AdventHealth

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

Contents

Supplier Account Setup

Sign up for Strategic Sourcing

Prerequisites

You can access Strategic Sourcing by email invitation only.

Ensure your IT team enables the amazonses.com domain.

Before creating a Workday Central Login (WCL) account, download an authenticator app from the Apple or Google app stores. You can also use a web browser authenticator app. Frequently-used authenticators include:

- Authy
- Duo Mobile
- Google Authenticator
- LastPass Authenticator
- Microsoft Authenticator

Frequently used web browser authenticator apps include:

- Authenticator is a free web browser extension authenticator.
- 1Password is a subscription-based application that can provide a web browser extension authenticator.

Context

Workday Strategic Sourcing is a cloud-based sourcing tool that you can use to streamline your procurement process. You register through WCL which enables you to access Workday's suite of products from a single account. To create an account, you need to verify your email, set up a strong password, and pair your authenticator app.

Note: As a supplier, you must register your account on a desktop.

Steps

1. In the email, select Sign up and View this RFP.

   If you're expecting an email but don't receive it, ensure it's not in your Spam folder.
2. Click Send a Verification Code to send a 6-digit one-time password to your email address. This email will be the username you use to log into WCL.
3. Once you’ve verified your email address, enter your name, create a new password, and click Create Account.
4. Scan the QR code using your authenticator app and enter a 6-digit code from your app.
5. Click Connect Authenticator App.

   Note: If you stop the account creation process for WCL, your account will be locked. If you delete your authenticator app after you set up your account, you'll be locked out of your account.
6. (Optional) Add and verify your mobile phone number.

   Workday supports a limited number of countries for mobile phone numbers.
7. Select the Accept Terms of Service check box.

8. (Optional) Enter these fields:
    - Job Title
    - Phone Number
    - Language
    - Timezone
9. Click Save & Finish. You can now review the event that you've been invited to.

    You can view the event in the Responses section of the Dashboard.

    If you're unable to sign in, see FAQ: Supplier Sign In and Account Security.
10. Select the title of the event to review and respond to the sourcing team.

    When you're reviewing the event, pay particular attention to the conditions of participation and statement of requirements.
11. (Optional) You can invite teammates to collaborate with you on the event by entering their name and email in the Invite Team Members section, and clicking Add.

    If your colleague registered in Strategic Sourcing previously, they can sign in and access the bid immediately. Otherwise, they receive an email invitation with a link to create an account on Strategic Sourcing.

    If you can't add them, it might be because they're already registered in Strategic Sourcing under a different company name. To fix, contact the sourcing manager and request that they put you and your teammate under the same company name in their directory.
12. (Optional) You can submit questions and view other messages from the sourcing manager using the Message Center.

    Your questions are confidential.
13. (Optional) You can access help and support by selecting the Contact Support option from the Support tab in the top navigation bar.

Result

You and your teammates are signed up. You can sign into Strategic Sourcing at any time. Once registered with Strategic Sourcing, the next time you sign in, WCL will prompt you to always trust this browser. Mark a browser as trusted only for a computer you regularly sign in to.

Example

Watch the video: 1m 53s

Next Steps

You can now set your time zone and manage deadlines.

Self Register

Context

You can register with a buyer without using an event invitation when the buyer has supplier self-registration set up. You can self-register:

- By using a link that a buyer provided to you.
- Through a public bid site.

Steps

1. Access supplier self-registration.

2. Enter your email address, create a password, and click Continue.

   If you already have an account, you can click Sign In.
3. On the Register New User page, enter your name and accept the Terms of Service.

   When you click Save & Finish, you'll receive an email to complete your registration.
4. Enter the name of your company.

   When the buyer has similar company search enabled, Strategic Sourcing might prompt you that your company is already registered. If your company name matches any of the companies listed, contact an administrator at your company to gain access to Strategic Sourcing.

   To continue if there isn't a match, select My company doesn’t match any similar companies found.
5. Complete the self-registration form.

   You must complete all required fields requested by the buyer to finalize your submission.

