Supplier Guide – Workday Strategic Sourcing (WSS)

USER ROLE Supplier

Overview:

Helpful Links:

- Sign up for Strategic Sourcing (workday.com)
- FAQ: Supplier Sign In and Account Security (workday.com)

Key Terms

Sourcing Manager: Sourcing Managers involves your NAV CANADA Supply Chain Representative.

Stakeholders: Stakeholders involve internal teams at NAV CANADA.

Project: A project can take various forms, such as an RFx event, Sole Source, NDA, Contract, Contract Amendment, or the negotiation of Non-Standard Terms and Conditions.

Contract: A contract is an agreement, managed in Contracts module of Workday Strategic Sourcing (WSS)

Event: An Event refers to any RFx activity (RFI, RFQ, RFP, etc.).

Supplier Forms: Supplier Forms are used by the Sourcing Manager to gather pertinent company information from the Supplier directly through WSS.

Chapter 1: Account Set-up and Log-in

Prerequisites – Authenticator Apps

› Workday Strategic Sourcing (WSS) is a cloud-based sourcing tool that NAV CANADA uses to streamline procurement process. Your registration through **Workday Central Login** (WCL) enables your company 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.

Important Note: **You can access WSS by email invitation only. As a supplier, you must register your account on a desktop.**

› Before creating a **Workday Central Login** (WCL) account, download an authenticator app from the Apple or Google app stores on your phone. You can also use a web browser authenticator app.

Frequently-used authenticators include:

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

Frequently used web browser authenticator apps include:

- Authenticator - is a free web browser extension authenticator.

Set-up your WSS Account

Steps :

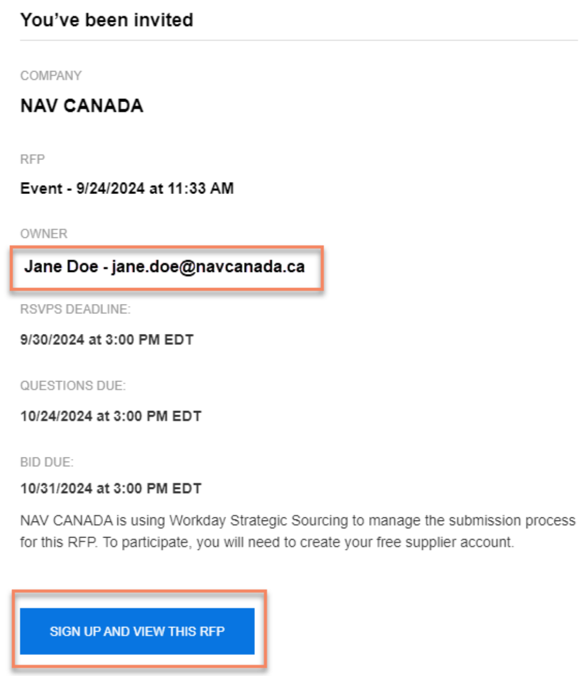
1) You will receive an external email from NAV CANADA Workday Strategic Sourcing with a header stating **You are invited** to a NAV CANADA specific event.

› The email would include the following fields when applicable:

- Event owner.
- RSVP deadline.
- Questions due date.
- Bid due date.

2) In the email, click on “**Sign up and View this RFP**” button at the bottom of the page (see below).

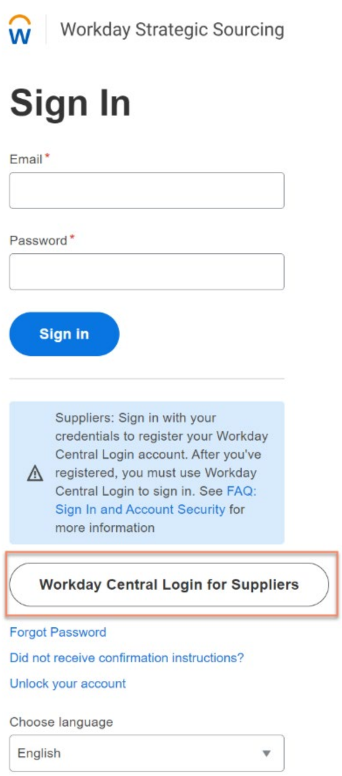
If you're expecting an email but don't receive it, ensure it's not in your Spam folder.

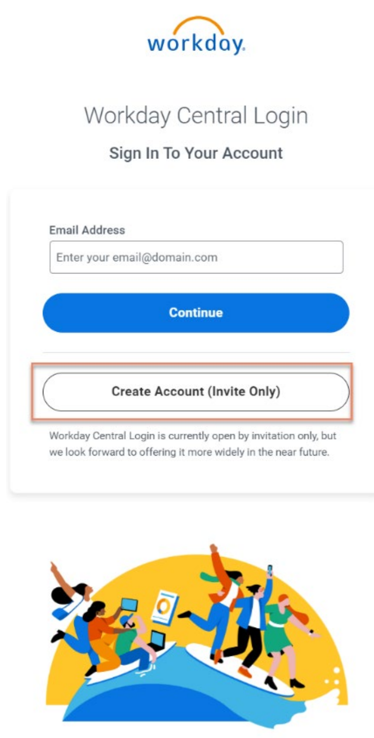


3) **Sign-in** page will display. **->** Click on **Workday Central Login for Suppliers.**

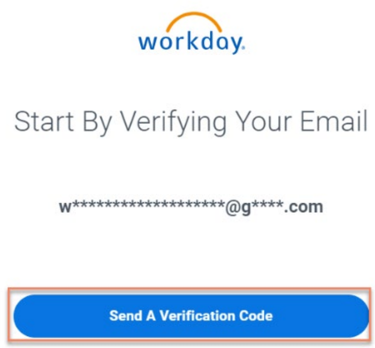
4) **Workday Central Login** (WCL) page will display. -> Click on **Create Account (Invite Only)** -> enter your email address.

This email will be the username you use to log into WCL.

