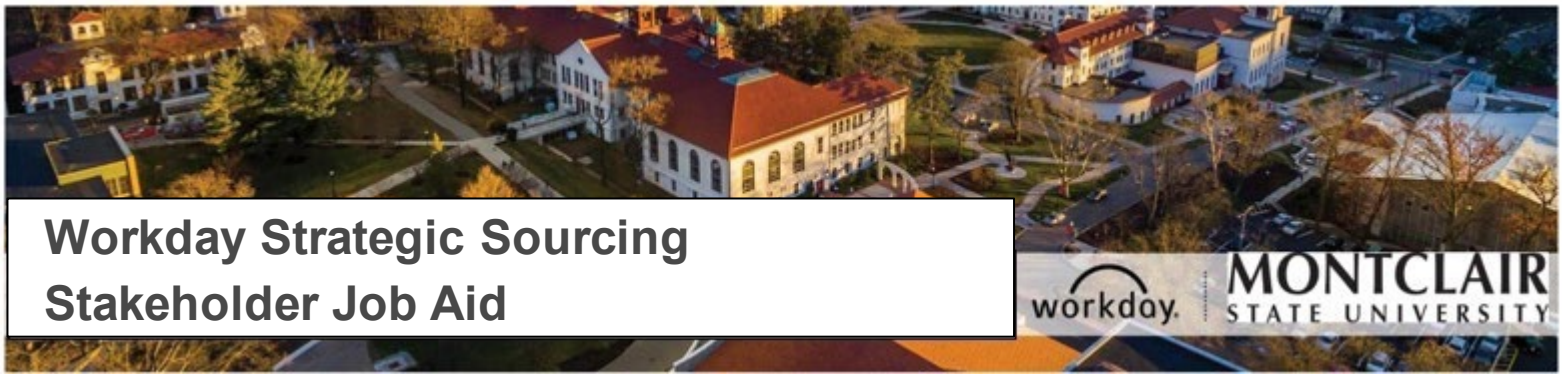



# Workday Strategic Sourcing Stakeholder Job Aid

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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.

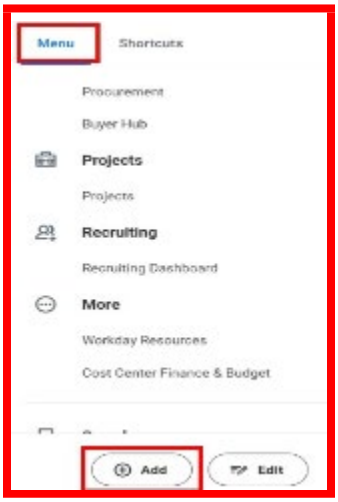
This job aid outlines the various intake requests from start to finish, as well as navigation within WSS. For other guides, including the "Workday Procurement Life Cycle Job Aid," please refer to the Procurement Requisitions & Purchase Orders Page.

## I. DEFINITIONS

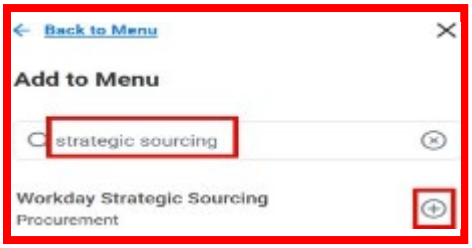
1. **Authorized Signatory** – Individual authorized by Montclair State University to sign contracts.
2. **Business Purchase Table** – This page acts as the intake screen for all procurement-related processes. It replaces the Contract Approval Sheet (CAS form) for procurement-related contracts, the Waiver 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

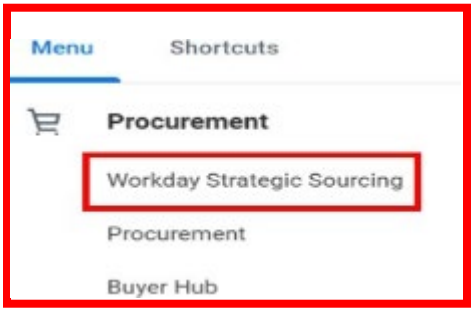
Sign in to Workday and click "Menu" and "Add".




Type "Strategic Sourcing" and then click the plus sign +

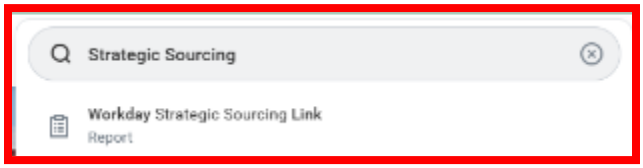


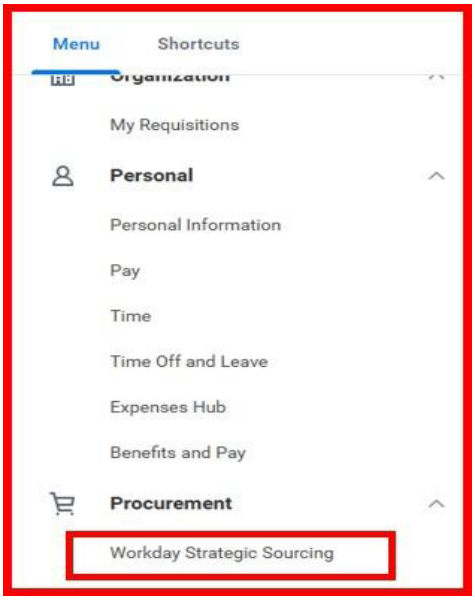

This will add the Workday Strategic Sourcing to your Menu



# 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".

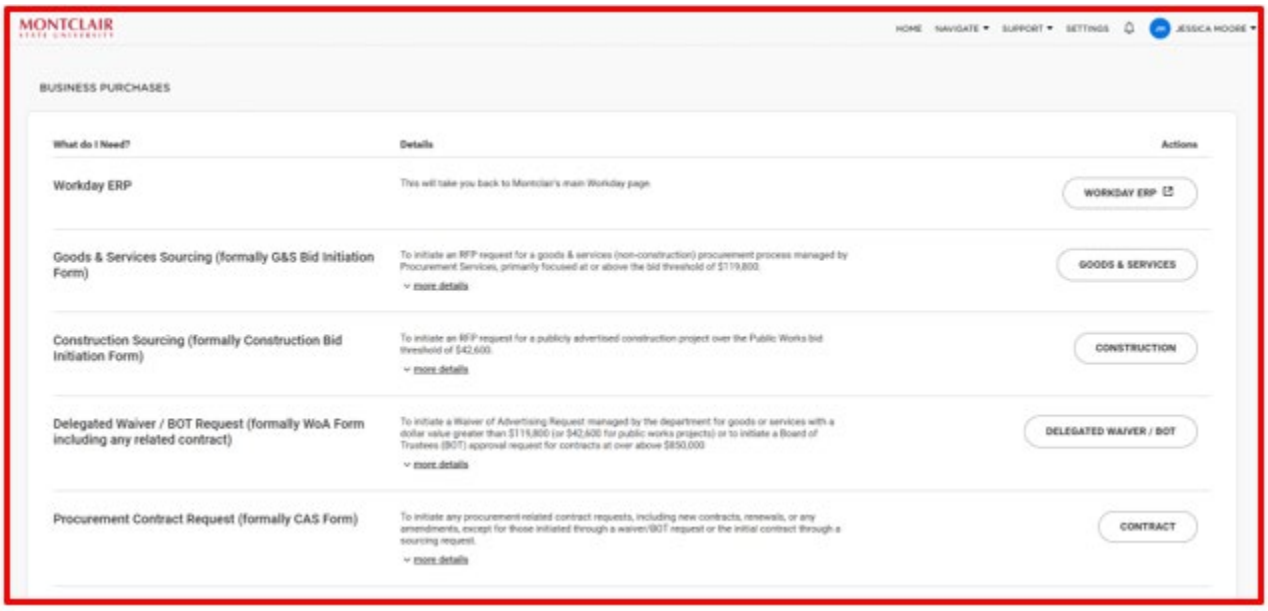


# IV. INTAKE PROCESS FOR REQUESTERS (STAKEHOLDERS)

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




## 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.

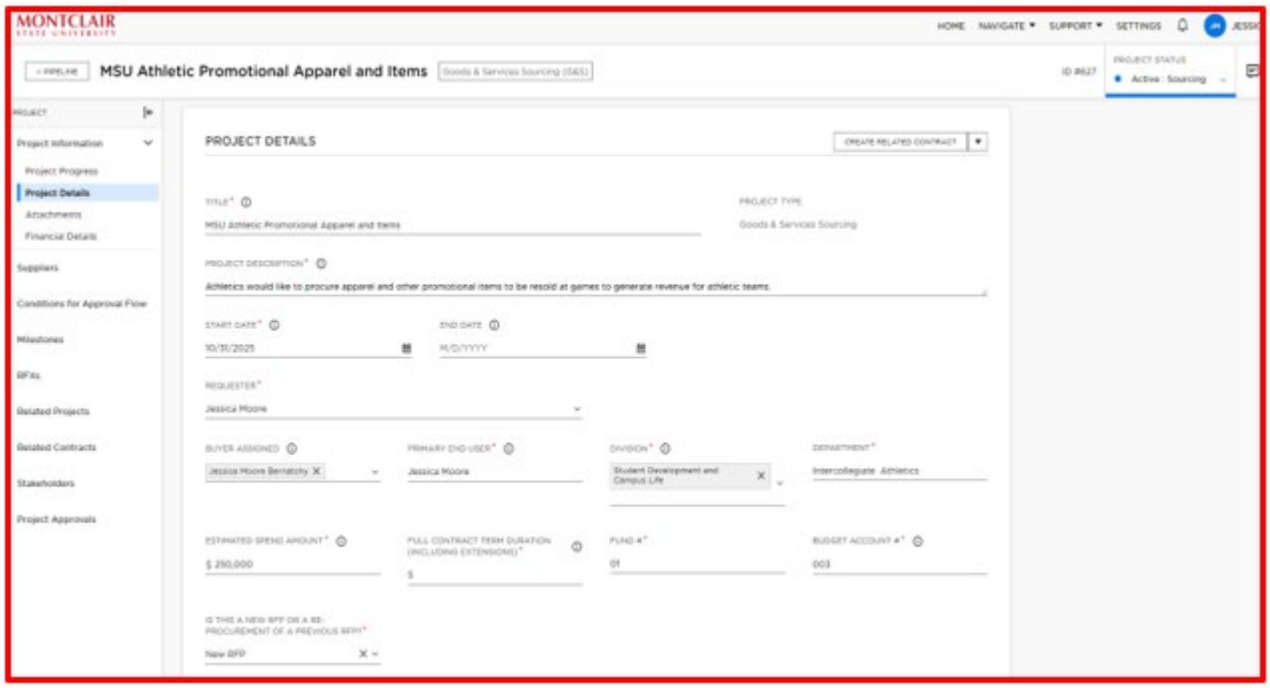
- Procurement Contract Request (formally CAS Form)

