agreement:** Select for all department agreements that are not a sole source supplier
 - **Personal Service Contract - RFP:** Select when a Personal Service Contract is needed but are not a sole source supplier
 - **Personal Service Contract – Sole Source:** Select when a Personal Service Contract is needed for a sole source supplier
 - **Department Agreement – Sole Source:** Select for department agreements for a sole source supplier
- **Project Description:** Enter the project title and the product name or service requested



Please note: No acronyms should be used when entering the **Project Title**.



Please note: Depending upon which **Project Type** is selected, additional sections will be displayed in the **Menu** dropdown on the left-hand side. These sections are required and must be completed to Submit.

- On the *Menu* dropdown, click **Stakeholders** to view which individuals have the ability to receive progress notifications about the procurement request from Workday Strategic Sourcing.

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HOME NAVIGATE SUPPORT SETTINGS NM

< PIPELINE **New Project** Personal Service Contract - Sole Source (PSSS) SUBMIT REQUEST

PROJECT

Project Information

Project Details

Attachments

Stakeholders

Worktag Section

Funding and PHI Details

Sole Source Justification Atta...

PSC Fee Details

Company Related Additional ...

STAKEHOLDERS

Invite internal team members to collaborate. Two Way Sync is turned on for this project.

STAKEHOLDER SYNC SETTINGS OPEN STAKEHOLDER DIRECTORY

NAME	LAST SIGN IN	ROLE	PERMISSION	EMAIL NOTIFICATIONS
		Requester	Read/Write	☐ Receive Email Notifications

ITEMS PER PAGE 10



Please note: Workday Strategic Sourcing will automatically mark yourself as a Stakeholder. To add additional participants, proceed with the following steps.

- OPTIONAL:** To add additional stakeholders, begin by selecting the **Open Stakeholder Directory** button to view all available stakeholders.

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HOME NAVIGATE SUPPORT SETTINGS NM

< PIPELINE **New Project** Personal Service Contract - Sole Source (PSSS) SUBMIT REQUEST

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STAKEHOLDER SYNC SETTINGS **OPEN STAKEHOLDER DIRECTORY**

NAME	LAST SIGN IN	ROLE	PERMISSION	EMAIL NOTIFICATIONS
		Requester	Read/Write	☐ Receive Email Notifications

ITEMS PER PAGE 10

- In the *Stakeholder Directory* screen, enter the **Name** of the stakeholder you would like to add in the **search bar**. Then click the **checkbox** next to their name and determine whether the stakeholder should receive notifications regarding the approval of this procurement request.



Please note: Only Stakeholders who have previously accessed Workday Strategic Sourcing accounts will populate in the Stakeholder Directory. If their name does not populate, they must first access WSS through their UofL Workday portal via Steps 1 – 2.

STAKEHOLDER DIRECTORY

Search stakeholders...

☒ [Redacted Name]

☐ Receive email notifications

☐ [Redacted Name]

☐ [Redacted Name]

☐ [Redacted Name]

1 STAKEHOLDER SELECTED

CLEAR SELECTION

ADD TO PROJECT

7. After confirming all necessary stakeholders, proceed down the Menu dropdown to provide additional details in each section.



Please note: These sections will vary depending upon which **Project Type** is selected, these sections are required and must be completed to **Submit** the procurement request.

8. In each section, begin by entering details for all **required fields**.



Please note: Required fields are indicated with a **RED** asterisk (*).

GENERAL INFORMATION

REQUESTOR DEPARTMENT* ULSA	REQUESTOR DEPT ID* 1234	ARE YOU SUBMITTING REQUEST ON BEHALF OF ANOTHER DEPARTMENT?* No	IS THIS AN INSURANCE CLAIM?* No
WILL PRIVATE DATA BE EXCHANGED?*	IS THIS A SOFTWARE PURCHASE?*		
No	No		

9. As you begin to enter details for the required fields, additional fields may populate due to the responses submitted in the required fields. Enter the necessary information in the newly populated required fields.



Please note: Workday Strategic Sourcing contains conditional formatting; therefore, for every Yes/No response, additional fields may populate and require information to proceed. If any required fields are missing information, the system will prevent submission of the procurement request and notify you via an Error message which section/field is missing information.

