Strategic Sourcing: Sourcing Managers

Product Summary

December 10, 2025

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

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Contents

Strategic Sourcing for Sourcing Managers

Welcome to the Strategic Sourcing: Sourcing Managers book, where you can learn how to:

- Create sourcing projects to strategically source and engage with suppliers.
- Collaborate with key stakeholders to receive intake requests, run sourcing events, and streamline the supplier selection and award process.
- Manage supplier contract collaboration, negotiation, and signature processes.
- Manage supplier data, diversity, and risk with collaborative workflows and both internal and external scorecards.

Note: Not all information in this book is applicable to the Strategic Sourcing configuration determined by your organization.

To learn more about how to use our documentation, see How to Use Workday Documentation or watch the video.

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 11

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 from the User Navigation menu that displays when you click your name.
2. In the Integrations section, 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 Strategic Sourcing to Tableau using Taco

Prerequisites

- Create a Tableau account.
- Download Tableau Desktop version 2024.1 or later.
- Generate a personal API token in your Strategic Sourcing profile.

Context

Workday provides a packaged data connector (*workday-strategic-sourcing-x.x.x.taco* file) that enables you to connect your Strategic Sourcing data to Tableau Desktop version 2024.1 or later.

Note: This connector is made available solely to enable current Workday customers to export information from their Workday Offering instance to a separately licensed Tableau software application. This Connector is not part of your Workday Service, and the terms and obligations under your agreements with Workday do not apply to this Connector or to the exported information.

By downloading the TACO file, you are agreeing to the license agreement, available here: Download the Connector License Agreement PDF.

Steps

1. Download the Workday Web Data Connector.

Option	Description
App Version	1.0.0
Checksums	• SHA1: d38f362b4d4ffa66dc319f904abca71aed37b3bc • SHA256: b76a2117da2e8acbb3033ec32f47d638e80611506884c • SHA512: 83c2e9076ff3a3fdb573da34b77fd646a5f22c77718a3cb

2. Download and unzip the Tableau Data Connector .zip file.
3. Extract the *workday-strategic-sourcing-x.x.x.taco* from the downloaded .zip file.

4. (Optional) To confirm the integrity of your TACO file, open your command prompt or terminal. Use these methods to verify the file's signature:

Option	Description
Check Command Output	Run this command in the command prompt or terminal: *jarsigner -verify* [TACO file path] -*verbose -certs -strict*. If the command output shows *jar verified*, the file is correctly signed. You can safely load and use the file in Tableau.
Calculate Checksums	Calculate the file's SHA1, SHA256, and SHA512 checksums. Compare these calculated checksums with the values provided in the first step. A match confirms the file's integrity.

5. Copy the *workday-strategic-sourcing-x.x.x.taco* file into your My Tableau Repository/Connectors directory:
   a) Windows: C:\Users\[Windows User]\Documents\My Tableau Repository\Connectors
   b) macOS: /Users/[user]/Documents/My Tableau Repository/Connectors
6. Launch Tableau Desktop.
7. Open Workday Strategic Sourcing by Workday under Connect to a server.
8. Consider configuration:

Option	Description
URL	Enter the applicable URL for your region: • United States: https://api.us.workdayspend.com • Canada: https://api.ca.workdayspend.com • Europe: https://api.eu.workdayspend.com
Report Type	Select the datasets that you want to pull in from Strategic Sourcing. Note: To ensure optimal system performance and faster report generation, select only the necessary datasets to generate reports. Selecting excessive data can cause delays and impact system efficiency.
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 Strategic Sourcing.

9. Click Load Data.
   This step opens the Tableau Workbook with your selected report data.

Connect Strategic Sourcing to Power BI

Prerequisites

Generate a personal API token in your Strategic Sourcing user profile.

Context

You can use the Strategic Sourcing Custom Data Connector to pull your data into Power BI.

Steps

1. Use 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 Workday Strategic Sourcing.
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 *Workday Strategic Sourcing* 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.

Set Up DocuSign in a Strategic Sourcing Profile

Prerequisites

- A company admin sets up DocuSign in Strategic Sourcing.
- Have a DocuSign account.

Context

You can enable DocuSign for your user profile to obtain digital signatures for your supplier contracts.

Steps

1. Access your user profile.
2. In the Integrations section, click Authorize next to DocuSign.

    When you aren't signed into DocuSign, Strategic Sourcing redirects you to a sign in page.

Result

Once you're signed in to DocuSign, you're redirected to Strategic Sourcing. You can now send supplier contracts through DocuSign to obtain digital signatures.

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: In Community, submit a Customer Care case and select Strategic Sourcing Instance Management 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.
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	
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
Third-Party Risk Integrations	Strategic Sourcing notifies you of risk level changes for third-party integrations. A company admin can configure notifications in Settings.

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 50

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 User Email Use Cases

You receive too many emails from Strategic Sourcing.	Strategic Sourcing has two customization options for emails: • When you’re added as a stakeholder to a project or contract, you can determine if you wish to receive emails related to the record on the Stakeholders tab. • In sourcing events, you can choose to enable daily digest emails for individual sourcing event message centers. If you’re still receiving too many emails, Workday recommends adding email filters and folders to your email inbox.

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 5

FAQ: Account Security

- How can I change the email address for my account?
- How can I confirm my account?
- How can I request a new confirmation email?
- What can I do when my session times out?
- What can I do when I receive a token invalid error?
- I have 2 Strategic Sourcing accounts. Can I consolidate them?
- What can I do when I forget my password?
- How can I unlock my account?

- How can I change my password?

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: If your organization uses SSO, there could be certain restrictions. Contact your company admin for more information.
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?	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 a time. 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?.
I have 2 Strategic Sourcing accounts. Can I consolidate them?	You can’t consolidate accounts. We recommend informing the sourcing team you work with which email you would like to be contacted at to avoid confusion.
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.

Pipeline

Create Project or Contract Request

Context

You can submit projects for sourcing managers and other stakeholders to approve. You can plan and create sourcing requests. You can use intake to initiate projects and loop in sourcing and procurement teams for help at the appropriate stage.

Workday Strategic Sourcing automatically adds stakeholders based on approval flows to a new contract request. When a project or contract approver is not already in the stakeholder list on a project or contract that requires that approver's action, then we send the project or contract approver an approval needed notification and add them to the project or contract stakeholder list with Receive Email Notifications disabled.

Steps

1. On the home page, click New Project. Enter a Title, and select a project or contract type.
2. Depending on the project type or contract type you select, you can configure these options:

Option	Description
Attachments	Attach any relevant files to your project.
Contract Summary	When you select a contract type, the Contract Summary tab replaces the Project Information. You can add a Category and Contract Description.
Milestones	Add an estimated start and end date for your project.
Project Approvals	Strategic Sourcing adds approval groups automatically depending on what conditions that your request meets.
Related Projects	Create a new project or link your project to an existing one.
Sourcing	Add Line Items, RFXS, and Auctions to your project.
Stakeholders	Access Open Stakeholder Director to add stakeholders to your project. To add a new stakeholder to your project, click Add New Stakeholder and add their Name and Email. Set your Stakeholder Sync Settings to synchronize stakeholders for the supplier-related activities of the project: • Events • Forms • Performance Reviews

Option	Description
Suppliers	Click Add Supplier to open the Supplier Directory and add suppliers to your project. To add a new supplier to your project, click Suggest a Supplier and add the: • Supplier Name • Contact Name • Email

The configurable options available might vary based on your organization.

