

Create Tactical Sourcing Request

Updated March 26, 2026

Purpose

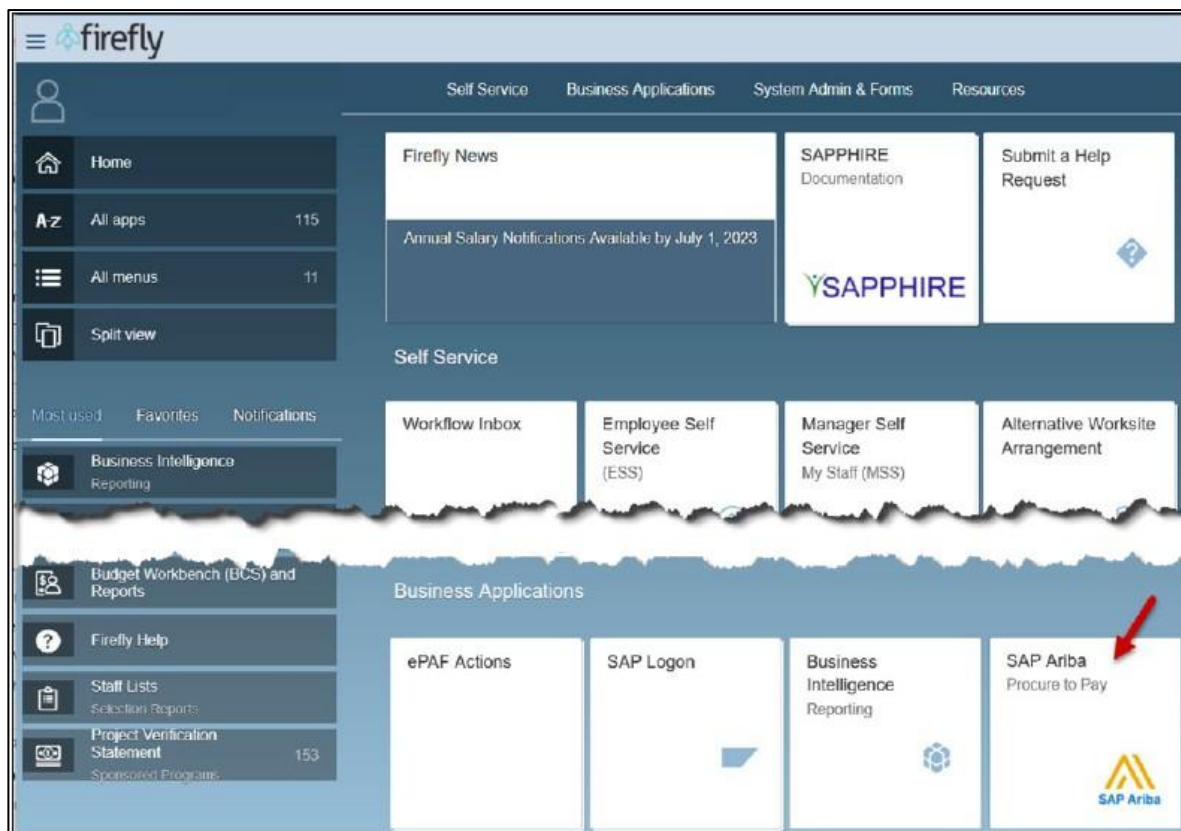
This document is designed to show the steps needed to create a tactical sourcing request in SAP Ariba.

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.

