

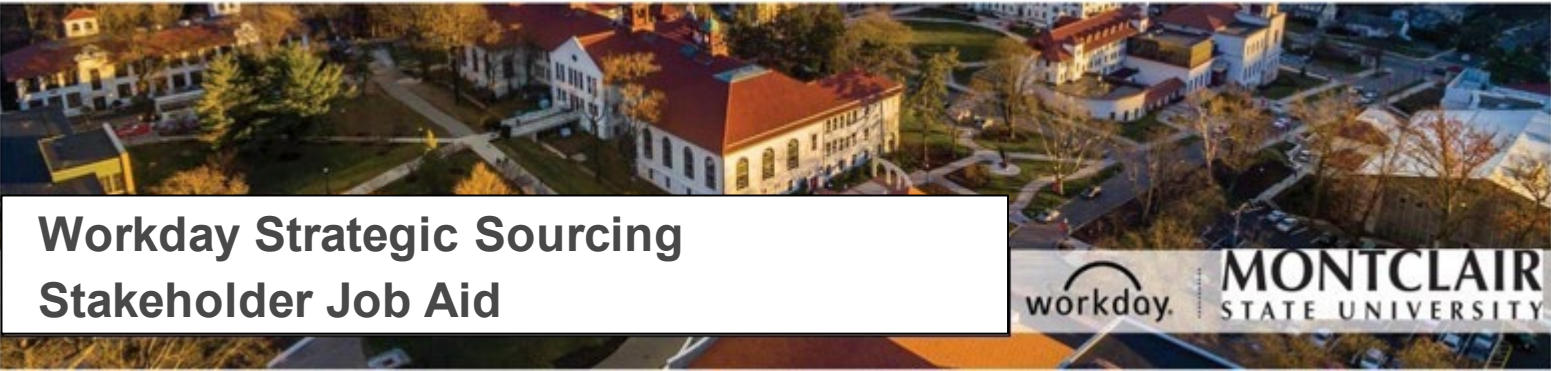


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Workday Strategic Sourcing Stakeholder Job Aid

Workday Strategic Sourcing (WSS) is the University's electronic platform for procurement contract management, bidding events, and other procurement-related requests. WSS:

- Establishes a standardized electronic intake process for various requests;
- Provides transparent workflows with visibility into the status of procurements and contracts;
- Provides a centralized repository of procurement-related contract documents through rule-based permissions; and
- Can integrate contracts within WSS with Workday Finance, streamlining the requisition process by ensuring the contract is tied to the payment and tracking spend against the contract.

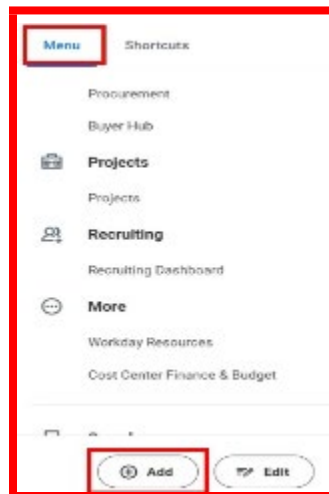
This job aid outlines the various intake requests from start to finish, as well as navigation within WSS. For other guides, including the “Workday Procurement Life Cycle Job Aid,” please refer to the [Procurement Requisitions & Purchase Orders Page](#).

I. DEFINITIONS

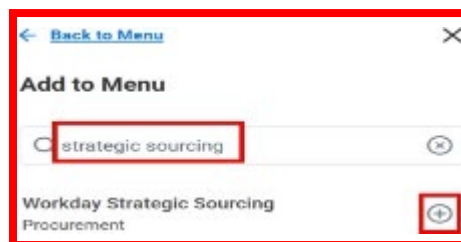
- 1. Authorized Signatory** – Individual authorized by Montclair State University to sign contracts.
- 2. Business Purchase Table** – This page acts as the intake screen for all procurement-related processes. It replaces the Contract Approval Sheet (CAS form) for procurement-related contracts, the Waiver of Advertising Request form, and Bid Initiation Forms. Once a request is submitted, the stakeholder will be directed to a Project Details Page to submit the specifics of the request.
- 3. Contract-** The Contract or final approval for the procurement in question. Stakeholders can review all contracts (active, expired, terminated, etc.) from the Contracts module of Workday Strategic Sourcing (WSS). Contracts will be created or updated after the related Project is approved.
- 4. Event-** An Event refers to any RFx activity (RFI, RFQ, RFP, etc.).
- 5. Project-** This is the procurement request part of the process. A project outlines requests for various types of procurements (new contracts, contract amendments, waiver requests and increases, goods & services sourcing bids, construction sourcing bids, etc.). Once the project is approved and all relevant actions have been taken, a Contract will be created or modified.
- 6. Project Details Page-** This page is where the stakeholders enter specific information about the various procurement-related requests. Once the request is submitted, it will be routed to Procurement Services for review.
- 7. Read Only** - The Stakeholder can view the Sourcing Event and corresponding Supplier submissions.
- 8. Sourcing Manager** – The role in WSS that represents the Procurement Services team that receives project requests and advances them through contract award.
- 9. Stakeholder** – A WSS user who has been assigned access to view the contract data.
- 10. WSS-**Workday Strategic Sourcing

II. ADDING STRATEGIC SOURCING TO YOUR WORKDAY MENU

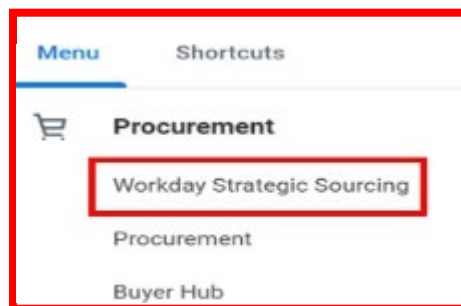
Sign in to Workday and click “Menu” and “Add”.



Type “Strategic Sourcing” and then click the plus sign +

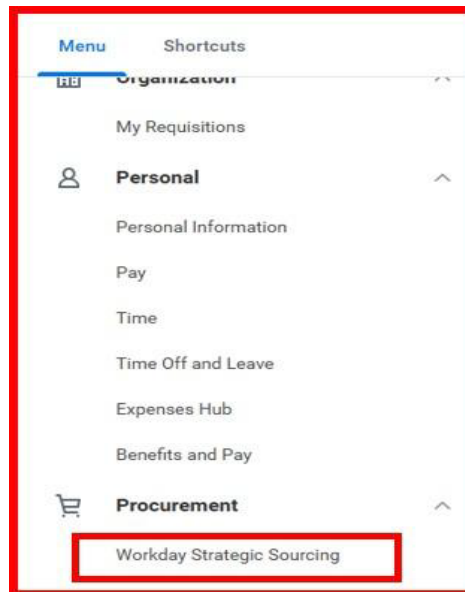
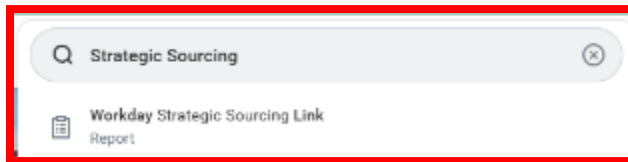


This will add the Workday Strategic Sourcing to your Menu



III. GETTING TO THE STRATEGIC SOURCING PAGE

In Workday, type “Strategic Sourcing” in the search bar or click on the Strategic Sourcing button in the Menu section under Procurement. This will take you to the main page, “Business Purchases”.



IV. INTAKE PROCESS FOR REQUESTERS (STAKEHOLDERS)

When you log in to Strategic Sourcing, your home page will display a Business Purchases table of the types of requests available for you to submit. Four (4) types of requests are available for Stakeholders to submit. Click on the requested type to submit your request.