   When you save the form as a draft, you have to sign out and return to Strategic Sourcing with the buyer self-registration link to access your draft. Contact Support through the Support tab if you can't access your draft.

Result

You’re added to the supplier directory of the buyer. You can:

- Access the supplier portal.
- Register another supplier.
- Return to the public bid site you registered from.

Set Up Supplier Profile for Autofill

Prerequisites

- A buyer sends you an invitation to complete an onboarding form or you have completed self-registration for a buyer.
- You've signed up for Strategic Sourcing.

Context

You can set up your supplier profile to:

- Autofill onboarding forms sent by buyers.
- Complete self-registration for a buyer.

When you select the consent check box and add additional supplier contacts to your supplier profile, those added contacts can use your supplier profile to autofill onboarding forms. Added contacts can view all the information on your form, but they can’t edit it.

In your supplier profile, you can add this information:

- Supplier Name
- Website
- Description
- Addresses
- Phones
- Tax information
- Bank accounts
- Payment information
- Contacts

Note: Workday recommends keeping your supplier profile updated. When you use autofill, Strategic Sourcing overwrites any input data in the onboarding form with data from your supplier profile. For any data not entered in the supplier profile, Strategic Sourcing removes entered data in the onboarding form. This only applies to fields on the supplier profile.

Steps

1. After you sign in to Strategic Sourcing, click Your Supplier Profile on your Dashboard.

   You must have an onboarding invitation to fill out your supplier profile.

   You can also access your supplier profile from the onboarding form while you're editing the form.
2. Fill out the supplier profile.

   In the Contacts section, to save entered contacts, you must select the consent check box. Added contacts can view your profile, including added banking information.
3. Click Save to save the supplier profile.

   When you update your supplier profile, the information doesn't automatically update in submitted forms. Ensure you update any forms previously submitted.

Concept: Customer Directory

You can access the Customer Directory from the Strategic Sourcing Supplier Portal. This directory displays the Strategic Sourcing customers that you have access to. You can only view data that the customer has granted you access to.

In the Customer Directory, you can search to find a Customer Profile by:

- Customer Company Name
- Contract Name
- Event Name
- Form Name
- Supplier Company Name

Each column displays the total number of events that you're invited to for each customer.

You can access these Strategic Sourcing tabs in a Customer Profile:

- Action Items
- Contracts
- Events
- Forms
- General Profile
- Performance Reviews

Your customers can give you access to the Unified Supplier Portal (USP) and more procurement information. If you have access to the USP for a customer, you can view these tabs:

- Catalogs
- Invoices
- Payments
- Purchase Orders

Note: Not all customers have the USP. Not all supplier contacts will receive access to the USP.

Concept: Unified Supplier Portal for Suppliers

When a customer grants you access to the Unified Supplier Portal (USP), you receive an email where you can sign up with Workday Central Login or sign in if you already have an account.

You use the same Workday Central Login account to sign in and access Strategic Sourcing and procurement information across multiple customers securely. Your primary work email used with multiple customers should be the same, and you must use Workday Central Login to create your account.

To receive access to the USP for different customers, contact each respective customer.

Additional Authentication for USP

A customer can require additional verification when you click Procurement Portal or the links in these tabs:

- Catalog
- Invoices
- Payments
- Purchase Orders

The additional verification requires you to enroll with email verification. A six-digit passcode will be emailed to you. After you enter the passcode and click Verify Code, you can access the Procurement Portal.

Note: Not all customers require the additional authentication.

Procurement Information and Tasks

You can receive access to these procurement apps:

- *Contacts and Banking*. You can change and view contact and settlement bank account information related to suppliers. To access the Contact and Banking procurement app from Strategic Sourcing:
    1. In the customer profile, click Procurement Portal.
    2. In the side menu in the Procurement Portal, click Contact and Banking.
- *Invoices and Payments*. You can view the Most Recent Invoices and Most Recent Payments.
- *POs and Catalogs*. You can view Most Recent Catalog Loads and Most Recent Purchase Orders. You can also access these tasks:
    - View All Catalog Loads, that you can use to search for catalog loads.
    - Catalog Load Request for Supplier, that you can use to add new items, update existing items, and load items to a catalog on Workday.
    - Find Purchase Order, that you can use to search for purchase orders by date, and name.
    - Create Invoice from Purchase Orders, that you can use to create an invoice request from a purchase order.
    - Log Time and Tasks, that you can use to log time worked by contingent workers on a purchase order.