GENERAL INFORMATION

REQUESTOR DEPARTMENT* ULSA	REQUESTOR DEPT ID* 1234	ARE YOU SUBMITTING REQUEST ON BEHALF OF ANOTHER DEPARTMENT?* No	IS THIS AN INSURANCE CLAIM?* No
WILL PRIVATE DATA BE EXCHANGED?*	IS THIS A SOFTWARE PURCHASE?*	SOFTWARE NAME*	BRIEF SOFTWARE DESCRIPTION
No	Yes		
LICENSE TERM (E.G. 1 YEAR, 2 YEAR)			
SOFTWARE PURCHASES REQUIRE APPROVAL FROM ITS & ISCO. COMPLETE VENDOR ASSESSMENT FORM (LINK FOUND BELOW)			

Figure 1: Selecting **Yes** in response to a required field will populate additional optional and required fields.

10. If you try to submit the request and additional required fields are missing, an **Error** message will be displayed notifying you exactly which section and field requires additional information before submitting the procurement request.

! CANNOT SUBMIT PROJECT REQUEST

Looks like you're missing some valuable information.
Please fix or clear the following:

Project Details

- Project Description

Worktag Section

- Company
- Cost Center
- Fund
- Function

Funding and PHI Details

- .Will Federal funds be used for project?
- .Will Sponsored Project funds be used for project?
- .Will Protected Health Information (PHI) be shared?
- Is supplier based outside of Kentucky?

Sole Source Justification Attachments

- Sole source justification
- Proposal/Quote/Scope of Work from Supplier

CLOSE

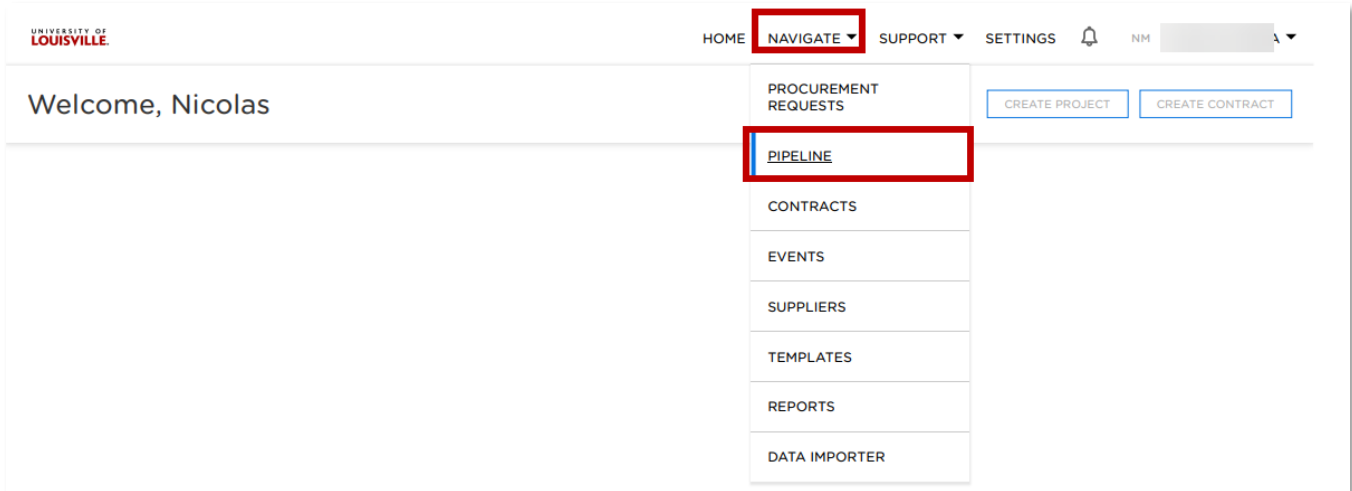


Please note: Following submission, the Procurement Request will proceed through the standard approval flows for current Department Agreements and Personal Service Contracts submissions.

