


Purpose: The article will explain how to create a Contract Intake Request within Workday Strategic Sourcing.

**Note* The process for submitting new supplier requests remains the same. Simply log in to Workday, go to “Create Supplier Request,” and fill in the required details. The Business Office will review and approve requests, after which the supplier will be available for any future contracts.*

Once the supplier request is approved, you will submit all new contracts with that supplier directly in Workday Strategic Sourcing.

Information about the University's Contract Policy and Procedures can be found on the Workday Strategic Sourcing homepage, Business Purchase Table.

From the Business Purchase Table there are three contract types to select from. Please read the descriptions for each type and select the appropriate contract type.

BUSINESS PURCHASE TABLE		
What do I Need?	Details	Actions
Contract Policy and Procedures	Access TU Contract Templates, Sample Certificate of Insurance (COI), and Contract Signature Authority List	TU Policy 
Intake form for Single Purchase/Charge Contract	SPCC - Select for Single Purchase or Charge Contracts (e.g. one-time events, product purchase)	SPCC
Intake form for Non-Purchase/Charge Contract	Select for contracts with no charges. Includes NDA, MoU, free services.	NPCC
Intake form for Recurring Purchase/Charge Contract	RPCC - Select for multiple or recurring charge contracts (e.g. software subscription, ongoing services, MSAs)	RPCC

Once contract type is selected the **New Contract** page will appear. All sections will appear on the left-hand side bar.

The screenshot shows the 'New Contract' form with the 'Contract Summary' section active. The form includes a yellow banner at the top stating 'This is a draft. To submit your request, click on the "Submit Request" button.' The 'Contract Summary' section contains the following fields:

- TITLE***: New Contract
- CONTRACT DESCRIPTION**: Contract description text
- CONTRACT START DATE***: M/D/YYYY
- CONTRACT END DATE***: M/D/YYYY
- FINAL SPEND***: \$ Enter Contract Amount
- COMPANY**: Select Company

Please fill in all required fields on the **Contract Summary** section.

*Note** Hover over the hint icon for further information.

Enter the Contract Title as follows: Supplier Name-Contract Name-Sponsoring Department Name

Example: Orion Security Solutions- Vendor MSA-TUPD

*Note** Company will always be Trinity University (select from drop down in field).

Navigate to the Supplier section, assign a supplier (by selecting from the supplier directory)

The screenshot shows the 'New Contract' form with the 'Supplier' section active. The form displays a message: 'Open your Supplier Directory to add a supplier to this contract. You can only add one supplier to contracts.' and a button labeled 'OPEN SUPPLIER DIRECTORY'. The 'Contract Status' is shown as 'In Progress' and 'Team Chat' is available.

Once Supplier has been selected navigate to **Intake Request Details**

The screenshot shows the 'New Contract' form with the 'Intake Request Details' section active. The form includes the following fields and options:

- CONTRACT FORM***: Select
- PROCUREMENT***: Select
- PLEASE LIST OTHER SUPPLIERS CONSIDERED***: Text input field
- JUSTIFICATION FOR SELECTING THIS SUPPLIER (E.G. BEST PRICE, ONLY SUPPLIER AVAILABLE, ETC.)***: Text input field
- DIVISION***: Select
- SPONSORING DEPARTMENT***: Text input field
- SPONSORING DEPARTMENT CONTACT NAME***: Text input field
- SPONSORING DEPARTMENT EMAIL***: Text input field
- SUPPLIER SIGNER'S EMAIL ADDRESS**: Text input field
- TU SIGNATURE APPROVER NAME***: Text input field
- TU Signature Authority is limited**: Text input field
- CONTRACT FOR SOFTWARE OR TECHNOLOGY***: Select
- IS ANY DATA SHARED WITH ACCESSIBLE BY OR STORED BY THE SUPPLIER OR ANOTHER THIRD PARTY?***: Select
- IS THIS CONTRACT FOR FOOD SERVICES?***: Select
- ARE THERE ANY RISKS ASSOCIATED WITH THIS CONTRACT?***: Select

For Example: bodily injury, property damage, data breach, no ability to terminate, no refund if terminate or contract not fulfilled, etc.

All required fields will have a red asterisk, enter information for all required fields.

Once all information has been entered, attach Contract and Certificate of Insurance in the **Attachments** Section.