You can only access procurement information in the USP for customers who grant the access. If you have other customers who have chosen not to uptake the Unified Supplier Portal, you can still access their Supplier Portal using the same login process you do today. You can't view them in the USP.

Example: Global Modern Services grants you access to the USP, but ProTech, Inc. doesn’t grant access. In the Global Modern Services customer profile, new tabs display for the information you’ve been granted access to. You can also click the Procurement Portal button from the Global Modern Services customer profile. No changes occur to the ProTech, Inc. customer profile.

Note: Not all customers enable access to all apps in the USP.

Email Updates in the Unified Supplier Portal

Email updates made in Workday Central Login don't update your primary work email in the USP. The email update will be reflected in the user profile in Strategic Sourcing, but this update won't reach the Supplier Profile in Strategic Sourcing. The customer can't sync the update.

To update your email address in the USP, Workday recommends that you reach out to your customer to update your primary work email to ensure both Workday Central Login email and verification email remain the same.

Access Supplier Invoice Requests in the Unified Supplier Portal

Context

You can view supplier invoice requests and non-purchase order invoices in the Unified Supplier Portal (USP).

Steps

1. Access your customer from the Customer Directory.
2. Select the Invoices tab.
3. Click View Invoices.

   You can also click Procurement Portal and enter Find Supplier Invoice Request in the search bar.

Result

Your invoice requests display in the USP.

Password Reset for Suppliers

Prerequisites

Set up your Workday Central Login account.

Context

You can reset your password for your Workday Central Login account if you've forgotten your password or need to reset it for security reasons.

Steps

1. On the Workday Strategic Sourcing Sign In page, click Are you a supplier - sign in here .link.
2. On the Supplier Login page, enter your email address and click Continue.
3. On the Password page, click Forgot Your Password?
4. Click Reset Your Password.
5. Enter the 6-digit code from your authenticator app.
6. Enter the 6-digit password sent to your email address.

   If you've added your mobile phone number to your account, you can click Try With SMS and enter the 6-digit code sent to your mobile phone. Currently, Workday Central Login only supports North American mobile phone numbers.

   Note: Try With SMS is only available when you verify your phone number in Workday Central Login.
7. Enter and confirm your new password.

Next Steps

Sign in to Strategic Sourcing the link Are you a supplier - sign in here with your new password.

Account Recovery for Suppliers

Context

You can reset your account when you meet all of these criteria:

- Forgot your password.
- Unable to access your authenticator app.
- Have no phone number added to your account. This is applicable only to the U.S. and Canada.

Steps

1. On the Workday Strategic Sourcing Sign In page, click Are you a supplier - sign in here link.
2. On the Workday Central Login page, enter your email address and click Continue.
3. On the Password page, click Forgot Your Password?
4. Click Reset Your Password on the Forgot Your Password page.
5. Click Recover Account on the Let's Verify It's You page.
6. In the Account Reset pop-up, select the acknowledgement check box and click Reset.
7. Click Send Code.
8. Enter the six-digit, one-time passcode sent to your email address.
9. Set up your authenticator app. See Sign up for Strategic Sourcing.
10. Enter and confirm a new password. Click Reset Your Password.
11. Sign in on the Supplier Login page with your new password and authenticator app.

    Note: After you recover your account, you lose access to customer procurement information in the Unified Supplier Portal. Contact customers to re-enable your access.

Result

You can access Strategic Sourcing by clicking the link Are you a supplier - sign in here.

Complete an Onboarding Form

Prerequisites

- A buyer sends you an invitation to complete an onboarding form.
- You've signed up for Strategic Sourcing.

Context

You can complete an onboarding form that buyers invite you to, which enables them to gather critical business and banking information.

When enabled by the buyer, you can login and edit at any time. If the Edit button doesn't display, contact the buyer to determine if your profile is going through an approval process.

