

PURPOSE

This Quick Reference Guide (QRG) is designed to show the steps needed to create a tactical sourcing request in SAP Ariba.

There are three (3) types of tactical sourcing requests:

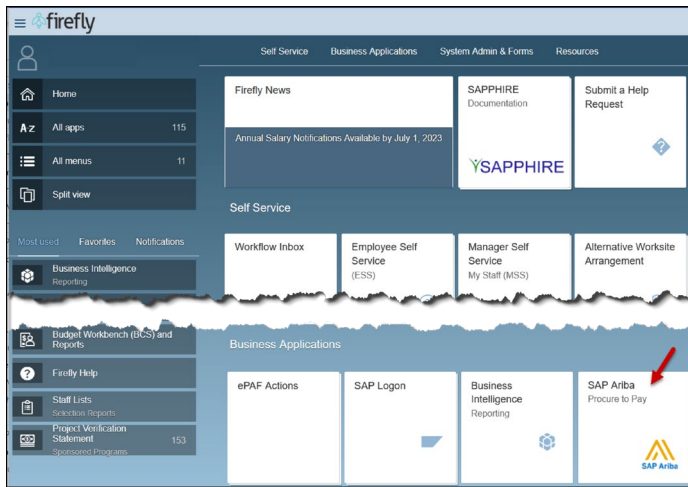
- Self-service – requests under \$10,000; your request will be sent directly to the vendors selected.
- Low Touch – requests from \$10,000 - \$50,000; Procurement will review before vendors are notified.
- High Touch – requests over \$50,000; Procurement will review before vendors are notified.

HELPFUL HINTS

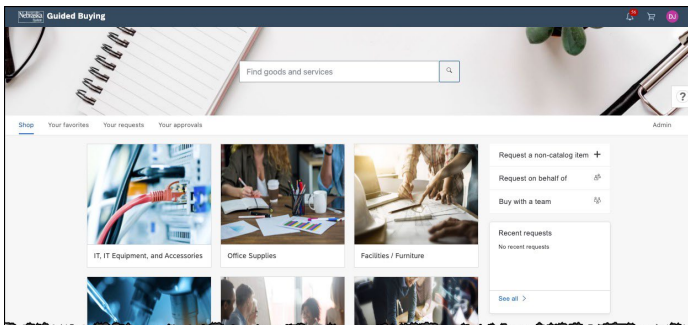
- Assemble all supporting documentation prior to beginning work in SAP Ariba.
- For the best experience, please use the following browsers:
 - Google Chrome (64-bit)
 - Apple Safari (64-bit)
 - Microsoft Edge (32-bit)
 - Microsoft Edge Chromium (32-bit and 64-bit)
 - Mozilla Firefox (64-bit)

PROCEDURE

1. Access SAP Ariba by clicking the “SAP Ariba – Procure to Pay” tile in Firefly.

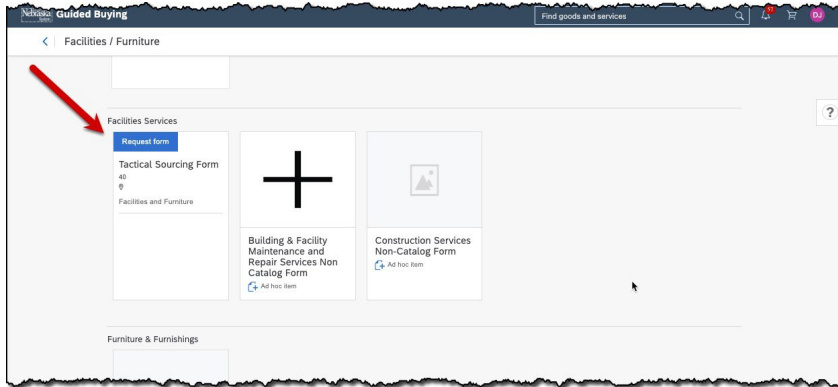


2. Click the desired tile (category) for your request.



PROCEDURE (CONTINUED)

3. The categories available under that tile display. Scroll to locate the “Tactical Sourcing Form” tile. Click on the tile.



4. The Tactical Sourcing Form displays. Complete the form as noted below. Required fields are denoted by “* “. Click “Next” to proceed.

