

Submitting a Sourcing Request

This document describes the procedure for adding the necessary documents to a Sourcing Request and submitting the Sourcing Request to OSP.

1. Log into Ariba and access your already created Sourcing Request.
2. In the Sourcing Request, click on the “Tasks” tab. This displays the tasks that must be completed to submit the Sourcing Request to OSP.

The screenshot shows the 'Overview' tab of a Sourcing Request. On the left, there is a 'Related Knowledge' sidebar with links for 'Expand Projects', 'All Knowledge Areas', and 'Search Knowledge'. The main content area displays the following details:

- ID: SR120335798
- Version: Original
- Project Status: Gray
- Start Date: 11/20/2020
- Due Date: 11/20/2020
- Owner: Austin Bachman
- Estimated Value: \$500,000 USD
- Process Status: (Info icon)
- Commodity: BUSINESS AND CORPORATE MA... (View more)

On the right side, there are sections for 'Quick' and 'Annot' with various icons.

3. Click on the “Add Team Members to Project” task and choose “View Task Details”.

The screenshot shows the 'Tasks' tab of the Sourcing Request. At the top right, a yellow box displays: ID SR120335798, Tasks: Incomplete Tasks: 2, and Next Milestone: Submit Sourcing Request to C. Below the tabs, there are filters for 'Show: (Any Status)', 'Required/Optional', and '(Any Owner)'. The main table lists tasks with a context menu open over the 'Add Team Members to Project' task.

Name	Document	Owner	Status	Due Date
Notification for New Sourcing Requests	RFP for Consulting Services	Project Owner	Scheduled	11/20/2020
Add Team Members to Project *		Austin Bachman	Not Started	
RFP Documents	RFP Documents	Project Owner	Not Started	11/20/2020
RFP for Consulting Services *	RFP for Consulting Services	Project Owner	Not Started	

The context menu for 'Add Team Members to Project' includes: Action, View Task Details, Edit Task, Mark Started, Mark Complete, and Associate Document. A note at the bottom right states: * Indicates require.

- Each task contains a description of the action to be taken in that task. Read the description and then click the “Mark Started” button.

The screenshot shows a user interface for a task titled "Add Team Members to Project" (ID: TSK120509968). At the top right, there are icons for print, chat, help, and a user profile (AB). Below the title is an "Exit" button. A breadcrumb trail reads "RFP for Consulting Services / Add Team Members to Project". The task description states: "Click on the 'Team' tab. On the right side of the screen, click the Actions button and select Edit." Below this, instructions explain how to add team members based on their role (Agency Approver, Agency Budget, Agency Legal, Evaluation Committee, Observers). At the bottom, there are two buttons: "Mark Started" and "Mark Complete".

- Returning to the Tasks tab, you will see the icon has changed for the Add Team Members to Project task and the status now shows “In Progress”.

The screenshot shows the "RFP for Consulting Services" page with the "Tasks" tab selected. The page header includes a search icon, print, chat, help, and user profile (AB). A summary box shows "ID SR120335798", "Tasks: Incomplete Tasks: 3", and "Next Milestone: Submit Sourcing Request to OSP". The "Tasks" tab is active, with other tabs for Overview, Documents, Team, Message Board, Event Messages, and History. Below the tabs are filters for "Show: (Any Status)", "Required/Optional", and "(Any Owner)". A table lists the tasks:

Name	Document	Owner	Status	Due Date
Notification for New Sourcing Requests	RFP for Consulting Services	Project Owner	Scheduled	11/20/2020
Add Team Members to Project *		Austin Bachman	In Progress	
Complete RFP Documents *	RFP Documents	Project Owner	Not Started	11/20/2020
Submit Sourcing Request to OSP *	RFP for Consulting Services	Project Owner	Not Started	

- To complete the “Add Team Members to Project” task, click on the “Team” tab. On the right side of the screen, click the Actions button and select Edit.

The screenshot shows the 'RFP for Consulting Services' page. The top navigation bar includes a search icon, a printer icon, a chat icon, a help icon, and a user profile icon labeled 'AB'. The page title is 'RFP for Consulting Services' with a sub-header 'Sourcing Request'. A yellow box in the top right corner displays 'ID SR120335798', 'Tasks: Incomplete Tasks: 2', and 'Next Milestone: Submit Sourcing Request to OSP'. Below the title is a tabbed interface with 'Overview', 'Documents', 'Tasks', 'Team' (selected), 'Message Board', 'Event Messages', and 'History'. On the left, there is a 'Related Knowledge' sidebar with links for 'Expand Projects', 'All Knowledge Areas', and 'Search Knowledge'. The main content area is titled 'Team Members' and contains a table with columns 'Group' and 'Members'. An 'Actions' dropdown menu is open over the table, showing 'Team Members' and 'Edit' options.