If you have any Stakeholders, you may add the individuals in the Stakeholders section (by selecting Open Stakeholder directory). Stakeholders are internal team members you invite to collaborate.

The screenshot shows the 'Stakeholders' section of the form. A yellow banner at the top reads: "This is a draft. To submit your request, click on the 'Submit Request' button." Below this, there is a table of stakeholders:

NAME	LAST SIGN IN	ROLE	PERMISSION	EMAIL NOTIFICATIONS
Stephanie Bloomingdale sbloom@trmiv.edu	9/19/2024 at 1:38 PM	Requester	Read/Write	<input type="checkbox"/> Receive Email Notifications

At the bottom of the table, there are navigation arrows and an 'ITEMS PER PAGE' dropdown set to 10.

The directory will allow you to search for stakeholder by name, check the box next to the individual to add to your contract request.

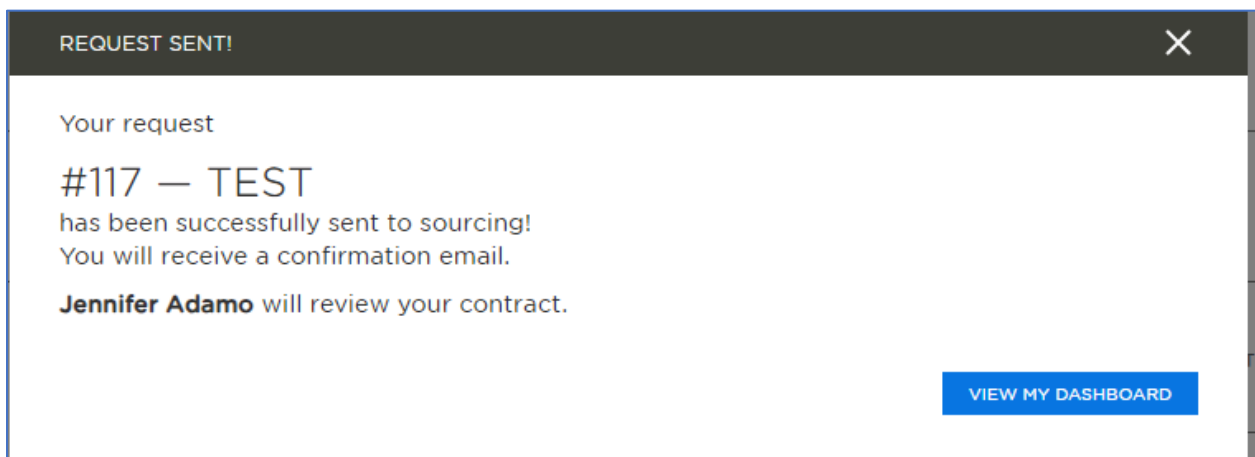
By checking the box next to Receive Email Notifications, this will allow email notifications to be sent to the Stakeholder throughout the contract review process within Workday Strategic Sourcing.

STAKEHOLDERS					
Invite internal team members to collaborate.					OPEN STAKEHOLDER DIRECTORY
NAME ▲	LAST SIGN IN ▲	ROLE	PERMISSION	EMAIL NOTIFICATIONS	
Noe De La Cerda ncerda@trinity.edu	9/19/2024 at 1:12 PM	Stakeholder	Read/Write	<input type="checkbox"/> Receive Email Notifications	DELETE
Stephanie Bloomingdale sbloomin@trinity.edu	9/19/2024 at 1:38 PM	Requester	Read/Write	<input type="checkbox"/> Receive Email Notifications	
<p>« < > »</p>					ITEMS PER PAGE <input type="text" value="10"/>

Ensure all required fields have been completed in all sections on the left-hand side bar, then select **SUBMIT REQUEST** on the top right-hand corner.

By submitting request this will assign your submission to a Sourcing Manager in Risk Management for review.

Once request has been submitted you will receive a confirmation with your contract request #:



Once your contract has been signed by the appropriate signature authority and finalized you will receive an email confirmation. *See example below:*

YOUR CONTRACT HAS BEEN APPROVED

Noe De La Cerda, the following Contract has been approved.

TITLE

#157 Test Noe

[VIEW CONTRACT](#)

*** DO NOT REPLY DIRECTLY TO THIS EMAIL ADDRESS ***

This is an automated email intended for ncerda@trinity.edu.