1. BUSINESS PURCHASES TABLE

What do I Need?	Details	Actions
Workday ERP	This will take you back to Montclair's main Workday page.	WORKDAY ERP
Goods & Services Sourcing (formally G&S Bid Initiation Form)	To initiate an RFP request for a goods & services (non-construction) procurement process managed by Procurement Services, primarily focused at or above the bid threshold of \$119,800. more details	GOODS & SERVICES
Construction Sourcing (formally Construction Bid Initiation Form)	To initiate an RFP request for a publicly advertised construction project over the Public Works bid threshold of \$42,600. more details	CONSTRUCTION
Delegated Waiver / BOT Request (formally WoA Form including any related contract)	To initiate a Waiver of Advertising Request managed by the department for goods or services with a dollar value greater than \$119,800 (or \$42,600 for public works projects) or to initiate a Board of Trustees (BOT) approval request for contracts at or above \$850,000. more details	DELEGATED WAIVER / BOT
Procurement Contract Request (formally CAS Form)	To initiate any procurement-related contract requests, including new contracts, renewals, or any amendments, except for those initiated through a waiver/BOT request or the initial contract through a sourcing request. more details	CONTRACT

2. REQUEST TYPES

- Goods & Services Sourcing (formally G&S Bid Initiation Form)
To initiate an RFP request for a goods & services (non-construction) procurement process managed by Procurement Services, primarily focused at or above the bid threshold of \$119,800. RFPs may be publicly advertised or invite-only, depending on the type of project and as determined by Procurement Services. Any department may submit a request for a goods & services RFP as needed. The request should include all required documents to proceed with the RFP, including but not limited to a scope of work. Services under this category may be related to public or non-public works and may be awarded to one or multiple suppliers.
- Construction Sourcing (formally Construction Bid Initiation Form)
To initiate an RFP request for a publicly advertised construction project over the Public Works bid threshold. All construction bid requests should be submitted by Capital Planning & Project Management (CPPM) within the Facilities Department and should include all required documents to proceed with the RFP, including but not limited to any drawings and/or specifications. Construction projects will be awarded to a single contractor for the full performance of the project.
- Delegated Waiver / BOT Request (formally WoA Form, including any related contract)
To initiate a Waiver of Advertising Request managed by the department for goods or services with a dollar value greater than \$119,800 (or \$42,600 for public works projects) or to initiate a Board of Trustees (BOT) approval request for procurements that were not managed directly by Procurement Services. BOT approval is required for all procurements at or above \$850,000, regardless of methodology, and may include

cooperative contracts or public bids. Procurement Services will oversee any initial BOT approval request for procurements that it manages. This request does not eliminate the requirement to obtain competition, and waivers of advertising must meet one of the statutory waivers to public bidding.

- Procurement Contract Request (formally CAS Form)

To initiate any procurement-related contract requests, including new contracts, renewals, or any amendments, except for those initiated through a sourcing or waiver/BOT request. All suppliers should be strongly encouraged to accept the University's Purchase Order as the contract, rather than go through a contract review process when possible. If the supplier requires a signed contract, use this request to submit all contract documents, including the University's Standard Terms and Conditions (signed or redlined). All documents that require review and potential revisions must be attached as Word documents (not PDFs). All procurement-related contracts must be routed to Procurement Services for review through this request. Procurement Services will ensure Procurement Policies and Procedures are met for purchases, ensure University Counsel reviews and approves contracts, and ensure the proper signatory authority executes the approved contract for the University.

3. INTAKE REQUEST SUBMITTAL – SOURCING

Under Actions, click the appropriate request (Goods & Services Sourcing or Construction Sourcing). The Project Details page will appear. To ensure that the Procurement Services team can act on your request, enter the requested information. Any fields required to be filled in before you submit are marked with an asterisk. This replaces the current Bid Initiation Forms.

A sample completed construction sourcing request intake is shown below. The *information required for goods and services sourcing intake is similar, but specific to that request type.*

The screenshot displays the 'PROJECT DETAILS' page for a sourcing request titled 'MSU Athletic Promotional Apparel and Items'. The interface includes a sidebar with navigation options like 'Project Information', 'Project Progress', 'Project Details' (selected), 'Attachments', 'Financial Details', 'Suppliers', 'Conditions for Approval Flow', 'Milestones', 'RFIs', 'Related Projects', 'Related Contracts', 'Stakeholders', and 'Project Approvals'. The main form contains the following fields:

- TITLE***: MSU Athletic Promotional Apparel and Items
- PROJECT TYPE**: Goods & Services Sourcing
- PROJECT DESCRIPTION***: Athletics would like to procure apparel and other promotional items to be resold at games to generate revenue for athletic teams.
- START DATE***: 10/25/2025
- END DATE***: M/D/YYYY
- REQUESTER***: JESSICA MOORE
- BUYER ASSIGNED***: JESSICA MOORE BENNETT
- PRIMARY END USER***: JESSICA MOORE
- DIVISION***: Student Development and Campus Life
- DEPARTMENT***: Intercollegiate Athletics
- ESTIMATED SPEND AMOUNT***: \$ 250,000
- FULL CONTRACT TERM DURATION (INCLUDING EXTENSIONS)***: \$
- FUND #***: 01
- BUDGET ACCOUNT #***: 003
- IS THIS A NEW RFP OR A RE-PROCUREMENT OF A PREVIOUS RFP***: New RFP (selected)

The top of the page shows the Montclair State University logo, navigation links (HOME, NAVIGATE, SUPPORT, SETTINGS), and a user profile for JESSICA MOORE. The project status is 'Active - Sourcing'.

MSU Athletic Promotional Apparel and Items (Goods & Services Sourcing (S&S))

EVALUATION COMMITTEE MEMBERS*

List all evaluation committee members by name. Provide a minimum of 3. More may be recommended, subject to approval.

LIST OF BIDDERS TO BE NOTIFIED*

Promote Me - Jarvis Cradd - mcradd@montclair.edu
 Athletic Apparel, Inc - Kathy Rigby - mcradd@montclair.edu
 RU Promotional Apparel - Alfonso Jaramal - mcradd@montclair.edu

LIST ANY INDIVIDUALS THAT SHOULD HAVE ACCESS TO THE CONTRACT*

Others will not automatically have access to this request and the resulting contract. List all individuals who should have access to this contract.

ATTACHMENTS FOR REQUEST*

FILE NAME	FILE SIZE	UPLOAD DATE	UPLOADED BY	FILE TYPE
MSU Football	334 KB	10/31/2025	Jessica Moore	other

ATTACH DOCUMENTS

FILE NAME	VERSION	UPLOAD DATE	UPLOADED BY	FILE TYPE	FILE SIZE
RFQ Goods and Services Services - 10-31-2025.docx	V3	10/31/2025	Jessica Moore	docx	352 KB

ATTACHMENT REQUIREMENT – SOURCING REQUESTS

The Stakeholder must provide the following items for all requests:

- ✓ Completing this Request (replacing the applicable Bid Initiation Form)
- ✓ Attach all documents required:
 - For Construction Projects, this includes any drawings and/or specifications.
 - For Goods & Services Projects, this includes the Scope of Work, Price Sheet, and any other related documents.

4. INTAKE REQUEST SUBMITTAL – DELEGATED WAIVER OR BOT REQUEST

Under Actions, click the appropriate request. The Project Details page will appear. To ensure that the Procurement Services team can act on your request, enter the requested information. Any fields required to be filled in before you submit are marked with an asterisk. This replaces the current Waiver of Advertising Form.

Note: If a request includes a contract, please submit it as part of this process. Please do not submit a separate contract intake request; Procurement Services will review it as part of a single workflow.

A sample completed delegated waiver or BOT request intake is shown below.

PROJECT DETAILS

CREATES RELATED CONTRACT

TITLE * ⓘ

PROJECT TYPE

Complete Program & NCLEX RN Examination Preparation

Delegated Waiver / BOT Request

PROJECT DESCRIPTION * ⓘ

The NCLEX-RN Prep Course supports the BSN and pre-licensure MSN graduating classes by strengthening content knowledge and critical thinking skills needed for the NCLEX-RN licensure exam. Students will have access to a variety of resources, including prep videos, flashcards, a content library, the Kaplan Channel, Computer Adaptive Tests (CAT), the NCLEX-RN Gboard, and Question Trainer Tests, along with a comprehensive Content Review Guide in PDF format. These tools offer personalized quizzes, detailed feedback, and proven strategies like Kaplan's Decision Tree method to build confidence and improve exam performance. After evaluating Kaplan, Elsevier, and ATI, the faculty selected Kaplan for its pricing, content quality, and seamless integration with the pre-licensure program. With an expected enrollment of 210 students at a cost of \$575.00 per student, the total projected investment with Kaplan will be \$122,250.

START DATE * ⓘ

END DATE ⓘ

9/26/2025

M/D/YYYY

REQUESTER *

Oswald Pasho

BUYER ASSIGNED ⓘ

WAIVER NUMBER ⓘ

WAIVER CATEGORY * ⓘ

PRIMARY END USER * ⓘ

Oswald Pasho X

Waiver Number to be assigned

(21) - Educational supplies, books, articles of clothing, and other miscellaneous articles purchased by the university for resale to students and employees X

Carolina Sanchez

DIVISION * ⓘ

DEPARTMENT *

AWARD TYPE *

WAS COMPETITION OBTAINED? * ⓘ

Academic Affairs X

School of Nursing

New X

No - Competition was not obtained. Support must be provided, subject to review and approval by Procurement X

NON-COMPETITION RATIONALE *

"True" Sole Source - Product must be truly unique as the only known source or no other comparable product/service available. X

"TRUE" SOLE SOURCE JUSTIFICATION * ⓘ

Product must be truly unique as the only known source or no other comparable product/service available.