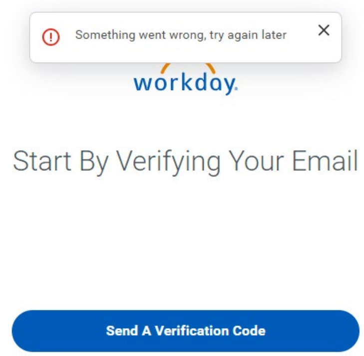




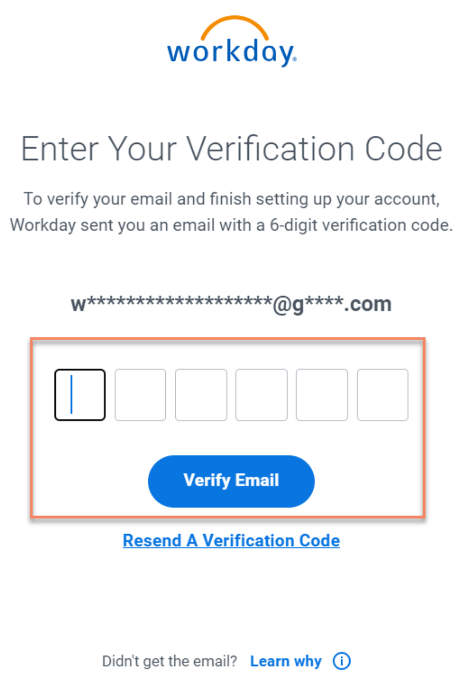
5) Click on **Send A Verification Code.**

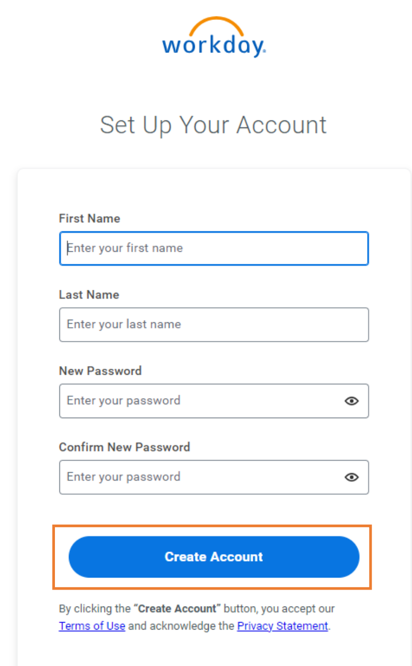


If you experience the following error, try switching your browser eg, Google Chrome.



6) Verify your email by entering the **Verification Code** emailed to you -> Set up your account and click **Create Account**.





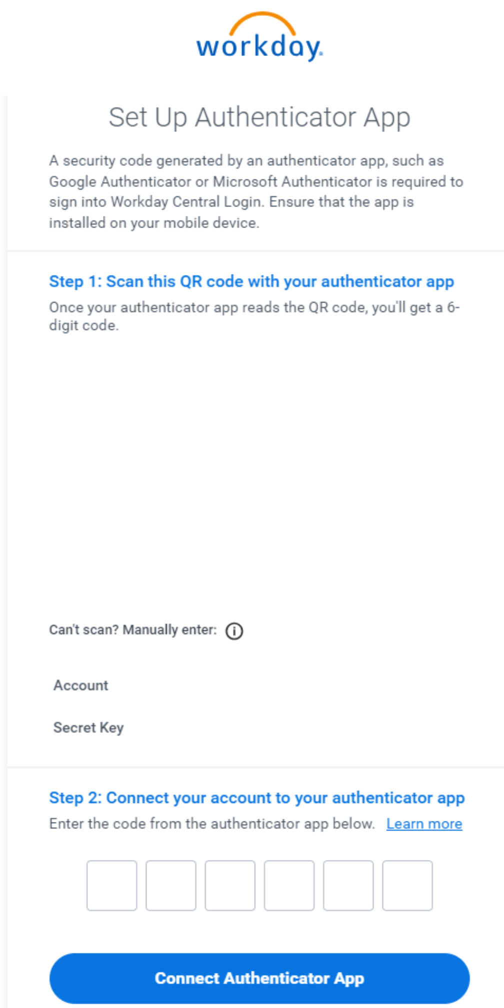
7) Set up **Authenticator App.**

Steps:

1. Scan provided QR code with your authenticator app. Once your authenticator app reads the QR code, you'll get a 6-digit code.
2. Scan the QR code using your authenticator app and enter a 6-digit code from your app.
3. Click **Connect Authenticator App**.

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.

4. (Optional) Add and verify your mobile phone number.
5. Select the **Accept Terms of Service** check box.
6. Scan **Click Save & Finish**. You can now open your Supplier Profile to review the event, supplier form or company information.



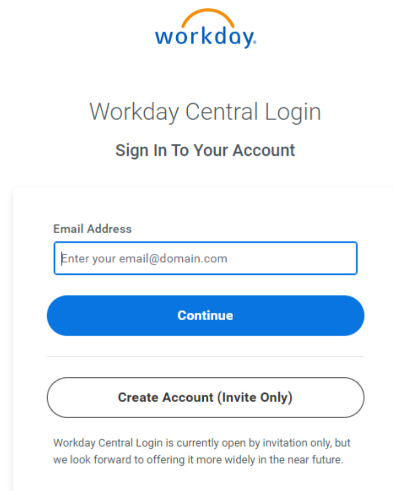
› Contact Workday's support team for assistance at scoutsupport@workday.com if you:

- Are unable to login after reviewing all documentation.
- Lost your authenticator app.
- Lost your authenticator app and your password.