Procedure

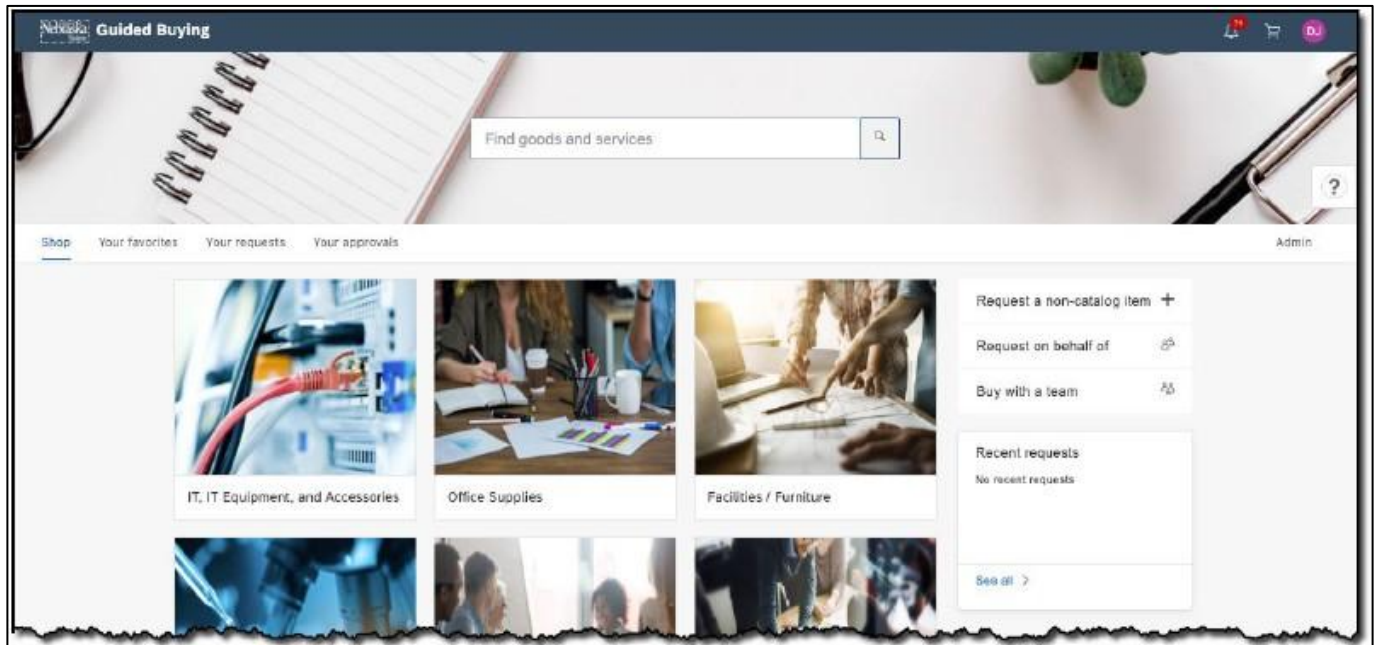
Access SAP Ariba by clicking the “SAP Ariba – Procure to Pay” tile in Firefly.



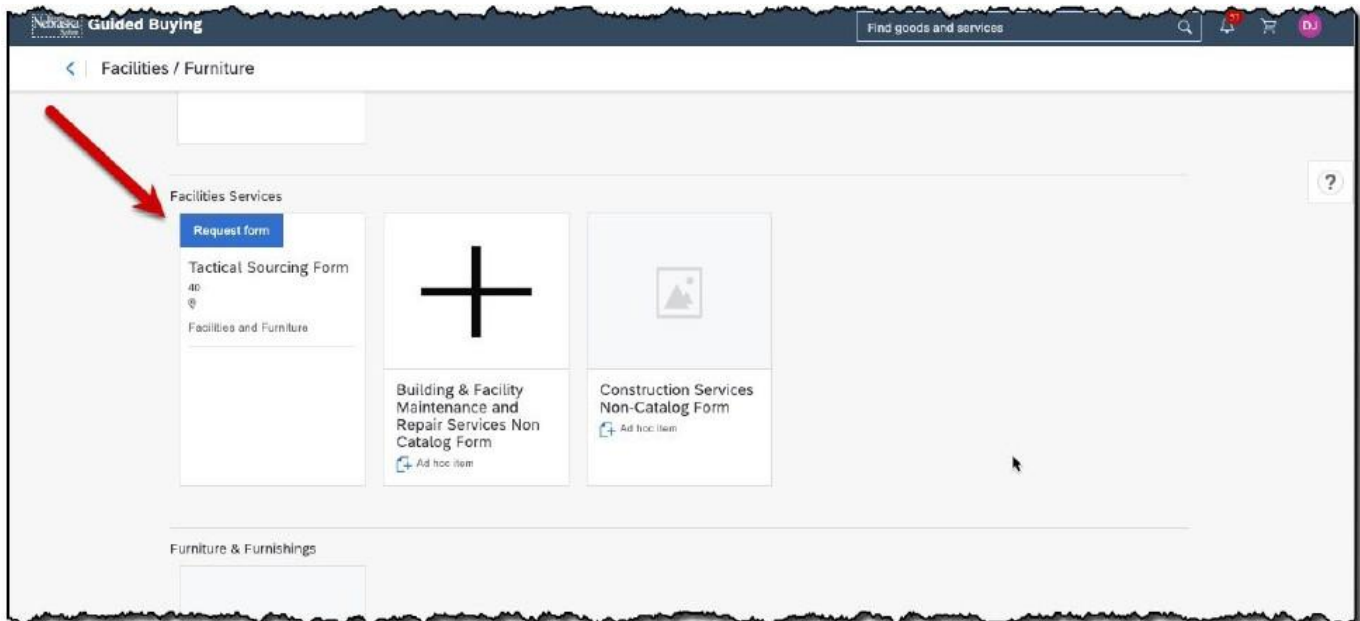
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Click the desired tile (category) for your request.