EXTENDED CONTRACT START DATE * ⓘ

ESTIMATED CONTRACT END DATE * ⓘ

ESTIMATED SPEND AMOUNT * ⓘ

FULL CONTRACT TERM (INCLUDING EXTENSIONS) * ⓘ

1/1/2026

12/31/2028

\$ 122,250

2

LENGTH OF POTENTIAL EXTENSIONS

SUPPLIER NAME * ⓘ

SUPPLIER IN WORKDAY *

COMPLIANCE PAPERWORK UP TO DATE? *

0

Kaplan LLC North America

Global X

Yes - Supplier has current BRC/CST/SA within Workday (as required) X

GRANT FUNDED * ⓘ

FUND # *

BUDGET ACCOUNT # * ⓘ

CONTRACT REQUIRED * ⓘ

NO X

13

CC10228

Yes - Attach the contract to the attachments field X

SUPPLIER HAS AGREED TO TERMS AND CONDITIONS * ⓘ

NO X

LIST ANY INDIVIDUALS THAT SHOULD HAVE ACCESS TO THE CONTRACT

< PIPELINE

Complete Program & NCLEX RN Examination Preparation

Delegated Waiver / BOT Request (WGA)

PROJECT

Project Information

Project Progress

Project Details

Attachments

Financial Details

Intake Information

Milestones

Related Projects

Related Contracts

Stakeholders

Project Approvals

ATTACHMENTS FOR WAIVER / BOT * ⓘ

FILE NAME	FILE SIZE	UPLOAD DATE	UPLOADED BY	FILE TYPE
3 Quotes	1.45 MB	9/26/2025	Oswald Pasho	pdf
Justification For Kaplan (1)	14 kB	9/26/2025	Oswald Pasho	doc
Kaplan North America, LLC Amendment 1 (School Of Nursing) To Msa July 17, 2023	260 kB	9/26/2025	Oswald Pasho	pdf
Kaplan 3 Year Contract Cost	11 kB	9/26/2025	Oswald Pasho	xls
Kaplan Competitive Quote Form 04.23.25	374 kB	9/26/2025	Oswald Pasho	pdf
Montclair State University Msa And Msa Terms 2025 57466 Kaplan 4.18.25	70.7 kB	9/26/2025	Oswald Pasho	doc
Affirmative Action Certificate Aa302 Form	12 kB	11/3/2025	Hilal Tabakci	doc
Chapter 51 Form	12 kB	11/3/2025	Hilal Tabakci	doc
Brc	12 kB	11/3/2025	Hilal Tabakci	doc

DRAG/DROP DOCUMENTS or BROWSE FILES

ATTACHMENT REQUIREMENT – DELEGATED WAIVER/BOT REQUEST

The Stakeholder must provide the following items for all requests:

- ✓ Completing this Request (replacing the Waiver of Advertising Request Form)
- ✓ Provide rationale for the request, including the Summary, Description & Background of the Procurement Process.
- ✓ Submit relevant documents such as the Scope of Work, proposals obtained, and any compliance paperwork for the supplier if it is not already within the supplier's profile within Workday.

If the Waiver request includes a contract, the Stakeholder must provide the following items:

- ✓ The contract requiring signature.
- ✓ The signed or redlined Terms & Conditions document.
- ✓ A new or previously signed MSA (if applicable)

5. INTAKE REQUEST SUBMITTAL – CONTRACT REQUEST

Under Actions, click the appropriate request. The Project Details page will appear. To ensure that the Procurement Services team can act on your request, enter the requested information. Any fields required to be filled in before you submit are marked with an asterisk. This replaces the current CAS Form for procurement-related contracts.

Note: Please submit a contract request for all related contract requests, including new requests, contract amendments to increase or extend a contract, or renewals. Procurement Services will review the request and will make the applicable update to the contract if it is an amendment.

A completed sample contract request intake is shown below.

PROJECT DETAILS

CREATE RELATED CONTRACT

TITLE*

Campus ESP Family Portal and Communication Tool

PROJECT TYPE

Procurement Contracts (Intake)

PROJECT DESCRIPTION*

CampusESP, a parent and family engagement platform designed specifically for universities. Its primary purpose is to help institutions communicate effectively with the families of both prospective and current students. The AI-powered platform offers a centralized, customizable portal - similar to a private, Facebook-style interface - where families can access important updates, resources, and event information. It supports outreach via email, text messaging, and the portal itself, ensuring families stay informed and involved throughout the student journey. CampusESP also integrates with campus systems like Slate and includes expert support to ensure successful implementation and ongoing engagement.

START DATE*

10/31/2025

END DATE*

M/D/YYYY

REQUESTER*

Hilal Tabakci

BUYER ASSIGNED*

Oswald Pasho

PRIMARY END USER*

Pablo Rodriguez

DIVISION*

Student Development and Campus Life

DEPARTMENT*

SDCL

AWARD TYPE*

New

ESTIMATED CONTRACT START DATE*

4/1/2025

ESTIMATED CONTRACT END DATE*

3/31/2028

ESTIMATED SPEND AMOUNT*

\$ 62,400

FULL CONTRACT TERM (INCLUDING EXTENSIONS)*

3 years

LENGTH OF POTENTIAL EXTENSIONS

NO

RELEVANT THRESHOLD*

General Goods & Services

METHODOLOGY*

Sole Source

SOLE SOURCE OPTIONS*

"True" Sole Source - Product must be truly unique as the only known source or no other comparable product/service available.

SOLE SOURCE JUSTIFICATION *

CampusESP curates personalized content for families, provides access to self-help resources for end users, allows for customized form creation, event registration and other flexible backend administrative tools making it indispensable to our ability to communicate with families of current and prospective students. Campus ESP is the only higher education-focused platform that integrates family engagement, roster management, analytics, and event registration all within one system. Student Communications has already developed an integration between CampusESP and Montclair's instance of Slate, allowing for weekly automated imports of family email address lists, student demographics, and other key data so that we can accurately communicate with current and prospective families. Through our integration with Slate, CampusESP enables us to: Create targeted communication campaigns to families who need to update their profiles or complete missing information in Slate Launch surveys to collect information from families, either when they are automatically imported from Slate or when they self-register using the link on our website

MASTER AGREEMENT EXISTS? * Yes - Attach to the attachments field ☒ **SUPPLIER PROVIDED CONTRACT? *** Yes ☒ **SUPPLIER HAS AGREED TO TERMS & CONDITIONS *** Yes - Attach to the attachments field ☒ **SUPPLIER NAME *** CampusESP Corporation

SUPPLIER IN WORKDAY? * Yes ☒ **COMPLIANCE PAPERWORK UP TO DATE? *** Yes - Supplier has current BRC/C51/AA within Workday (as required) ☒ **GRANT FUNDED? *** No ☒ **FUND # *** F10

BUDGET ACCOUNT # * CC10568

LIST ANY INDIVIDUALS THAT SHOULD HAVE ACCESS TO THE CONTRACT
Melissa Ginotti

ATTACHMENTS FOR CONTRACT *

FILE NAME	FILE SIZE	UPLOAD DATE	UPLOADED BY	FILE TYPE
Redlined Montclair Terms And Conditions Document	75.5 kB	10/31/2025	Hilal Tabakci	doc
Campus Esp Sole Source Form	169 kB	10/31/2025	Hilal Tabakci	pdf
Campus Esp Agreement	464 kB	10/31/2025	Hilal Tabakci	pdf

DRAG/DROP DOCUMENTS or [BROWSE FILES](#)

ATTACHMENT REQUIREMENT – CONTRACT REQUEST

The Stakeholder must provide the following items:

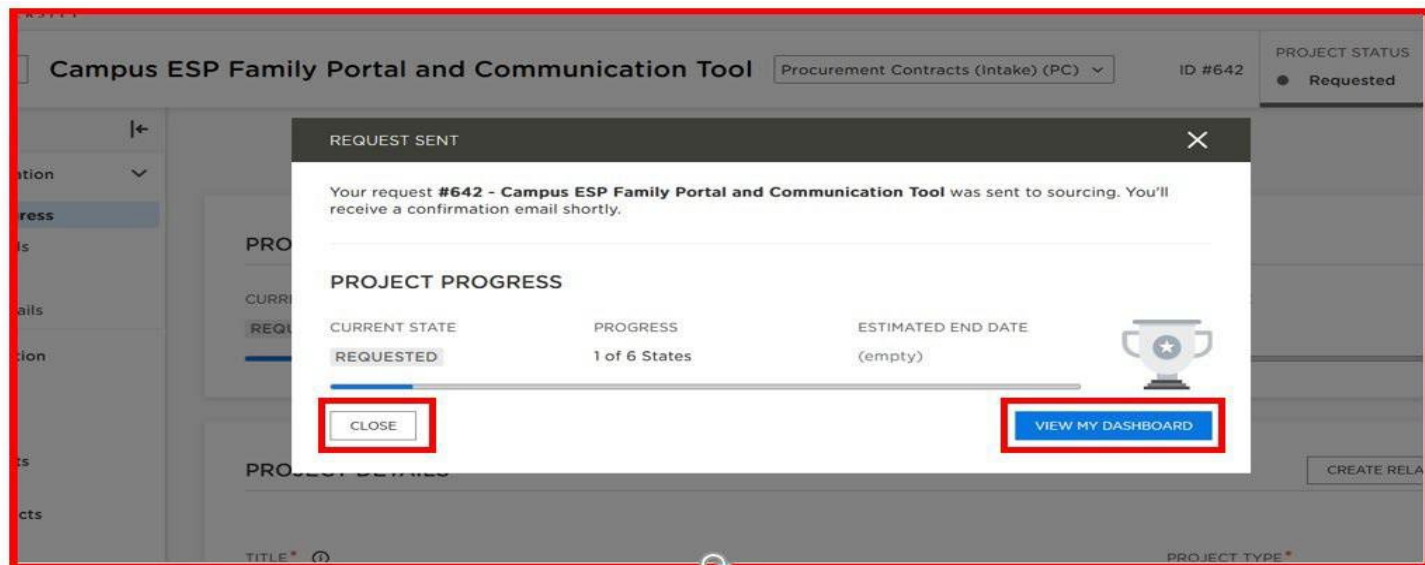
- ✓ Completing this Request (replacing the CAS Form)
- ✓ The contract/quote requiring a signature based on the purchasing methodology
- ✓ The signed or redlined Terms & Conditions document
- ✓ A new or previously signed MSA (if applicable)
- ✓ Any additional proposals or quotes and other supporting documentation as required (based on the purchasing methodology selected)

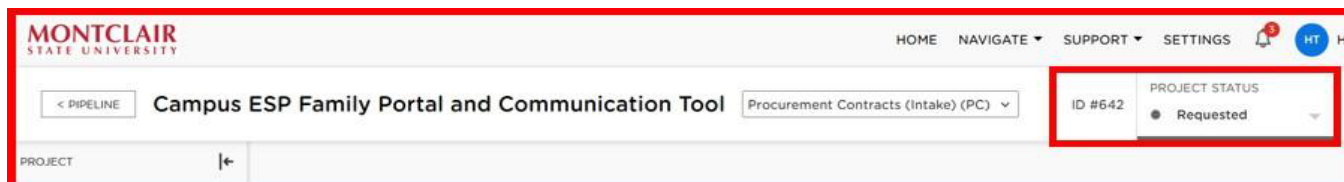
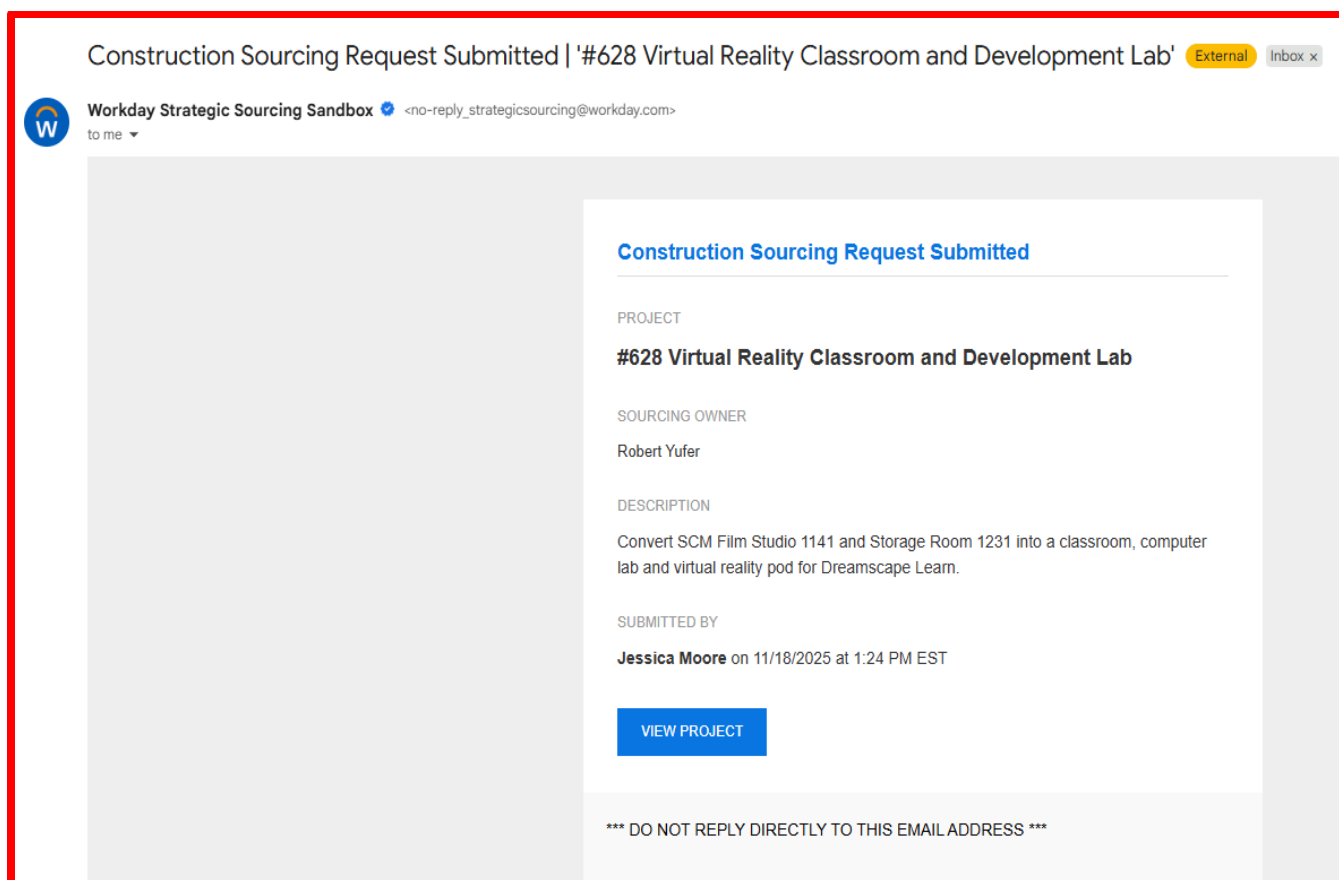
V. PROJECT REQUEST SUBMITTAL

Once you've completed the details on the applicable request form, select the Submit Request button on the top right of the page.

SUBMIT REQUEST

You'll receive a pop-up notification denoting the new ID# of your request. You will also receive an email notification when your project is submitted. You can select the View My Dashboard button to return to the Pipeline Dashboard, where all Project requests can be managed. When you submit a request, you are a read-only Stakeholder on the Project by default.