- A. Enter a brief name/title of the request.
- B. Validate “Ship to” address; edit, if needed.
- C. Check “same as total target price”. This will allow SAP Ariba to create the total based on the item(s) requested.
- D. Enter a date for responses from vendors.
- E. Enter a description for the sourcing project.
- F. Enter a title for the first line item.
- G. Enter a target (desired) price for the item.
- H. Enter the quantity needed.
- I. Validate/change unit of measure.
- J. Enter a detailed description of the item.
- K. (optional) Search for and select a contact at the University (this will be made visible to vendors).
- L. Add email/phone information for contact.
- M. (optional) Click to add attachments. **IMPORTANT:** Mouse-over this area to reveal the “+” symbol; click to add additional line items.

RFQ Header
Please provide all the information for RFQ tactical sourcing forms.

Please provide a title* **A**

Requester* **D**
Doug Julius

Ship to* **B**
2000 (UNL General Receiving)
1100 No 17th St Lincoln, NE 68588-0690 United States

Estimated budget* **C**
0.00 USD
 same as total target price

Respond by date* **D**
September 4, 2023

Purpose **E**

Sourcing Event Header fields

Project Header Description* **E**

Total target price
0.00 USD
0.00 USD under budget

We have defaulted the title to the item name but please do not forget to change it

RFQ Items

Title*	Target unit price*
RFQ Items F	0.00 USD G
Quantity* H 1	Unit of measure* I each

Detailed description* **J**

University Contact Name: **K**
Select

Supplier Part Id
Manufacturer Part Id

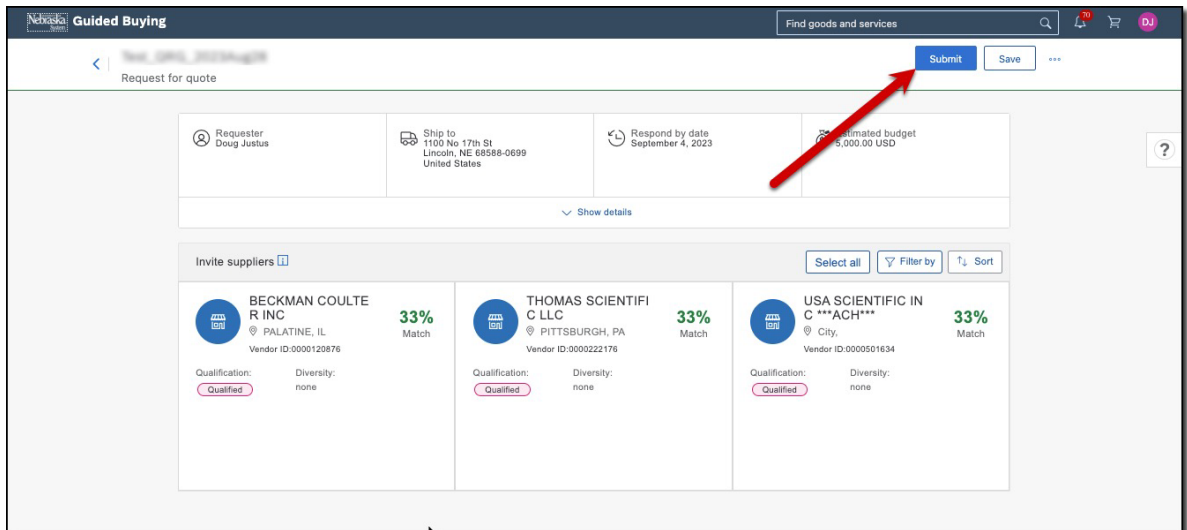
Requirement Attachment **L**
Upload file
Reference documents

Add related items **M**
RFQ additional items
Laboratory and scientific...

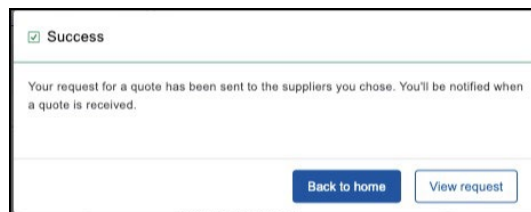
Next Save

PROCEDURE (CONTINUED)

5. The “Invite suppliers” screen displays. Select the vendors/suppliers to be included in this request (i.e., these are the vendors who will be invited to submit quotes for your items). Mouse-over each vendor to display the “Select” icon. Click “Submit” to proceed.



