Vendor: Reviewing and Accepting a SOW

Overview

This guide provides vendors an overview of the Workday VNDLY program as implemented by the Oklahoma Office of Management and Enterprise Services (OMES).

This guide covers:

- Review a Statement of Work in Workday VNDLY.
- Accept a SOW in Workday VNDLY.

Process

Review a statement of work.

Step 1: On the home page, select **Awaiting Vendor Review** on the SOW scorecard.

> **Step 1a:** You can also access this by going to **SOW > Statement of Work** and selecting an SOW.

Step 2: Review the following fields in the **Overview** tab.

> **Step 2a:** General section**:** title, location, description.

> **Step 2b:** Contacts section: vendor management.

> **Step 2c:** Timeline section: planned start date, planned end date.

> **Step 2d:** Budgets & payments section: currency, planned total budget, Pre-VNDLY invoice amount (if applicable)

> **Step 2e**: Payment type.

> **Step 2f:** Check to see if time is being captured for contractors from the **Is time being captured for contractors?** settings. If yes, indicate whether VNDLY will capture their time and if checklist items apply to all contractors on this SOW.

> **Step 2g:** For contractors who will not submit timesheets in VNDLY, review whether VNDLY or the vendor will track them.

> **Step 2h:** Documents (if applicable).

Step 3: Select the **Settings** tab.

Step 4: Review the **Key Activity Dates and Personnel**.

Step 5: (If applicable) On the **Fixed Price Payments** tab, select and review each scheduled payment. This tab will display on the SOW if the General section of the Overview tab lists Fixed Price. **Step 6:** (If applicable) Select the **Milestones** tab. This tab will display the SOW in the General section if the Overview tab lists Milestone.

> **Step 5a:** Select each milestone and review the following fields:

Step 5a1: Deliverables: defines the exacted output within the scope of a project.

Step 5a2: Acceptance criteria: defines pre-established standards or requirements a project or product must have.

Step 5a3: Timeline**:** indicates the overall planned start and end dates and the milestone due date.

Step 5a4: Budget: outlines the planned labor and expenses that are budgeted for this milestone.

Step 5a5: Location: indicates the location where services will be completed.

Step 6: (If applicable) Select the **Units** tab. This tab will display on the SOW if the General section of the Overview tab lists Unit Price.

Step 6a: Select each unit and review the following fields:

Step 6a1: Payment requested date.

Step 6a2: Payment title.

Step 6a3: Units.

Step 6a4: Quantity.

Step 6a5: Labor hours.

Step 6a6: Total payment amount.

Step 6a7: Attached documents (if applicable).

Step 7: (If applicable) Select the **Teams** tab. This shows a list of the contractors associated with the SOW. This tab will display on the SOW of the general section of the Overview tab lists Time and Materials.

Step 7a: Review the following fields:

Step 7a1: Ensure that all contractors are listed.

Step 7a2: If applicable, select **Complete Checklist** to complete any checklist items.

Send SOW back to client (two possible scenarios)

Scenario 1: You do not have permission to make edits within the SOW but no changes are needed.

Step 1a: Complete your review of the SOW.

Step 2a: Select the **Acknowledge and Accept** button. This will send the SOW back to the client for approval.

Scenario 2: You do not have permission to make edits within the SOW but have changes to propose.

Step 2a: Select **Propose Changes** button.

Step 2b: Enter your proposed changes in the free-form field.

Step 2c: Select **Send to Client**.