ARIBA SOURCING MODULE
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Preparation

Prepare before creating your Sourcing Project and Event in Ariba by:

- Having specifications and requirements ready
- Discuss solicitation with your manager if it is complicated
- Generating a solicitation number from the Solicitation Numbering System in SharePoint

Create Sourcing Project

On the Sourcing screen, click Create and select Sourcing Project

Name: Enter name of your project

Description: Enter description to include the department you are creating this bid for

Copy from Project: Leave as is

Project: Leave as is

Project State: Leave as is

Test Project: Always select “No”

Solicitation Type: Click on dropdown to select appropriate solicitation type

Base Language: Leave as is

Departments: Select department you are creating this bid for.
You may select multiple departments if needed.

Lead Agency/Department: Enter lead agency/ dept if you selected more than one in the previous field. This field will not be visible if only one department was selected.

Lead Agency/Dep Point of Contact: Enter the person’s name

Project Reason: Select reason for creating this bid.
Never select “New Component/Reengineer”

Anticipated Maximum Financial Obligation: Enter the total amount for full contract or PO term (include any extensions).

Predecessor Project: Leave as is
**Owner:** Leave as is

**Currency:** Leave as is

**Commodity:** Click on dropdown and click on **Search** to look for the commodity.

*Tip:* Make your search is broad and then drill down to more specific commodities if you need to. If your search is too specific you may not find any matches.

Select the commodity and click on **Done**

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**Maximum Contract Term in Months:** Enter total number of months for full contract term. For one-time PO enter the estimated delivery time.

**Anticipated Contract Effective Date:** Enter the expected date you will be issuing a PO or Contract.

Scroll down to Click on **Create**

If a Desktop File Sync window pops up, Click on **Enable DFS** and follow the steps.
Complete Initial Project Tasks

Populate Team Members
Click on Team tab, **Actions > Edit**

- **ADOP Approval Group:** Will default to ADOP, Cheryl Liu (Liu, Shuang)
- **Procurement Manager:** Search for your manager's name. Click on dropdown to search for a user's name.
- **Project Owner:** Your name will populate. Leave as is

Click on **OK**

Initiate Sourcing Event

Go to Tasks tab

If not open, click on the triangle to open each phase and its corresponding tasks

Click on the **“RFQ”** or **“ITB”** link and select **Open** to create your sourcing event
Create Sourcing Event

Title: Enter the solicitation number created in the SharePoint Solicitation Numbering System, followed by a short description.

Description: Enter same description as you did in the Sourcing Project description field.

Test Event: Leave as “No”

Base Language: Leave as is

Currency: Leave as is

Commodity: Leave as is

Event Type: Always select RFP from dropdown

Announce creation of document: Leave unchecked

Validate the correct template is showing up

Click on Create

Timing Rules

Schedule For the Future: Select date to publish event. Make any changes to the time if necessary.

Due Date: Select Fixed time and enter date your event will Be Closing. Change the time to 3:00PM. Leave Reminder checked

Estimated Award Date: Enter date PO or contract is Estimated to be issued.

Click on Next
Invite Participants

Click on the **Invite Participants** button

Click on **Options** and uncheck **Hierarchical Search Includes Parents** then Continue to search.

In the search filter type in the supplier’s name. You may type part of the name only. Click **Search**. Type a commodity to search all suppliers registered under this (commodity).

Click on check box next to Organization Name to select all suppliers listed. Click on **OK**

When you complete inviting all the suppliers Click on **Next**
Invitation – Type your invitation in this section

Click on the section title then Action > Edit

Tip: If you copy your text from another document, change Font to Verdana, size 9 then paste in Ariba or copy your text in a notepad file then paste over to Ariba section.

Name: Do not change. Leave as is

Description: Copy or type in your invitation content

Visible to Participant: Leave as Is

Term Access Control: Leave as is

Visibility Conditions: Leave as is

Click on OK

eRFQ Instructions to Bidders: Leave as is. This section is for Supplier reference only.

Bid Document and Submission of bid: Leave as is. This section is for Supplier reference only.

Required Documents from Successful Bidder:

If you have required documents, please indicate in this section. If you do not have any required documents you will also need to indicate it.

Click on title and select Edit

Modify text to insert number of days and list documents to be submitted or
Replace Number of Days with “N/A” if not applicable to your sourcing event and type NONE on the next paragraph
eRFQ Point of Contact and Anticipated Schedule

**Point of Contact:** Click on title and select **Edit.**
Update with your information. Click **OK**

**eRFQ Anticipated Schedule:** Click on the table icon and
Click on Maximize icon to see all entries

Enter Dates

**DO NOT DELETE ANY OF THE ITEMS.**
If it is not applicable, type in “N/A”

Click on **Done**

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**Payment Terms**
Leave as is. This for supplier to complete.

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**Bid Items and Specifications:**
Note: For RFQ, if you have a large list of items to enter you can upload a Bid Response Form. Skip to **Item Cost Detail Section**

Click on title and select **Add > Line Items**

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**Location:** Leave as is “Add Inside”

**Name:** Enter first item of your bid

**Description:** Enter specifications. If specs are too long to type it is recommended that you attach a document instead (see **Add Attachment** section below)

**Commodity:** Leave as is

**Visible to Participant:** Yes

**Team Access Code:** Leave as is

**Response required for this item or lot:** Select **Yes** and also
Mark checkbox to apply to all items and lots.

**Unit or Extended Bidding:** Leave as is unless you are setting up
Price: leave blank

Quantity: Enter quantity you require for first item

Note: Unit of measure defaults to each. Click on each if you want to change the unit of measure

Add Attachment
Click on Add button and select Attachment

Enter a short description of the document that is attached
Attachment: Click on Attach a file > Upload a file from desktop
Browse and select your file to be attached
Click OK

Click on Done to complete your first line item

Notes:
Use Add > Term to add other fields to gather information you need from suppliers (e.g. Manufacture Part Number, Delivery period, etc.)
Use Set Decimal Places button to increase the decimal places if you require more than two decimal places on your bid pricing.
Validation of Specifications:
If you do not require validation skip to Delete Section below
Click on title and Action > Edit
Attach the excel file if you require validation of specifications
Click on Attach a file in Reference Documents field.
Leave all other fields as is
Click on Done

Delete Section

If you do not require a section, check box next to the item and
Click on Delete button.
Make sure only Section 5 is selected

You can verify you are deleting the appropriate section by
looking at the number of items deleting.
Click OK.