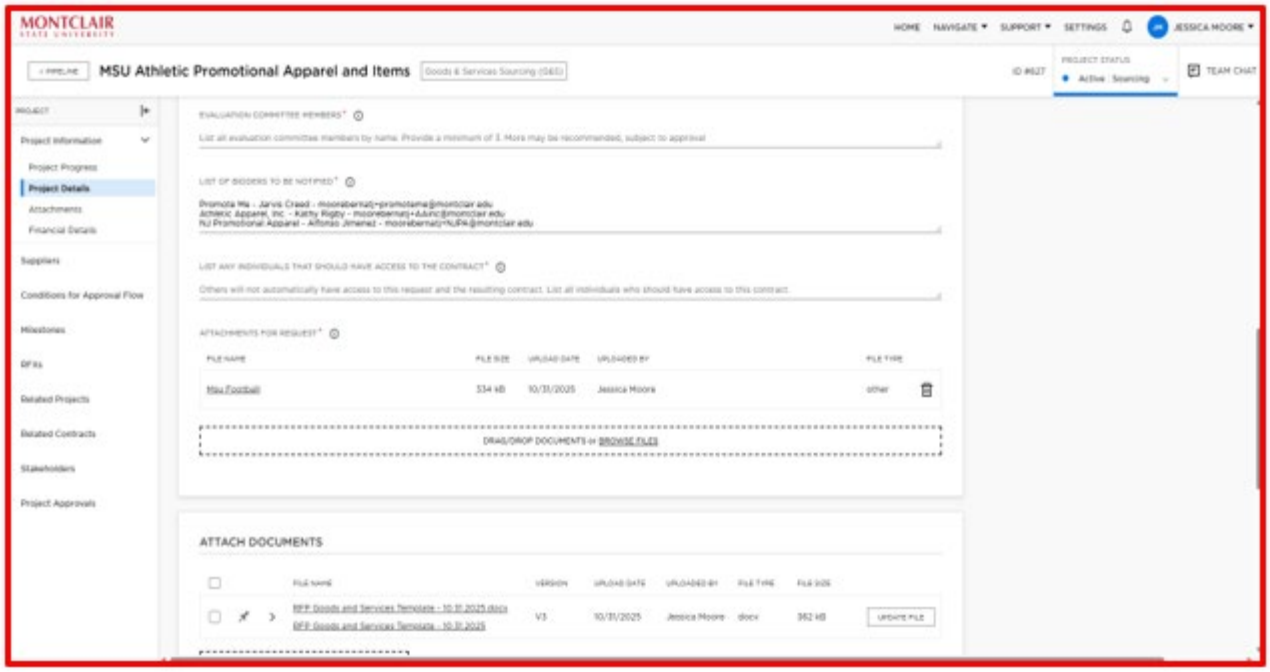
  To initiate any procurement-related contract requests, including new contracts, renewals, or any amendments, except for those initiated through a sourcing or waiver/BOT request. All suppliers should be strongly encouraged to accept the University's Purchase Order as the contract, rather than go through 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.*






## ATTACHMENT REQUIREMENT – SOURCING REQUESTS

The Stakeholder must provide the following items for all requests:

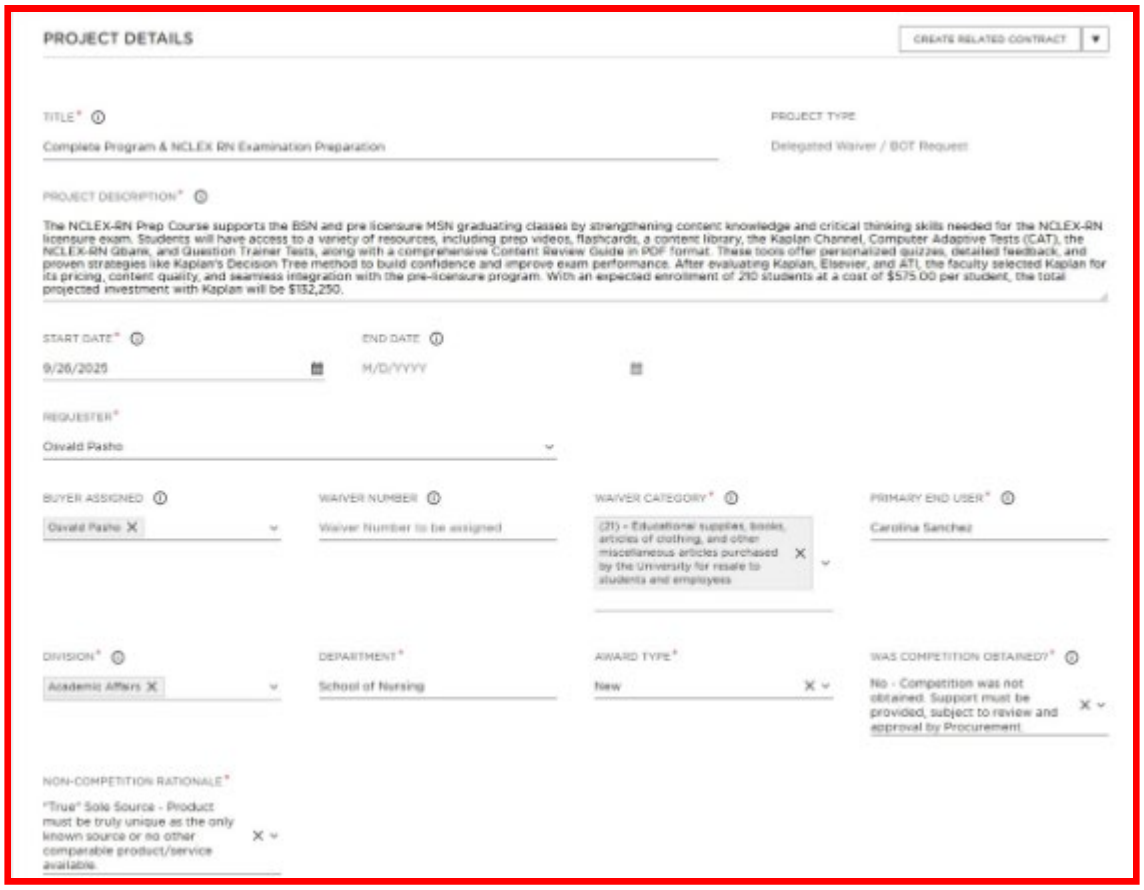
- ✔ Completing this Request (replacing the applicable Bid Initiation Form)
- ✔ Attach all documents required:
  - For Construction Projects, this includes any drawings and/or specifications.
  - For Goods & Services Projects, this includes the Scope of Work, Price Sheet, and any other related documents.

## 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

CREATE RELATED CONTRACT

TITLE*

Complete Program & NCLEX RN Examination Preparation

PROJECT TYPE

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 Qbank, 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 $152,250.

START DATE*

9/26/2025

END DATE

M/D/YYYY

REQUESTER*

Osvald Pasho

BUYER ASSIGNED

Osvald Pasho

WAIVER NUMBER

Waiver Number to be assigned

WAIVER CATEGORY*

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

PRIMARY END USER*

Carolina Sanchez

DIVISION*

Academic Affairs

DEPARTMENT*

School of Nursing

AWARD TYPE*

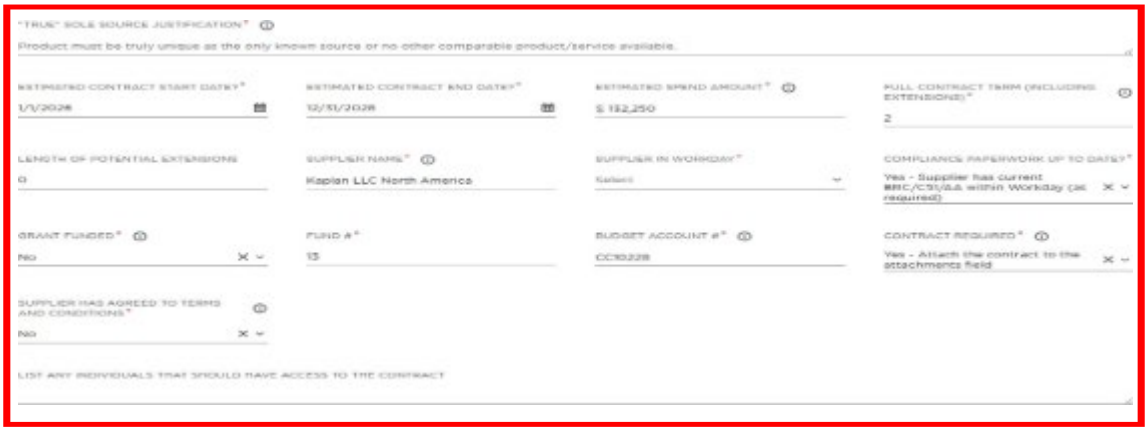
New

WAS COMPETITION OBTAINED?*

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

NON-COMPETITION RATIONALE*

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



"TRUE" SOLE SOURCE JUSTIFICATION*

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

ESTIMATED CONTRACT START DATE*

1/1/2026

ESTIMATED CONTRACT END DATE*

12/31/2028

ESTIMATED SPEND AMOUNT*

$ 152,250

FULL CONTRACT TERM (INCLUDING EXTENSIONS)*

2

LENGTH OF POTENTIAL EXTENSIONS

0

SUPPLIER NAME*

Kaplan LLC North America

SUPPLIER IN WORKDAY*

COMPLIANCE PAPERWORK UP TO DATE?*

Yes - Supplier has current IRC/CSVAA within Workday (as required)

GRANT FUNDED*

No

FUND #*

13

BUDGET ACCOUNT #*

CC10228

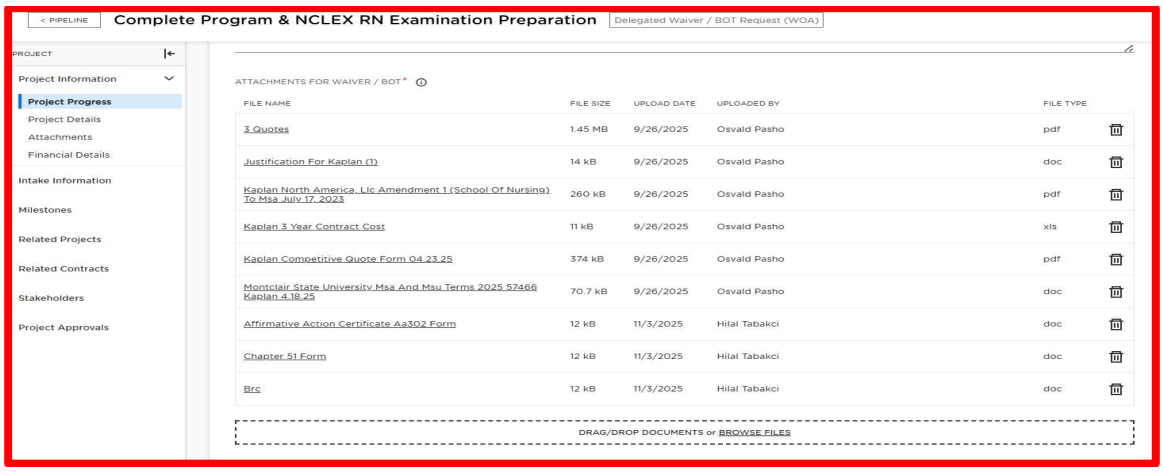
CONTRACT REQUIRED*

Yes - Attach the contract to the attachments field

SUPPLIER HAS AGREED TO TERMS AND CONDITIONS*

No

LIST ANY INDIVIDUALS THAT SHOULD HAVE ACCESS TO THE CONTRACT



< PIPELINE

Complete Program & NCLEX RN Examination Preparation

Delegated Waiver / BOT Request (WOA)

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 | Osvald Pasho | pdf |
| Justification For Kaplan (1) | 14 kB | 9/26/2025 | Osvald Pasho | doc |
| Kaplan North America, Llc Amendment 1 (School Of Nursing) To Msa July 17, 2023 | 260 kB | 9/26/2025 | Osvald Pasho | pdf |
| Kaplan 3 Year Contract Cost | 11 kB | 9/26/2025 | Osvald Pasho | xls |
| Kaplan Competitive Quote Form 04.23.25 | 374 kB | 9/26/2025 | Osvald Pasho | pdf |
| Montclair State University Msa And Msu Terms 2025 57466 Kaplan 4.18.25 | 70.7 kB | 9/26/2025 | Osvald 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:

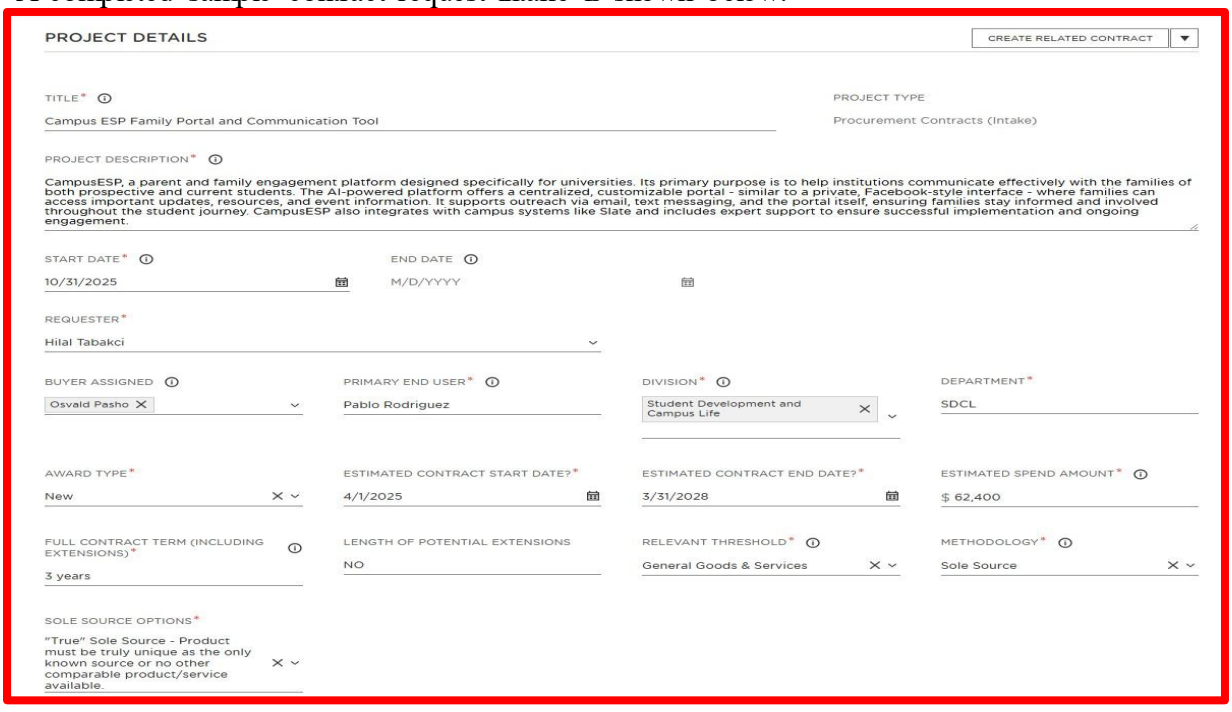
- ✔ The contract requiring signature.
- ✔ The signed or redlined Terms & Conditions document.
- ✔ A new or previously signed MSA (if applicable)

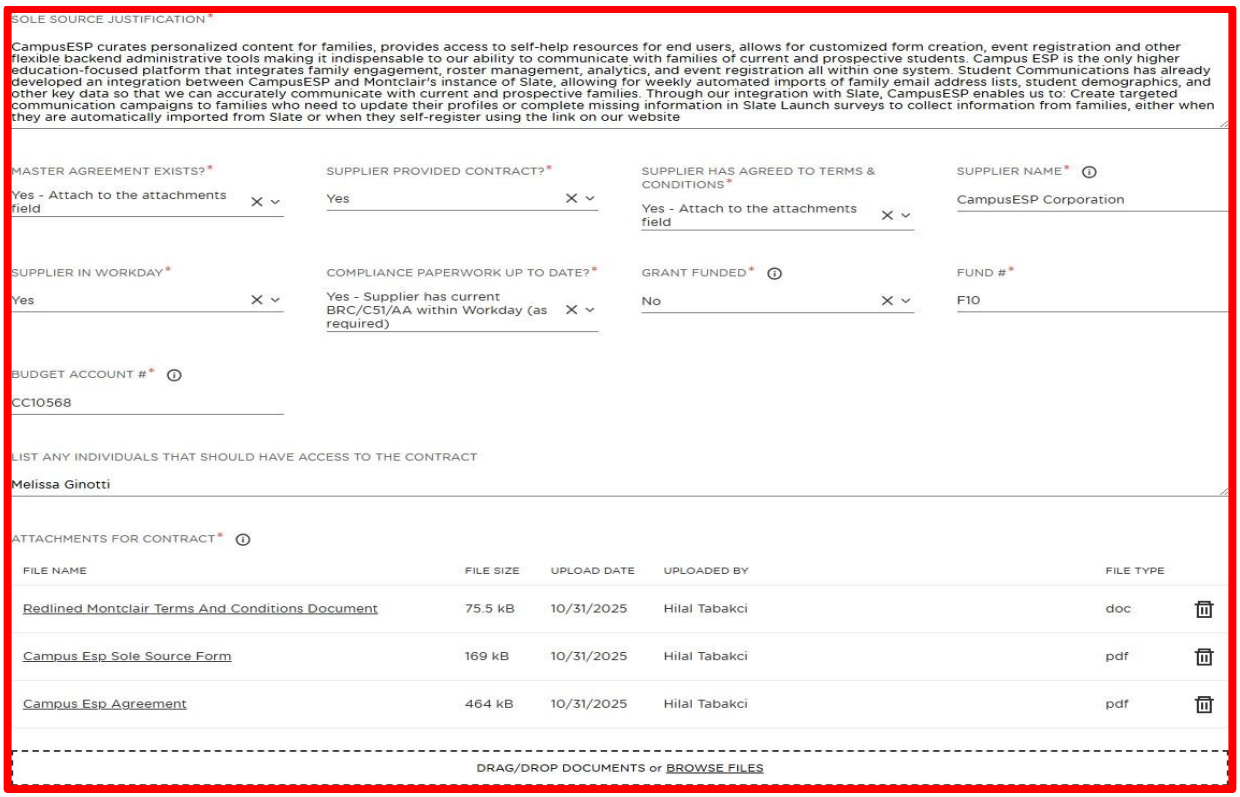
## 5. INTAKE REQUEST SUBMITTAL – CONTRACT REQUEST

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.





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:

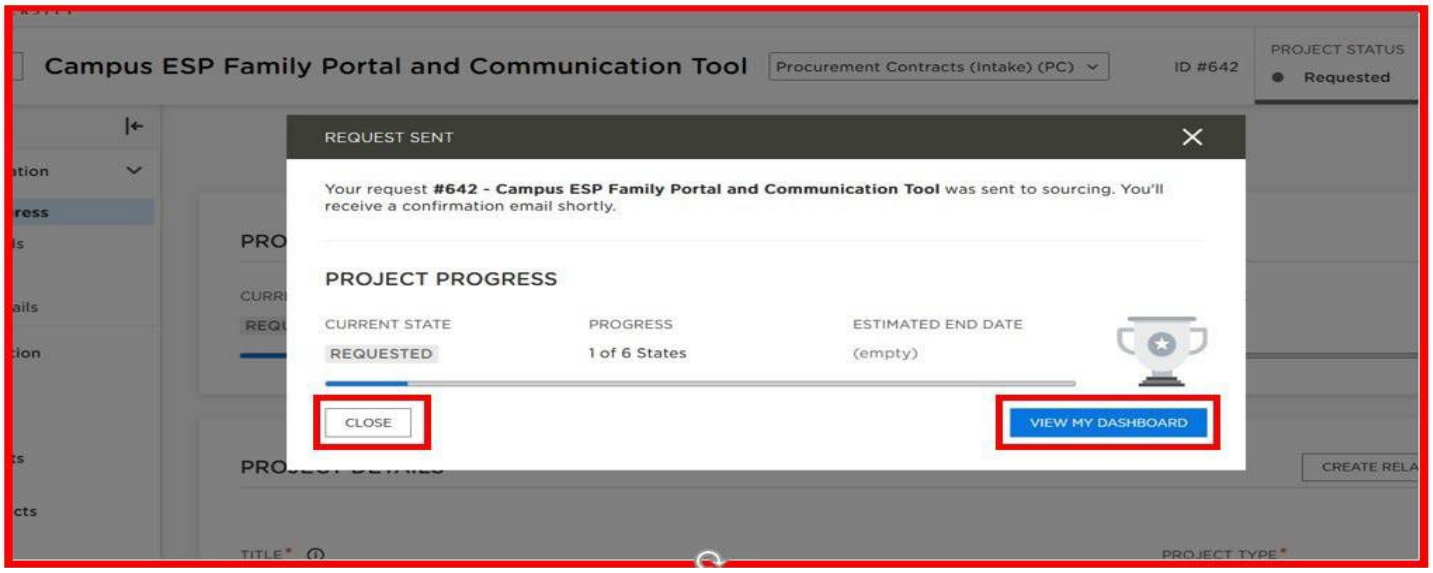
- ✔ Completing this Request (replacing the CAS Form)
- ✔ The contract/quote requiring a signature based on the purchasing methodology
- ✔ The signed or redlined Terms & Conditions document
- ✔ A new or previously signed MSA (if applicable)
- ✔ Any additional proposals or quotes and other supporting documentation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

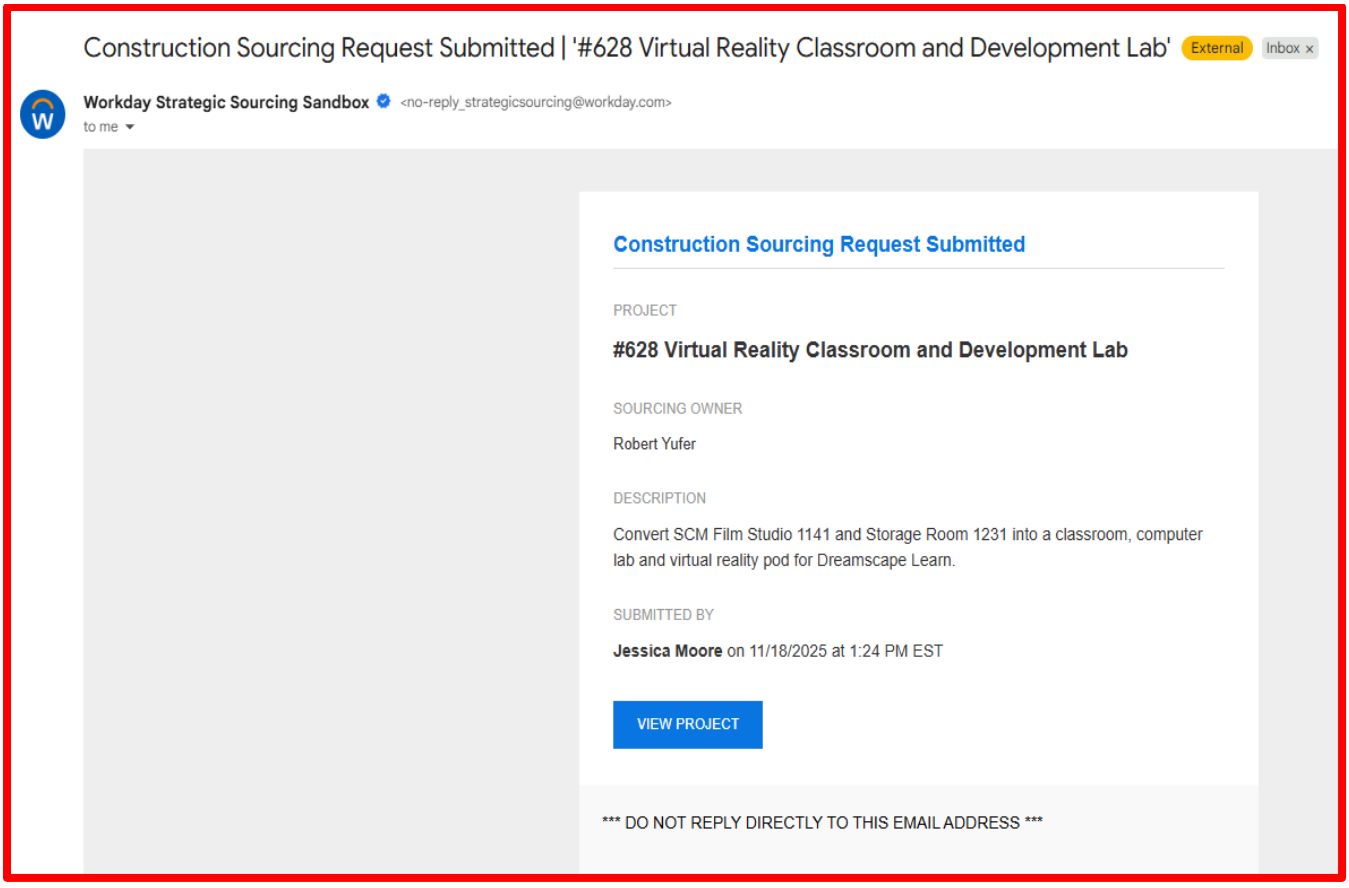
# V. PROJECT REQUEST SUBMITTAL

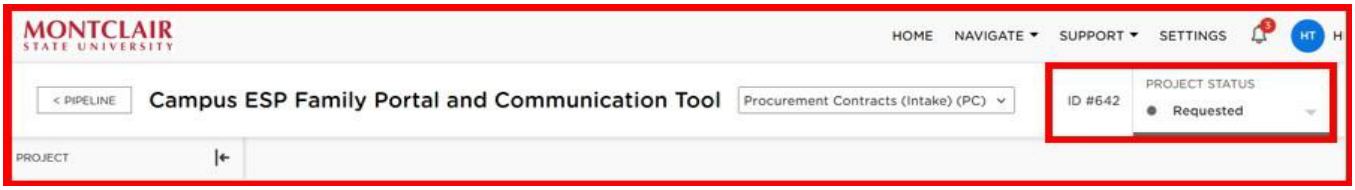
Once you've completed the details on the applicable request form, select the Submit Request button on the top right of the page.