3. When you've completed the project request, select Submit Request.

Result

When you submit your request for approval a pop-up notification displays on page with your request number. You also receive an email with your request number. You can track the status of your submission on your Projects and Requests home page.

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 New 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 your project's approved spend, estimated spending, and savings. Note: If the Requisition to Project Integration is enabled, the system will alert when a requisition's currency differs from the default to ensure accurate spend planning.
Sourcing Events	Create and manage all Sourcing Events related to your project.

Option	Description
	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.

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 Requests tab, 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.

    When you enter recognized savings as *Calculated* with start and end dates, Recognized Savings calculates up to the current date based on the 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.
Download	Download a copy of any document version.

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 and Contracts

Prerequisites

Create sourcing projects and contracts and have Project Types and Contract Types configured.

Context

You can apply filters to your projects or contracts and create filtered views. Use filters to narrow the projects or contracts listed on your dashboard to focus on a specific aspect of your projects or contracts.

You can share different filtered views with other sourcing managers in your organization.

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.

Send a Project for Approval

Prerequisites

Meet any of these requirements to send a project for approval:

- Stakeholders with Read/Write permission
- Sourcing owners

Meet any of these requirements to edit the approval workflow:

- Company admins with Read/Write permission
- Department admins with Read/Write permission
- Sourcing managers with Read/Write permission
- The sourcing owner of the project

Context

You can:

- Add ad hoc approvers, if enabled by a company admin.
- Send and monitor approval requests before project completion.
- Retract approval requests.
- Record approval details.

Company admins set up approval flows in your company settings. When a project meets the requirements for an approval flow, Strategic Sourcing adds that flow to the Project Approvals tab where you can preview the flow. A project can be assigned more than 1 approval flow. When a project has multiple approval flows, all flows must be completed before the project moves to the *Approved* status.

When an approver is in multiple approval flows or multiple phases of 1 flow, they only have to approve the project once.

Steps

1. Access the project you want to send for approval in your Pipeline.
2. (Optional) To add ad hoc approvers, select the Project Approvals tab.
    a) Click Preview Approval Flow.
    b) Click Edit Flow.
    c) Enter a reason for the approval flow change.
    d) Click Add Approver to in the phase where you want to add an ad hoc approver.

       When an approval group requires all approvers to approve, you can reorder the approvers.

       You can’t remove approvers from the existing approval group.
    e) Click Apply and Send to save the changes. Strategic Sourcing changes the project status to *Out for Approval*.
3. To send a project for approval, select *Send for Approval* from the Project Status prompt.

Result

Approvers in the first phase receive notifications to review the project and submit a decision.

Next Steps

Monitor the approval process in the Project Approvals tab.

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 project statuses can have reasons:

Project Statuses	Status Description
Canceled	You can cancel projects that have never been Active and are now inapplicable.
Needs Attention	
On Hold	
Does Not Need Attention	You can snooze or ignore Needs Attention reminders when you select this status. You can select Ignore, which will prevent all upcoming reminders and the item will no longer have the Needs Attention status. You can also select a number of days to snooze reminders.

These contract statuses can have reasons:

Contract Statuses	Status Description
Canceled	You can cancel contracts that have never been Active and are now inapplicable.
Termination	You can only terminate Active contracts.
Needs Attention	
Does Not Need Attention	You can snooze or ignore Needs Attention reminders when you select this status. You can select Ignore, which will prevent all upcoming reminders and the item will no longer have the Needs Attention status. You can also select a number of days to snooze reminders.

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.

Reference: Pipeline and Intake Email Notifications

As a sourcing manager, you can use this table to understand which scenarios different user types receive email notifications for. Links in email notifications link directly to the record that the link references.

Scenario	Sourcing Manager	Stakeholder
New project request submitted through Intake	Yes	Yes
Invitation to collaborate on a project	No	Yes
Projects assigned to you're marked as *Needs Attention*	Yes	Yes
Status of the project changed to *Completed*	Yes	Yes
Assigned a milestone	No	Yes
Your project milestones are marked as *Needs Attention*	Yes	Yes
Milestone date changes	Yes	Yes
Day a milestone is due	Yes	Yes
You mark your milestone complete	Yes	Yes
Team chat: sent automatically if individual stakeholders or all stakeholders are @mentioned. When there are no @mentions, you receive a digest of messages within 24 hours.	Yes	Yes
Team chat reminder: sent within 24 hours if messages are left unread.	Yes	Yes

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.

Reference: Strategic Sourcing Events Use Cases

You have multiple supplier bidding rounds that you want to manage in one sourcing event.	Within one event, you can provide feedback requesting that suppliers change questionnaire responses or provide lower bid prices. When the supplier must see different information at each stage, you can't have multiple rounds of supplier bidding managed within 1 event. Workday recommends creating multiple events from 1 project so that supplier lists from a project carry over to the event. Similarly, you can only have 1 stakeholder evaluation per event. Once published, stakeholders can respond to all questions related to a supplier bid. Stakeholders can't evaluate multiple rounds in a single event.

You want to communicate additional RFx dates beyond the default three available in the timeline.	The dates available in the RFx timeline trigger email notifications to the supplier, and you can't edit or add to these emails. When you want to communicate additional key dates to suppliers, you can include those dates in the Description section of the event.

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 24.
2. (Optional) Create Templates from Existing Sourcing Events on page 24.
3. Start Sourcing Events from Templates on page 25.

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

Steps: Create an Auction

Context

You can create a reverse auction to achieve savings and gain better insight to the market price of each line item in an auction. With multi-lot auctions, you can group line items into different lots and add suppliers to lots that are relevant to them. Multi-lots enable you to manage an auction with multiple lots scheduled to start sequentially.

Steps

1. Select Navigate > Events and click Create Auction.

   You can also start an auction:

   - From a project. In the Auctions section of the Sourcing tab, click Create New Auction.
   - From a closed sourcing event. In the Dashboard of your closed event, select Build Auction from the Download drop-down menu.
2. Enter your auction details.
3. Configure your auction settings. As you complete this step, consider:

Option	Description
Auction Start	When left blank, your auction starts as soon as you click Publish. Workday recommends scheduling auctions for future dates to

Option	Description
	ensure your suppliers have time to sign up for Strategic Sourcing and prepare for the auction.
Auction End	Set the amount of time each lot in your auction will run for. The estimated end time updates when you add lots. Example: When you set this field to 15 minutes and enter a start time at 11:30 AM, the estimated end time displays 12:15 PM for an auction with 3 lots.
Auction Extension	Enter time extension parameters for your auction so that the auction stays open if suppliers continue to lower their bids. This prevents bid sniping and drives further savings.
Currency	Select the currency that you want the auction to be in.
Minimum Bid Decrement	Enter an amount that the suppliers have to decrease their total bid by each time to update their current bid.

4. Configure Supplier View Auction Options.
5. Add suppliers in the Invited Suppliers section.

   You can add new suppliers in the Supplier Directory side panel.
6. Configure your auction lots.
   a) Click Edit Items.
   b) Add rows and enter item information for each item in the lot.
   c) (Optional) Click Edit Lot Details to rename the title of the lot or select to include a starting price.

