This job aid details how to request a contract in Workday Strategic Sourcing.

CONTRACT REVIEW REQUESTS

ACRONYMS

OGC – Office of General Counsel

OPC – Office of Procurement and Contracting

RAS – Research Administrative Services

WSS – Workday Strategic Sourcing System (formerly known as Scout RFP)

DEFINITIONS

Authorized Signatory – Individual that is authorized by Howard University to sign contracts

Contract Admin – (OPC Buyer) Is assigned the Sourcing Owner role for the WSS tasks. Throughout this job aid, they will be referred to as Contract Admin

Sourcing Owner – The role in WSS that represents the person that owns and is responsible for this particular contract. This role is referenced as the **Contract Admin** in this job aid

Stakeholder – A WSS user who has been assigned access to view the contract data

CONTRACT STATUS

In Progress: OPC Review – Contract is under review by OPC

In Progress: Pending Authorized Signatory Milestone Approval – Request has been sent to Authorized Signatory to approve contract

In Progress: RAS Review – Contract is under review by RAS

In Progress: Supplier Review – Contract has been sent to Supplier to review

Out for Approval – Contract is under review by OGC

**Active** – Contract is signed and fully approved

CONTRACT SUMMARY TAB

1. Create a requisition, allow it to complete all required approvals in Workday

2. Once the requisition completes the approval process in Workday and is assigned to the OPC Buyer, OPC will send the requester the link to WSS to complete the intake form. (https://howard.go.scoutrfp.com/new_request/contract/psct)

3. Select the most applicable contract type based on the information you have (Contract Admin will validate and update the contract type if necessary)
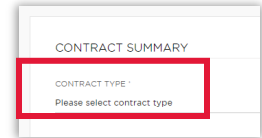
4. Once the contract type is selected, additional questions will appear on the **Contract Summary** tab
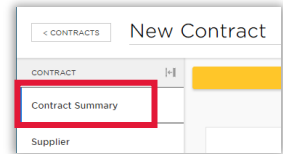
5. Fill in all the information you have on the contract to the best of your ability:

   a. **Contract Name:** Be specific – include contract type and supplier name at the very least

   b. **Company Name:** Almost always select **HU101: Howard University**

   c. **Department, School or Office:** Utilize the multi-select if your contract is applicable to multiple areas, or select your own department

   d. **IMPORTANT**: The answer to "Will this be a Research or Sponsored Program?" impacts contract routing

      i. **YES:** *additional questions will appear for the Principal Investigator (PI) to answer if the agreement is RAS-related*

   ii. **NO:** the contract is not related to the RAS division of Grants

SUPPLIER TAB

6. Click **Add Supplier**

7. Search Suppliers to see if your Supplier is already in WSS. *(The Workday supplier database is not currently loaded into WSS.)*
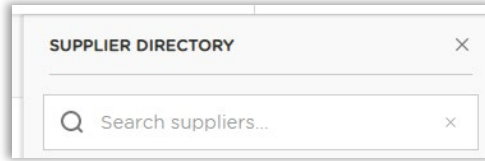
8. If the Supplier **is** in WSS, select the Supplier name and click **Add to Contract.** Once selected, the tab should say **1 Added Supplier.**

9. If your supplier is **NOT** in WSS, Click **Make A Suggestion**
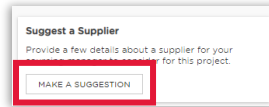
   a. Add Supplier information:
      i. Full, legal **Supplier Name** (including Inc, LLC, etc.),
      ii. **Contact Name**
      iii. **Email** address.
      iv. **Phone number**
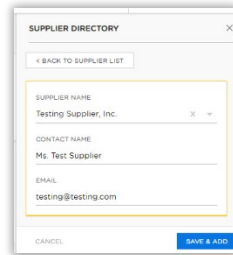
   b. Click **Save and Add**
      The new supplier will show as a "Suggested Supplier".

10. Add all applicable attachments including Word version of agreement needing review.

CHECKLIST TAB

Fill in the requested data related to your contract. (This replaces the OGC forms for Term sheet and Checklist.)

11. **Is this a confidential agreement?** Most agreements are not confidential (an example of confidential agreement is an employment agreement.)

12. **Is this contract related to the procurement of goods or services?** There MUST be a requisition in Workday prior to submitting a contract request in WSS.

   If the requisition is NOT in Workday, your Contract Review Request will not be approved.

   a. Pull the following information from Workday:
      - **Spend Category**
      - **Requisition Number**
      - **Budget Amount**

   b. If you do not have 3 quotes for requests > $2500, Attach the sole source documents/justification per the University Procurement Policy.

RAS TAB

13. Questions on the RAS tab only populate if the question regarding "Will this be a Research or Sponsored Program?"" is **YES**. Otherwise, this tab is not required.

ATTACHMENTS TAB

14. Attach all relevant contract documents. Attachments can include:
   a. Word version of contract
   b. Statement of Work including pricing
   c. Proposals/Quotes
   d. Any other relevant documents

STAKEHOLDERS TAB

15. Anyone who is registered in the WSS system can be added as a stakeholder. A stakeholder can see the contract as it is going through the approval process.

The contract requester is automatically added as a stakeholder.

If you need to add a stakeholder and that individual is not selectable, send an email to the WSS Administrator to add them as a user
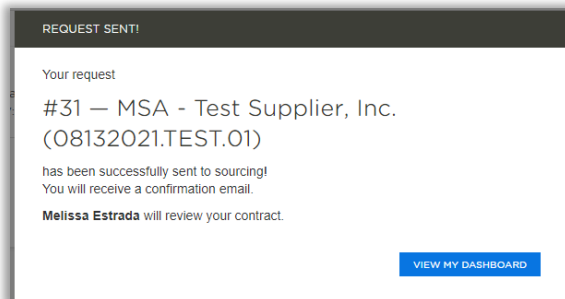
SUBMIT CONTRACT REQUEST

16. Once you have answered the questions on all the tabs and attached your documents, click **Submit Request** in the upper right-hand corner
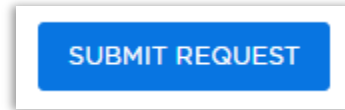
SUBMIT REQUEST

**17.** If any errors appear, they must be corrected before your contract request can be submitted

18. The contract will route to the Contracts Manager, who will validate your information and assign the appropriate OPC or RAS Contract Admin to own the contract and manage the approval process.

REQUEST SENT!

Your request

#31 — MSA - Test Supplier, Inc. (08132021.TEST.01)

has been successfully sent to sourcing! You will receive a confirmation email.

Melissa Estrada will review your contract.

VIEW MY DASHBOARD

REVIEW CONTRACT REQUEST STATUS

Contract status is displayed in WSS on the top right-hand corner

1. Log in to WSS

2. Navigate to the contract

3. Review the status of your contract in the upper right corner of the dashboard

CONTRACT STATUS — In Progress : OPC...   TEAM CHAT
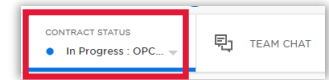
Note: If the contract is in an "Out for Approval" Status, click the **Approvals** tab to see the next step in line for review and approval

COMMUNICATING WITH THE TEAM

CONTRACT STATUS — In Progress : Pen...   TEAM CHAT

TEAM CHAT allows you to ask questions or make comments that stay with the contract record.

If you need an answer from a specific person, you can use the @ symbol to bring the request to their attention.

TEAM CHAT ✕

[All Stakeholders] use the Team Chat to post notes and attachments to your team, or @ mention stakeholders to delegate tasks.

Enter message text

DRAG/DROP DOCUMENTS or BROWSE FILES

CLEAR   SEND