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



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

The screenshot shows the 'Guided Buying' interface for creating a Tactical Sourcing Request. The form is titled 'Please provide a title' and 'Request for quote'. A red arrow points to the 'Next' button. The form contains several sections: 'RFQ Header' with fields for 'Requester*', 'Ship to*', 'Estimated budget*', 'Respond by date*', and 'Project Header Description*'; 'Sourcing Event Header fields'; 'RFQ Items' section with fields for 'Title*', 'Quantity*', 'Target unit price*', 'Unit of measure*', 'Detailed description*', 'Supplier Part id', 'Manufacturer Part id', and 'Requirement Attachment'; and 'Add related items' section with a field for 'RFQ additional items'. Red callout letters A through M are placed over various fields to indicate where to enter information.

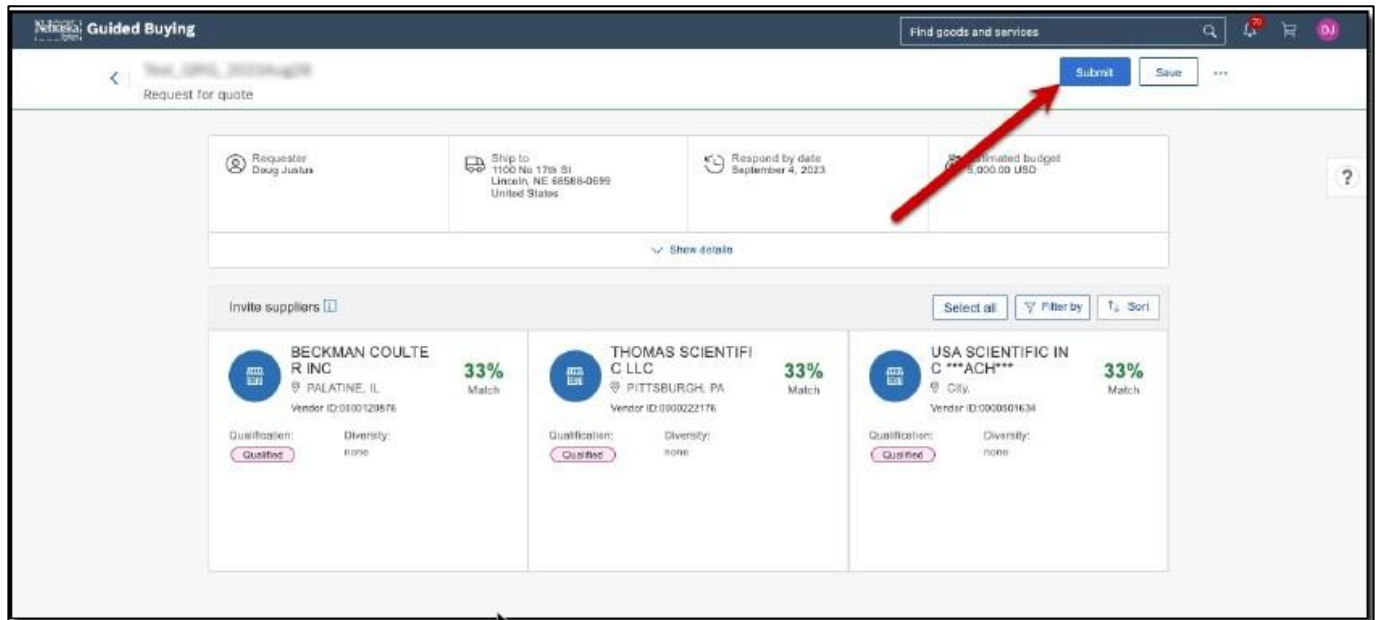
- A. Enter a brief name/title of the request.
- B. Validate “Ship to” address; edit, if needed.
- C. Check “same as total target price”. This will allow SAP Ariba to create the total based on the item(s) requested.
- D. Enter a date for responses from vendors.
- E. Enter a description for the sourcing project.