      When you include a starting price, a new Starting Price column is added.
   d) (Optional) Click New in the Auction Lot tab to add a new lot.
   e) In the Auction Lots section on the Build Auction page, use the Suppliers Invited to This Lot prompt to assign specific suppliers to a lot.
7. Add suppliers on the Invite Stakeholders section.

   You can add new stakeholders in the Stakeholder Directory side panel.
8. Click Publish.

   When you publish your auction, you can't add or remove suppliers, or edit the lot worksheets.

Result

Suppliers receive an invitation to the auction. A countdown and the list of your lots displays if you publish a scheduled auction.

Next Steps

(Optional) You can pause an auction when it's live.

(Optional) You can end an auction when it's paused.

Related Information
Tasks

Create a Public Event on page 39
Edit Live Events on page 44
Analyze Completed Auctions on page 64

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.

Concept: Live Auction

When your auction is live, you can view the Auction Prices chart that displays the activity of your suppliers. The page refreshes every minute so you stay updated on the bids of your suppliers. Suppliers can only submit bids that are less than their previous bids.

The Overall Bids table displays a clear breakdown of each supplier bid and your savings compared to the original bid. You can also view the activity status of your suppliers in this table. Next to each supplier name is a circle that indicates their status:

Circle	Status
Green, filled	Supplier is online and viewing the bid sheet.
Red, filled	Supplier is registered with Strategic Sourcing but hasn’t accepted their auction email invitation.
Red, open	Supplier hasn't registered with Strategic Sourcing and hasn’t accepted their auction email invitation.

When the auction ends, refresh your browser to ensure your suppliers submitted no new bids in the last few seconds of the auction that might have extended it.

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.

Reference: Auction Email Notifications

As a sourcing manager, you can use this table to understand which scenarios different user types receive email notifications for. Company admins only receive notifications for auctions when they're the sourcing owner or added as a stakeholder.

Scenario	Sourcing Manager	Stakeholder	Supplier
Invitation to collaborate on an auction	No	No	No
Invitation to participate in an auction	No	No	Yes
Auction scheduled	No	No	Yes
Auction live	Yes	Yes	Yes
Supplier submitted their bid	No	No	No
Specific auction lot is active	No	No	Yes
Specific auction lot closed	No	No	Yes
Auction chat sent	Yes	Yes	Yes
Auction paused	Yes	Yes	Yes
Auction closed	Yes	Yes	Yes
Supplier bid awarded or rejected (optional	No	No	Yes

Scenario	Sourcing Manager	Stakeholder	Supplier
email sent by the sourcing manager)			

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. Click Add Multiple Choice Questions Here where you want to add the questions.
5. Enter your questions and answers. You can configure the answer options for suppliers.

   Multiple-choice questions don't have a limit on the number of options you can list.

   When creating multiple-choice questions, consider:

Option	Description
Require	Suppliers must provide an answer to the required questions to be able to submit the form.
Allow Supplier to Select Multiple Answers	Enables a multiselect question. You can't control how many options that you want your suppliers to select.
Allow Supplier to Include Comments	Provides suppliers with an option to add a comment to the question.
6. (Optional) After you create your questions, click the question to edit it and add scoring the multiple-choice answers.

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.

Note: Auto-scoring doesn't display in exports of the event data or in the evaluation scorecard.

Steps

1. Access your event edit page.
2. In the Build Your Response Sheet section, select Edit Questionnaire.
3. Click to edit your multiple-choice question.
4. Add scoring for each answer next to the answer text box.

Result

When you compare the bids you receive, you can expand the Questionnaire Responses section to view the auto-scores for supplier answers. You can use Edit Automatic Scoring in Compare Bids to add or change the auto-scoring.

Add Auto-Scoring to the Event Analysis

Prerequisites

Have multiple choice questions in your event 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.

Note: Workday Strategic Sourcing doesn't doesn't display auto-scoring results in exports of the event data or in the evaluation scorecard. You can't use the auto-scoring results in reports.

Steps

1. AccessEvent Analysis in your event.
2. Select the Questionnaire tab.
3. ClickView Settings.
4. In theView Optionssection, select the *Show score options* check box under Multiple Choice.
5. ClickUpdate.
6. Select the Add Scores icon next to your multiple choice questions to add auto-scoring.

Result

You can view the auto-scores for supplier answers in the Questionnaire Responses section.

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. Access your draft event.
2. In the Build Response Sheet section, click Edit Questionnaire.

   To add a questionnaire, click Add Questionnaire.

   You can also sort sections of the questionnaire in the Build Response Sheet section. Click the draggable icon and move sections into your desired order.
3. Click Sections in the top action bar.
4. In the Sections side panel, click and drag sections into your desired order.
5. To move questions, click the question you want to move.
   a) Click the Move button.
   b) To move the question to another section, select the section from the prompt.
   c) To move the question within the current section, click Move Here between questions.

   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. Select a Worksheet Template or Add a Blank Standard Worksheet.

   When you select multiple worksheet templates, you create a worksheet for each template selected.
5. Click the worksheet name to open and edit the worksheet.
6. (Optional) To edit the worksheet title and add notes for the supplier, click Edit Worksheet Details.

7. (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.

   a) Edit a column to define the type.

      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 the formula you input.

      To calculate the sum of columns with numeric values, select Calculate Total when editing the column.

   b) Define the supplier visibility. As you complete this step, consider:

Option	Description
Show to Supplier	Suppliers can view the column but can't modify the information.
Supplier Fills	Supplier inputs the information.
Hide From Supplier	Supplier can't view the column. This visibility type can be used to include data for internal reference. Example: past pricing information.

8. (Optional) Click and drag column headers to reorder columns.
9. (Optional) To delete columns, select the drop-down menu next to the column title.
   a) From the filter view, click the menu icon.
   b) Select Delete Column.
10. (Optional) To add sections to your worksheet, click Add Section when viewing the worksheet.

    Strategic Sourcing duplicates your column setup, but you can populate the cells with new information. You can use sections to collect bid amounts that might vary between supplier regions.

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 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

Column	Field Type
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)
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.

Prerequisites

Submit a Customer Care case in Community for Strategic Sourcing Instance Management, and select the Enable Feature option. Specify the *linked_worksheets* feature flag, the Sourcing module, and the name of the environment where you want to enable the flag. You can find environment names in your company profile in Settings.

Steps

1. Access your event.
2. In the Build Response Sheet section, select Add Worksheet.
3. In the Add New Worksheet side panel, select Add a Blank Standard Worksheet and click Add.
4. Click Edit Worksheet Details to rename the worksheet to *Conversion Rates*. Click Save & Close.
5. Click the Edit Column drop-down menu and select Remove All Columns.
6. Click Delete All Columns to confirm deletion.
7. Click Add Column and add these 2 columns:

Column Name	Column Type
Currency Type	Text
Conversion Price	Currency

Ensure you select *Show to Suppliers* for Visibility in both columns. Suppliers need to see the currency types in the drop-down menu of this column.