Note: The following sections may be deleted if not applicable to your bid. All other sections are to remain in place.

- Validation of Specifications (ITB and RFQ)
- Item Cost Detail (RFQ)
- Insurance (ITB and RFQ)
**Item Cost Details (RFQ Only)**

Use this section to provide a breakdown of the line items in Section BID ITEMS AND SPECIFICATIONS. The line item in BID ITEMS AND SPECIFICATIONS may be the subtotal or total of line items outlined in the ITEM COST DETAILS spreadsheet.

Use the sample documents to complete the ITEM COST DETAILS forms and attach in the reference field in Section 6.1.

Delete ITEM COST DETAILS Sections if not applicable to this bid. See Delete Section.

**Bidder’s Information**

Leave as is. Supplier will be entering their information.

**Appendices**

Attach required appendices by clicking on the title and select Add Content from Library. Open the Appendices Folder and select appropriate document. Click on select. Note: you need to select one document at a time.

Check the box next to Name to select both items. Click on Copy. Documents will pull over to your content. Repeat steps to attach additional appendices.

**Exhibits**

Add appropriate Terms and Conditions. Click on title, Add > Content From Library. Open the Appendices Folder and select appropriate document. Click on select. Check the box next to the document. Click on Copy.
**Insurance**
Download appropriate Insurance exhibit by clicking on the ESA link
Save insurance exhibit and attach in the **Insurance Requirements** section in the Reference field.
Delete Insurance section if it does not apply. See **Delete Section** on page 9.

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**View Sourcing Event as Participant**

To see how your solicitation flows view as a Participant.

On the Supplier tab, click on **Actions > View As Participants >** select any supplier

**Note:** you can use this view only on draft mode.
Once the event is published you will not be able to access this view.

Click on **End Preview** to go back to your Sourcing Event.

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**Summary Overview**

On the next screen, review your rules, suppliers (Participants) and content.
Add your manager as a Editor

On the **Overview** section click on **Actions > Edit Overview >**
Click on dropdown next to Editors field and select your manager’s name
Click on **OK**

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**DO NOT SCHEDULE. YOUR MANAGER NEEDS TO REVIEW FIRST**
DO NOT SCHEDULE. YOUR MANAGER NEEDS TO REVIEW FIRST

Click on [Exit] > [return to project]
Do not use [Create saved version]

Send Review Request to Manager and Schedule Event

Click on the clock to the left of the title

Complete fields 2-4
1. Leave as is
2. Specify Due Date: Enter due date for your manager to complete Review
4. Click on submit

When you receive the email that your item has been reviewed, go to the task and [Mark Complete] then [OK].
The status will change to [Reviewed].
Click back on the Event link to schedule your event.  
*Note: The event will publish at the time selected on the Timing Rules section. If the time has already passed then the event will publish in the next 15 minutes.*

**Complete Project Tasks (Continue)**

Each project contains Phases and tasks within each phase. These tasks need to be completed as you move along the solicitation process.

Open your Sourcing Project and go to the Tasks tab.

To complete each task, click on the title and select **Mark Complete**. The task will show a green check mark next to it. Move on to the next task.
Submit eBid Abstract for Approval

Complete PO Mgr and ADOP Approval of Bid Abstract
Click on the eBid Abstract Document. **Actions > Open**
Complete the bid abstract document > SAVE > CLOSE
Click on the icon to the left of the task

When you get the Document Update window, click on **Update Now**

Confirm changes made to the Excel document, click **Save > Exit**

Fixed Date: Enter Today’s date

Click on **Submit**

Upon receiving approval email proceed to the next task.
Amending

Project Closeout: Create Scenario in Sourcing Event

When you have determined the lowest responsive and responsible bidder create a scenario at the Event.

In the Sourcing Event, go to Scenario tab > Create > Manual Scenario

Name: Enter Bid Evaluation
Totals dropdown: Select lowest responsive and responsible bidder
Click on Submit for award...

MAKE SURE BOTH BOXES ARE UNCHECKED
Click on Done
Your event is now in Complete status and Awarded

Tip – To go back to the corresponding Sourcing Project from the Event, click on Actions > View Project

Project Closeout: Complete Project Closeout in the Sourcing Project

Create Contract for Execution (In Contracts) – Not in Ariba yet. Mark Complete Document any Lessons Learned – Click on Actions > Edit Task to document lessons learned in the Description text box.
Click OK and Mark Complete

Close Project: Mark Complete if you have created a PO or Contract in SAP

Document your Cost Savings, SAP PO or Contract #, and supplier awarded.

Click on the Overview tab
Click on Actions > Edit Overview

Scroll down in Ariba Screen to update following fields:

Actual Savings: Enter total Savings amount
**Project Results:** Enter supplier name

**Award Justification:** Enter PO or Contract # and Date created

*Scroll up on your Ariba Screen*

Project State: Select **Completed**
Click **OK**