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- 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. **Note:** Mouse-over this area to reveal the “ + “ symbol; click to add additional line items.

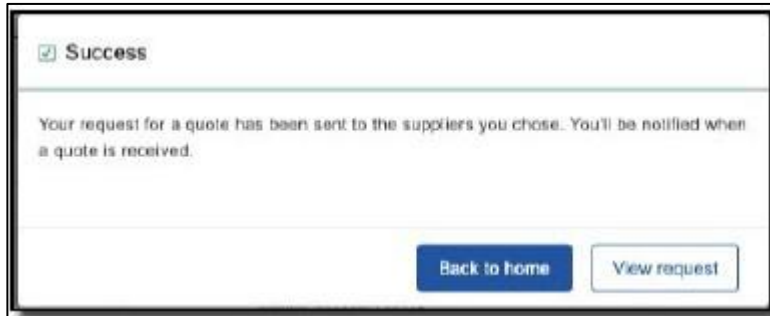
The “Invite suppliers” screen displays. Select the vendors/suppliers to be included in this request (i.e., these are the vendors who will be invited to submit quotes for your items). Mouse-over each vendor to display the “Select” icon. Click “Submit” to proceed.



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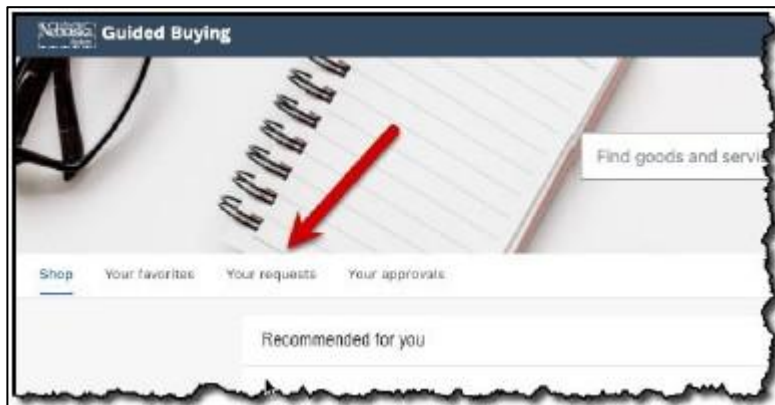
The confirmation screen displays. Your request has been sent to the selected vendors.



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.