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.



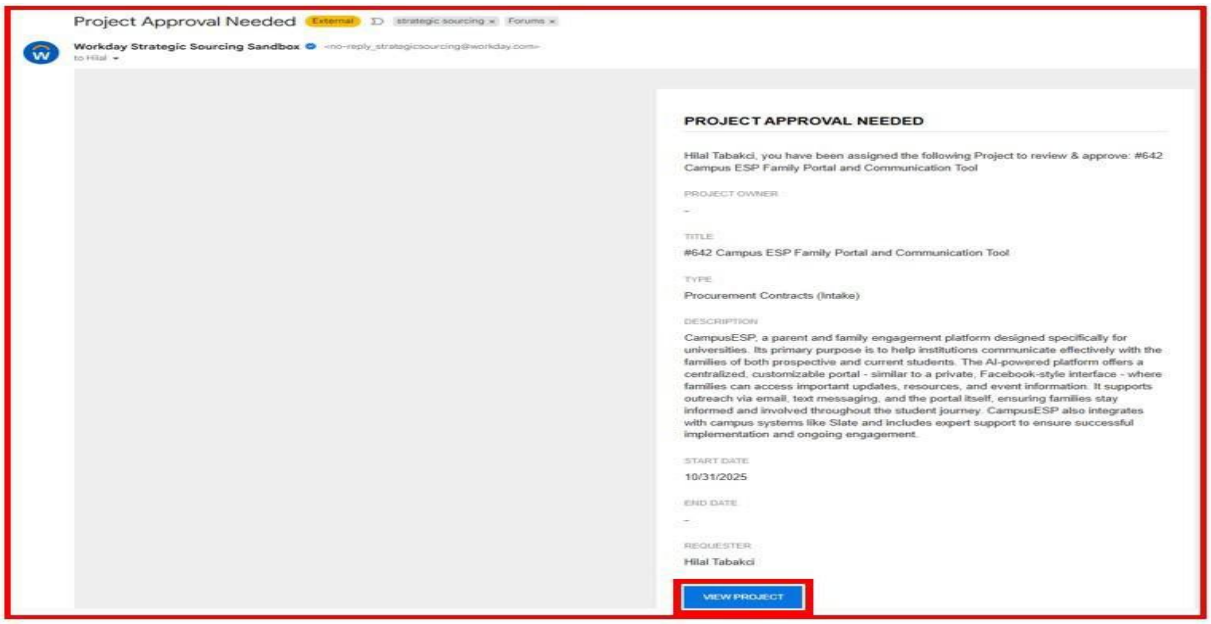


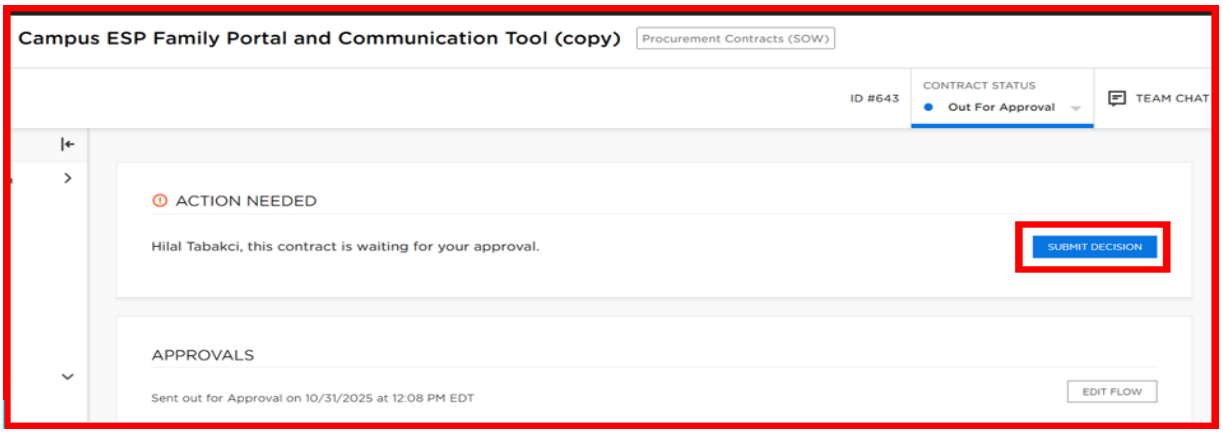



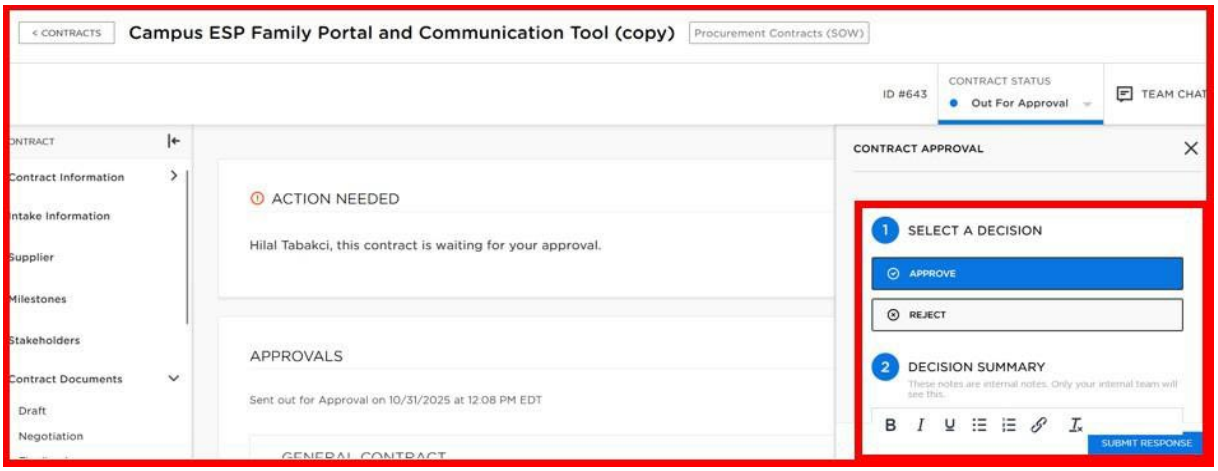

*Procurement Services will review in accordance with its Policy and Procedures, and if all is in order, will route for appropriate approvals.

# 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.



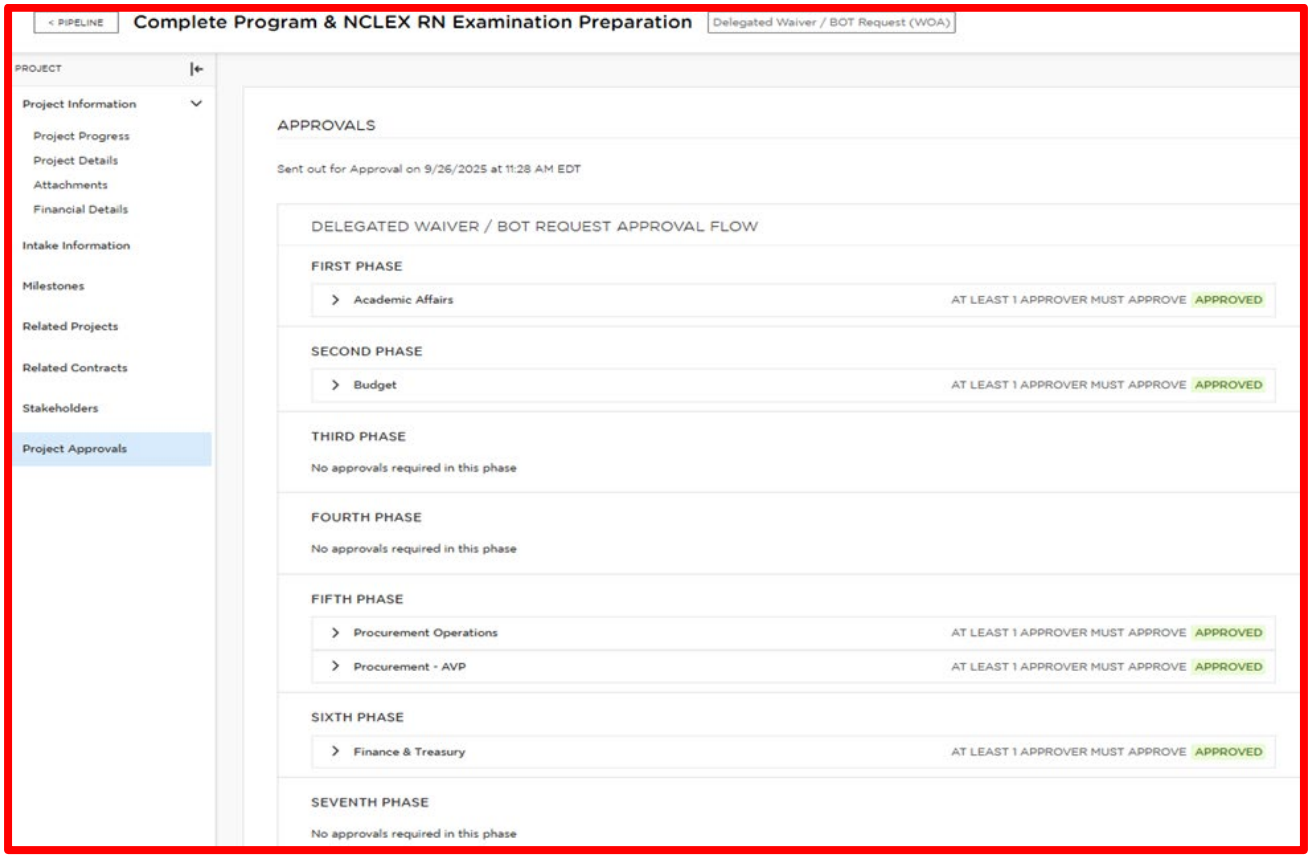



As a stakeholder, you might be involved in approving projects.

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.