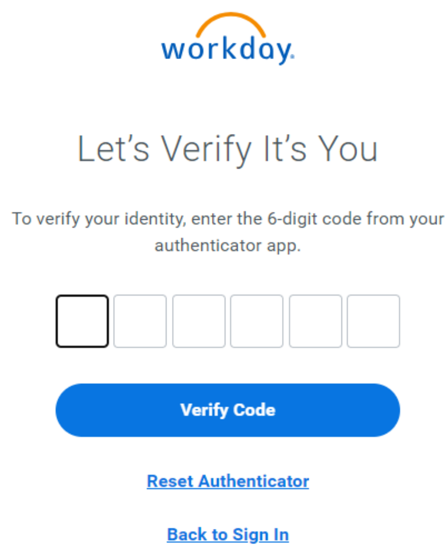
Log-in to your WSS Account

Steps :

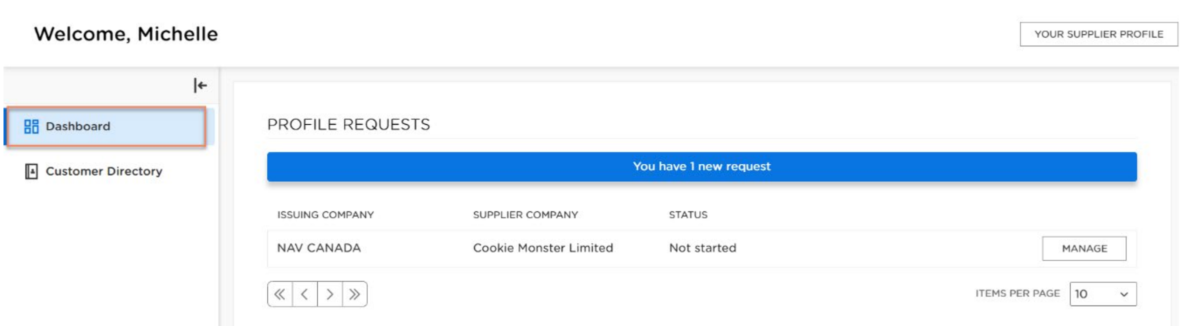
1) Navigate to the WCL page.
2) Enter your email -> Click **Continue.**



3) Enter your password and 6-digit code from your authenticator app.



4) WSS **Dashboard** page will display.

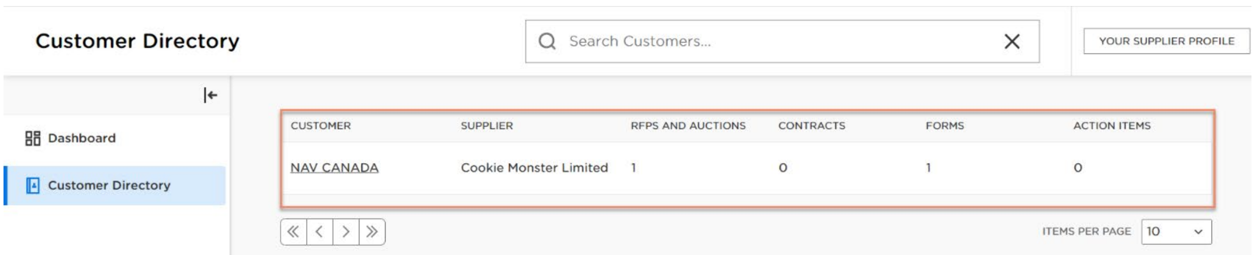


If unable to sign in after reviewing documentation, you may contact Workday's support team for assistance at scoutsupport@workday.com.

Chapter 2: Customer Directory and Supplier Dashboard

Customer Directory

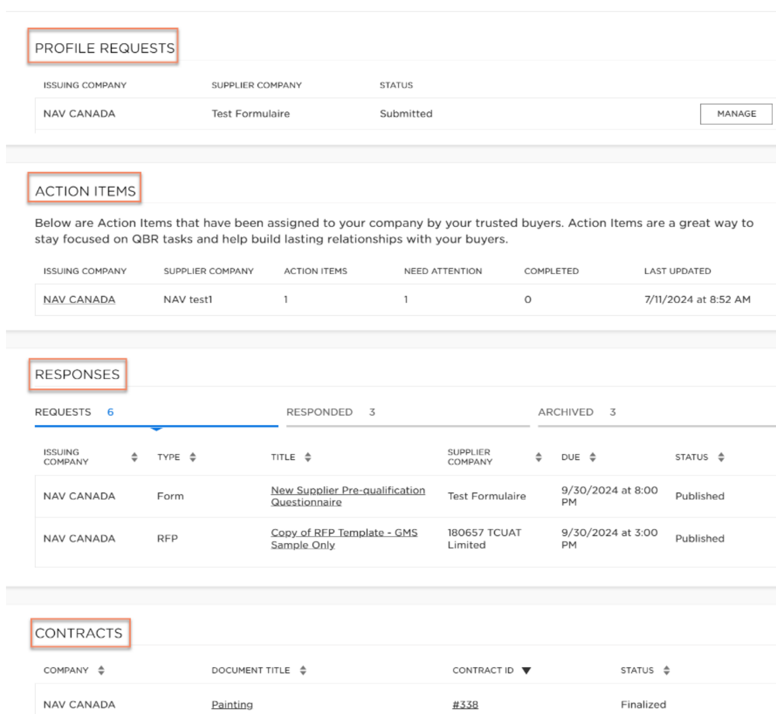
- You can access the **Customer Directory** from the WSS **Supplier Portal**. This directory displays the WSS customers that have given you access to. You can only view data that NAV CANADA has granted you access to.
- In the **Customer Directory**, you can search to find a Customer Profile and your different Supplier Profiles by:
  - Customer
  - Supplier
  - Contracts
  - RFPs and Auctions
  - Forms
  - Action Items
- Each column displays the total number of events that you're invited to for each customer.



- You can access each tab through the **Dashboard**.

Supplier Dashboard

- You can access the **Dashboard** from the WSS Supplier Portal. This directory displays any WSS events and/or activities you've been invited to.
- Each section of the **Dashboard** displays the total number of events that your organization need to action on:
  - **Profile Requests.**
  - **Action Items.**
  - **Reponses** - for RFx Events and Forms: **Requests** (Active), **Responded**, **Archived**.
  - Contracts (you will only see contracts that have negotiated Terms and Conditions with NAV CANADA).