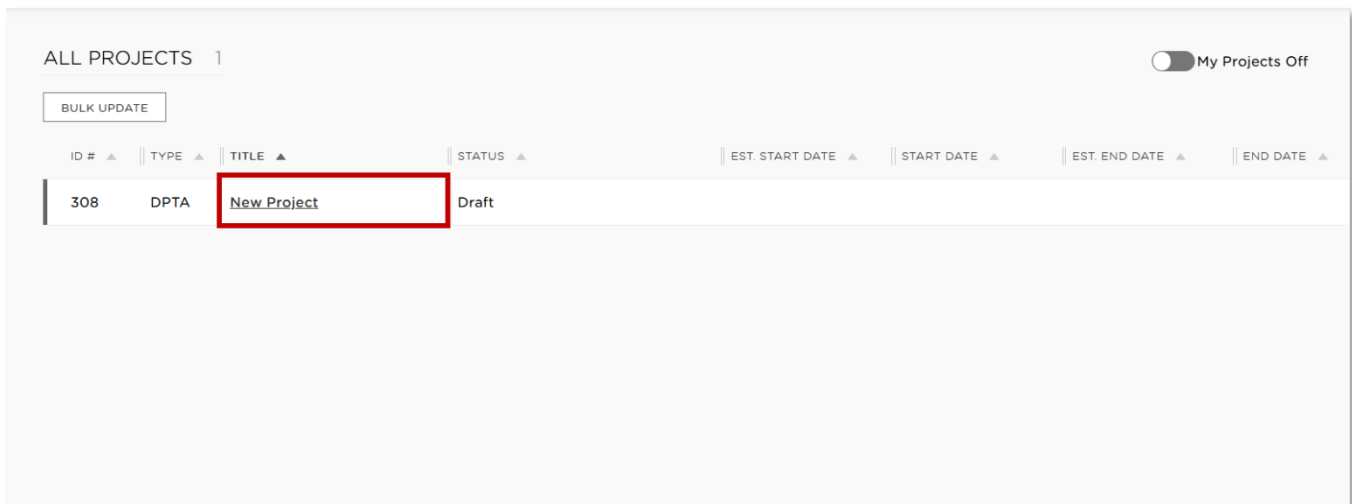
11. After submitting the newly created Project, you will be redirected to your home screen. From the home screen, you can locate the newly and any previously created Projects by selecting **Pipeline** from the **Navigate** dropdown menu.



Please note: Projects displayed are either projects you have previously created or projects you have been labeled as a stakeholder.



12. In the *All Project* section, select the Project **Title** to open the Project and review any associated supplier contract documents.



3. CONTRACT INTEGRATES TO CORE WORKDAY

The following steps assist end users in finding their approved Personal Service Contracts in UofL Workday after it has been approved in Workday Strategic Sourcing.



Please note: Department Agreements are excluded from Workday Core integration. Requestors will receive a signed agreement via Adobe Sign when the Department Agreement is completed.

1. Once you locate your contract in WSS using the instructions above you will be able to see the contract status. If the contract is in approved/active status, then it will integrate to Workday where it can be associated with downstream transactions including requisitions, purchase orders, and supplier invoices. Select **“Go to Workday Supplier Contract”** to be brought to the contract document in Workday.

The screenshot displays the Workday Strategic Sourcing (WSS) interface for a contract titled "JC Test Project PSC". The interface includes a left sidebar with navigation options: "Supplier", "Contract Information", "Contract Summary" (highlighted), "Company", and "Milestones". The main content area shows the "CONTRACT SUMMARY" with fields for "TITLE", "CATEGORY", and "CONTRACT TYPE". The "TITLE" field contains "JC Test Project PSC", the "CATEGORY" field contains "Gifts / Art / Music", and the "CONTRACT TYPE" field contains "Standard Purchasing Contract & Punchouts". A red banner at the top indicates "Needs attention - Contract Expiring". A red box highlights the "CONTRACT STATUS" dropdown menu showing "Active". Another red box highlights the "Go to Workday Supplier Contract" button.

2. After selecting “**Go to Workday Supplier Contract**” you will see the contract document and the Workday generated “*Supplier Contract Number*”. If the contract type is “*Personal Service Contract – Obligation*” that means this contract will be encumbered in Workday and invoiced directly (no requisition or purchase order required). All other contract types will not be encumbered and will still require requisitions and purchase orders (no direct invoice entry).

View Supplier Contract

View Exceptions

Supplier Contract	🔍	Contract Number	SCON-00000741	Version	1	Status	Approved
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Contract Information

Company	ULSA University of Louisville
Supplier	Construction Machinery Company Inc
Contract Specialist	Amber Horn
Contract Type	Personal Services Contract - Obligation
Contract Name	JC Test Project PSC



Please note: All invoices billed for this work should be for “SCON-00000741” so Accounts Payable can accurately invoice this supplier contract and liquidate the encumbrance.

For Workday Finances questions, please contact us via email at wrkdyfin@louisville.edu.