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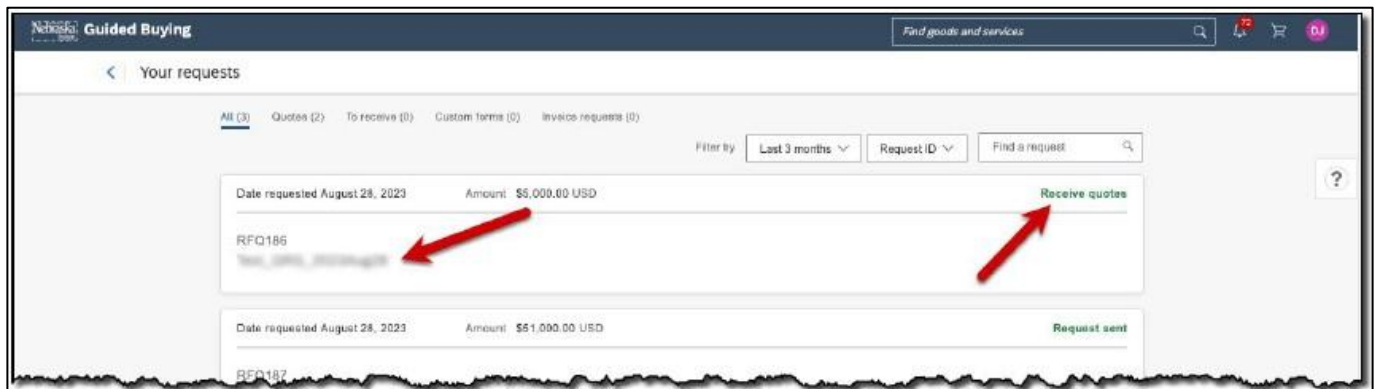
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To review quotes received from vendors:

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



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



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To review quotes received from vendors:

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

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

Receive quotes

- Your request for a quote has been sent to the suppliers you choose. 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.

Supplier participation

Participated: 2/2 | Intent to participate: 0/2 | Declined: 0/2 | No response: 0/2

Overview

Compare bids

Items	Suppliers	Terms
1 Terms	THOMAS SCIENTIFIC LLC	Primary bid
2 Items	BECKMAN COLTLER INC	Primary bid

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Callout Box:

- A. Provides the current progress in the workflow. The blue node is the active node.
- B. Provides summary of vendor engagement for the request.
- C. Summary of the vendors.
- D. The vendor quotes can be filtered, as shown in the screenshot.
- E. Click to expand the vendor quote details.
- F. Click "Award."