Chapter 3: Supplier Forms

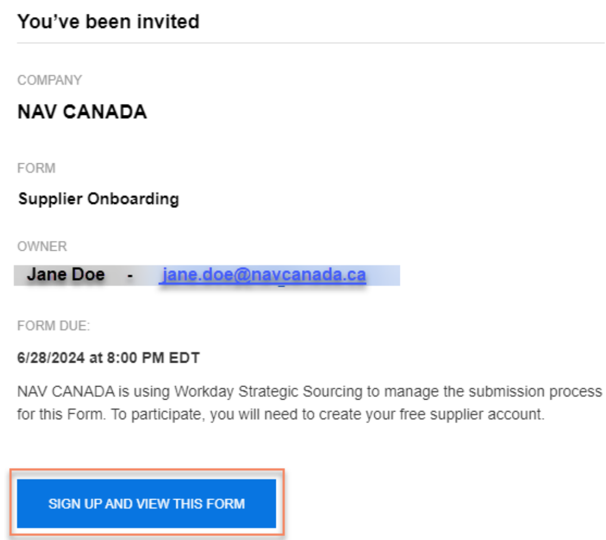
How to Complete Supplier Forms

- You can complete requested Supplier Forms containing questionnaires that Sourcing Managers send you directly through WSS.
- You must be signed up for WSS to access Supplier Forms.

Steps:

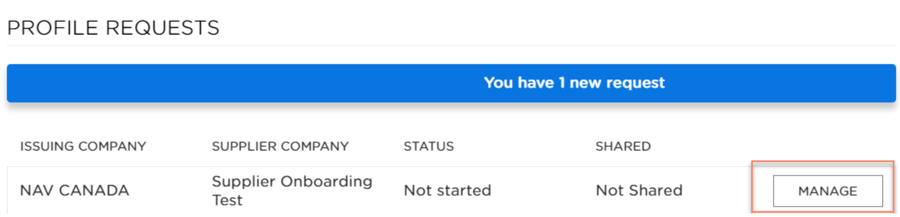
- Access the Supplier Form you want to complete either via email or through WSS Dashboard.
- **Access via email**: the following email received in your inbox -> click on **View this Form** (or **Sign up and View this Form** if it's your first-time logging in).

If it is your first-time logging in, you are likely being sent a Supplier Onboarding Standard Form, this form allows you to update your own company information such as address, bank and tax information, etc.

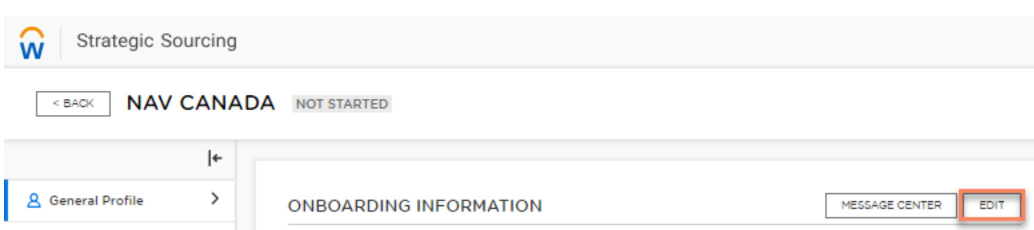


Supplier Onboarding Standard Form

- **Access via WSS Dashboard:** Login to WSS -> Navigate to **Dashboard** -> **Profile Requests** -> Click on **Manage** -> **NAV CANADA Onboarding Form** displays.



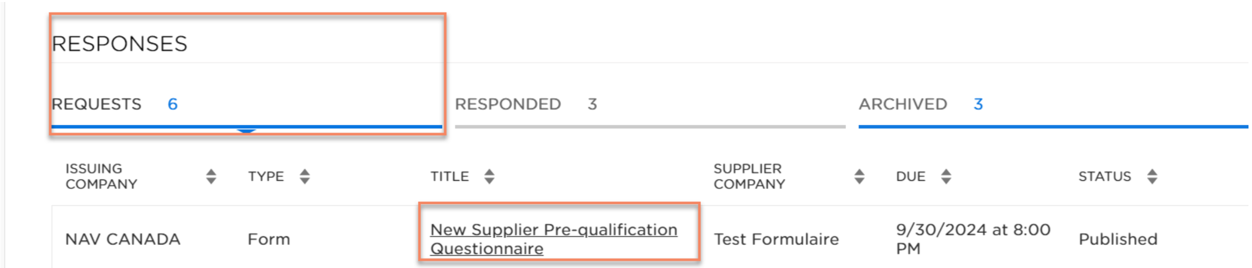
- Click **Edit** to complete your company onboarding information.



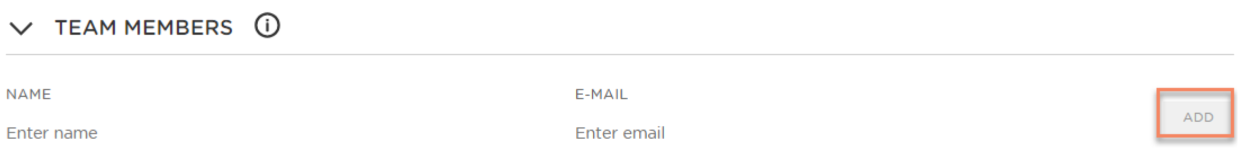
- You must complete all mandatory fields to finalize your Supplier Onboarding Form. Click **Submit** when the form is completed.

All other Supplier Forms

› **Access via WSS Dashboard:** Login to WSS -> Navigate to **Dashboard** -> **Responses** -> **Requests** -> Access the form you want to complete by clicking on the Title field.