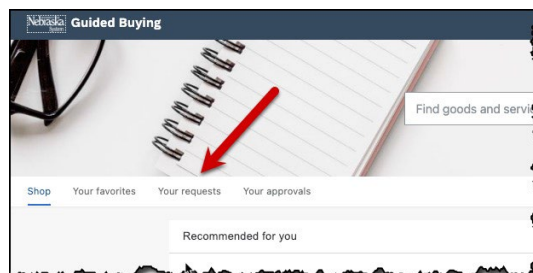
6. The confirmation screen displays. Your request has been sent to the selected vendors.



NOTE:

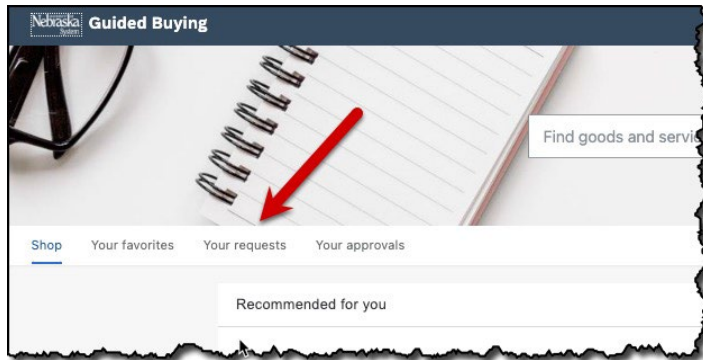
- **Self-service requests** (i.e., under \$10,000) will be sent directly to vendors. You will receive responses from the vendors and can choose accordingly.
- **Low Touch** (i.e., \$10,000-\$50,000) and **High Touch** (i.e., more than \$50,000) requests will route to Procurement so that a sourcing event can be prepared. The Procurement Buyer will receive vendor responses.

You can check the status of your Tactical Sourcing request at any time by accessing SAP Ariba and clicking “My requests” from the homepage.

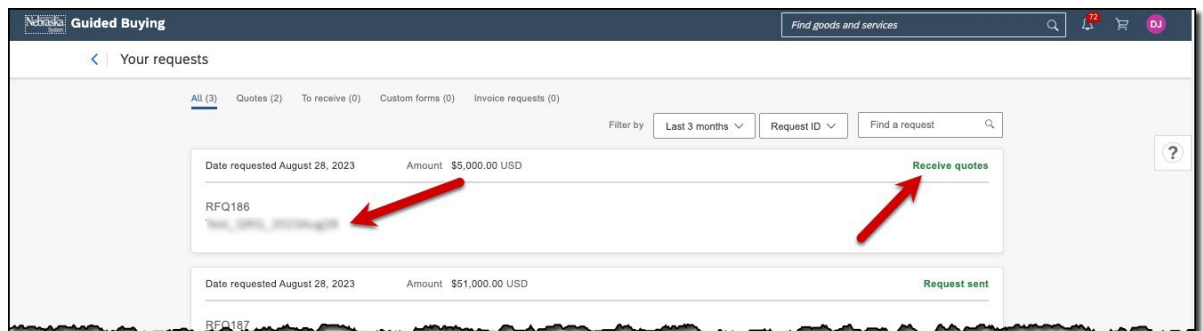


PROCEDURE (CONTINUED)**To review quotes received from vendors:**

1. Access SAP Ariba and click “My requests” from the homepage.



2. Locate the request with a status of “Receive quotes.” Click on the request title.



PROCEDURE (CONTINUED)

To review quotes received from vendors:

3. The “Receive quotes” screen displays. Review the screen as noted below. Click “Award” as appropriate. NOTE: The example below is a self-service request which allows the requester to choose the vendor and make the award.

Receive quotes

Process A

Request sent → **Receive quotes** → Award → Requisition completed

Receive quotes

Your request for a quote has been sent to the suppliers you chose. You'll be notified when a quote is received.

- Suppliers can send in their quotes until the **Respond by date** on your request.
- You can accept a quote any time, but we recommend that you wait until you receive all quotes to ensure you get the best deal.