Group ↑	Members
Agency Approver	(no value)
Agency Budget	(no value)
Agency Legal	(no value)
Evaluation Committee	(no value)
Observers	(no value)
OSP	Manager

- Add team members by clicking the down arrow under Members and choosing “Search more”. For Agency Approver, select the person at your agency who has the authority to approve the procurement. If your internal agency policy requires agency budget to approve the project prior to sending to OSP, select the fiscal approver for your agency in the Agency Budget group. If your internal agency policy requires agency legal to approve the Scope of Work prior to sending to OSP, select the attorney assisting you with the procurement in the Agency Legal group. For Observers, add any agency personnel that may need to be involved in the procurement, but do not fall into one of the other Groups. If you need to add someone to the Team who does not have an Ariba account, contact LESA@la.gov.

Team

Define the Team for this Sourcing Request. To add a new Group to this Sourcing Request, click **Add Group**.

Team Members

The screenshot shows the 'Team Members' configuration page. It features a table with columns 'Group' and 'Members'. The 'Agency Approver' group has a dropdown menu open, showing a list of names: Shannon Arceneaux, Austin Bachman, Calvin Mayeux, Glenn Frazier, and Jessica Barnes. There is also a 'Search more' option with a magnifying glass icon. The 'Project Owner' group has 'Austin Bachman' selected and an 'Add more' link. At the bottom, there are 'Delete' and 'Add Group' buttons.

Group ↑	Members
Agency Approver	[Dropdown menu]
Agency Budget	
Agency Legal	
Evaluation Committee	
Observers	
OSP	
Project Owner	Austin Bachman Add more

Team
OK
Cancel

Define the Team for this Sourcing Request. To add a new **Group** to this Sourcing Request, click **Add Group**.

Team Members

Choose Values for Members

Add to Currently Selected

Search

<input type="checkbox"/>	Name ↑	ID	Type	Phone	Email Address
<input type="checkbox"/>	Felicia Sonnier	felicia.sonnier@la.gov	Enterprise User	225-342-8029	felicia.sonnier@la.gov

Currently Selected

<input type="checkbox"/>	Name ↑	ID	Type	Phone	Email Address
No items					

Done

8. Once all Team Members have been added, return to the Tasks tab. Click on the “Add Team Members to Project” task and select “Mark Complete”.

<

AB

Related Knowledge

[Expand Projects](#)

[All Knowledge Areas](#)

[Search Knowledge](#)

RFP for Consulting Services

Sourcing Request

Overview
Documents
Tasks
Team
Message Board
Event Messages
History

ID SR120335798

Tasks: Incomplete Tasks: 3

Next Milestone: Submit Sourcing Request to OSP

Show: (Any Status) ▾ Required/Optional ▾ (Any Owner) ▾

RFP for Consulting Services Actions ▾

Name	Document	Owner	Status	Due Date
Notification for New Sourcing Requests ▾	RFP for Consulting Services ▾	Project Owner	Scheduled	11/20/2020
Add Team Members to Project * ▾		Austin Bachman	In Progress	
Action ▾	RFP Documents ▾	Project Owner	Not Started	11/20/2020
View Task Details	RFP for Consulting Services ▾	Project Owner	Not Started	
Edit Task				
Mark Started				
Mark Complete				
Associate Document				

* Indicates required task

9. Next click on the “Complete RFP Documents” task and select View Task Details.

The screenshot shows the 'RFP for Consulting Services' project page. The 'Tasks' tab is active, displaying a list of tasks. The task 'Complete RFP Documents' is highlighted, and a context menu is open over it, showing options: 'View Task Details', 'Edit Task', 'Open Folder', 'Mark Started', and 'Mark Complete'. The 'View Task Details' option is selected. The task is marked as required with an asterisk. The table below shows the task details:

Name	Document	Owner	Status	Due Date
Notification for New Sourcing Requests	RFP for Consulting Services	Project Owner	Scheduled	11/20/2020
Add Team Members to Project *		Austin Bachman	In Progress	
Complete RFP Documents *	RFP Documents	Project Owner	Not Started	11/20/2020
Action	RFP for Consulting Services	Project Owner	Not Started	

* Indicates required task

10. Read the task description. The referenced document templates can be downloaded within the task or from the RFP Documents folder on the Documents tab. Click Cancel to return to the Tasks tab.