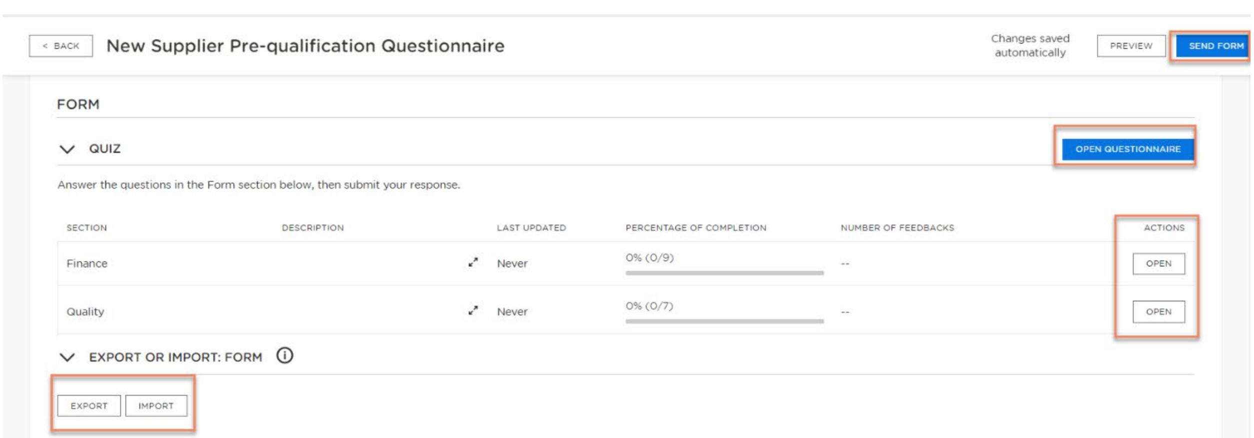
› (Optional) To invite colleagues to edit the form, enter their name and email address in the **Team Members** section and click add, your colleague receives an email invitation to access the form.



› To answer questions, navigate to **Form** section -> click **Open** under each section of the form or **Open Questionnaire** to access all sections at once.

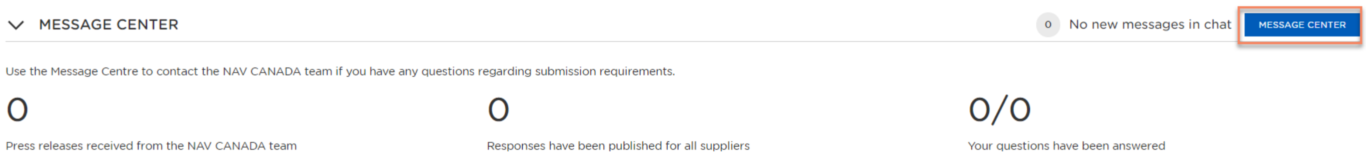
› Forms can have multiple sections of questions for you to complete. WSS automatically saves your responses. Questions marked with an asterisk are required. At the top of each section, WSS lists the number of:

- 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.
- Once complete, click **Send Form**.

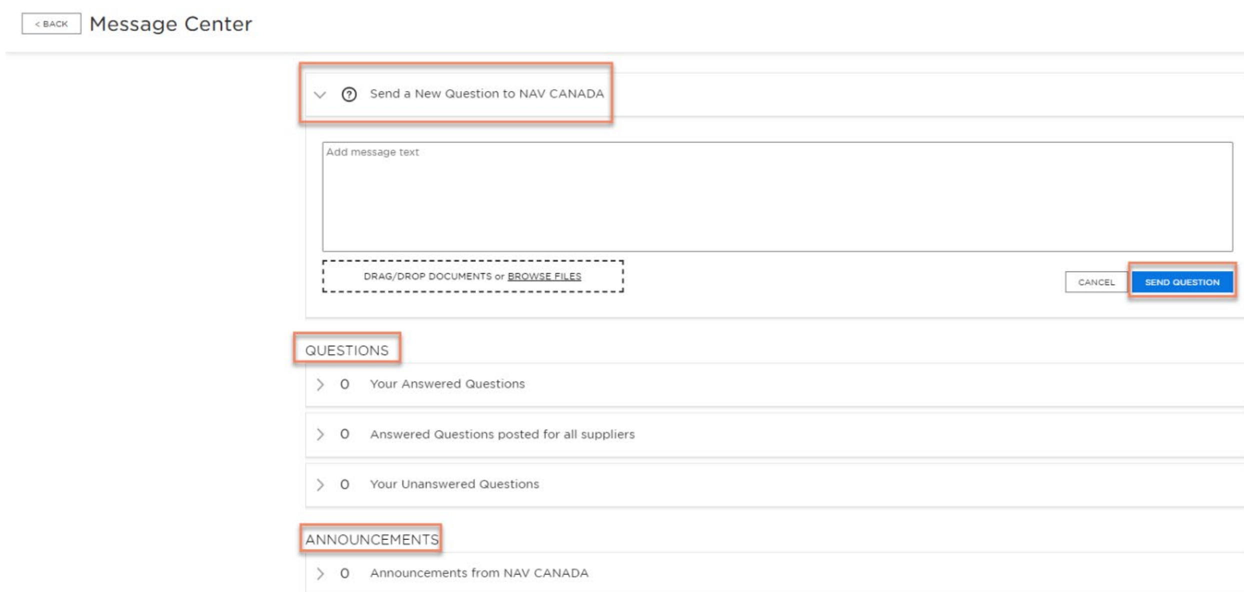


You can export your Form and use Excel to fill out the questions. Import your updated Excel file to then submit your response. Click **Export** -> Fill out an Excel file -> Upload completed Excel from by clicking **Import**.

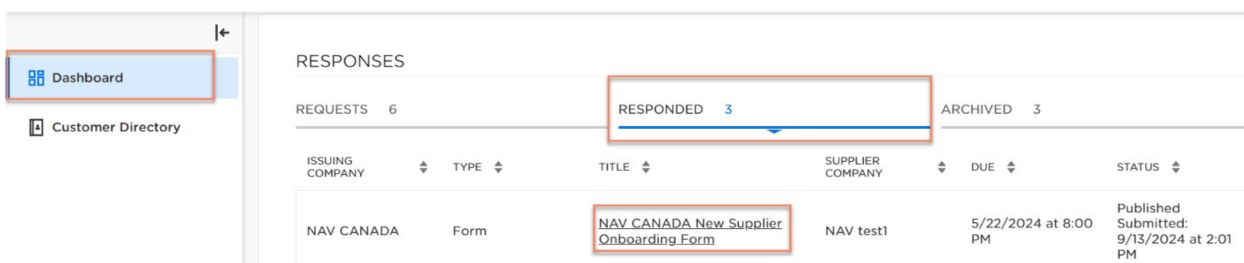
› (Optional) To contact the Sourcing Manager, click **Message Center.**