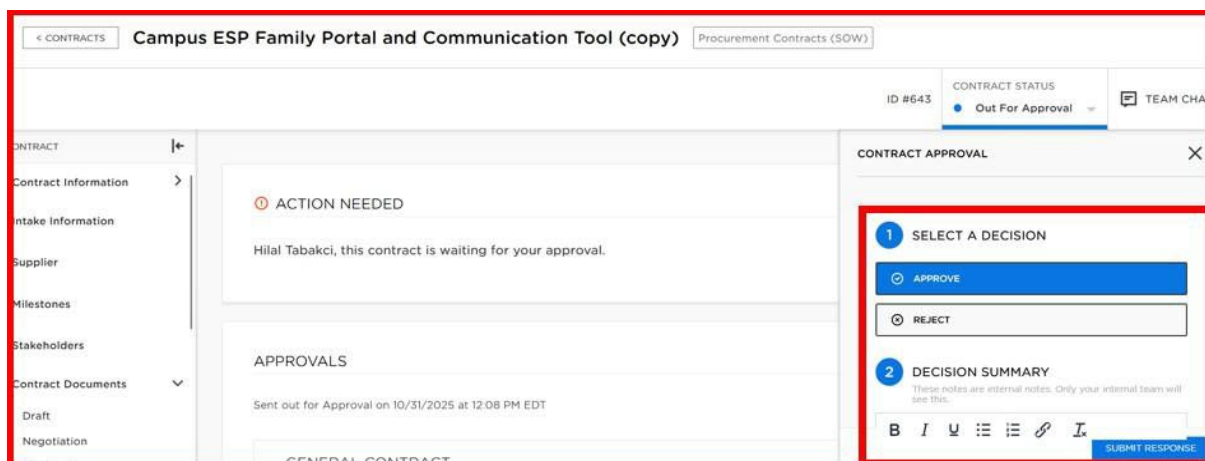
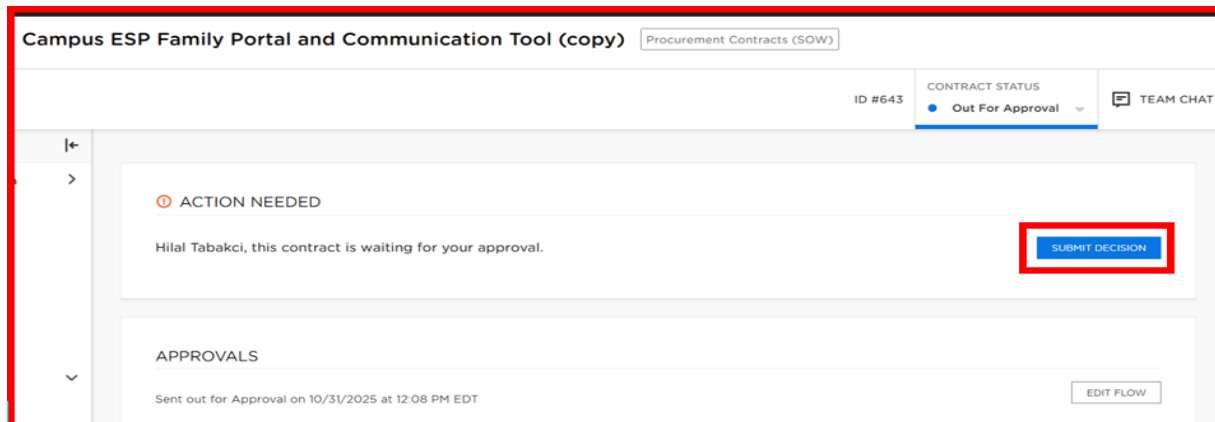
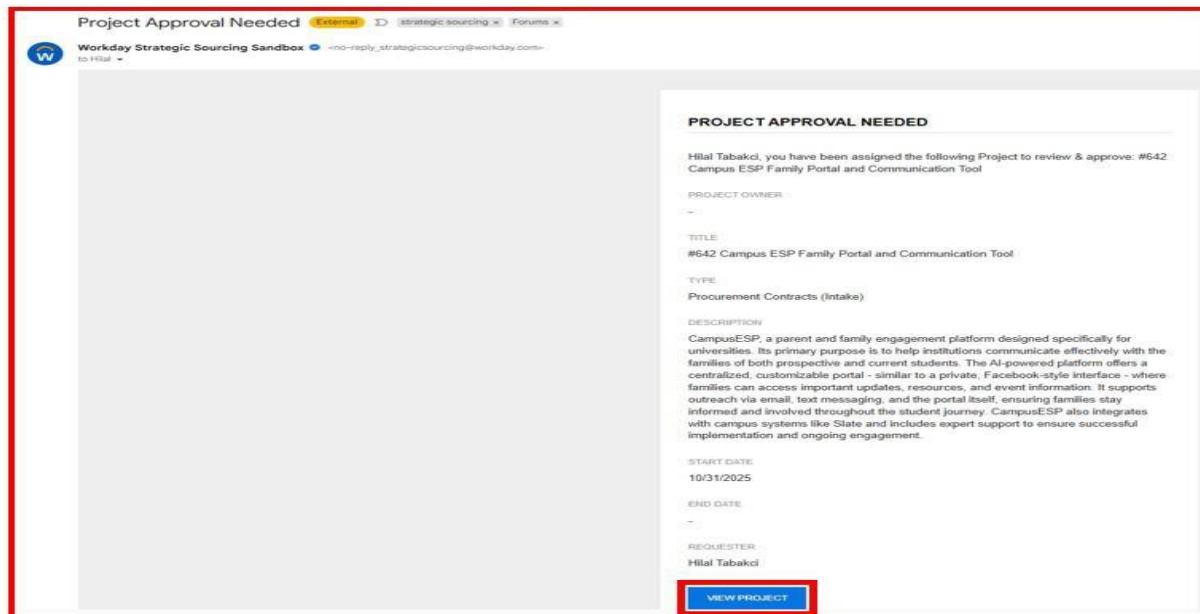




*Procurement Services will review in accordance with its Policy and Procedures, and if all is in order, will route for appropriate approvals.

VI. APPROVING A PROJECT

Once a project is moved to the Out for Approval status, any designated approver will receive a notification email. Also, any approvals due will be listed under the Notifications bell at the top right of Pipeline and the Contracts workbench.



As a stakeholder, you might be involved in approving projects.

After going into the record, the ability to approve is visible at the top of the record and on the Approvals tab.

Review the relevant information that needs to be approved and select the Submit Decision button on the record. You can approve or reject the record and add internal decision summary notes/an attachment if needed. Then, select the Submit Response button to finish your review.

The screenshot displays the 'Complete Program & NCLEX RN Examination Preparation' project record. The 'Approvals' tab is selected, showing a 'DELEGATED WAIVER / BOT REQUEST APPROVAL FLOW'. The flow consists of seven phases:

- FIRST PHASE:** Academic Affairs (AT LEAST 1 APPROVER MUST APPROVE) **APPROVED**
- SECOND PHASE:** Budget (AT LEAST 1 APPROVER MUST APPROVE) **APPROVED**
- THIRD PHASE:** No approvals required in this phase
- FOURTH PHASE:** No approvals required in this phase
- FIFTH PHASE:** Procurement Operations (AT LEAST 1 APPROVER MUST APPROVE) **APPROVED**; Procurement - AVP (AT LEAST 1 APPROVER MUST APPROVE) **APPROVED**
- SIXTH PHASE:** Finance & Treasury (AT LEAST 1 APPROVER MUST APPROVE) **APPROVED**
- SEVENTH PHASE:** No approvals required in this phase

The bottom of the screenshot shows the Montclair State University header and a navigation bar. The 'Project Status' is highlighted as 'Approved'.

VII. GOODS & SERVICES/CONSTRUCTION SOURCING EVENTS

This section only applies to Sourcing Projects (after Approvals have been obtained)

1. EVENT DASHBOARD

To navigate to a published event log in WSS (the RFP or RFQ), click the NAVIGATE drop-down menu, select EVENTS, search for the event you want to view, and click on TITLE. This will bring you to the Event Dashboard, where you can view a summary of the current event, including event deadlines, invited suppliers, and stakeholders.

Note: This information may not be published until the RFP/Q documents and timeline have been established between Procurement Services and the Requester, and after the Project-level approvals have taken place.

The screenshot shows the Event Dashboard for RFP1630. The header includes the Montclair State University logo, navigation links (HOME, NAVIGATE, SUPPORT, SETTINGS), and a user profile for Jessica Moore. The main content area displays a summary of the event, including the event ID (#110173), start date (11/19/2025 at 9:02 AM), questions date (11/19/2025 at 3:00 PM), and bid date (11/21/2025 at 3:00 PM). A timeline bar shows the progression from start to questions to bids. Below the timeline, there are checkboxes for RFP options: "Allow late bids" and "Revise bids after submission deadline". A message at the top states: "Your event is private. Only invited suppliers can view this event, and it doesn't display in your public portal."