Steps

1. Access the onboarding form in the Profile section by clicking Manage.

2. Click Edit to make changes to the form and input the requested information.

   When you have a supplier profile filled out, you can autofill the onboarding form for a buyer with information from your profile. When you autofill, any information already enter is overwritten. See Set Up Supplier Profile for Autofill.

   The buyer can add help text at the start of the form for you to review.

   You can add Contacts to this form so that the buyer company has the correct contact information for you and colleagues at your organization. Contact the sourcing manager through the Message Center to enable access for new contacts to your profile.

   Your Onboarding Journey displays at the top of the form if the buyer requires you to complete additional custom forms as part of the onboarding process.
3. (Optional) You can submit questions and view other messages from the sourcing manager using the Message Center.
4. Once completed and ready to submit, click Submit.

   You can click Save Draft to save your incomplete form and return to finalize it later.
5. (Optional) To revise the submission, click Edit. Ensure you submit the profile once you finish making changes.

Result

The form information that you submit to the buyer ensures a quick and accurate setup for your company.

FAQ: Supplier Sign In and Account Security

I already have a Strategic Sourcing account. How do I register for Workday Central Login?	1. Navigate to the Workday Strategic Sourcing Sign In page. 2. Sign in to Strategic Sourcing with your current credentials. 3. Sign out of the supplier portal. 4. On the Sign In page, click Are you a supplier - sign in here link and sign in with the credentials you used for Strategic Sourcing. You can no longer sign in to Strategic Sourcing directly and must go through Workday Central Login (WCL). 5. Follow steps 2 through 9 in Sign up for Strategic Sourcing to finish your WCL registration.
What if I don't have a mobile device?	If you don’t have a mobile device, you can use a browser-based option, like 1Password, for multifactor authentication. Browser-based options can scan QR codes in WCL.
If I get a new phone, do I need to reset my authenticator app?	Yes. To reset your authenticator app and pair it with a new device: 1. When WCL prompts you to enter a 6-digit verification code from your authenticator, click Reset Authenticator below the prompt. 2. Enter the 6-digit password sent to your email address before synching the authenticator on your new device.

	3. Scan the QR code with your new device to sync your authenticator app.
Will my password expire?	No, your password won't expire with Workday Central Login.
How do I reset my password?	See Password Reset for Suppliers.
How can I change the email address for my Strategic Sourcing account?	1. Hover over your name and click User Profile. 2. Click Change Email. 3. Enter your email address in the Email field. 4. Save the change. 5. Access your old email and follow the instructions in the email you receive. Note: Users can't change their email address if your company uses a SSO (Single Sign-On) integration. If your company doesn't use SSO, changes to a user's email address are automatically reflected for any other company they work with in Workday Strategic Sourcing.
How can I change the email address for my Unified Supplier Portal account?	When you need to change your email address for WCL, contact your customers to update the primary work email in Workday to ensure both the WCL email address and the verification email address are the same. For more information, see Concept: Unified Supplier Portal for Suppliers.

How do I keep my account safe?	• Create a strong password with at least:
	  ◦ 8 characters.
	  ◦ 5 or more unique characters.
	  ◦ 1 uppercase, lowercase, numeric, and special character.
	• Avoid creating passwords that:
	  ◦ Contain spaces.
	  ◦ Use common words, abbreviations, or acronyms.
	  ◦ Are compromised or previously used.
	• Monitor any suspicious account activity by checking your email for security notifications or accessing Manage Your Account > Security Settings > Show logged in sessions.
	• Maintain multiple methods of account or password recovery.
	
	If you think your password is compromised, reset it as soon as possible.

How do I set up different methods of password recovery?	1. On your profile page in Workday Central Login, select Manage Your Account.