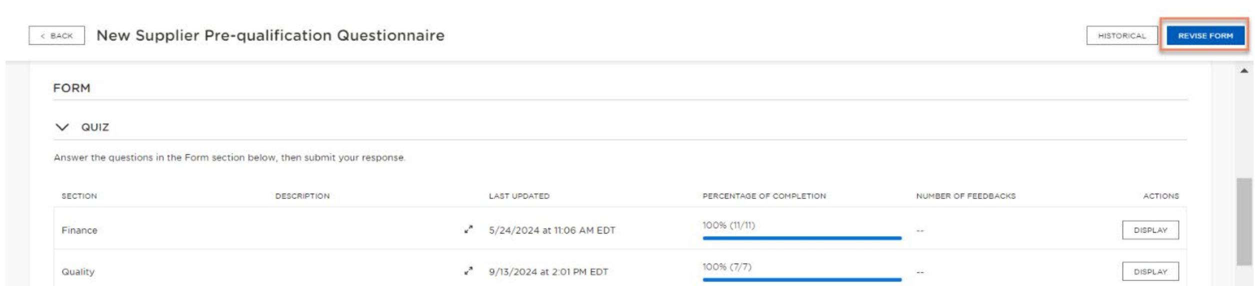
› **Message Center** contains all communication between parties: Questions, Answers, Announcements, Unanswered questions



› To review status of your submission, navigate to **Dashboard** -> **Responses** -> **Responded** -> click on the **Form Title**.



› (Optional) To revise the submission, click on the **Form Title** -> Click **Revise Form** at the top right of the page.



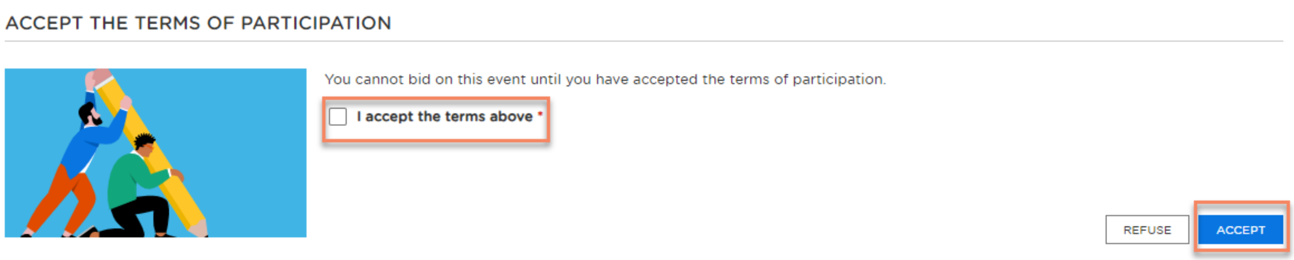
› After revising the form, click **Submit Form Again** at the top right of the page to send updates to the Sourcing Manager.

Chapter 4: Sourcing Events

Important Terms of Participation

IMPORTANT NOTE: **You must agree to the Terms of Participation of specific RFx event in order to access any of the RFx documents and information.**

› If you do not accept the **Terms of Participation**, you will not be able to view any of the documents and you will not receive any amendments such as answers to questions, supplier announcements, deadline extensions, etc.



Find and View Sourcing Events

› You can complete requested RFx Events that a Sourcing Manager has sent to you directly through WSS.

› You must be signed up for WSS to access RFx Events.

Steps :

› Access the RFx Event you want to view / complete either via email or through WSS Dashboard by navigating to **Responses** then to **Requests** and locate the RFx Event.

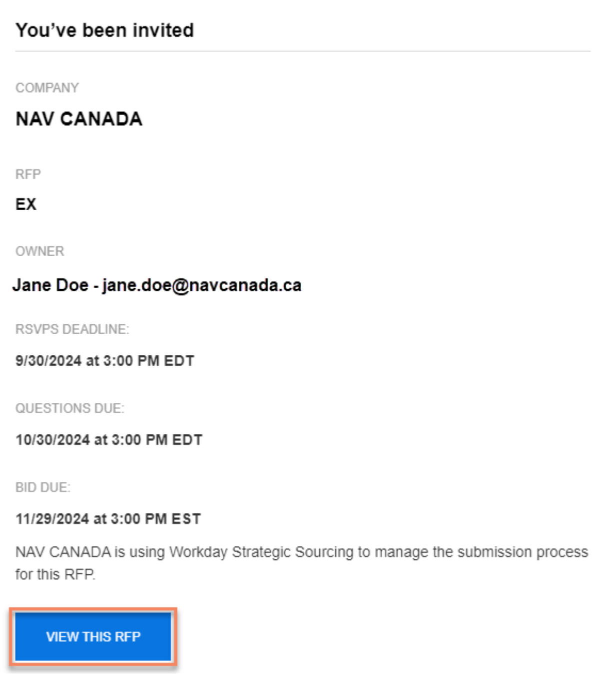
1) You will receive an external email from NAV CANADA WSS with a header stating **You are invited** to a NAV CANADA specific event.

› The email would include the following important fields, when applicable:

- **RFP Title.**
- **Event owner.**
- **RSVPs deadline.**
- **Questions due.**
- **Bid due.**

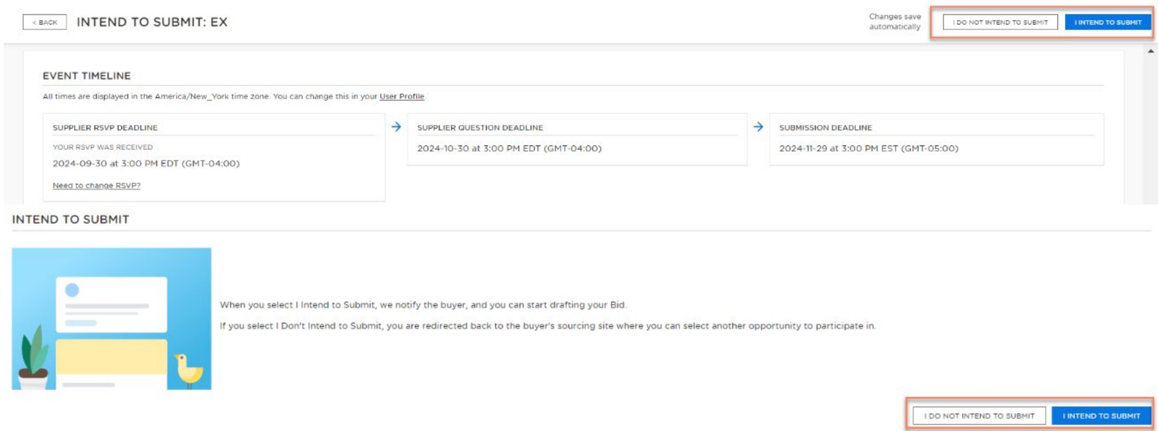
2) In the email, click on **View this RFP** button.