8. To base the conversion rate in USD, enter 2 rows:

Currency Type	Conversion Price
USD	1
EUR	0.94

9. Click New to add a new blank standard worksheet and create your bid sheet.
10. Click Add Column while in the new worksheet, name the column *Quoted Price*, and enter these values:

Field	Select
Type	*Number*
Visibility	*Supplier Fills*

11. Click Save.
12. Click Add Column, name the column *Currency*, and enter these values:

Field	Select
Type	*Lookup*
Source Worksheet	*Conversion Rates*
Source Key Column	*Currency Type*
Visibility	*Supplier Fills*

13. Click Save.
14. Create another column, name it *Extended Price in US Dollars*, and enter these values:

Field	Select
Type	*Formula*
Visibility	*Show to Suppliers*

15. Click Save.
16. Click into the Extended Price in US Dollars column and click Edit Column.
17. Click Edit Formula.
18. Enter this formula to convert the quoted price from the supplier currency into USD: *Quantity * (Quoted Price * Source Field(Currency, Conversion Price))*.

    Use *Source Field* to lookup the value for the conversion price associated with the option selected by the supplier for currency.
19. Click Save Formula.
20. In the Edit Column side panel, click Save and close the panel.
21. Right-click in the Price column and select Delete Column.
22. Right-click in the Extended Price column and select Delete Column.

23. Test your formula:
    a) Enter *1* in the Quantity column for row 1.
    b) Click Preview.
    c) In the Quoted Price column, enter *1*.
    d) In the Currency column, select *USD*.

       The Extended Price in US Dollars column displays *1.00*.
    e) In the Currency column, select *EUR*.

       The Extended Price in US Dollars column displays *0.94*.

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 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 an email address that you can access.

   Workday recommends adding your work email address as the supplier email. When you use your work email, you can quickly switch active companies from the User Navigation menu.
6. Publish the duplicate sourcing event.
7. To test the duplicate sourcing event, use the email invitation sent to your email address.

Send Customized Invitations

Prerequisites

Publish a sourcing event.

Context

You can send your supplier a customized invitation from Strategic Sourcing.

Steps

1. Access Navigate > Events.
2. Select your sourcing event.
3. In the Suppliers section of the Dashboard, select a supplier.

   Only supplier contacts that have never activated their account are able to receive custom invitations.
4. Click Send Custom Invite.
5. Enter the subject of the email and the invitation, and click Send Email.

   You can't include hyperlinks in the email.

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.

Introductory emails can increase supplier engagement and give you the ability to:

- Promote the opportunity by informing your suppliers the size of the deal, a new partnership, or a need for innovation.

- Simplify the event process by providing more information on support for Strategic Sourcing and your event requirements.

Steps

1. Navigate to Events > Events and access your sourcing event.
2. In the Invite Suppliers section, click Draft Introductory Email.
3. Select the email client you use.
4. Select which suppliers to send the email to and click Draft Email.
5. Edit the email in your preferred email client.
6. 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.

When at least 1 supplier has agreed to the gateway documents, you can click Download to export an Excel file of the event. In the Terms and Conditions tab of the Excel file, each row displays:

- Supplier.
- Type of terms and conditions.
- Response.
- Supplier user that agreed and their email.
- Full text of the terms.

Live Sourcing Events

Create a Public Event

Prerequisites
A company admin must 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. The Share RFP button displays when you select *Yes* for Public Bid in the Event options section.

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

Steps: Create a Public Event for the Public Sourcing Site

Prerequisites

A company admin enables and configures the public sourcing site for your organization.

Context

You can create and share a public sourcing event so that it displays on your public sourcing site. Potential suppliers can access the event without an invitation from the sourcing team.

Steps

1. Create a new project.
2. Select the Sourcing tab in the project.
3. Click Create New RFX.
4. Select Create Public Event, and click Create New RFX.
5. Complete the Event Set Up section. You can add:
   - A title.
   - A description of the event.
   - Any relevant attachments.
   - Commodity codes, if enabled by a company admin.

   You can also update the Internal data and Event options.
6. Enter deadlines in the Set Your Timeline section.
7. (Optional) Invite suppliers to your event. You can select Restrict by Invite to allow only invited suppliers to bid on your event. The event still displays on your public sourcing site.
8. Createquestionnairesorworksheetsfor your event. You can also request documents from suppliers.
9. (Optional)Create an evaluation.
10. Invite Stakeholders.
11. Publish your event.

Result

Your event displays on the public sourcing site of your company.

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.

   This prompt is only available if a company admin has enabled sealed bids in Settings.

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.

Bypass Terms of Participation for a Supplier

Prerequisites

Publish an event.

Context

You can bypass the terms of participation for a supplier.

Steps

1. Access your event.
2. In the Suppliers section of your event dashboard, select the name of the supplier.
3. In the Supplier Information section of the Invited Supplier side panel, select the Agreed to Terms of Participation check box.

Result

The supplier can access the event without needing to agree to your terms of participation.

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. When you create a sourcing event from a project, Workday carries over the stakeholders who are already on that project to the event.

Steps

1. Access the Invite Stakeholders section of your event.
2. Click Open Stakeholder Directory.
3. Select stakeholders to add to your event and individually set their permissions. 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

Option	Description
	sourcing event, invite suppliers, respond to questions, and so on.

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

To delete a stakeholder who isn't assigned as the Owner from the event, click Delete under the Send Message option on their row.

4. (Optional) To add a new stakeholder, click Add New Stakeholder.
   a) Enter the name and email address of the person that you want to invite as a stakeholder, and configure their permissions.
   b) Click Save & Add to Event.
5. Select Add to Event.

Result

Stakeholders from your Stakeholder Directory receive an email invitation to the sourcing event when you publish the event.

New stakeholders receive an email invitation to set up their account and access the sourcing event when you publish the event.

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 Owner from the drop-down menu.

   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 43

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 the View Event tab.
3. Click Edit RFP.

   Note: Your suppliers can still access and update their bids while you're editing your event. Editing an event doesn't remove it or prevent suppliers from accessing it.
4. Make your edits.
5. To publish changes, click Publish Updates.

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

Next Steps

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

Related Information
Concepts
Concept: Message Center on page 51
Tasks
Request Bid Updates on page 48

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. You must click Publish Updates for the event to reopen.
Can I add new suppliers to a reopened event?	When live editing your event, you can add or delete suppliers in the Invite Suppliers section.
How do suppliers know I've reopened an event?	Use the Message Center to notify all invited suppliers that the due date has changed.
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.

You can only provide question feedback while an event is published.

Steps

1. Access the Suppliers section of your event.
2. Click a supplier name to open the Invited Supplier side panel.
3. Click View Bid to open a supplier response.
4. ClickView to review responses to your questionnaire in the Response Sheets section of the supplier bid.
5. Select Add Feedback from the side panel.
6. Enter your requests for clarification into the fields next to each question, where applicable.
7. Select the Prepare Summary button to save and summarize your comments.
8. On the Questionnaire Feedback 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 48

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 the supplier that you're proxy bidding for.
3. In the side panel, click Import Bid.
4. Click Export Bid Sheet.
5. 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.
6. When you're ready to import the bid, click Import.
7. Attach the completed spreadsheet file on your computer under the Attach Bid Sheet section. Attach additional documents if needed.
8. 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 a sourcing event invitation to a supplier after publishing the sourcing event. You can do this when:

- Suppliers are unable to locate the original sourcing event invitation email.

- You'd like to send a reminder to those who have not accessed the sourcing event.
- The default Workday invitation.
- A customized invitation.