	2. In the Personal Info tab, you can: • Add a mobile number for password recovery with the Edit Mobile Numberbutton. • Substitute your current primary email with another email to verify and recover your account with the Add Email address button. Workday recommends activating both methods of recovery, in case you lose access to either your phone or email.
What if I can't access Workday Central Login or any related links on the site?	If you can't access WCL, delete your browser history, contact your customer administrator, and sign in again. If you tried clicking the Forgot Your Password? link on the sign-in page, and it didn't work, clear the cookies and cache of your web browser and try again. Note: Workday collects cookies and other information about your activity on WCL.
What if I have a supplier account and a buyer account?	If you have both account types, you'll be required to sign in through WCL when you select Supplier portal on the Select Company page. You are required to sign in to the Supplier Portal with MFA even if you have SSO set up.
I forgot my password and don’t have access to the authenticator app. What should I do?	You can reset your account. See Account Recovery for Suppliers.
How do I contact Workday Strategic Sourcing if I'm still unable to sign in?	Contact Workday's support team for assistance at scoutsupport@workday.com if you: • Are unable to login after reviewing all documentation. • Lost your authenticator app. • Lost your authenticator app and your password.

FAQ: Contacting Strategic Sourcing

How do I contact Workday Strategic Sourcing if I'm unable to sign in?	If you're still unable to login after reviewing documentation, you may contact Workday's support team for assistance at scoutsupport@workday.com.
How do I contact the sourcing manager?	Access the event and click the Message Center button in the Message Center section. You can: • Ask the sourcing manager a question. Enter a question in the box, attach a file if applicable, and click Send Question.

- Chat with the sourcing manager.

  If the sourcing team sends you a question using Chat, click the chat icon and enter your answer.
- View questions you've asked and the answers that you've received from the sourcing team.

  When the sourcing team replies to your questions, you receive an email notification.
- View questions and answers from other suppliers that the sourcing manager shares and general messages.

Reference: Supplier Profile Update Emails

You can receive an email when updating your profile for these reasons:

- Approved
- Blocked
- Failed
- Overridden
- Rejected

If you don’t receive any of these emails and don’t see the Edit button, contact Strategic Sourcing Support or the buyer for more information.

Profile Update Approved

Your update was successful. You can log back in and manage your profile by clicking Edit.

Profile Update Blocked

Workday blocks the update you made in Strategic Sourcing because of an in-progress process. Try to make the update again later.

Profile Update Failed

Workday didn’t receive the update you made in Strategic Sourcing. This can occur when:

- A change comes from Workday at the same time as you have made a change in Strategic Sourcing.
- The buyer is editing your profile at the same time and attempts to push their edit to Workday.
- The integration service is down.

Try to make the update again later when the Edit button is active.

Profile Update Overridden

A change was already in progress and Workday didn’t receive the latest update you made in Strategic Sourcing. Review your profile, and try to make the updates again.

Profile Update Rejected

A change to your profile was rejected in Workday. To resolve the issue, contact the sourcing manager in Strategic Sourcing through email or the Message Center.

Proposal Events

Complete a Supplier Form

Prerequisites

- A buyer sends you an invitation to complete a form.
- You've signed up for Strategic Sourcing.

Context

You can complete required forms containing questionnaires that buyers send you.

Steps

1. Access the form you want to complete.
2. (Optional) To invite colleagues to edit the form, enter their name and email address in the Invite Team Members section and click Add. Your colleague receives an email invitation to access the form.
3. To answer questions, click into the sections of the form under Fill Out Your Form.

   Forms can have multiple sections of questions for you to complete. Strategic Sourcing automatically saves your question responses. Questions marked with an asterisk are required. At the top of each section, Strategic Sourcing lists the number of:

   - Questions in a section.
   - Required questions in a section.

   If you don't complete required questions, you can’t submit the form.

   Forms can also have conditional sections and questions. When your answers meet a condition, a new section or new questions display for you to respond to.

   You can take your form offline in the Export or Import Your Form section once you’ve accessed the form in Strategic Sourcing. When only the *Export* option is available, click Revise Form to import the form after you’ve updated the exported Excel file.
4. (Optional) To contact the buyer, you can click Message Center or email the primary contact.
5. Click Submit to send your completed form to the buyer. The form Status updates on your homepage.
6. (Optional) To revise the submission, click Revise Form. After revising the form, click Resubmit Form to send your updates to the buyer.