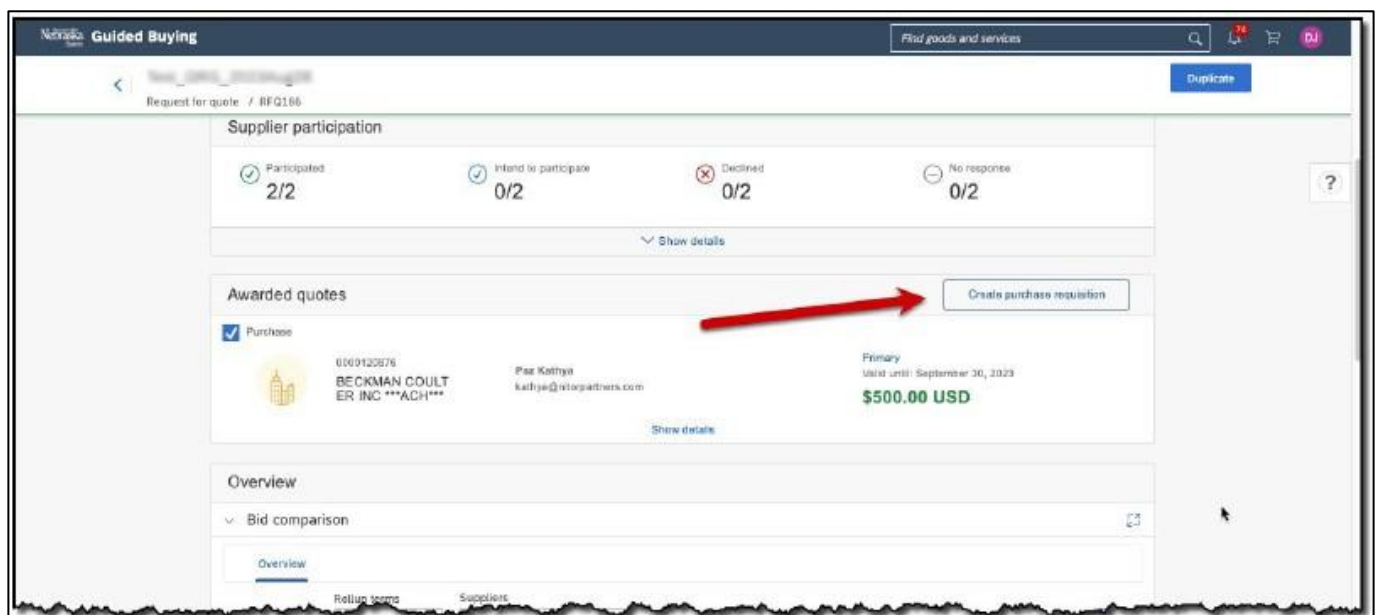
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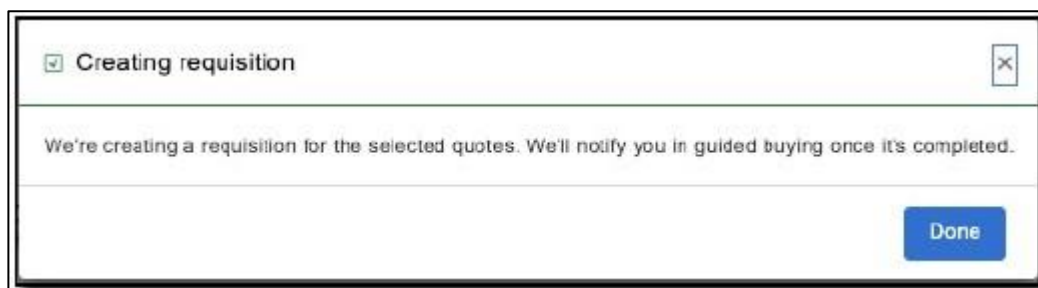
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- B. Provides summary information on vendor engagement with the request.
- C. Summary of the quotes provided by the vendors.
- D. The vendor quotes/responses can be filtered, as needed.
- E. Click to expand and see details on the vendor quotes.
- F.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

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.”



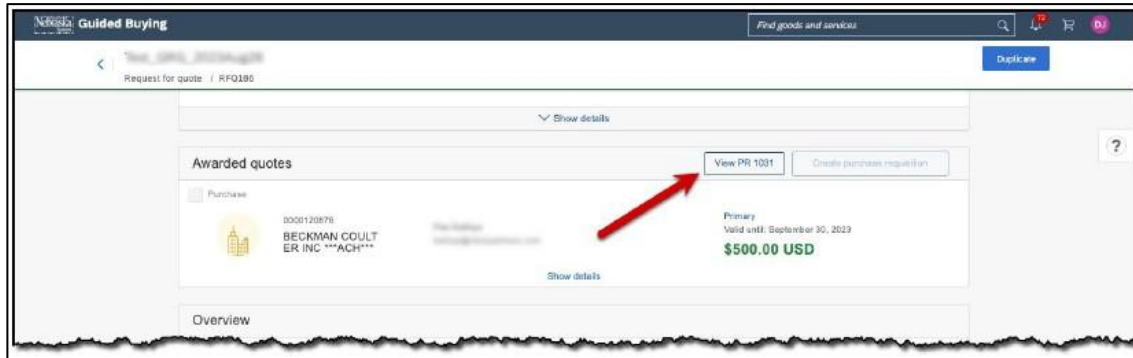
The confirmation screen displays. Click “Done.” You will be returned to the Guided Buying homepage. NOTE: The Requisition has been prepared at this point; **however, it has not been submitted for approval.**