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 to All Contacts	Automatically resends an invitation email to all supplier contacts.
Resend Invitation	Automatically resends an invitation email to a supplier contact.
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 38

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.

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:
    - Click the name of your supplier. In the Invited Supplier side panel, click 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.

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. Select Navigate > Events.
2. Access your sourcing event.
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 49

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. Select Navigate > Events.
2. Access your sourcing event.
3. Click the Message Center tab.
4. Select the Send Announcement To All Suppliers section.
5. Enter your message and click Send Announcement.

Related Information
Tasks
Send Direct Messages to Suppliers on page 49

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 51

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.

Sourcing managers and stakeholders receive email notifications for these scenarios:

- Someone @mentions them. They receive the email immediately.
- Someone @mentions all stakeholders. Sourcing managers and stakeholders receive the email immediately.
- Messages are unread for 24 hours. Strategic Sourcing sends a digest of all messages left unread for 24 hours.

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. You can access the Message Center by accessing the event and selecting the Message Center tab in the navigation pane.

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.

Sourcing managers and stakeholders receive email notifications in these scenarios:

- A supplier asks a new question in the Message Center.
- A sourcing manager or stakeholder posts a new answer to a question.
- A sourcing manager or stakeholder sends a new message to all suppliers.

Stakeholders also receive email notifications when assigned new questions.

Suppliers receive email notifications when the sourcing team:

- Posts a new answer.
- Sends a new message to all suppliers.
- Shares an answer with all suppliers.

Related Information
Tasks
Assign Questions to Stakeholders on page 50

Reference: Events Email Notifications

As a sourcing manager, you can use this table to understand which scenarios different user types receive email notifications for. Company admins only receive notifications when a another company admin invites a new team member to the User List.

Scenario	Sourcing Manager	Stakeholder	Supplier
Invitation to collaborate on an RFx	No	Yes	No
RFx event published	Yes, if you're the event owner	Yes, if you're a stakeholder on the event	No
Invitation to participate in an RFx	No	No	Yes
A supplier RSVPs to an RFx	Yes	Yes	No
Invitation to collaborate on an RFx (sent by supplier team members)	No	No	Yes
Reminder to submit questions in the Message Center 2 days before	No	No	Yes
Reminder to submit bid sent 2 days before the submission deadline	No	No	Yes
A supplier submitted their bid	Yes	Yes	No
Bid update requested by sourcing manager	Yes	Yes	Yes
A supplier revises their bid	Yes	Yes	No
A supplier resubmits their bid	Yes	Yes	Yes
Event closes	Yes	Yes	No
A supplier has been awarded or rejected	Yes	Yes	Yes

Scenario	Sourcing Manager	Stakeholder	Supplier
Invitation to evaluate suppliers	Yes	Yes	No
Evaluation has been updated	Yes	Yes	No
Weekly event report	Yes	Yes	No

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 zSuppliers section, click Analyze Event.
3. Click Download All Files on the action bar.
4. Download the ZIP 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 tab from the left side panel.
3. Draft your evaluation in the Evaluation section.

   You can link your event questionnaire to your evaluation. See Link Event Questionnaire to an Evaluation.

   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 apply weights evenly to questions in a section, click Apply even weights in the Section Title section. To enter a weight for each section, select Sections. The weight total must equal 100%. To apply weights evenly to sections, click Apply Evenly.

You can adjust stakeholder visibility for sections. When you select the Results Visibility check box, all stakeholders can see all evaluation results on the Evaluation Comparison page, regardless of stakeholder event permissions.

4. To publish the evaluation, click Edit Event to go to the event page.
5. In the Build an Evaluation section, enter an evaluation due date and click Publish Evaluation.

Result

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

Related Information
Concepts
Concept: Scorecard Scoring Logic on page 57

Link Event Questionnaire to an Evaluation

Prerequisites

Start a sourcing event with a questionnaire.

Context

You can copy all the questions from a questionnaire into an evaluation so that your stakeholders and score the questions that suppliers responded to.

Steps

1. Access your event.
2. Select the Evaluation tab from the left side panel.
3. When editing or creating your evaluation, select Link with Questionnaire.
4. In the Set Default Evaluation Range window, configure the default range you want to apply to all questions from the questionnaire.

   You can modify these ranges for each question in the next step.

   Strategic Souring adds a new section to your evaluation that has all the questions from the event questionnaire. When you try to enable Link with Questionnaire but don't have a questionnaire in your event, a new section isn't added.

   To delete unwanted sections, click the section title, and then click Delete.
5. Add weights to the questions in the section and to the separate sections. You can adjust them individually or apply weights evenly.

   The weight total must equal 100%.
6. (Optional) To hide a question from the evaluation, click the question name and select the Hide in Evaluation check box.

Result

When stakeholders start the evaluation, they can view the suppliers questionnaire responses while completing the synced evaluation questions.

Edit Published Event Evaluations

Prerequisites

Sourcing event must be in the *Published* or *Closed* status.

Context

You can make changes to event evaluations after you publish them.

Steps

1. Select Navigate > Events.
2. Access you published or closed event.
3. Select Evaluations.
4. Select Edit Evaluation and confirm that you want to edit.
5. Select Edit Evaluation in the Evaluation section.
6. Make updates to your evaluation.

   When you add or delete scoring questions in a section, you must update the scoring weights for each question in that section.

   When you add or delete a section, you must update the scoring weights for each section.
7. (Optional) Update the Set Evaluations Due Date.
8. Click Publish Evaluations.

   Strategic Sourcing automatically notifies all invited stakeholders when you update an evaluation.

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 submitted bids.

Context

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

Steps

1. Access your sourcing event.
2. Select the Evaluation tab in the navigation panel.
3. In the status tabs, select the check boxes of the suppliers you want to evaluate.

   You can only select suppliers that have submitted bids.
4. Click Start Evaluation.

   If you select suppliers in the In Progress tab, click Continue Evaluation.
5. Complete the evaluation. As you complete the evaluation, consider:

Option	Description
Sections	Navigate to separate sections and view how many questions you've answered.

Option	Description
Suppliers	Filter suppliers from your evaluation as you complete it. You won't submit evaluations for suppliers that are in your view.
Team Chat	Collaborate with your team by providing notes or attachments for your suppliers.

You can also click Bid Analysis beneath the name of a supplier to view their bid responses.

6. To submit your evaluations for all suppliers in your view, click Submit Evaluations.

Result

Your sourcing manager receives your evaluations.

Next Steps

To view and compare stakeholder responses, click Compare Evaluation Results in the Evaluation tab. If the sourcing manager has limited the view of the stakeholders, this option isn't available.

To revise your evaluations after you submit:

1. Select suppliers in the Completed tab.
2. Click View Evaluations.
3. Click Revise Evaluations. You can't revise evaluations 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. Select Navigate > Events tab.
2. Access your sourcing event from the list of events.
3. In the Suppliers section of your event dashboard, select a supplier you want to add to the award summary.
4. In the Invited Supplier side panel, click Add to Award Summary.

   You can also click Actions next to a supplier in Event Analysis to open the Invited Supplier side panel.
5. (Optional) Drag and drop your preferred suppliers to rank them in the Award Options Recommendations section 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.
6. (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.

7. (Optional) Edit an award summary option to add internal information about the option. You can add pros, cons, and attachments for each option.