Related Information
Tasks
Sign up for Strategic Sourcing on page 3

Manage Deadlines

Prerequisites

You’ve signed up to Workday Strategic Sourcing.

Context

The sourcing manager determines the event timeline that consists of these possible deadlines:

- Supplier RSVP Deadline
- Supplier Question Deadline
- Bid Submission Deadline

Steps

1. To ensure you submit information to the sourcing manager on time, set your time zone in your User Profile that you can access under your user name on the Home Page.
2. When you receive a Supplier RSVP Deadline, you can inform the sourcing manager that you plan to bid by selecting I Intend to Submit on the invitation before the set time and date. As you decide if you want to participate in a bid event, consider:

Option	Action
You don't receive and invitation.	Either: • You or 1 of your team have already responded to the invitation. • There's no requirement for you to respond.
You're not going to accept the invitation.	Select I Do Not Intend to Submit and you can either: • Select a reason why you don't want to participate, as well as provide additional comments. • Select Submit RSVP.
You decide you intend to participate in a bid event.	You can select I Intend to Bid as long as the invitation hasn't expired.
The deadline passed but you want to bid in the event.	You can submit a ticket to support by clicking Support, and they can help you change your response to the invitation.
You no longer intend to participate in a bid event.	No action is needed.

   If the deadline has passed, you can submit a ticket to support by clicking Support, and they can help you change your response to the invitation.
3. If you receive a Supplier Question Deadline event, you can't submit questions to the sourcing manager from the Message Center after the deadline date and time.

   You can continue to view the questions and answers that you or your team submitted before the deadline.

   If you don't see the deadline, you can submit questions to the sourcing team at any time during the RFx process.
4. To submit a bid on the RFP to the sourcing manager, check the due date and time on the Submission Deadline, and click the Submit Bid button.

   The sourcing manager can set the submission deadline so that you can submit your response after the deadline.

Next Steps

You can start submitting your bid and invite team members to collaborate with you on the bid proposal.

Create Bid Proposals

Prerequisites

You've been invited to submit a bid proposal by the sourcing manager.

Context

You create bid proposals to submit to the sourcing team. Sourcing teams request suppliers to provide pricing and line item quotes.

Steps

1. Navigate to the Build Your Proposal section on your bid.
2. In the Response Sheets section, click Edit and answer questionnaire questions, if applicable.
3. In the Worksheets section, click Edit to start creating your bid proposal.

   You can view details of any worksheets in the panel on the left.

   To view worksheet instructions and notes from the sourcing manager, click the Supplier Instructions button.
4. Enter bids on the highlighted rows of the worksheets. To identify what you need to do to submit your bid, you can select Validate to highlight the cells you must complete. A side panel also displays showing the line items and columns that need information. When you complete all highlighted cells, *Worksheet Valid* displays when you select Validate.

   You can apply filters to view the items you want to bid on by clicking the 3 horizontal lines in the column header, selecting the conditions and values, and clicking Apply Filter. Calculated totals change as you apply filters.

   You can also display or hide columns using Show/Hide Columns and clicking Update View.
5. In the Requested Document section, select the Browse for File button.

   Attach requested documents to submit your bid proposal.
6. In the Additional Documents section, drag and drop files from your PC to the box, or click the Browse for Files button.

   Attach additional documents for the attention of the sourcing manager.

   You can attach as many files as you want and each file can be up to 5GB.

   Wait for the upload to complete before navigating away from the page.
7. (Optional) Click Preview to view your event submission in a read-only view that the buyer will see.
8. To finalize your bid submission, select Submit Bid on the bid event.

Result

The sourcing manager receives an email to notify them that you’ve submitted your bid. You can submit incomplete bids, however, it's up to the sourcing manager to determine whether to accept an incomplete proposal.

In the Responded tab, you can view the status of your submission on the bid event, including the date and time of the submission.

Next Steps

- If you want to change your bid and it's before the bid submission deadline, change your bid by clicking the Revise Bid button on the event. After you make your revisions, click the Resubmit Bid button.