If you're expecting an email but don't receive it, ensure it's not in your Spam folder.



3) Agree to the **Terms of Participation** to view this Event.

4) Review Event timeline -> click the button at the top or bottom right; either **I do not intend to submit** or **I intend to submit.**

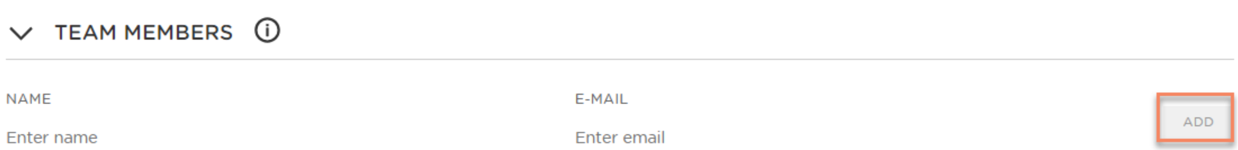


Option	Action
You're not going to accept the invitation.	**I Do Not Intend to Submit** and select a reason why you don't want to participate, as well as provide additional comments.
You decide you intend to participate in a bid event.	You can select **I Intend to Bid** as long as the invitation hasn't expired.
You no longer intend to participate in a bid event.	No action is needed.

Be mindful of the **Event Timeline** to ensure your RSVP, Questions and Submission deadlines are met.

Build your Proposal

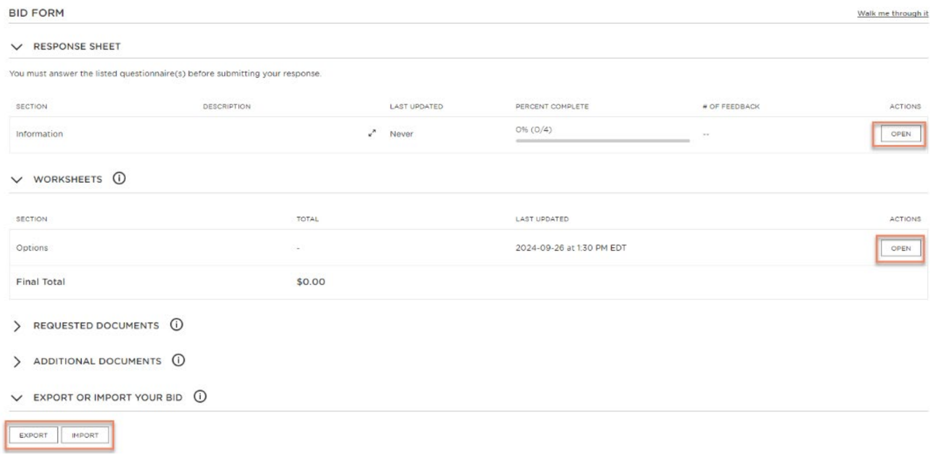
- You can add your Team Members to collaborate on an event you've been invited to.
- Navigate to **Team Members** section -> enter their **Name** and **Email** -> Click **Add**.



Steps :

1. Navigate to the **Bid Form** section of 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, if applicable.
4. You can also attach any documents relevant to your **Sourcing Event**.

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. If the documents are marked as required, you cannot submit your bid unless a document is attached.
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 Sourcing Manager will see.
8. To finalize your bid submission, select **Submit Bid** on the bid event.

- Important Note: **You have an option to work on the bid offline ->** Navigate to the **Bid Form** section -> click **Export** -> once Proposal completed select **Import** to upload the file.
- Once your bid is submitted, the Sourcing Manager receives an email to notify them that you've submitted your bid.
- To view the status of your submission, including date and time of submission, navigate back to your **Dashboard**, go to **Responses** then **Responses.**

Dashboard

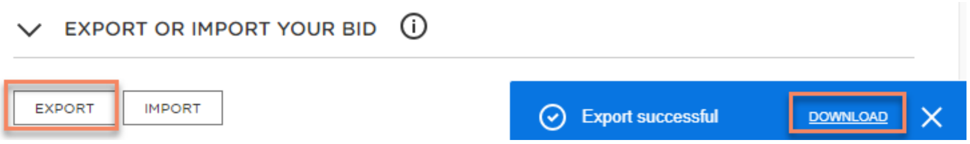
If you want to revise your bid and it's before the bid submission deadline, change your bid by clicking the Revise Bid button on the event. After you make your revisions, click the Resubmit Bid button.

Using Excel to Submit your Bid

- You can create your bid proposal using Excel.

Steps :

1. Access the bid event on your **Dashboard** page.
2. In the **Bid Form** section, Navigate to **Export of Import your Bid**, select **Export**, then Click **Download** on the bottom right pop-up.



   - 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 Manager might ask you to submit specific documentation to complete your bid proposal.

3. 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.

- Important Note: WSS can't unlock cells for editing as the format must match what is on the WSS platform. This is to ensure your information imports correctly. Only suppliers can edit the blue cells to provide details.

4. In the **Worksheets** section, click **Open** 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.
5. Click **Import** from the **Export of Import your Bid** section of your bid event, select your Excel spreadsheet manually using the **Choose File** button, or drag and drop the file into the box.
6. When the file finishes loading, click **Import Bid** to complete the import operation.