Requester: [redacted] Ship to: 1100 No 17th St, Lincoln, NE 68588-0699, United States. Respond by date: September 4, 2023. Estimated budget: 5,000.00 USD.

Supplier participation B

Participated: 2/2. Intend to participate: 0/2. Declined: 0/2. No response: 0/2.

Overview C

Bid comparison

Filter by: Extended Price. Suppliers: All suppliers.

Estimated Price: \$5.5K, \$5K, \$4.5K, \$4K, \$3.5K, \$3K, \$2.5K, \$2K, \$1.5K, \$1K, \$500.

BECKMAN COULTER INC ***ACH*** Primary bid: \$750. THOMAS SCIENTIFIC LLC ***ACH***THOMAS SCIENTIFIC HOLDINGS Primary bid: \$750.

Compare bids D

Filter by: All items, All suppliers, 24 more. Reset filters, Apply.

Items	Suppliers	Terms
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>THOMAS SCIENTIFIC LLC ***ACH***TH...</p> <p>Primary bid 1/2 Items</p> <p>Award</p> </div> <div style="width: 45%;"> <p>BECKMAN COULTER INC ***ACH***</p> <p>Primary bid 1/1 Items</p> <p>Award</p> </div> </div>	<p>Total Extended Price: \$750.00 USD, Total Cost: \$750.00 USD</p>	<p>Total Extended Price: \$500.00 USD, Total Cost: \$500.00 USD</p>
> 1 Terms	...	\$0.00 USD
> 2 Items	...	\$750.00 USD

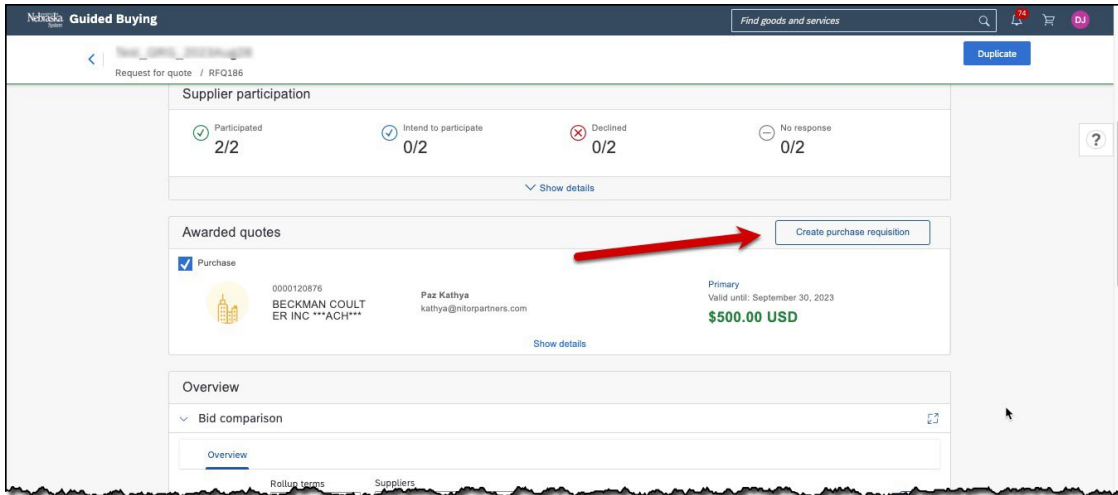
Compare bids E

Compare bids F

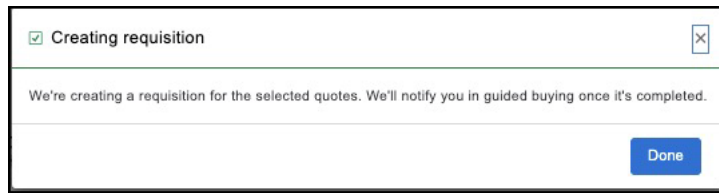
- A. Provides the current progress in the workflow. The blue node is the active node.
- B. Provides summary information on vendor engagement with the request.
- C. Summary of the quotes provided by the vendors.
- D. The vendor quotes/responses can be filtered, as needed.
- E. Click to expand and see details on the vendor quotes.
- F. Click “Award,” as appropriate.