2. VIEW EVENT

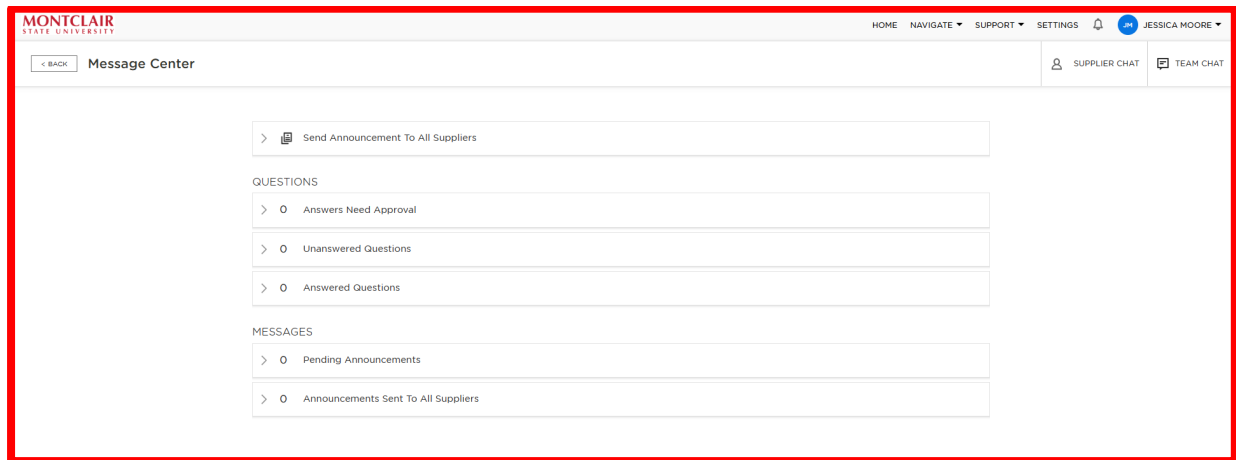
To view details about the Event, you can navigate to the VIEW EVENT tab in your event dashboard. This tab includes some of the same information shown on the dashboard screen, but with more detail. It shows RFP Details and the documents used to solicit proposals, including finalized specifications, drawings, and any other documents provided to the suppliers. It will also show event time, invited suppliers, evaluations, and stakeholder information.

The screenshot shows the View Event page for RFP1630. The header is similar to the dashboard, but the main content area is titled "RFP DETAILS". It includes fields for Event name, Issuing company (Montclair State University), and Primary contact (Jessica Moore). Below this is a "DESCRIPTION" section with a scrollable text area containing the RFP details, including the scope of work and bid proposal information. At the bottom, there is a table of "RFP DOCUMENTS" with columns for Type, Title, and Description. The table lists three documents: "Construction_General Conditions - 11.27.2023.pdf", "RFP 1630 Virtual Reality Development Lab - Document.pdf", and "RFP 1630 Virtual Reality Development Lab - Drawings.pdf". Each document has a "DOWNLOAD" button next to it.

To navigate back to the event dashboard, click on the < EVENT DASHBOARD tab at the top left of the screen.

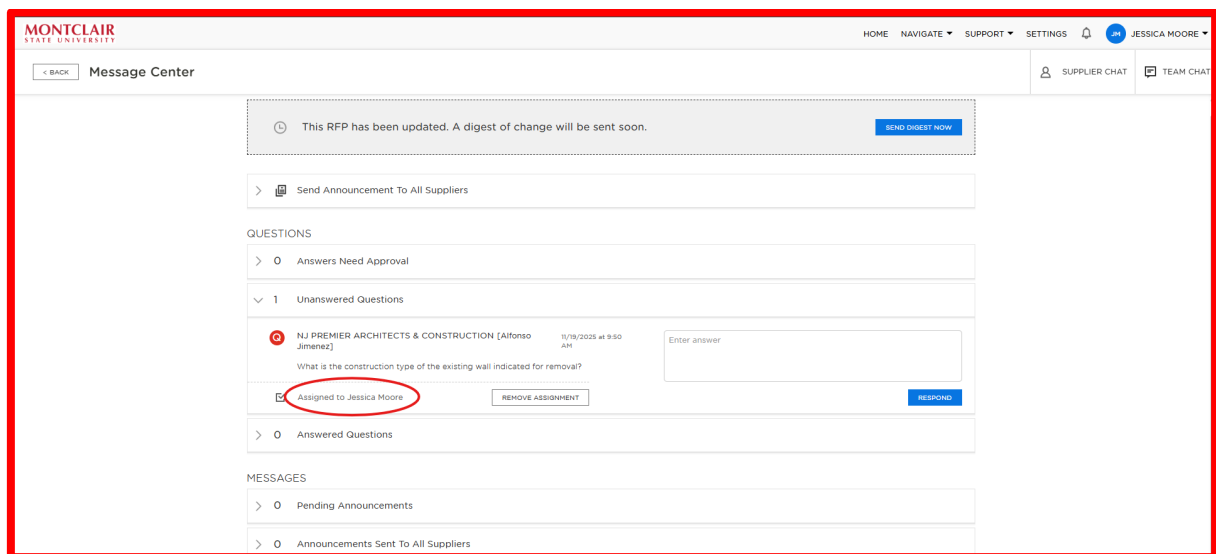
3. MESSAGE CENTER

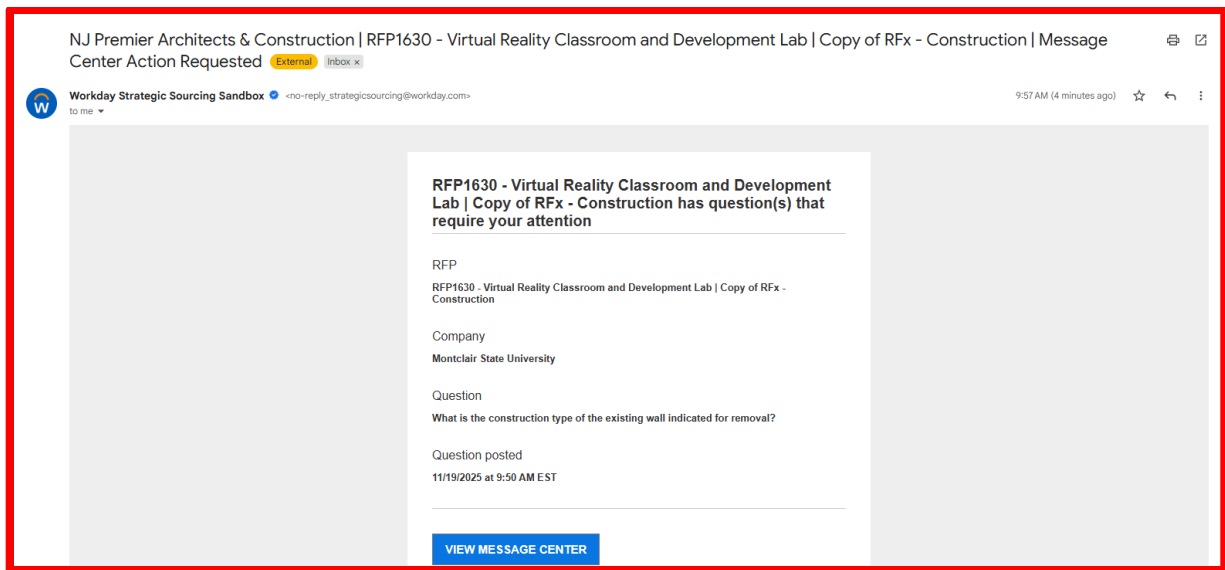
Stakeholders may be required to answer specific questions from suppliers related to the RFP. You can access the Message Center via the Event Dashboard. Click the Message Center tab on the left of the screen, and it will open a new window with a list of all questions, answers, pending messages, or announcements related to the Event.