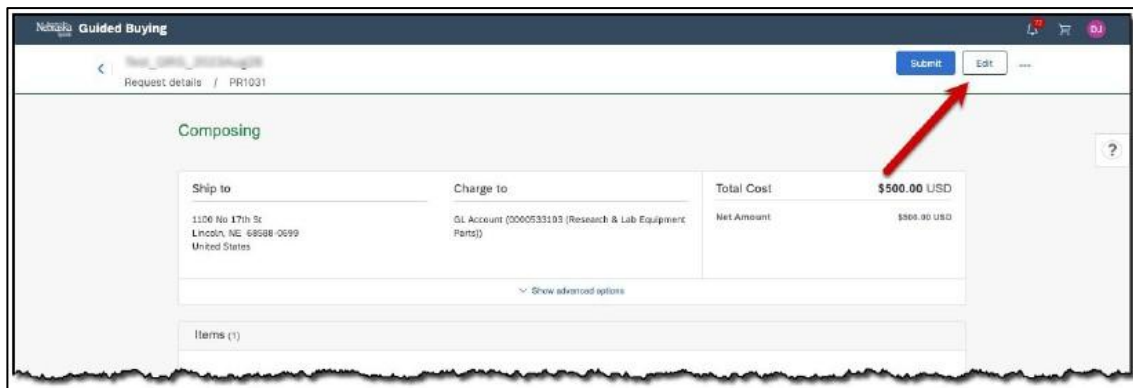
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From the homepage, locate the request again (refer Step #1, Page 4). The request displays. Scroll to the “Awarded quotes” section and click “View PR #####.”



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.”



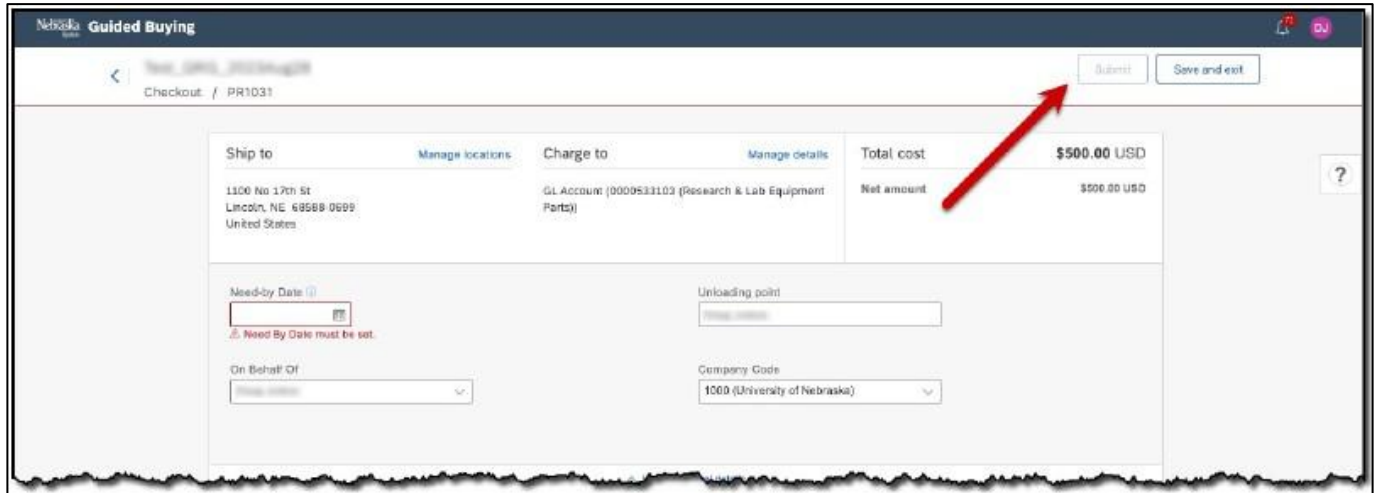
The confirmation screen displays. Click “Done.” You will be returned to the Guided Buying homepage. NOTE: The Requisition has been prepared at this point; **however, it has not been submitted for approval.**



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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 #####.”



The Requisition displays. Click “Edit.”



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The confirmation screen displays. Click “Edit.”



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.