Result

Stakeholders can review and approve recommendations on bids from suppliers.

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 name and select Award in the side panel.
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 panel.

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.

This scorecard scoring logic applies to performance reviews and sourcing events.

Calculating Total Scores

To calculate the total 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%
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: (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 53

Create Workday Requisitions from Awards

Prerequisites

A company admin must set up the Award to Requisitions Integration.

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.

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.

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.

Event Analysis

Concept: Event Analysis

Event Analysis enables multifaceted negotiations between sourcing teams and supplier engagement. At the end of a sourcing event, you can use Event Analysis to analyze a side-by-side comparison of supplier bids. You can also calculate savings around the best possible outcomes within your supply base. Provide immediate feedback directly to your suppliers on how to improve their bids with actionable data and market trends around their competitors.

You can start the analysis process as soon as you receive bids from your suppliers.

Add and Edit Columns

You can add and edit columns in the Event Analysis module that 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*.

Column Type	Description
Reference	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*.
Bid Analysis	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.

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.

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

Supplier Coverage

In the Supplier Summary tab in Event Analysis, you can view different types of supplier coverage data. This coverage data enables you to analyze bids per line item, by volume, and by baseline price, providing insight into how each supplier responded to your event.

Column	Description
Line Item Coverage	Line item coverage enables you to view the percentage of line items your suppliers bid on. You can determine whether a supplier can provide sufficient coverage for each line item. Example: When a supplier specializes in a good, you can identify which of your other suppliers are best suited to fulfill different line items.
Volume Coverage	Volume coverage enables you to see how much of the total quantity your suppliers covered, specifically the volume that your suppliers bid on. This coverage provides a measure of the capacity of a supplier as compared to the total quantity out for bid. Example: When a supplier bids on 80% of the total volume out for bid, you can identify the best path for awarding bids while consolidating suppliers.
Baseline Coverage	Baseline coverage enables you to view how much of the business spend is covered based on the supplier. You can evaluate how they performed against a certain benchmark. Example: When a supplier bids on 50% of the baseline spend, you can identify opportunities for negotiation based on spend with each supplier.

Supplier Parameters

In the Supplier Summary tab of Event Analysis, you can drill down in supplier bids by grouping your important parameters. You can include additional parameters you want to group your suppliers by like *Quantity* or *Item*. Similar to Excel, when you group by a parameter, you can view the granular details of the coverage of your suppliers.

Item Pivots

Item Pivot enables you to group rows based on column data points. Some common examples for row groupings include section, location, or category. The grouping and structure of the exported pivot table doesn't save, and the Item Pivot you create doesn't persist for different sourcing managers or stakeholders.

Access the Item Pivot tab in Event Analysis to set up your pivot table.

Exporting to Excel

When you finish your analysis, you can export your data as an Excel file. Export individual worksheets by right-clicking in the worksheet that you want to export and clicking Export. You can export either a CSV or XLSX file. You can't export from the Item Pivot tab of a worksheet.

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

You can also export using the Export Bid Data tab. Before you export the data, you can define:

- Which suppliers to include.
- Which data to include.
- How the data displays.

When you export from the Export Bid Data tab, you can only export Excel files, and you obtain all event data from the selected suppliers.

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.

Option	Description
	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: Scenarios on page 65
Examples
Example: Create a Manual Scenario on page 64

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 65

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.

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.

Tab	Description
	• A single supplier.
Export Bid Data	Configure how you want to export the event data into Excel.

Related Information

Concepts

Concept: Scenarios on page 65

Tasks

Analyze Supplier Bids on page 63
Analyze Completed Auctions on page 64

Contracts

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.
- Create contract revisions.
- Track contract negotiations with your supplier.
- Add start and end dates.
- Assign milestones.
- Add stakeholders.
- Change contract status.

Strategic Sourcing delivers 4 contract types that you can customize:

- Contract Amendments
- Master Service Agreements
- Non-Disclosure Agreements
- Statement of Work

You can customize the delivered contract types and create new types to fit your business needs.

Contract Search

Contract stakeholders can only search for contracts that they have visibility into.

When displaying search results, Strategic Sourcing displays two lines of data listing matches. To view additional matched data beyond this, select expand all.

You must input 3 characters in order to search your contracts. You can enter a space as a character, and the search will return accurate results.

When the contracts machine learning search is enabled, you can search through your contracts using related terms or exact matches. When you select Related Terms from Search Options, search results display the relevant fields, field value, and any passages from the attached documents that relate to the search query.

When you select Exact Match from Search Options, your results show exact matches from all fields on a contract, including custom fields. Exact match search highlights the search term when displaying results. When you enter multiple words in the search bar using Exact Match, the results display all contracts with any of the words. To search for exact phrases, add quotations around the phrase.

You can also search through DOCX and PDF attachments when the contracts machine learning search is enabled.

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.
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. You can’t manually change a contract status to*Expired*.
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*.
Doesn't Need Attention	You can snooze or ignore *Needs Attention* reminders when you select this status. You can select *Ignore*, which will prevent all upcoming reminders and the item will no longer have the *Needs Attention* status. You can also select a number of days to snooze reminders.

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

You can store contract documents for later use in Strategic Sourcing by in the Contracts tab on the Templates page.

You can add new contract templates by uploading files in the Contracts tab. You can edit template information or upload a new template document. When you upload a new template document, you create a new version of the template. When you upload .docx or .pdf file templates, you can use them to generate new contracts in the Contract Documents tab.

Contract Negotiation

You can track your contract negotiations with your supplier in the Contract Documents tab of a contract. Contracts that you use in negotiations must be .docx files. You can edit the contracts in Word from your browser if you have Microsoft 365 enabled.

This integration must not be used to give users based in the People's Republic of China or Russia access to Microsoft 365.

You can identify the major and minor versions of a contract document and see who's responsible for the next action item. When you finalize a contract, you can send it to Adobe Sign or DocuSign for an e-signature.

Contract Hierarchy

You can create a contract hierarchy by linking related contracts together. When organizing and managing your contracts in Strategic Sourcing, you view the relationship tree for easy navigation. A contract must have a supplier to be linked to other contracts and can only have 1 parent contract. Contracts within a contract hierarchy have the same supplier. You can also link contracts to projects.

The relationship tree displays the entire hierarchy of a contract and where the current contract fits into the family. When you click the information icon next to a contract, you can view a summary of the contract and access the contract through View Contract.

See Steps: Link Contracts for more information.

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.
Contract Summary	If you don't select an Auto Renewal option, Strategic Sourcing populates *No*. When you select *Yes* for Auto Renewal, set the frequency to send emails to your stakeholders in these fields: • Renewal Termination Notice is the amount of time that you agreed to give the supplier when notifying them of a contract cancellation as defined. This notice is informational and doesn't initiate email notifications to you or your supplier. • Renewal Termination Reminder is how early you want to be sent an email notification as a reminder that you need to provide the termination notice to the supplier when you haven't set a contract to auto-renew. This notification doesn't impact the automatic contract expiration reminders.
Attachments	You can download or check out attachments. To use DocuSign, you need to authorize your DocuSign account with your Strategic Sourcing account.
Contract Documents	You can use .docx or .pdf files for contract negotiation. Only contract templates in the Template Library that are DOCX or PDF file format display in this section when you click Generate New Contract Document.
Stakeholders	You can add stakeholders from the Stakeholder Directory and update their permissions on the contract. Only stakeholders with the Receive Email Notifications check box selected receive email notifications.