The screenshot shows the 'Document Task' dialog box. The task name is 'TSK120509917 Complete RFP Documents' and the status is 'Not Started'. The task description includes the following steps:

- 1) Open RFP Documents folder.
- 2) Download templates included in RFP Documents folder.
- 3) Complete documents and upload to RFP Documents folder.

The dialog box also shows a list of documents to be reviewed:

- RFP Documents (Read Only)
- Scope of Work Template
- RFP Definitions and Acronyms

Here you can do the following actions:

- **View** folder and edit documents
- **Replace** document(s) on the left

Buttons: Cancel, Mark Complete

11. Click on the “Complete RFP Documents” task and select Mark Started.

The screenshot shows the 'RFP for Consulting Services' page with the 'Tasks' tab selected. The page header includes the ID SR120335798, 3 incomplete tasks, and a next milestone of 'Submit Sourcing Request to OSP'. The 'Tasks' tab is active, and a context menu is open over the 'Complete RFP Documents' task, with 'Mark Started' selected. The task list includes:

Name	Document	Owner	Status	Due Date
Notification for New Sourcing Requests	RFP for Consulting Services	Project Owner	Scheduled	11/20/2020
Add Team Members to Project *		Austin Bachman	In Progress	
Complete RFP Documents *	RFP Documents	Project Owner	Not Started	11/20/2020
OSP *	RFP for Consulting Services	Project Owner	Not Started	

* Indicates required task

12. Click on the Documents tab. Open the RFP Documents folder by clicking on it. Click on Scope of Work Template and select Download.

The screenshot shows the 'RFP for Consulting Services' page with the 'Documents' tab selected. The 'RFP Documents' folder is selected, and a context menu is open over it, with 'Download' highlighted. The page header includes the ID SR120335798, 3 incomplete tasks, and a next milestone of 'Submit Sourcing Request to OSP'. The 'Documents' tab is active, and a context menu is open over the 'RFP Documents' folder, with 'Download' selected. The document list includes:

Name	Owner	Status
Sourcing Instructions	Project Owner	Not Edited
RFP Documents	Project Owner	Not Edited
Scope of Work Template	Project Owner	Not Edited
Replace Document	Project Owner	Not Edited

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 Austin Bachman (austin.bachman@ia.gov) last visit 11/19/2020 9:05 AM | State of Iowa
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13. Download the remaining documents in the folder using the same process.

14. Complete the Scope of Work Template and the other documents. Once the Scope of Work is complete, return to the Documents tab. Click on Scope of Work Template and select Replace Document.

Related Knowledge

- Expand Projects
- All Knowledge Areas
- Search Knowledge

RFP for Consulting Services

Sourcing Request

ID SR120335798
Tasks: Incomplete Tasks: 3
Next Milestone: Submit Sourcing Request to OSP

Overview Documents Tasks Team Message Board Event Messages History

Quick Links

- Sourcing Instructions
- RFP for Consulting Services

Name

Name	Owner	Status
Scope of Work Template.docx	Project Owner	Not Edited
...	Project Owner	...
...	Project Owner	Not Edited
...	Project Owner	Not Edited

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Justin Bachman (austin.bachman@la.gov) last visit 11/19/2020 9:05 AM | State of Louisiana

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15. The completed Scope of Work can be uploaded by clicking Browse or by dragging and dropping the file into the denoted box. Next click Replace.

Replace Document

Choose a document to replace the **Original Document** and enter a **Description** to explain why the document is being replaced. You can replace the Original Document by [More](#)

Original Document: Scope of Work Template.docx

Description:

New Document: Upload

Replace original document with a document from a project

16. You should receive a message stating the file you are uploading does not match the file you are trying to replace. Select “Replace document by the uploaded file” and then click OK.

State of Louisiana

HOME SOURCING CONTRACTS SUPPLIERS Recent Manage Create

Replace Document

The file you are uploading does not match the file you are trying to replace. You can either overwrite the old file with this new one or choose a different file by selecting the [More](#)

The file Scope of Work.docx, which you are uploading, does not match Scope of Work Template.docx, which you are trying to replace. Do you want to:

Use the original document name and continue uploading of file

Replace document by the uploaded file

Select another file for upload.

OK Cancel

17. On the next screen, click Save.

Scope of Work

Save Cancel

Edit this Document as necessary. You can choose to label these changes as a **new version** by checking the box at the top. When you have finished editing this Document, click [More](#)

Save these changes as a new version? Yes, save as v3 No, save and continue editing v2

Version Comment:

Title:

Description:

18. Follow the same process to upload the other documents.

19. Return to the Tasks tab. Click on the Complete RFP Documents task and select Mark Complete.

20. The final task to perform is the “Submit Sourcing Request to OSP” task. This task is an approval task that will route a simultaneous approval to the Team Members designated as Agency Budget and Agency Legal. Once the task is approved by Agency Budget and Agency Legal, the approval

routes to Agency Approver. Once the Agency Approver approves the task, the Sourcing Request is submitted to OSP. To begin the approval workflow, click on the task and select View Task Details.