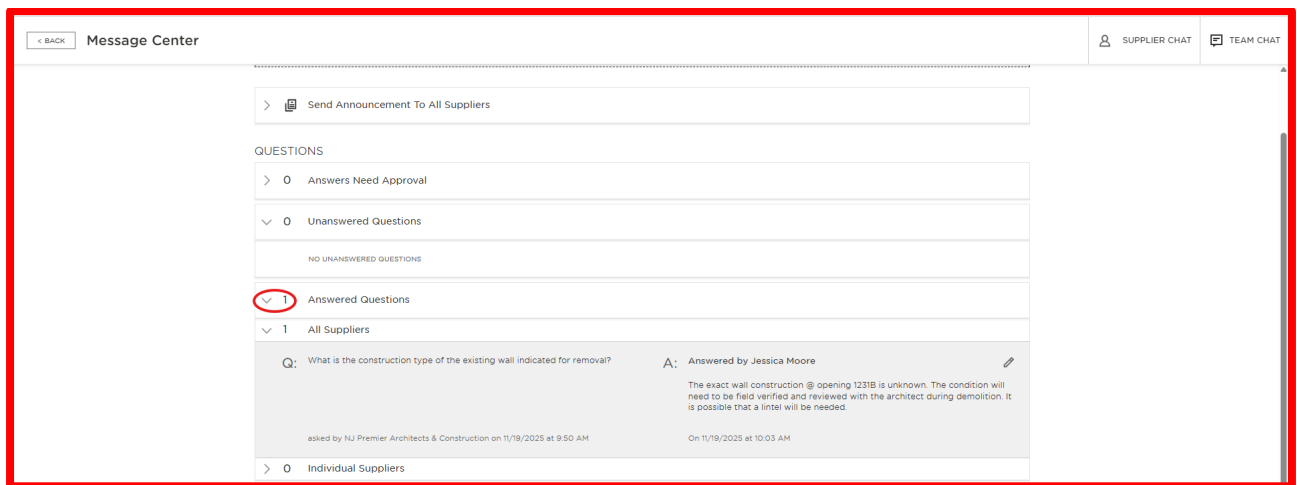
To navigate back to the Event Dashboard, click the < **BACK** tab at the top left of the screen.

If suppliers post questions, Procurement Services may assign specific stakeholders who best represent the subject-matter expert for the question. If a question is assigned to you, you will receive an email.





Procurement Services will review and approve any answers to questions before they are provided to the suppliers. Answered questions will be sent to all suppliers, and can be viewed under the Answered Questions drop-down by clicking on the > Answered Questions tab, then the > All Suppliers tab. Answers submitted via message center are for informational purposes, official answers will still be issued via Addendum.



4. EVENT ANALYSIS

The EVENT ANALYSIS tab will not appear in the sidebar until after the proposal submissions are due, when the system performs a quick bid analysis. You can review all proposal submittals and view pricing information once you are granted access.

Stakeholders can choose to evaluate individual suppliers or evaluate the entire group simultaneously. To evaluate individual suppliers, click the checkbox next to the SUPPLIER NAME (see the screenshot above). To evaluate all suppliers simultaneously, click the top box next to SUPPLIER NAME, which will select all automatically. Once you have selected the supplier(s) you are evaluating, click START EVALUATION. Selecting all suppliers will put them in a single form, displaying each supplier listed under each question.

Once you have answered all questions and made your recommendation, click the blue SUBMIT EVALUATIONS button at the top of the form.

6. AWARD & CONTRACT PROCESS

Procurement Services will execute the award process once a recommendation has been made, including the creation of the contract within WSS, as outlined in the section below.

VIII. RELATED CONTRACTS

Once the Project has been approved by all required individuals (as indicated by an “Approved” Project Status), and any related Events have been awarded (for Sourcing Request types), Procurement Services will create or edit a related Contract in WSS, which can be reviewed from the Project's “Related Contracts” tab.

The screenshot shows the Montclair State University WSS interface. The top navigation bar includes the Montclair State University logo, a 'HOME' link, and a breadcrumb trail: '< PIPELINE' > Complete Program & NCLEX RN Examination Preparation > Delegated Waiver / BOT Request (WOA). The left sidebar contains a 'PROJECT' section with a list of tabs: Project Information, Project Progress, Project Details, Attachments, Financial Details, Intake Information, Milestones, Related Projects, Related Contracts (highlighted with a red box), Stakeholders, and Project Approvals. The main content area displays the 'RELATED CONTRACTS' tab with a count of 1. Below this is a table with the following data:

ID	TYPE	TITLE	STATUS	START DATE	END DATE	SOURCING OWNER
518	SOW	Complete Program & NCLEX R...	Approved	1/1/2026	12/31/2028	Shawn Laidlaw

Below the table are navigation controls: '<< < > >>' and a dropdown for 'ITEMS PER PAGE' set to 5.

Contracts will be routed for approvals (this does not duplicate approvals obtained during the Project phase) and may include University Counsel (Legal) review and approval of the contract documents.

The screenshot shows the Montclair State University WSS interface. The top navigation bar includes the Montclair State University logo, a 'HOME' link, and a breadcrumb trail: '< PIPELINE' > Campus ESP Family Portal and Communication Tool > Procurement Contracts (Intake) (PC). The left sidebar contains a 'PROJECT' section with a list of tabs: Project Information, Project Progress, Project Details, Attachments, Financial Details, Intake Information, Milestones, Related Projects, Related Contracts (highlighted with a red box), Stakeholders, and Project Approvals. The main content area displays the 'RELATED CONTRACTS' tab with a count of 1. Below this is a table with the following data:

ID	TYPE	TITLE	STATUS	START DATE	END DATE	SOURCING OWNER
643	SOW	Campus ESP Family...	Active	4/1/2025	3/31/2028	Oswald Pasho

Below the table are navigation controls: '<< < > >>' and a dropdown for 'ITEMS PER PAGE' set to 5. The top right of the main content area shows 'ID #642' and 'PROJECT STATUS: Approved'.

Once the contract documents are finalized and all approvals are obtained, Procurement Services will assist with routing the applicable contract documents to the appropriate Contract Signatory Authority, as outlined in the chart below. Contracts involving the purchase of goods and services must be signed by the appropriate Contract Signing Authority and must include Procurement Services and University Counsel's approval (as applicable) through WSS prior to their signature.

PROCUREMENT SERVICES
MONTCLAIR
STATE UNIVERSITY

Contract Signing Authority

The University Signing Authority Policy was revised at the November 2023 Board of Trustees Meeting. As it relates to contracts involving the procurement of goods and services that require signature by the University, the updated signing authority levels are as follows:

Amount	Approver Position / Title
\$0 to <\$200,000	Vice President for Finance and Treasurer (VPFT)
\$200,000 to <\$500,000	Chief Operating Officer and Senior Vice President (COO);
≥\$500,000	President (after approval of the Board of Trustees for procurements)

- The VPFT, COO, and the President are the only signatory authorities for the University for goods and services contracts except in cases where the approval has been delegated in writing.
 - No other individuals have the authority to enter into a goods and services contract on behalf of the University.**
- The VPFT or COO may sign larger value amendments at their discretion if no additional funds above Board approval are contemplated.

Once any applicable contracts have been executed, the Contract Status will update to “Active” and the Stakeholder will be able to view their contract and create their Requisition in Workday.

← CONTRACTS
Campus ESP Family Portal and Communication Tool (copy)
Procurement Contracts (SOW)

REVISE

ID #643

CONTRACT STATUS
Active

TE

CONTRACT

SUBMITTANTS

Contract Documents

Draft

Negotiation

Finalized

Attachments

Related Projects

RETRACT

DELETE

DOWNLOAD

1 SELECTED (119 KB)

Adobe Sign

SEND TO ADOBE SIGN

RETRACT

DOWNLOAD

FINALIZED

✓

DOCUMENT TITLE

VERSION

CREATED BY

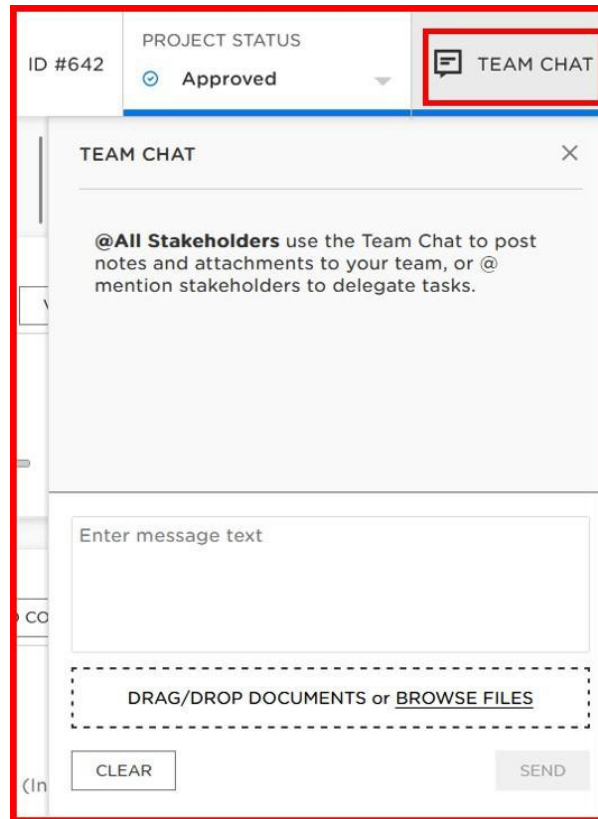
LAST EDIT

FILE TYPE

✓	CampusESP Corp Service Provider Agree...	v0.0	Hilal Tabakci	Hilal Tabakci 10/31/2025 at 12:13 PM	docx
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IX. TEAM CHAT

Should you need to communicate with the Sourcing Manager assigned to your request or any other Stakeholders added to the Project, select the Team Chat button. Make sure to “@” mention the appropriate team members if you wish them to receive an email notification about your message.