To reach the Support team, please have an NSC from your organization submit a case through the "Contact Support" link in the Workday Strategic Sourcing Platform or through the [Customer Center](#).

If you are a supplier and need to reach the Support team, please submit a case through the "Contact Us" link in the Workday Strategic Sourcing Platform.

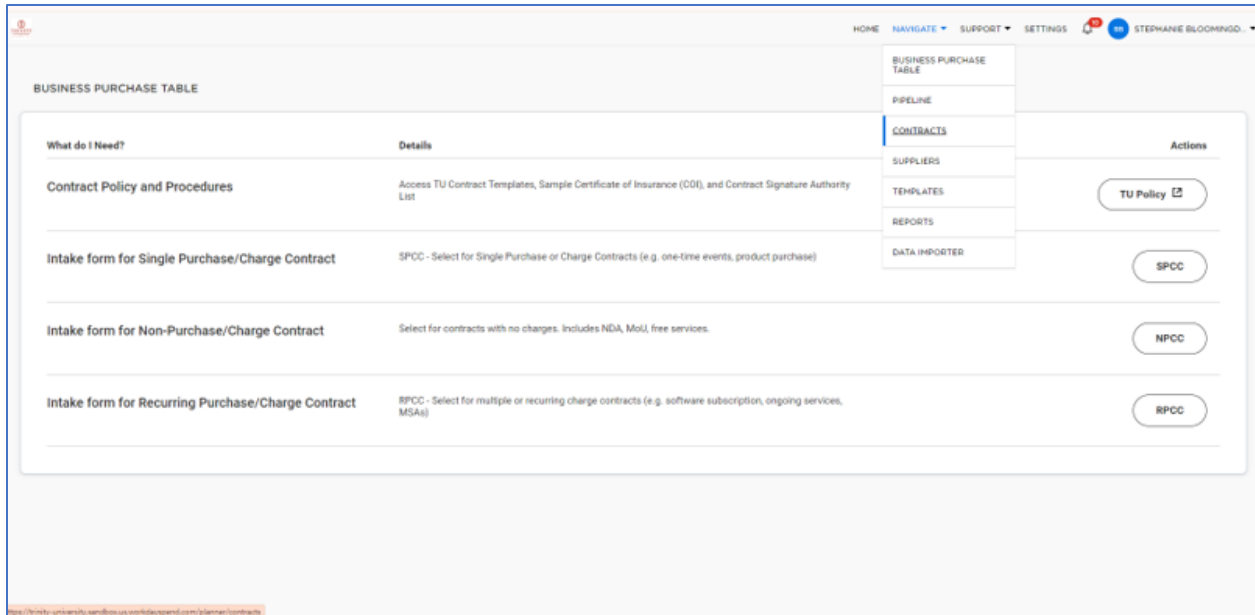


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Contract Follow-up Self Service for Requesters:

To view status of your contract request, go to **Workday Strategic Sourcing**.

From the homepage, go to **Navigate** and select **Contracts** to see your dashboard.



All contract requests you have submitted and the **Contract Status** will be displayed.

Note Contract Status will provide you the progress of the contract review*

Example of dashboard view:

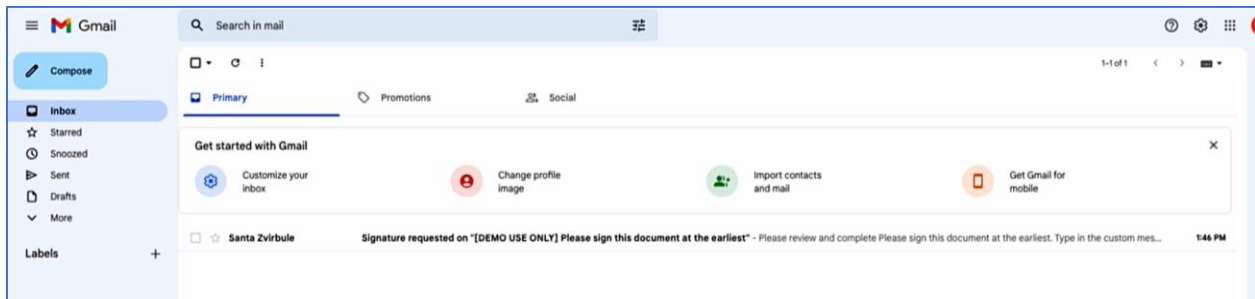
ID #	TYPE	TITLE	SUPPLIER	CONTRACT STATUS	AUTO RENEWAL	START DATE	END DATE	SPEND	SOURCING OWNER
131	RPCC	Documation-RPCC-ITS	Documation of San...	Out For Approval	Yes	9/4/2024	9/13/2024	\$50,000.00	Jennifer Adamo
136	NPCC	Libre Office-NPCC-ITS		Requested	Yes	9/4/2024	9/13/2024	\$50,000.00	Jennifer Adamo
145	SPCC	New Contract		Draft	No				Unassigned
135	NPCC	Synthesis-NPCC-ITS		Requested	Yes	9/4/2024	9/13/2024	\$50,000.00	Jennifer Adamo