Related Knowledge

- Expand Projects
- All Knowledge Areas
- Search Knowledge

RFP for Consulting Services

Sourcing Request

ID SR120335798
Tasks: Incomplete Tasks: 1
Next Milestone: Submit Sourcing Request to OSP

Overview Documents **Tasks** Team Message Board Event Messages History

Show: (Any Status) Required/Optional (Any Owner)

RFP for Consulting Services Actions

Name	Document	Owner	Status	Due Date
Notification for New Sourcing Requests	RFP for Consulting Services	Project Owner	Scheduled	11/20/2020
Add Team Members to Project		Austin Bachman	Complete	
Complete RFP Documents	RFP Documents	Austin Bachman	Complete	11/20/2020
Submit Sourcing Request to OSP	RFP for Consulting Services	Project Owner	Not Started	

* Indicates required task

Action

- View Task Details
- Edit Task
- Open Sourcing Request

21. An initial message may be entered to provide additional information to the approvers.

Approval Task Cancel

This task requires approval on one or more documents. Prior to submitting this task, documents must be ready for approval. You can enter any necessary task messages and [More](#)

RFP for Consulting Services / [Submit Sourcing Request to OSP](#)

TSK120509915 Submit Sourcing Request to OSP Round 1: Not Started

Submit this task to begin the agency approval process. Once the Agency Approver has approved the Request, the Sourcing Request will be submitted to OSP.

- RFP for Consulting Services
- Specify Due Date
 - Days after parent phase starts: None
 - Fixed Date:
- Provide an initial message and click Submit

B *I* U Verdana

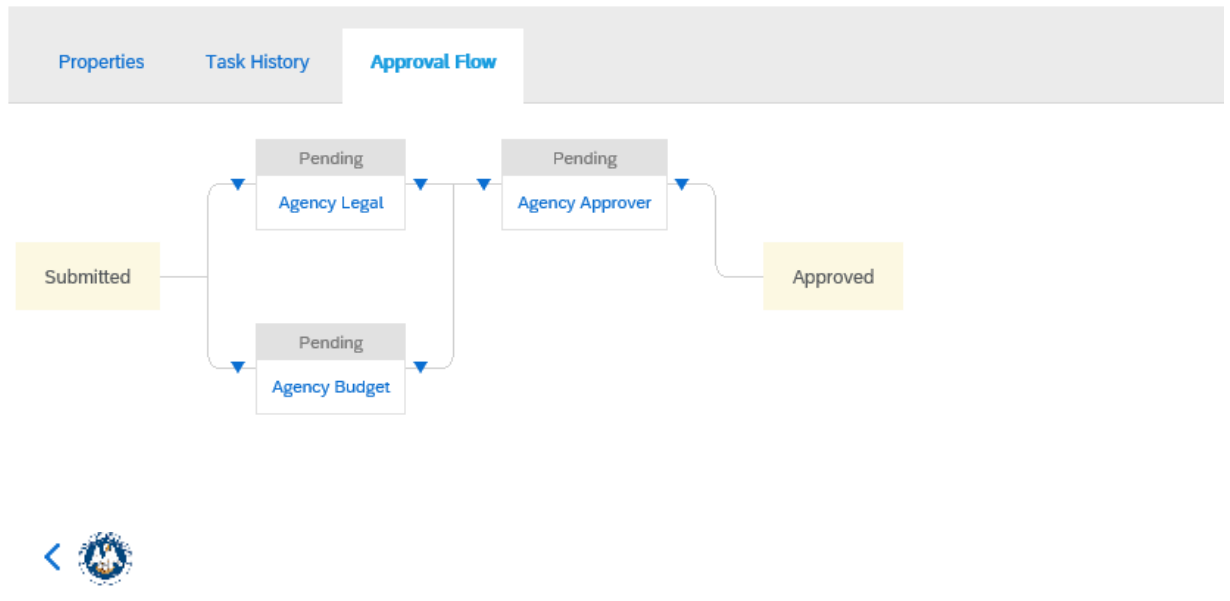
These services are mission critical. The estimated cost is \$500,000. Fund XYZ will be used.
- Submit

Additional Attachments...

22. To view the approvers, scroll to the bottom and click on Approval Flow. The specific approvers may be seen by clicking on each group name.

[Additional Attachments...](#)

4.



Review Details for Agency Legal

These are the details for the approver you selected.