- Conclusion: A **Bid Import Successful** message displays and you can view your bid using the **View My Response** button

7. Make sure you click **Submit Bid** once your response is complete.

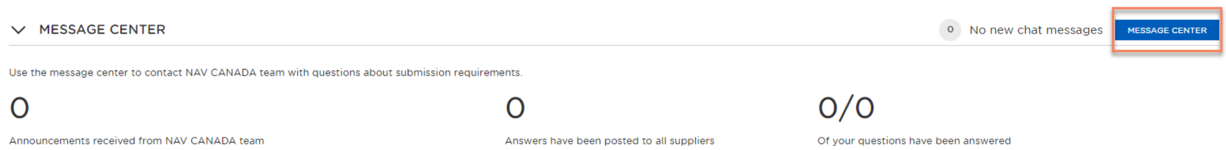
- Important Note: If you want to change your bid proposal, we recommend that you export the Excel file each time you update to ensure you are working from the most up to date copy of your bid proposal. If the Sourcing Manager makes any updates to the structure of the bid event, you must export the bid again, because you won't be able to import it back into WSS if the format doesn't match.

Using the Message Center in a Sourcing Event

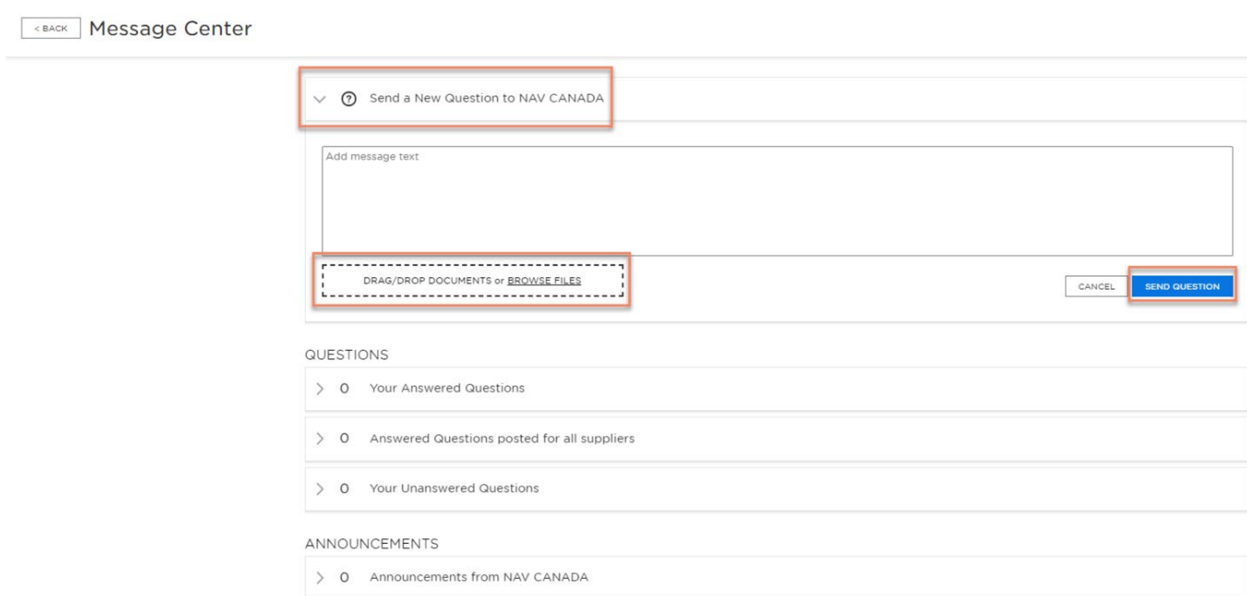
› The **Message Center** is the line of communication between Sourcing Managers and Suppliers on any given sourcing event. The Sourcing Manager can send messages, announcement and answer questions to Suppliers, and Suppliers can send questions to the Sourcing Manager. Each sourcing event has its own **Message Center**. All RFx Sourcing Event Amendments/Addendums will occur through the **Message Center**.

Steps :

1. Navigate to the Event you are currently working on.
2. Scroll down to the **Message Center** section -> click **Message Center**.



3. Expand section **Send a New Question to NAV CANADA** -> add your question, and attach files, if needed -> Click **Send Question.**



4. You'll receive **Message Center** notifications through both email and WSS. These notifications ensure that you are aware of **Message Center** activity, such as the Sourcing Manager sending announcements or answering questions.

Chapter 5: Contract Negotiations

Complete Contract Negotiations

- You can easily upload changes and collaborate with a Sourcing Manager during the contract negotiation process.
- Once a Sourcing Manager submits a contract for your review,you'll receive email notification -> click on **View Contract**

  OR
- You can access the Contract directly from your **Dashboard.**
  - Navigate to the **Contracts** section, click the document with the **Editing – Needs Attention** status.

CONTRACTS

COMPANY	DOCUMENT TITLE	CONTRACT ID	STATUS
NAV CANADA	Test	#7152	Editing - Needs Attention

Steps:

1) Select the document that you want to edit by clicking on the check mark and click Download.

CONTRACT DOCUMENTS

Review the contracts shared between you and the buyer. For contracts in Editing, finish updating the contract. Then, send the contract back to the buyer. For contracts that are Awaiting Response, the buyer is reviewing your contract updates.

EDITING

	TYPE	DOCUMENT TITLE	VERSION	FILE NAME	LAST EDIT	
		Test	v1.1	Test		UPLOAD NEW

1 SELECTED (26.2 KB) DOWNLOAD SEND CHANGES ACCEPT TERMS

2) When you finish Redlining the contract, select the document again and click **Upload New**
   - You can only upload .docx and .pdf file types.
3) Click **Send Changes**
4) When the Sourcing Manager sends the document back to you, review the latest updates by downloading the document again. You might need to download and update the document multiple times before both you and the Sourcing Manager reach an agreement.
5) Click **Accept Terms** to accept the terms of the contract. When you click **Accept Terms** you indicate to the Sourcing Manager that you have no further edits to the contract.

- The Contract will remain visible in your **Dashboard** with a **Finalized** status. You can open the document and review the Version History at any time.

NO ACTION NEEDED

	TYPE	DOCUMENT TITLE	VERSION	FILE NAME	LAST EDIT	STATUS
		Test	v2.0	Test		Finalized
			v1.1	Test		
			v1.0	Test		

DOWNLOAD