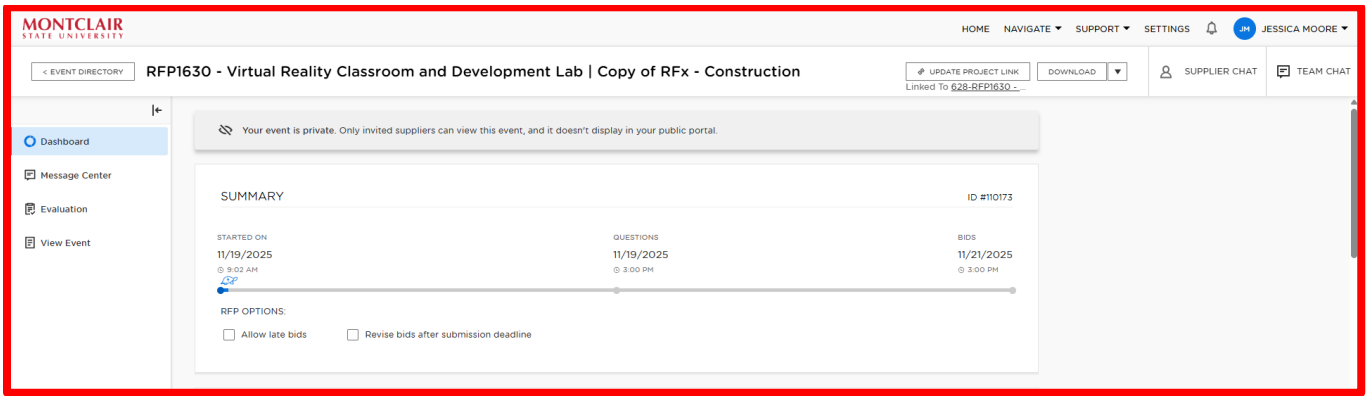

# VII. GOODS & SERVICES/CONSTRUCTION SOURCING EVENTS

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

## 1. EVENT DASHBOARD

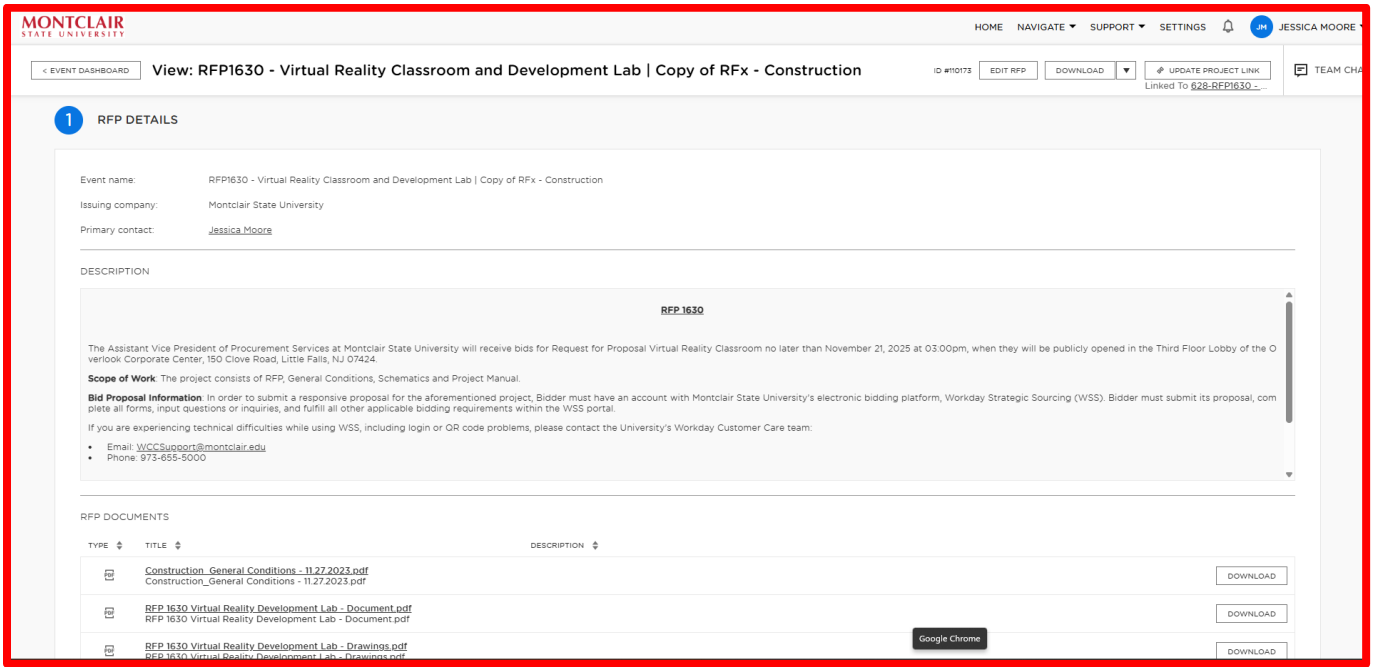
To navigate to a published event log in WSS (the RFP or RFQ), click the NAVIGATE drop-down menu, select EVENTS, search for the event you want to view, and click on TITLE. This will bring you to the Event Dashboard, where you can view a summary of the current event, including event deadlines, invited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




## 2. VIEW EVENT

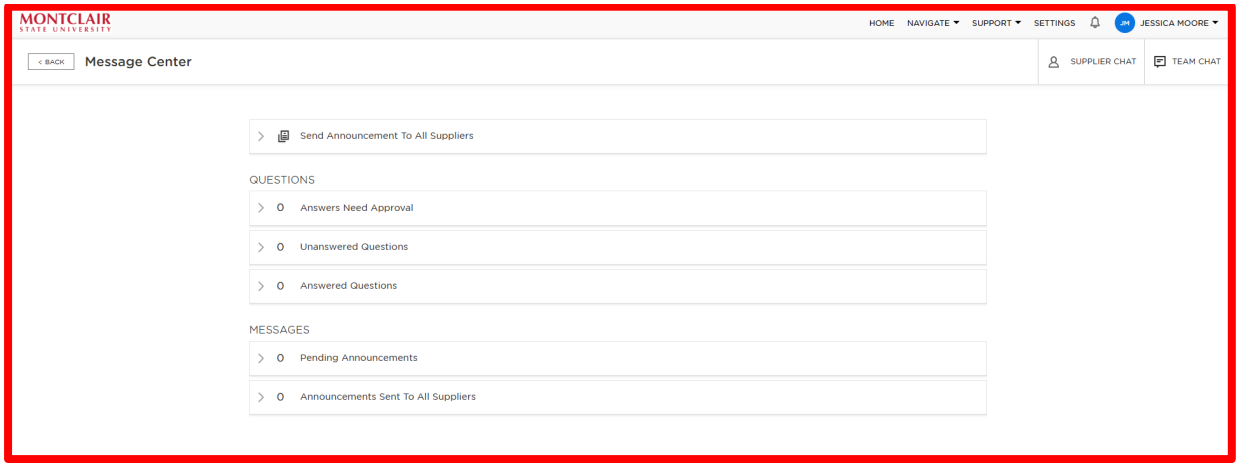
To view details about the Event, you can navigate to the VIEW EVENT tab in your event dashboard. This tab includes some of the same information shown on the dashboard screen, but with more detail. It shows RFP Details and the documents used to solicit proposals, including finalized specifications, drawings,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



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

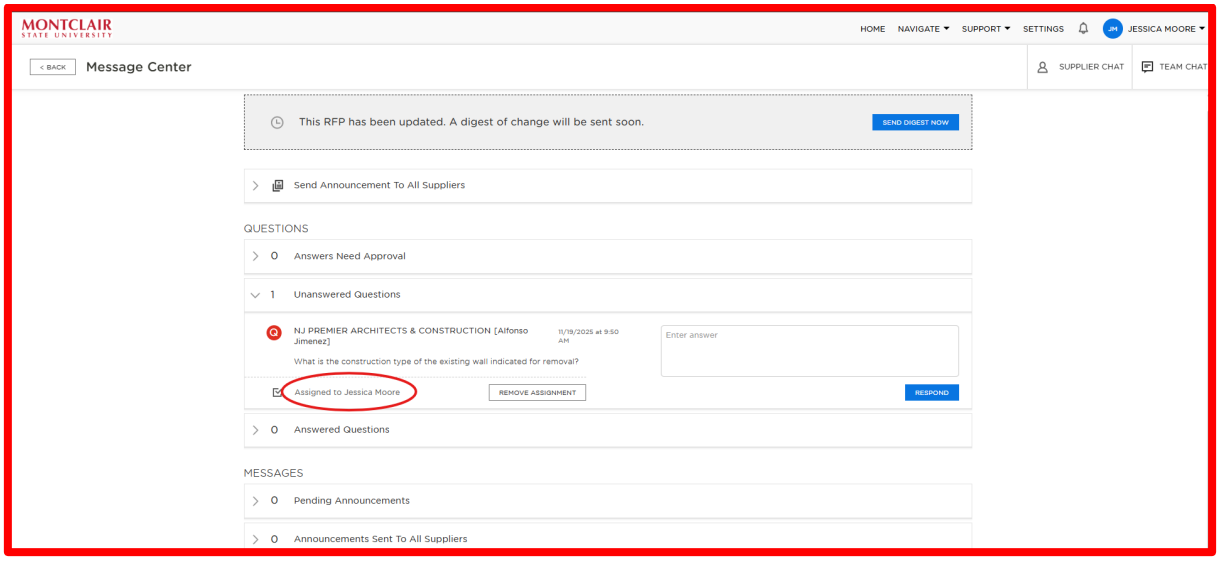
## 3. MESSAGE CENTER

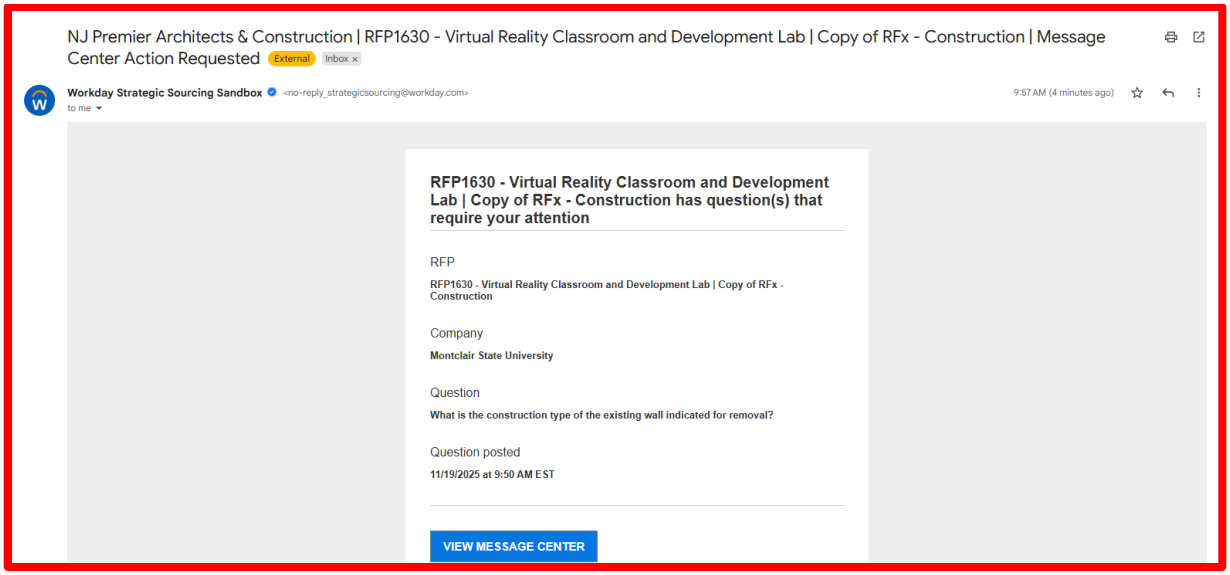
Stakeholders may be required to answer specific questions from suppliers related to the RFP. You can access the Message Center via the Event Dashboard. Click the Message Center tab on the left of the screen, and it will open a new window with a list of all questions, answers, pending messages, or announcements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



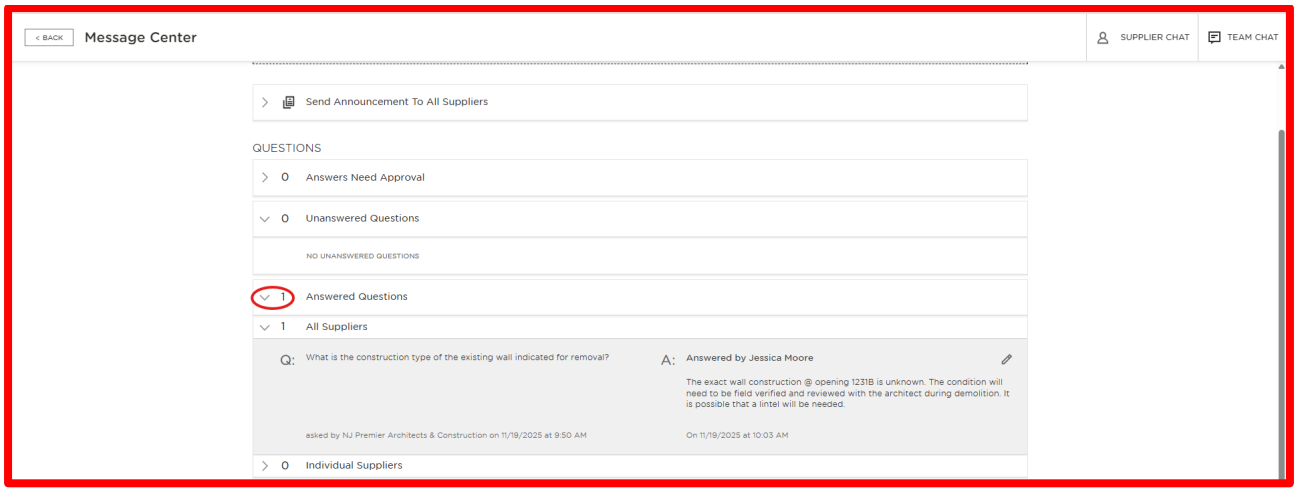

To navigate back to the Event Dashboard, click the **< BACK** tab at the top left of the screen.