PROCEDURE (CONTINUED)

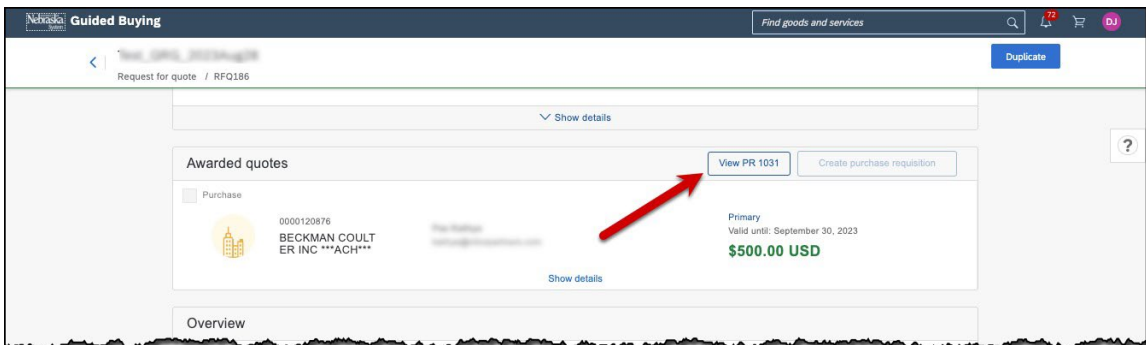
- 4. **IMPORTANT:** You will need to return to the Guided Buying homepage and then locate your request again (refer Step #1, Page 4). The request displays. Scroll to the “Awarded quotes” section and click “Create purchase requisition.”



- 5. The confirmation screen displays. Click “Done.” You will be returned to the Guided Buying homepage. **NOTE:** The Requisition has been prepared at this point; **however, it has not been submitted for approval.**

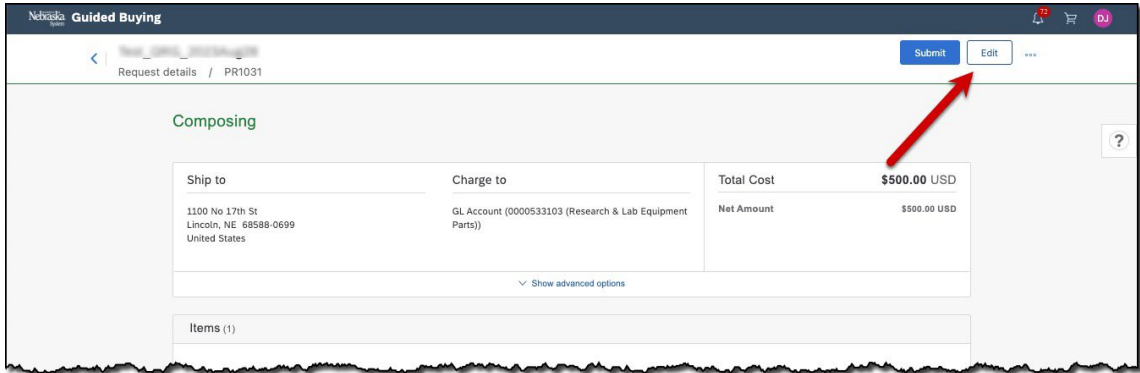


- 6. From the homepage, locate the request again (refer Step #1, Page 4). The request displays. Scroll to the “Awarded quotes” section and click “View PR #####.”

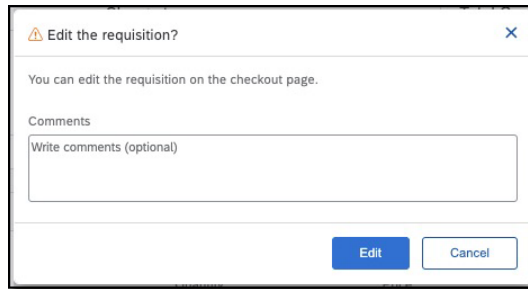


PROCEDURE (CONTINUED)

7. The Requisition displays. Click “Edit.”



8. The confirmation screen displays. Click “Edit.”



9. The Requisition displays. Review and complete the information including the areas in **RED** (you may need to expand the Line Item sections to view these fields):

- “Need by date”
- ”Cost Center”
- “Project/WBS”

Click “Submit” when complete.