- If you want to revise the bid proposal but it's after the deadline, contact your sourcing manager directly.
- Respond to requests from the sourcing manager.

  Depending on the bid proposal, the sourcing manager can request, by email or chat, further clarification on your bid submission. Use the Revise Bid button on the bid event to edit the proposal and respond to the update request.

Use Excel to Submit Bids

Prerequisites

You've accepted the invitation from the sourcing manager to submit bids.

See page 18 for instructions

Context

You can create your bid proposal using Excel.

Steps

1. Access the bid event on your home page.
2. In the Take Bid Offline section, select Export Bid.

   A copy of your bid proposal downloads to an Excel spreadsheet and organized into multiple tabs. These tabs include questionnaires, worksheets, required documentation, and additional documentation. You can enter bids and information into any cells highlighted in blue.

   If you don't receive questionnaires or worksheets to complete, the sourcing team might ask you to submit specific documentation to complete your bid proposal.
3. Read the Instructions tab on the spreadsheet.
4. Save the file when you've fulfilled all the bid proposal requirements.

   When naming the file, don’t include special characters in the name. Special characters can cause errors when uploading.

   Note: Strategic Sourcing can't unlock cells for editing as the format must match what is on the Strategic Sourcing platform. This is to ensure your information imports correctly. Only suppliers can edit the blue cells to provide details.
5. Click Import Bid from the Take Bid Offline section of your bid event, select your Excel spreadsheet manually using the Browse for Files button, or drag and drop the file into the box.
6. When the file finishes loading, click Import Bid again to complete the import operation.

Result

A Bid Import Successful message displays and you can view your bid using the View My Response button.

You can also view your responses on the Strategic Sourcing platform in their associated sections. Example: If you filled in a questionnaire on Excel, your responses populate in the questionnaire on the bid proposal.

The event now displays in the Responded tab on the Home page.

Next Steps

If you want to change your bid proposal, we recommend that you export the Excel file each time you update to ensure you are working from the most up to date copy of your bid proposal.

Note: If the sourcing team makes any updates to the structure of the bid event, you must export the bid again, because you won't be able to import it back into Strategic Sourcing if the format doesn't match.

Download Terms of Participation

Prerequisites

You've been invited to participate in a bid event.

Context

When responding to a bid event on behalf of your company, your legal department may want a copy of the Terms of Participation for their records.

Steps

1. Accept the invitation to participate in the bid event.

2. Access the Take Bid Offline section and click the Export Bid button.
3. Open the Excel worksheet and click the Terms of Participation tab.
   The terms of participation include signatures, names, email addresses and time stamps.
4. Print or take a copy of the Terms of Participation.

FAQ: Events

When I attempt to access an event from an email link, I get a Page Not Found error message.	The Page Not Found error message occurs when someone forwards you the event link and you have not been invited to the event by the buyer. You can log into your account to find out if you have access to the event.
Why does the Submit button not display when I've completed my bid?	Ensure you remove all pop-up windows from the event page as they can hide the Submit button. Also, you must select an RSVP choice before you can submit your bid.
How do I add internal team members to an event I've been invited to?	You can add internal team members by: • You can invite teammates to collaborate with you on the event by entering their name and email in the Team Members section and clicking Add. If your colleague registered in Strategic Sourcing previously, they can sign in and access the bid immediately. Otherwise, they receive an email invitation with a link to create an account on Strategic Sourcing. If you can't add them, it might be because they're already registered in Strategic Sourcing under a different company name. To fix this issue, contact the sourcing manager and request that they put you and your teammate under the same company name in their directory. For more information, you can select Walk me through it located in the top right of the Team Members section. • Contacting the buyer and requesting that they add your team members to the event.
How do I update the primary contact of my company?	You can only update the primary contact once you've been onboarded with a buyer company. If the original primary contact is no longer available, contact Strategic Sourcing Support at scoutsupport@workday.com.
Why is the Total field empty in the Price section when I upload a bid?	The buyer uses the Total field, and it always displays as empty for suppliers.
How do I change an RSVP response or see if I've responded?	Access Support > Contact Support in Strategic Sourcing to reset your RSVP response.