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.





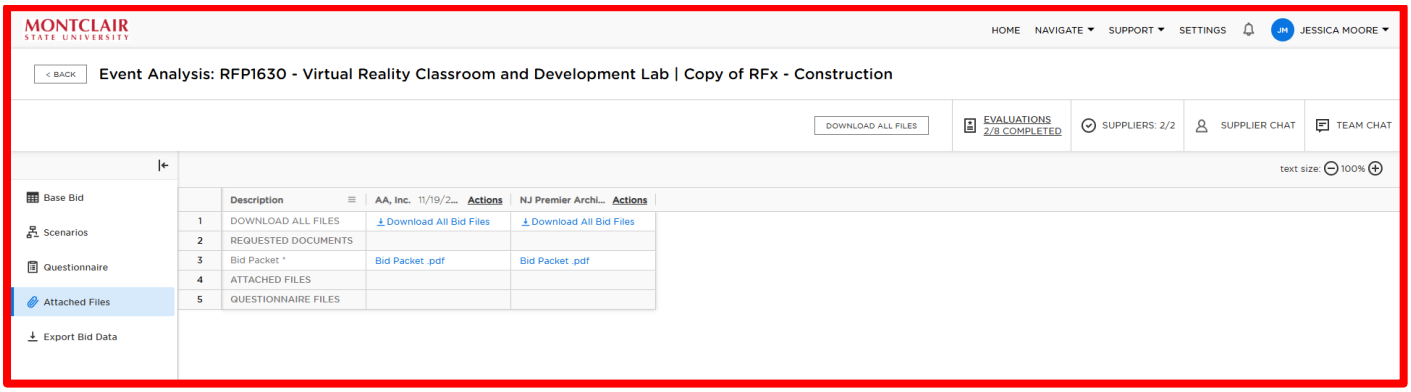

Procurement Services will review and approve any answers to questions before they are provided to the suppliers. Answered questions will be sent to all suppliers, and can be viewed under the Answered Questions drop-down by clicking on the > Answered Questions tab, then the > All Suppliers tab. Answers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




## 4. EVENT ANALYSIS

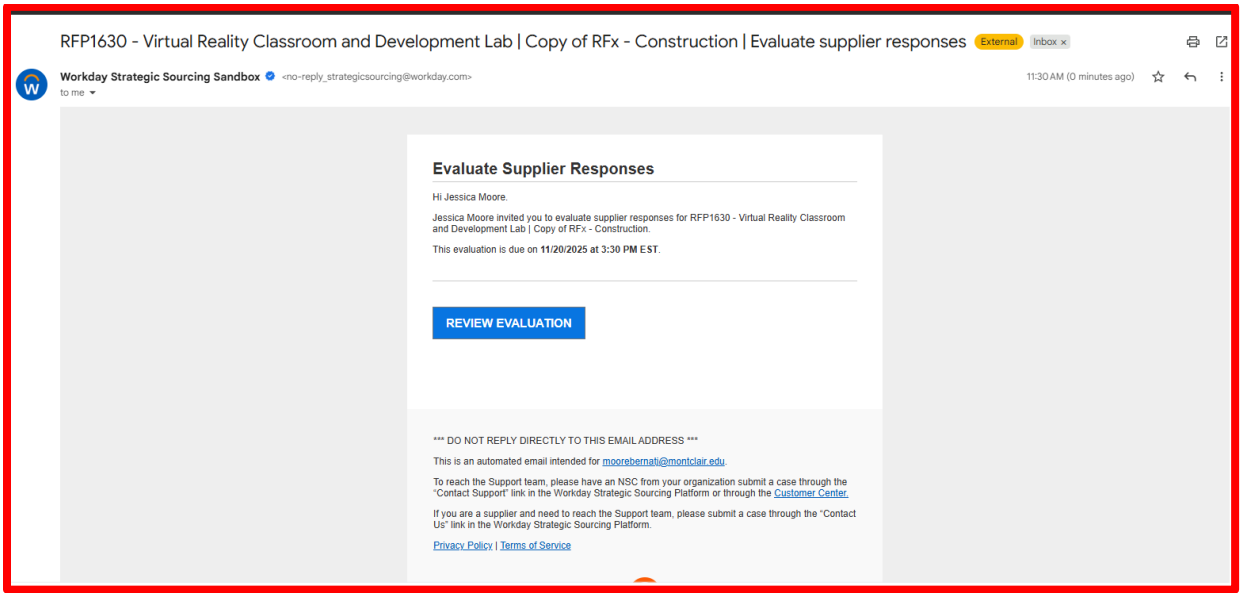
The EVENT ANALYSIS tab will not appear in the sidebar until after the proposal submissions are due, when the system performs a quick bid analysis. You can review all proposal submittals and view pricing information once you are granted access.

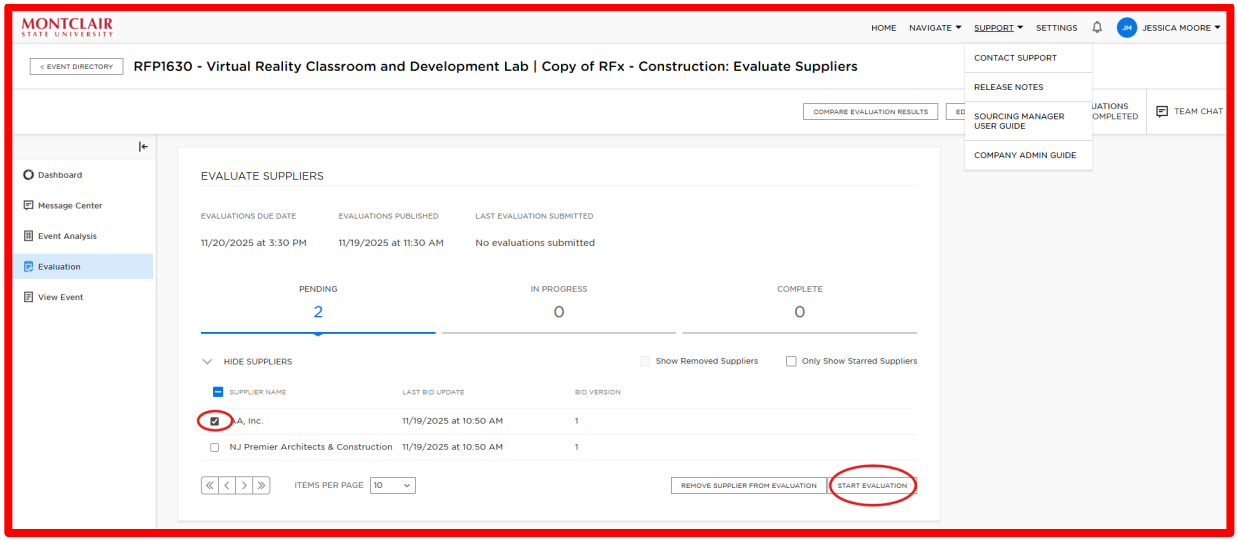


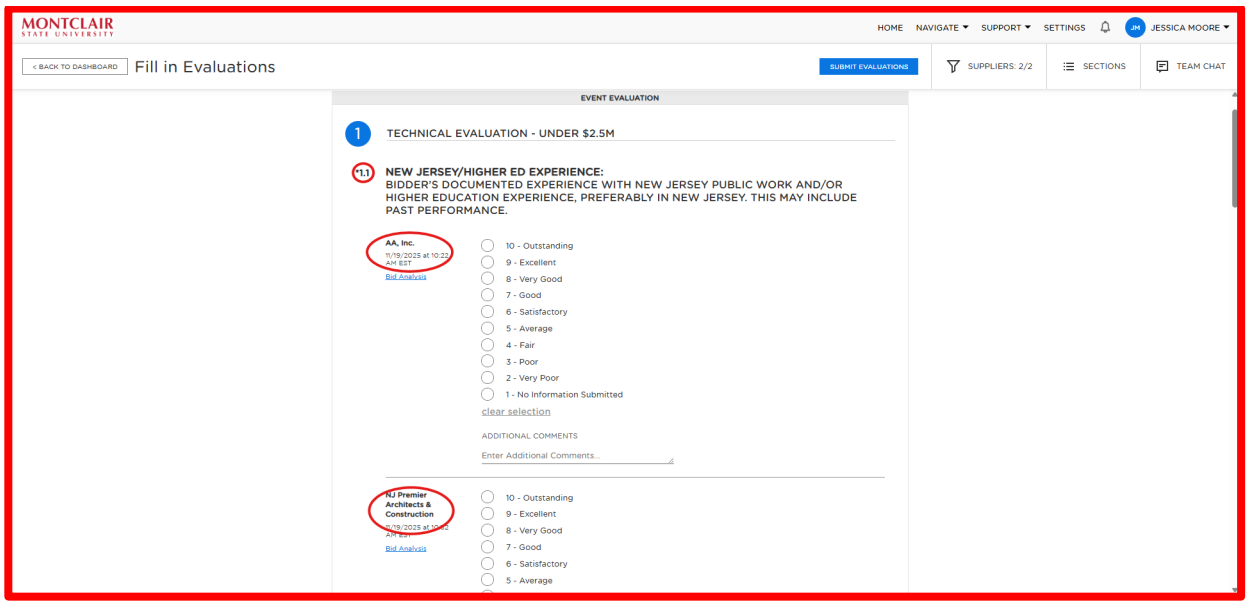

## 5. EVALUATION

Evaluation Committee members will be invited to evaluate all responsive proposals after submissions to the Event are due, when applicable. Evaluators will receive an email notification and can also navigate to the evaluation through the Event Dashboard by clicking on the Evaluation tab.






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.



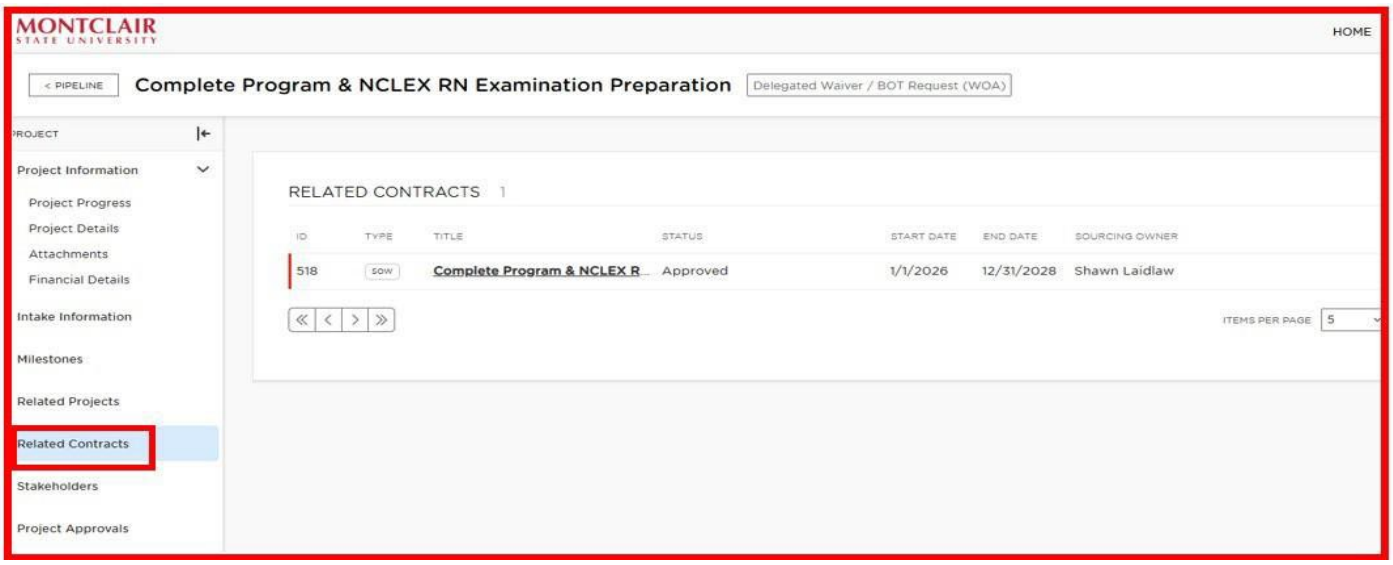

Once you have answered all questions and made your recommendation, click the blue SUBMIT EVALUATIONS button at the top of the form.