X. PROJECT AND CONTRACT STATUS

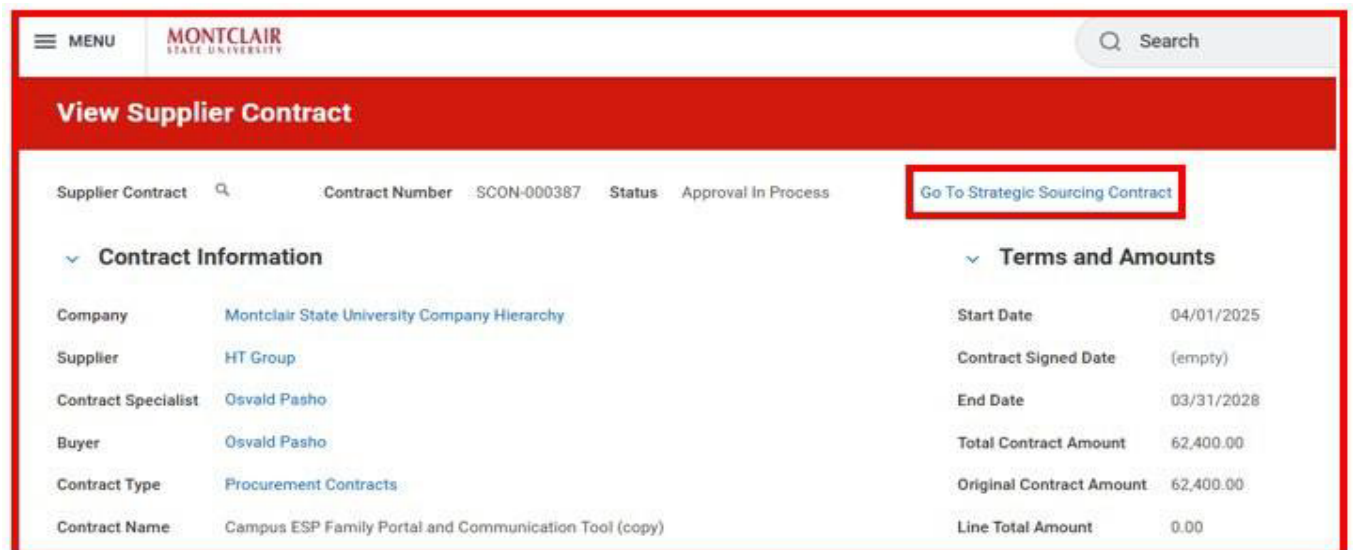
1. Requested- Project has been submitted for review by the Stakeholder to Procurement Services.
2. Planned- Project has been defined, but not approved.
3. In Progress- Project or Contract is under review by Procurement Services, or we are pending additional information before submitting for approvals.
4. Out for Approval – Project or Contract is under review and approval
5. Approved- All required parties have approved the Project or Contract.
6. Active – Contract is signed and fully approved. Contracts within the start date and end date are Active.
7. Expired- Applies to contracts that pass the signed contract end date and don't automatically renew.
8. Canceled/Terminated – Projects or contracts that have been cancelled or terminated.

XI. SUPPLIER CONTRACT

If a Contract is in “Active” status and the “Procurement Contracts” Contract Type is selected by Procurement Services, a Supplier Contract will be created in Workday. The Supplier Contract can be accessed from WSS or within Workday, as highlighted in the screenshots below:

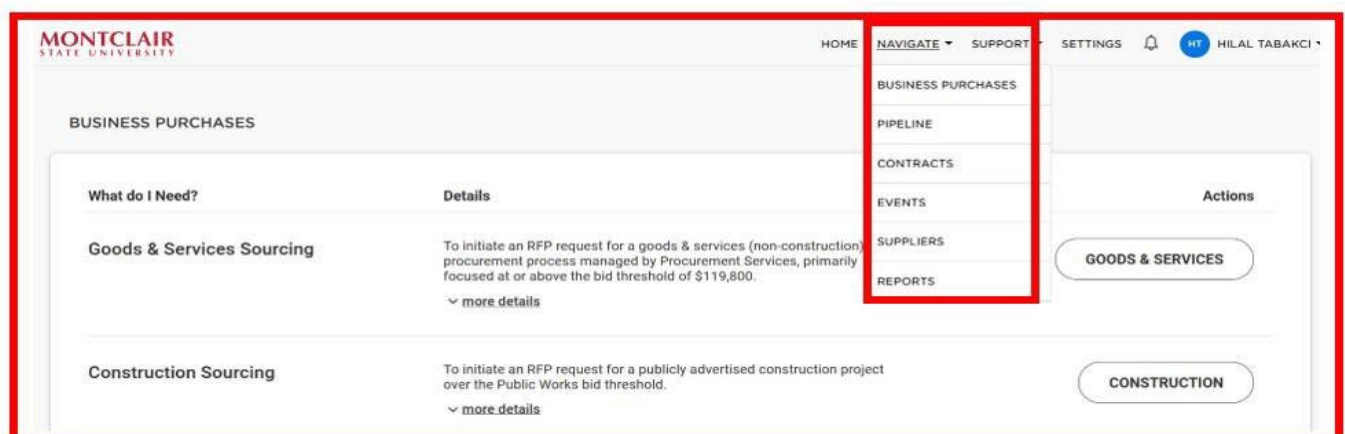


Once you select the Supplier Contract, you can go back to WSS by selecting the following:



XII. DASHBOARD

Stakeholders can view all projects or contracts through the Navigate dropdown, as shown in the screenshot below.



- Pipeline (Project)-** When in the Pipeline / Projects view, stakeholders can see all their projects or search for a particular project. For reference, projects are the procurement request part of the process. A project outlines requests for various types of procurements (new contracts, contract amendments, waiver requests and increases, goods & services sourcing bids, construction sourcing bids, etc.). Once the project is approved and all relevant actions have been taken, a Contract will be created or modified.

Projects

Search Projects...

ALL PROJECTS 66

My Projects On

ID #	TYPE	TITLE	STATUS	EST. START DATE	START DATE	EST. END DATE	END DATE
84	CNST	2-21-25 Mallory Hall Update	Approved		2/20/2025		
476	FORM	ABC- Company- onboarding	Approved		8/25/2025		
478	FORM	ABC Company Supplier Review	Active - Forms Sent		8/28/2025		
94	CNST	Cali Business of Music- HT	Active - Contract		3/6/2025		
111	G&S	Cali School of Music Reno	Planned				
444	G&S	Cali School of Music Renovati	Active - Contract		8/17/2025		
622	WOA	Campus ESP Family Portal an	Draft				
642	PC	Campus ESP Family Portal an	Approved		10/30/2025		

- Contract-** When in the Contracts view, stakeholders can see all their contracts or search for a particular contract. For reference, contracts are the signed Contract or final approval for the procurement in question. Stakeholders can review all contracts (active, expired, terminated, etc.) from the Contracts module of Workday Strategic Sourcing (WSS). Contracts will be created or updated after the related Project is approved.

Contracts

Search Contract

ALL CONTRACTS 220

Business Purchases

PIPELINE

CONTRACTS

EVENTS

SUPPLIERS

REPORTS

ID #	TYPE	TITLE	SUPPLIER	CONTRACT STATUS	START DATE	END DATE
299	SOW	07.21.2025 - General Contract	Shawn's Burgers	Active	7/21/2025	7/21/2025
582	CON	1510 - UFAC Maintained Site...	FOLEY INC	Active	7/1/2022	6/30/2022
415	MSA	1522 - Campus Streaming IP...	Apogee Inc.	Active	7/1/2022	6/30/2022
585	CON	1522 - Campus Streaming IP...	APOGEE TELECOM...	Active	7/1/2022	6/30/2022
416	MSA	1533W - Workday Student J...	Incline Alchemy	Active	12/2/2022	12/1/2022
417	MSA	1537C - Enterprise Copiers	Sharp Electronics C...	Active	11/9/2022	11/8/2022

- Event-** When in the Events view, stakeholders can see all their events or search for a particular event. For reference, the event is the sourcing event (RFx) tied to a Project. Refer to Section VII for additional context.