Related Information

Concepts

Concept: Strategic Sourcing Contracts on page 67

Concept: DocuSign Integration on page 76

Extract Metadata from Contracts

Context

You can extract contract metadata from uploaded contract documents with machine learning. After you extract metadata, you can automatically create a contract record with that metadata.

Note: When you use the Supplier Contracts Connector, you can't create a contract with a Workday contract type using this feature.

Steps

1. Access Navigate > Contracts.
2. In the Contract Tools tab, select Metadata Extraction.
3. Click to upload a PDF or DOCX document or drag and drop a file in the Upload section. You can upload multiple documents at a time.
4. Click the document uploaded to review it after processing finishes.

   You can manually enter values that weren't extracted or are incorrect.

   Note: Contract metadata extraction may return incorrect or missing results. You should review all results for accuracy.
5. Enter values in the Manual Input Fields to create a new contract record.
6. To create a contract record, click Finalize & Create.

   When you create a contract record in the *Active* state, you bypass any approval rules for the contract type.

   You can bulk create contract records with contracts that have been finalized.
7. Click Create and View Contract in the confirmation pop-up.

Result

You create a new contract record.

Next Steps

Enter or update any additional information in the new contract.

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.

Documents in the Contract Documents tab from the original contract aren't added to the revision record. Once you archive a revision record, documents in the revision record from the Contract Documents tab aren't merged onto the original contract. In a contract revision record, documents in the Contract Documents tab aren't added to Attachments in the revision record or the original contract record.

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.

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.

   You can only link contracts if they have the same supplier.
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 69

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.

Snooze Needs Attention Alerts

Context

You can silence email notifications for contract and project deadlines to minimize the amount of emails you receive. Snoozing Needs Attention email notifications helps you:

- Maintain relevance for records marked as *Needs Attention* in your Pipeline Dashboard and Contracts Dashboard.
- Provide control on what you receive alerts for.
- Manage your contracts and projects with flexibility.

Steps

1. Access the contract or project.
2. Click the Contract Status or Project Status.
3. Select *Doesn’t Need Attention*.

4. Select a reminder period. To silence notifications completely, select *Ignore*.
5. (Optional) Select a reason for silencing notifications and enter notes.

Result

Your Needs Attention email notifications will be silenced for the selected reminder period.

Edit Contract Auto Renewal Fields

Prerequisites

Create a contract.

Context

You can edit auto renewal fields on the original contract and revisions after contracts have been renewed.

Steps

1. Select Navigate > Contracts.
2. Access the contract that you want to edit for auto renewal.
3. Select Update Autorenewal from the options menu in the contract summary.

   To access the Update Autorenewal button, the original contract must be in active status or the contract revision needs to be In Progress or Approved status.
4. Update these fields:

- Auto Renew
- Contract End Date
- Renewal Term/Duration
- Renew Number of Times

5.

Result

After you modify renewal fields and archive revisions, the Auto Renewal tab displays on original contracts. The tab enables you to view:

- Auto Renew
- Renewal Number of Times
- Renewal Term/Duration
- Start Date
- End Date

Example

Next Steps

Concept: Clause Library

Your clause library contains clauses that you use frequently when writing contracts. You can create and maintain clauses by uploading .docx files. Clauses save automatically when you make changes. You can also view version history and create reports on your clauses.

All stakeholders have read access to clauses in the library and have the ability to copy the text of a clause.

When a company admin adds you to a manage access, you can:

- Create and edit clauses.
- Search and view clauses.
- Upload a document containing the content of a clause.
- Upload a new version of a clause.

On the Settings page, a company admin can:

- Enable the clause library.
- Configure manage access teams.
- Create clause types.

Only company admins can delete clauses from the Options button on a clause.

Create a Clause in the Clause Library

Prerequisites

In your company settings, a company admin:

- Enables the Clause Library.
- Adds you to a Clause Library access team.

Context

You can create and maintain frequently used contract clauses in your Clause Library.

Steps

1. Select Navigate > Contracts.
2. Access Contract Tools > Clause Library.
3. Click Create New Clause.
4. In Clause Information, enter a name for the clause.

   When you fill out these fields, you can filter by them:

   - Code
   - Status
   - Type

   Clause types for your organization are set by your company admin.
5. Select the clause file to upload.

   You can only upload .docx files.

Result

The text of your clause displays, and you can copy the text to add to your contracts.

Example

Watch the video: 1m 11s

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

As a sourcing manager, you can use this table to understand which scenarios different user types 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 immediately.	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

Scenario	Sourcing Manager	Stakeholder
Renewal termination notices and reminders. The sourcing team sets the frequency.	Yes	Yes
30, 60, and 90 days before contract end date. These notifications are in addition to the renewal termination notices and reminders.	Yes	Yes
A contract needs approval. If Sourcing Manager and Stakeholder are unchecked from contract notifications, they'll still receive emails for approvals.	Yes	Yes
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.

   If the Supplier Connector is set up for your organization, all approved suppliers in Workday are part of your Strategic SourcingSupplier Directoryunless the connector was configured with supplier group or category filters.
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.

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 Suppliers 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.

Result

Strategic Sourcing saves the statuses, segments, and risk levels of your suppliers.

Supplier Forms

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. In the Prepublish drop-down menu, select *Include Scorecard for Suppliers*.

   You must publish the supplier form before you can prepublish the scorecard.
3. Enter a due date for the scorecard.
4. Click Prepublish.

   Prepublishing automatically enables stakeholders to begin scoring supplier responses as soon they receive them.

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 81

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. Access Pipeline, and create a new project for your forms.
2. Select the Forms tab.
3. Select Add Forms, and select the forms you want in the project in the Select Forms side panel. Click Add Forms.
4. Select the suppliers you want to add to the forms from the Supplier Directory side panel.

   You can also click Manage Suppliers on the form to add suppliers.
5. Determine which supplier you want to submit for, and click Submit on Supplier's Behalf.

   Selecting this option prevents suppliers from receiving forms when they're published.
6. Select a supplier review due date and click Publish.

Next Steps

You can fill in a supplier form on behalf of a supplier.

Start Review Forms

Prerequisites

The sourcing manager has created forms, such as security forms, questionnaires, or worksheets, that they want to send to suppliers.

Context

When you have forms that you want to send to multiple suppliers, you can start a review form project.

Steps

1. Select Navigate > Pipeline.

   You can also start a review form project from directly from a supplier in the Supplier Directory. From the Forms tab in the supplier profile, click Select Forms and select which forms you want to run for that supplier.
2. Click New Project.
3. Select the *Form* type from the Project Type prompt.
4. Add suppliers to the project by selecting Suppliers > Open Supplier Directory, selecting suppliers, and clicking Add To Project.

   When you want to add a supplier but they're not in the supplier directory, click Add New Suppliers, enter their profile description, and click Save and Add to Project.
5. To add forms to the project, select the Forms tab and click Add Forms and select the forms you want to send.
6. Enter a due date for suppliers in the project to return their forms complete and click Publish.