## 6. AWARD & CONTRACT PROCESS

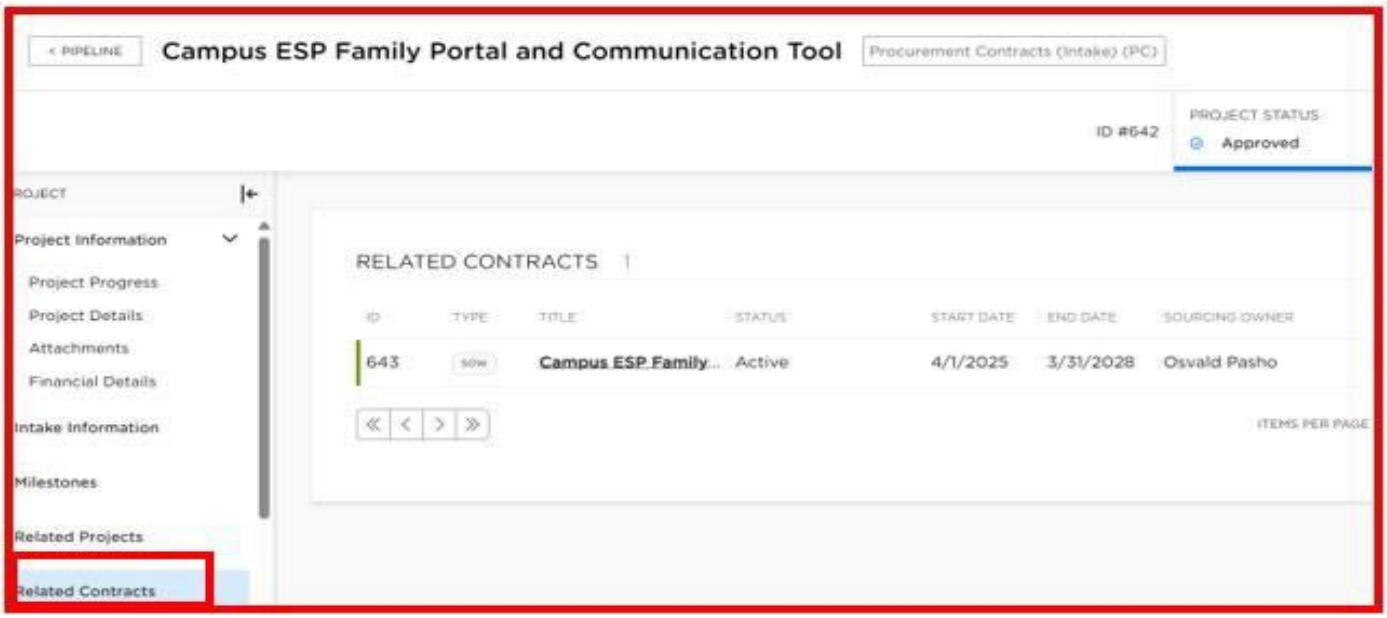
Procurement Services will execute the award process once a recommendation has been made, including the creation of the contract within WSS, as outlined in the section below.

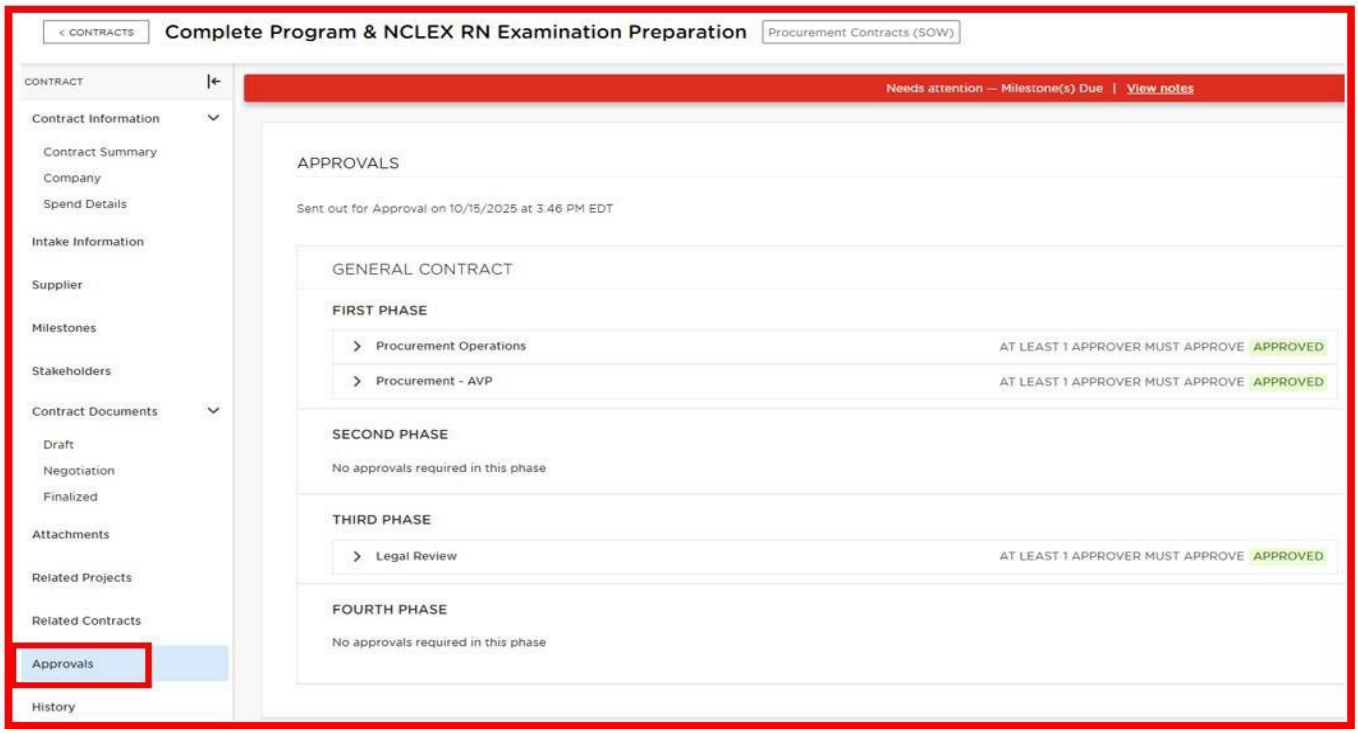
# VIII. RELATED CONTRACTS

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.

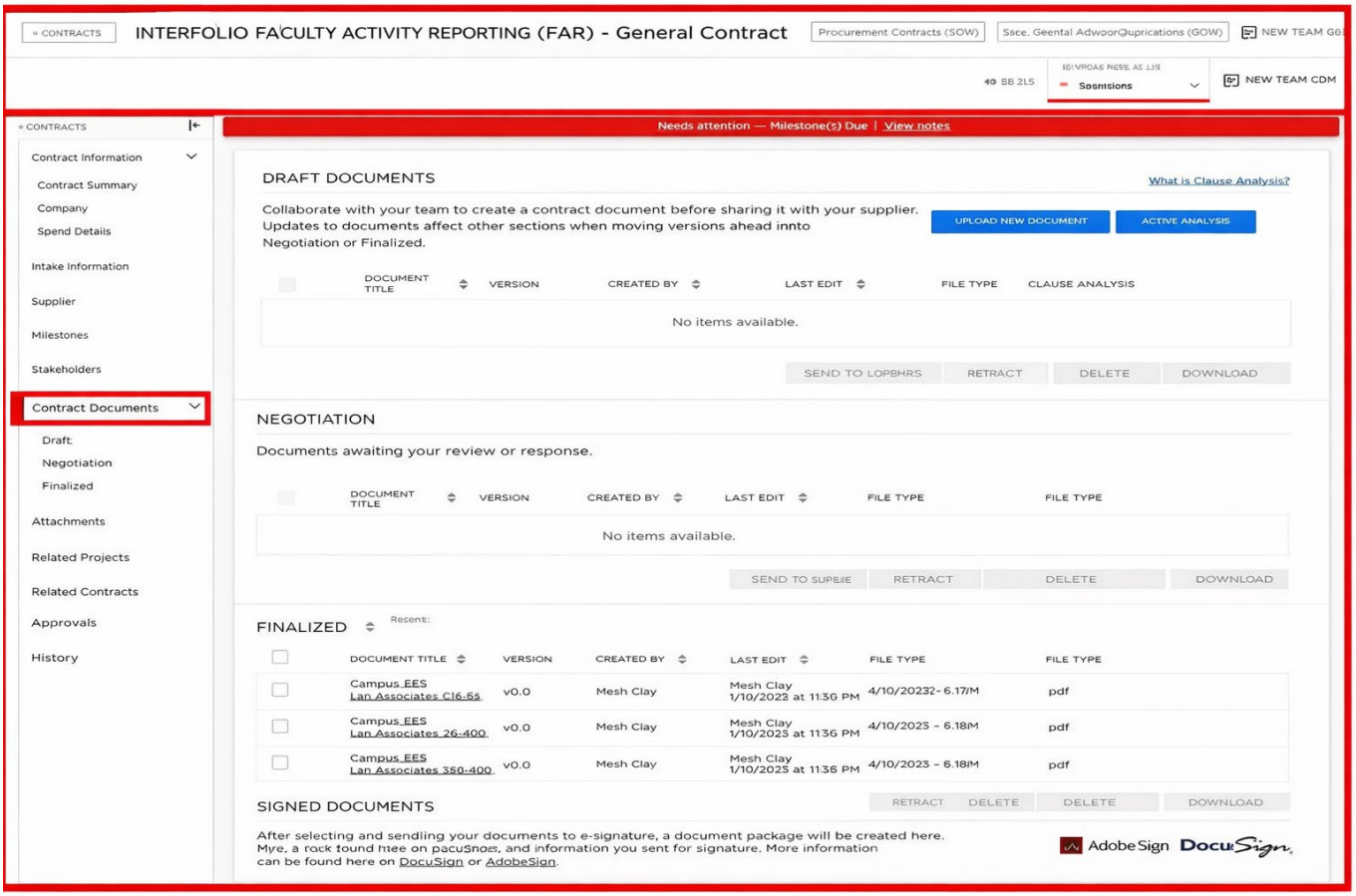



Contracts will be routed for approvals (this does not duplicate approvals obtained during the Project phase) and may include University Counsel (Legal) review and approval of the contract documents.






The "Contract Documents" tab allows users to view contract documents by phase and track the contract's progress through the legal review process, from draft to final execution.