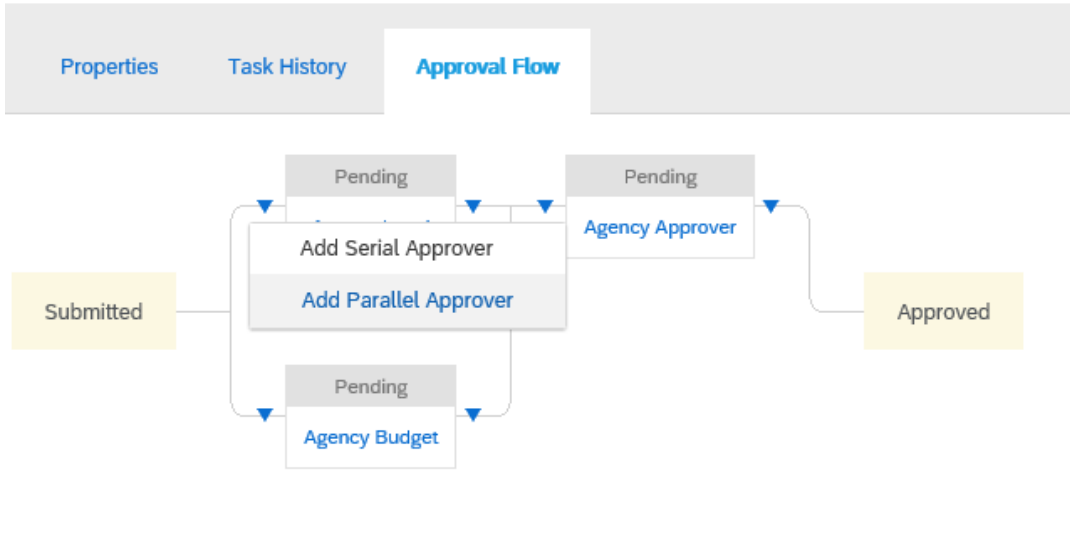
ID: PG120509904

Name: Agency Legal

Users who can approve:

[Karen Loftin](#)

23. If additional approvers need to be added to the workflow, this can be accomplished by clicking the appropriate blue arrow and choosing whether the new approver is a serial approver or parallel approver. A serial approver is sequential whereas a parallel approver receives the approval simultaneously with other approvers.



24. To begin the approval flow, click Submit.

Approval Task Cancel

This task requires approval on one or more documents. Prior to submitting this task, documents must be ready for approval. You can enter any necessary task messages and [More](#)

[RFP for Consulting Services](#) / [Submit Sourcing Request to OSP](#)

TSK120509915 Submit Sourcing Request to OSP Round 1: Not Started ⓘ

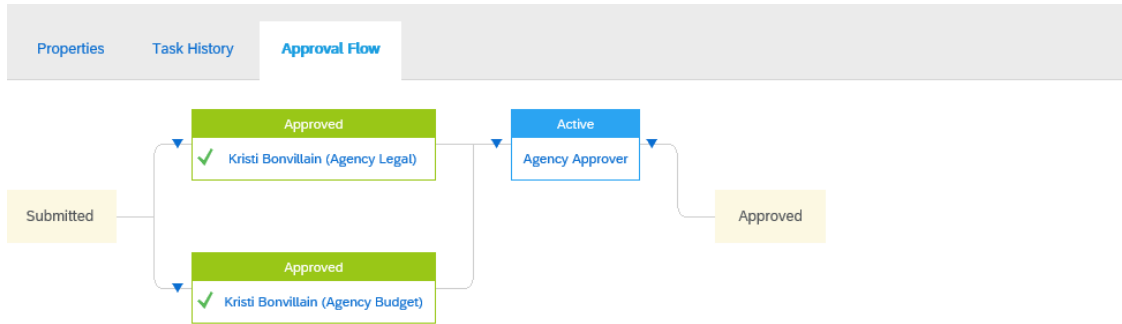
Submit this task to begin the agency approval process. Once the Agency Approver has approved the Request, the Sourcing Request will be submitted to OSP.

- ▶ [RFP for Consulting Services](#) ▼
- Specify Due Date
 - Days after parent phase starts: None ⓘ
 - Fixed Date: ⓘ
- Provide an initial message and click Submit

These services are mission critical. The estimated cost is \$500,000. Fund XYZ will be used.

Additional Attachments...
- Submit

25. You can monitor the approval progress by returning to the task and viewing the Approval Flow.



26. When the Agency Approver approves the task, the Sourcing Request is submitted to OSP. It will be assigned to an OSP Analyst who will contact you regarding the next steps.