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 Supplier Forms on Behalf of Suppliers

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
Finalize Supplier Review Forms on page 83

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 Scorecardsection, 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 78

Rerun Supplier Forms

Prerequisites

- Suppliers have returned the completed form to the sourcing team, and completed scorecards, if applicable.
- The approval group has 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.

You can only rerun custom forms.

Steps

1. Access the Supplier Directory on the Forms tab of the supplier's profile.
2. Select a supplier to view the supplier profile.
3. Select the Forms tab. This tab only displays when forms have been sent to the supplier.

   You can also:

   - Rerun multiple forms by clicking Select Forms.
   - Rerun forms by creating a new project.
4. Click Re-Run Form.

   Rerunning creates a new version of the form on the profile of the supplier profile, while still retaining the existing completed form in the Form History section on a form in the Forms tab.
5. Select a due date and click Publish. When you rerun a form, Strategic Sourcing automatically creates a new project for the form.

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. They can remove the form or remove 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.

Reference: Supplier Forms Email Notifications

As a sourcing manager, you can use this table to understand which scenarios different user types receive email notifications for. Company admins don't receive email notifications unless you add them as stakeholders or are part of approval groups.

Scenario	Sourcing Manager	Project Stakeholder	Event Stakeholder	Approval Group Used for Forms	Supplier
Sourcing manager creates a project with a form	No	No	No	No	No
Stakeholders are added to the project	No	Yes	No	No	No
Stakeholders are added to the form	No	No	Yes	No	No
Invitation to participate in supplier review form	No	No	No	No	Yes

Scenario	Sourcing Manager	Project Stakeholder	Event Stakeholder	Approval Group Used for Forms	Supplier
(sent when the sourcing manager publishes the form)					
Sourcing manager prepublishes scorecard so that stakeholders receive notification when suppliers complete the form	No	No	No	No	No
Reminder that the form is due at 30-, 7-, and 1-day intervals before submission deadline	No	No	No	No	Yes
Project status changes to *Active*	No	No	No	No	No
Supplier submits form	Yes	No	Yes	Yes	Yes
Approval group reviews form	Yes	No	Yes	Yes	No
Form is finalized	Yes	No	Yes	No	No
Project status changes to *Complete*	Yes	Yes	No	No	No
Form gets flagged When you flag a supplier review form, Strategic Sourcing flags all suppliers in your directory	No	No	No	No	No

Scenario	Sourcing Manager	Project Stakeholder	Event Stakeholder	Approval Group Used for Forms	Supplier
that have completed the form.					

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. Access Navigate > Pipeline.
2. Create a new project and select the *Performance Review* project type in the drop-down list next to the project name.
3. In the Reviews tab in navigation pane, click New.
4. In the Performance Reviews side panel, select the Performance Review Template check box.

   If you don't have a Performance Review Template option, select the Add a Blank Review & Start from Scratch check box.
5. Click Add.
6. In the Reviews tab, select Scorecard. As you complete this section, consider:

Option	Description
Choose Suppliers to Review	Select which suppliers you want your stakeholders to review.
Invite Your Stakeholders	Select which stakeholders you want to invite to the review.
Edit You Scorecard	Edit the scorecard sections, questions, and weights. You can also preview the scorecard.
Publish Your Review	Set a due date and publish your review. You can also edit which stakeholders can see which sections.

7. (Optional) In the Reviews tab, select Supplier Survey and create or modify your supplier survey.

   Your sourcing team can set up a Questionnaire, include a Scorecard, and add Worksheets for your supplier to complete in the Build Your Supplier Survey section.

   In the Publish Your Supplier Survey section, you can modify the name of the supplier survey and set a timeline before publishing.

   The Supplier Survey section might not be available based on your company settings. Contact a company admin to modify the *Performance Review* project type.

Result

You can view the past performance of your suppliers.

Example

Watch the video: 2m 7s

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.

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.

Reference: Supplier Performance Review Email Notifications

As a sourcing manager, you can use this table to understand which scenarios different user types receive email notifications for. Company admins only receive email notifications if you add them as stakeholders.

When you ask the supplier to complete a scorecard and a survey, the supplier must click Submit on both the scorecard and the survey. Strategic Sourcing doesn't send notifications when the supplier submits only the scorecard.

Scenario	Sourcing Manager	Project Stakeholder	Event Stakeholder	Supplier
Stakeholders added to the performance management project	No	Yes	No	No
Stakeholders added to the performance management event (scorecard)	No	No	Yes	No
Supplier survey published	Yes	Yes	Yes	Yes
Scorecard published	Yes	Yes	Yes	Yes

Scenario	Sourcing Manager	Project Stakeholder	Event Stakeholder	Supplier
Supplier submits the supplier survey	Yes	Yes	Yes	Yes
Supplier revises the supplier survey	Yes	Yes	Yes	No
Supplier resubmits the supplier survey	Yes	Yes	Yes	Yes
Scorecard updated after publication	Yes	Yes	Yes	Yes
Sourcing owner or stakeholders complete the scorecard	No	No	No	No
Supplier assigned an action item that links to a project	No	No	No	Yes
Supplier action item marked as complete	Yes	No	No	Yes
Stakeholder assigned an action item that links to a project	No	Yes	No	No
Stakeholder action item marked as complete	Yes	No	No	No
Performance review finalized	No	No	No	No
Performance review overdue	No	No	No	No
Performance review overdue and marked as *Needs Attention*	Yes	Yes	Yes	No
Status of the performance review project changed to *Completed*	Yes	Yes	No	No

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 your performance reviews.

The Performance Review Master Template sets the default sections for every new performance review template that you create in Strategic Sourcing.

Steps

1. Select Navigate > Templates.
2. Click the Performance Reviews tab to create a new template.
3. Click Add Performance Review Template.
4. Edit the performance review template. As you complete this task, consider:

Option	Description
Scorecard	Add stakeholders to the template and edit the scorecard. When editing the scorecard, total weights must equal 100%. You can edit titles that are sections from the master performance review template.
Supplier Survey	Add questionnaire and worksheets to send to your suppliers.

Result

You can use the performance review template to create future supplier performance reviews.

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

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.

When accessing your report for the first time, Strategic Sourcing automatically sets your visibility to the Table view. You can select one of these visualization types from the Charts menu:

- *Bar*
- *Bar Line*
- *Bar Stack*
- *Column*
- *Line*
- *Pie*
- *Pivot*
- *Scatter*

To share a saved report with other members of your organization, you can edit the saved report and add other sourcing managers in the Share Your Report field.

You can export the reports you create to:

- Excel
- HTML
- PDF
- Print

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 that 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 rows.

   You can also remove specific rows by clearing the check boxes.
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 and add users in the Share Your Report field.
15. (Optional) Click Export and select the file format that you want to download your report in.

Result

You now have a saved report.

Next Steps

Export or share your reports with users in your organization.

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.

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.

Reference: Strategic Sourcing Reporting Use Cases

You can't filter the Request Submitted and Request Opened fields in Filters and Columns.	After adding the fields to the report, Workday recommends using column header filtering on both the Request Opened and Request Submitted dates to filter and sort by these dates. Click the column header in Row 1 to view the filter. You can use the Editor button to remove any of the date columns that aren't relevant to your analysis.
You need to transfer a saved report to a new owner when the current owner has left the company.	Create a support case that specifies the name of current owner and the name of the new owner for assistance.