Note Should you need to communicate with the Sourcing Owner assigned to your request or with any other Stakeholders added to the Contract, you do this by selecting the Team Chat button in the record. Make sure to “@” mention the appropriate team members if you wish them to receive an email notification about your message.*

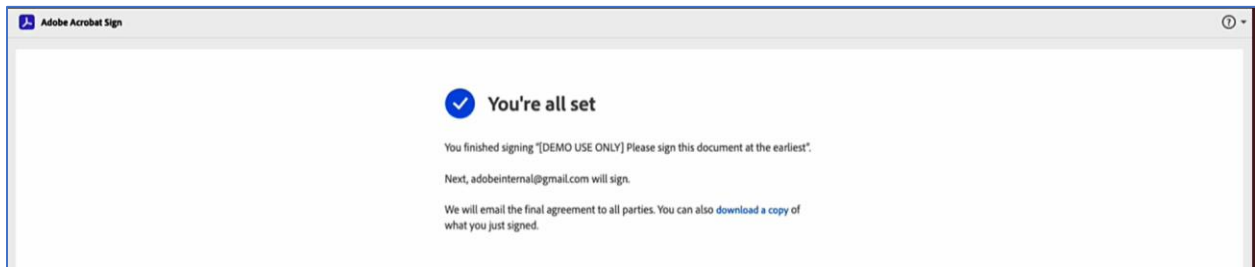
Adobe Sign interface showing contract details for 'Test Video-SOW-PPMO'. The contract form includes fields for 'CONTRACT FORM' (TU Template No Changes), 'PROCUREMENT' (New Contract with Previously Used Supplier), 'DIVISION' (Academic Affairs), and 'SPONSORING DEPARTMENT' (Other). It also includes a section for 'JUSTIFICATION FOR SELECTING THIS SUPPLIER' and a 'SIGNATURE APPROVER' field.

For Signature Authorities Use Only- Review and Signature:

As a Signature Authority approver, you will receive an email notification of a contract signature requested via **AdobeSign**:



Once you have signed the contract, **AdobeSign** will give you this message once the signature has been completed:



The Sourcing Manager (Risk Management reviewer) will then see the signed contract in **Workday Strategic Sourcing** and will be able to download. See example below:

← CONTRACTS WSS - Adobe Integration ... CSPO ID #3294 CONTRACT STATUS Approved TEAM CHAT

CONTRACT [+]

- Supplier
- Contract Summary
- Milestones
- Attachments
- Related Projects
- Related Contracts
- Stakeholders
- Approvals
- Contract Documents
- Forms
- History

ATTACH DOCUMENTS

FILE NAME	VERSION	UPLOAD DATE	UPLOADED BY	FILE TYPE	FILE SIZE	
Confidentiality Terms Addendum Confidentiality Terms Addendum (1)	V1	9/15/2022	Helmi Ubera...	DOCK	26.5 kB	UPDATE FILE

DRAG/DROP DOCUMENTS or BROWSE FILES

NO DOCUMENT SELECTED

DELETE CHECK OUT DOWNLOAD SEND TO ADOBE SIGN

SIGNED DOCUMENTS Adobe Sign

After selecting and sending your documents to AdobeSign, an agreement will be created here. It will contain all the documents and information you sent for signature. More information can be found on [AdobeSign](#).

Adobe Sign

AGREEMENT	STATUS	TIMESTAMP
[DEMO USE ONLY] Please sign this document at the earliest	Signed	9/15/2022

Confidentiality Terms Addendum (1).docx DOWNLOAD

Summary DOWNLOAD

Add link to AdobeSign Video here:

https://community.workday.com/node/1030282?check_logged_in=1