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

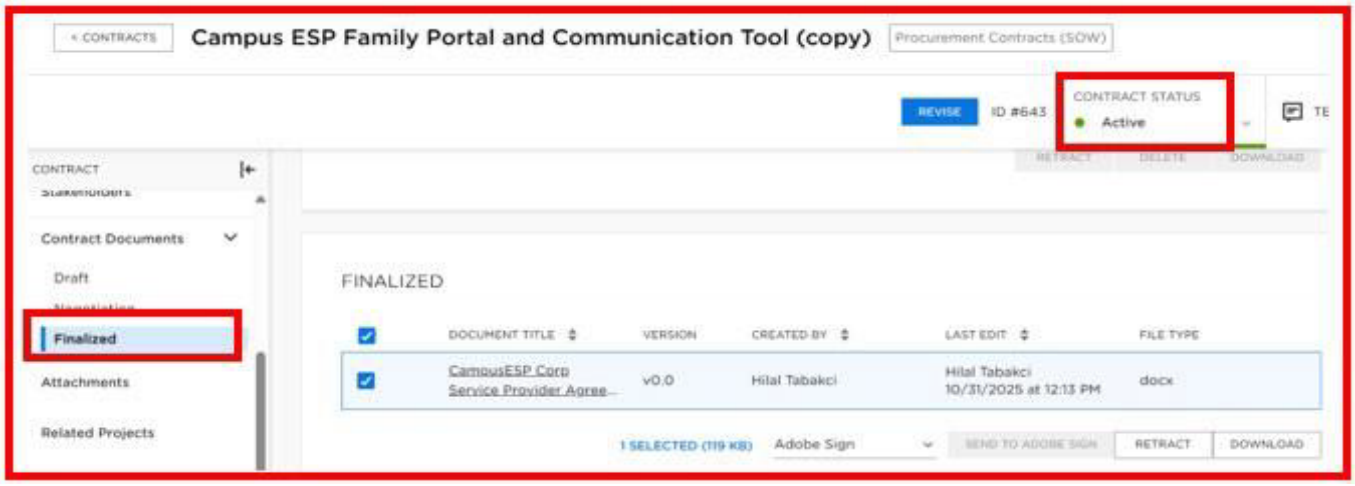
## Contract Signing Authority

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) |

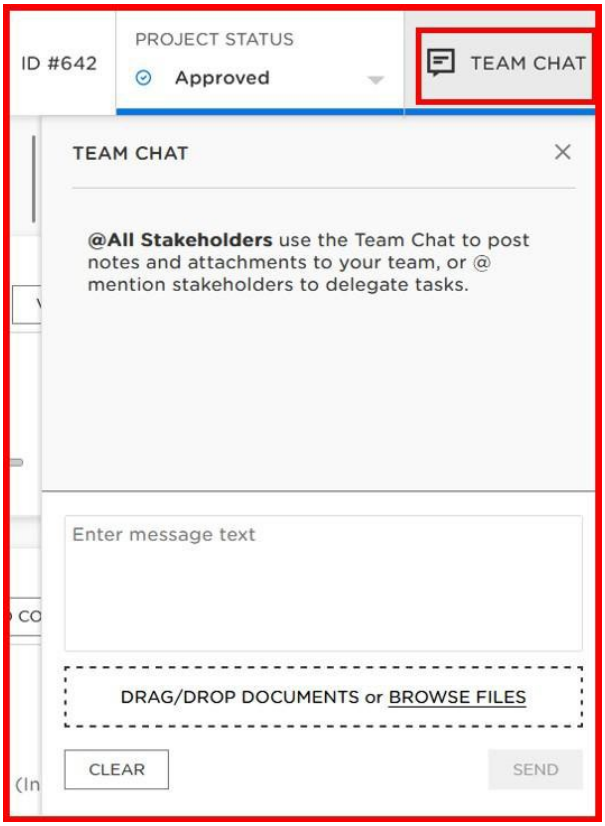
- The VPFT, COO, and the President are the only signatory authorities for the University for goods and services contracts except in cases where the approval has been delegated in writing.
  - **No other individuals have the authority to enter into a goods and services contract on behalf of the University.**
- 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.



# 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

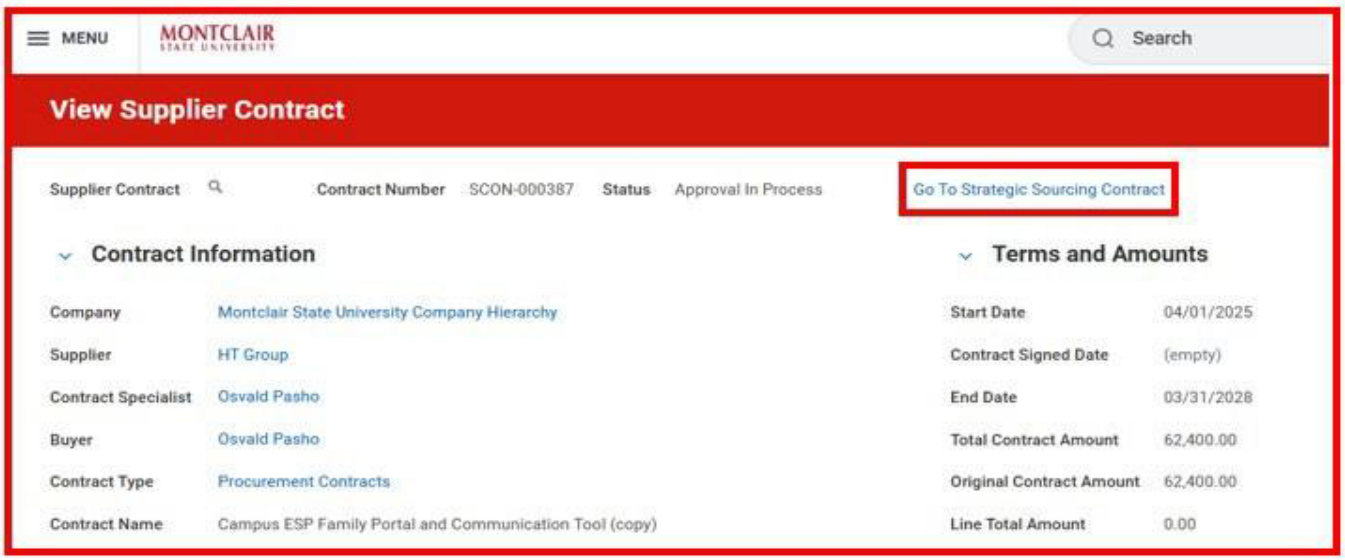
1. Requested- Project has been submitted for review by the Stakeholder to Procurement Services.
2. Planned- Project has been defined, but not approved.
3. In Progress- Project or Contract is under review by Procurement Services, or we are pending additional information before submitting for approvals.
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:

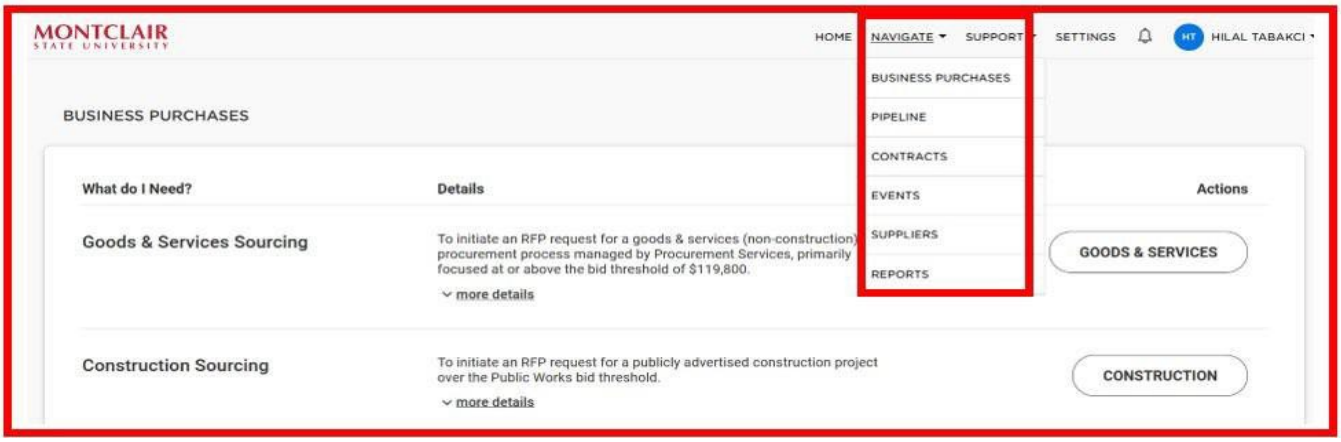



Once you select the Supplier Contract, you can go back to WSS by selecting the following:

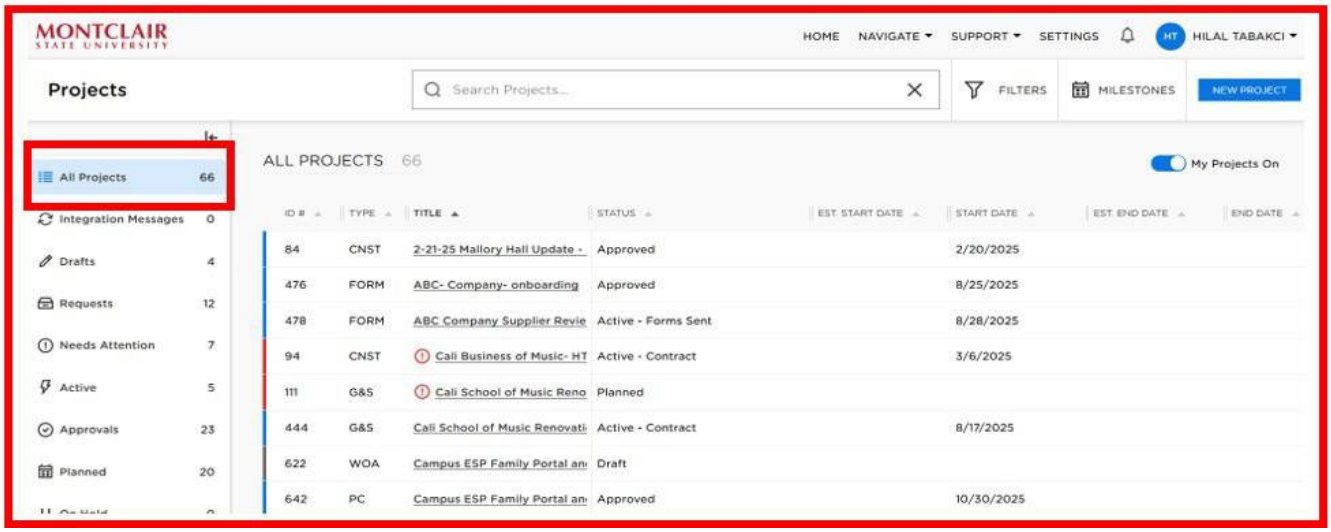



# XII. DASHBOARD

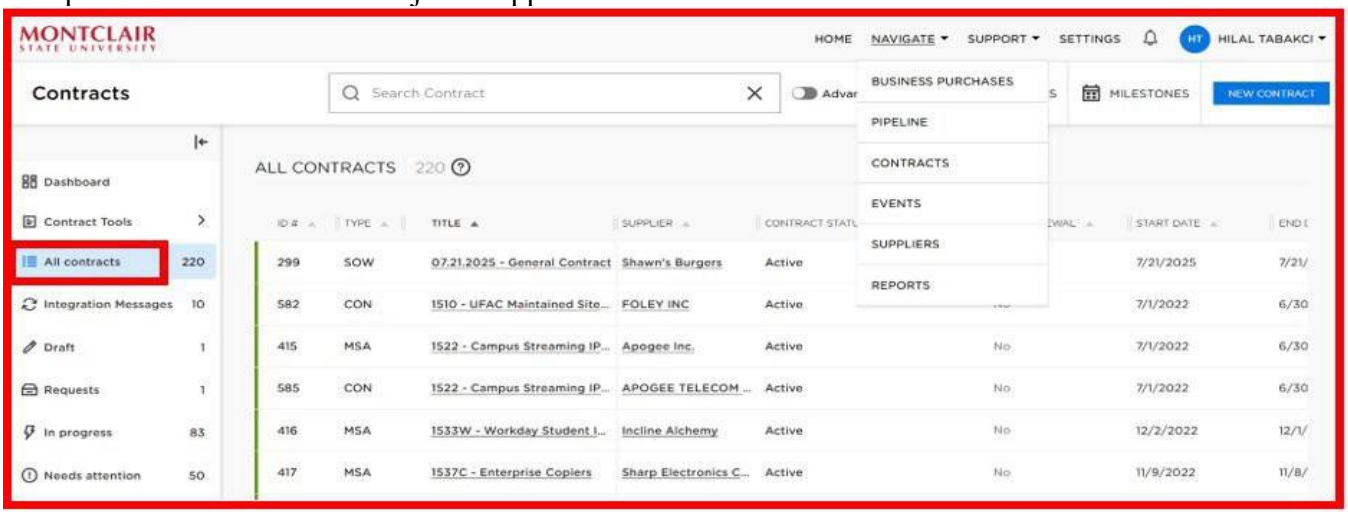
Stakeholders can view all projects or contracts through the Navigate dropdown, as shown in the screenshot below.



- **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.




- **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.




- **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.